



# Expert Guide to Affinity Publisher

Learn how to create books, magazines, newspapers,  
reports and more with Affinity Publisher 2.3

By Mike Loader

## **Expert Guide to Affinity® Publisher**

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This guide was created with Affinity Publisher 2.3. Screenshots are from the Macintosh version. Typefaces are from the Adobe Myriad Pro and Minion Pro families.



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# Introduction

This manual is a guide to creating long publications such as books, newspapers, magazines, reports, and papers with Affinity Publisher. It does not describe all the features of Publisher so you will have to know how to use format text and create graphics.





Creating a book or other long document in Publisher for the first time can be daunting because there are so many ways to approach a project that you might not know where to start. This manual will help you master some of Publisher's most complex features and get started more quickly.

This manual is laid out for print although it's distributed electronically because it is intended to be a demonstration of what you can accomplish with Affinity Publisher. The tips and recommendations found in this guide will help you lay out similar publications.

## Conventions used

The instructions provided here are for both Macintosh and Windows which share a similar user interface. The steps may be somewhat different for iPad and are not described in this guide.

Menu commands are abbreviated to make this guide more readable. For example, instead of writing *choose Copy from the Edit menu* this guide uses *choose Edit > Copy*. Keyboard modifiers are shown as:

Macintosh	Windows
 (Command)	<b>Ctrl</b>
 (Option)	<b>Alt</b>
 (Shift)	<b>Shift</b>
 (Ctrl)	
<b>Return</b>	<b>Enter</b>

Many users of the Affinity suite prefer the dark UI Style, more commonly referred to as *dark mode*. This guide uses light mode screenshots with mono icons because they're easier to read on screen and will save ink or toner for those who print this manual on their own printer. You're welcome to print a copy for your own use.

## Thank you

Thank you to Serif for providing us with an amazing suite of tools without a subscription and for patiently listening to our suggestions. And thank you to all the users on the Affinity forum who have put up with my rambling.

Good luck!

Mike





# Document setup 1

Publisher makes it easy to create a new document but understanding layout options and master pages is important for creating a publication that is easy to update in the future.

Master pages can be used to insert headers and footers that are repeated throughout a publication with automatic page numbering and chapter titles.

Using a baseline grid can improve the design of a publication with multiple text frames and columns to align the baselines of text and objects.

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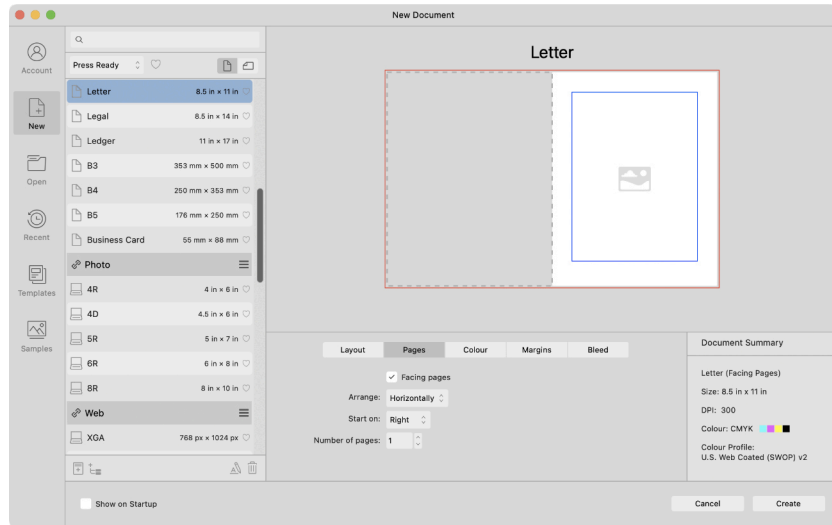
# Creating a new document

Before you create a new document you should plan its size and margins and decide whether it will have facing pages. You can change anything about your document after creating it, but some changes may require additional effort so it's best to decide on the layout in advance.

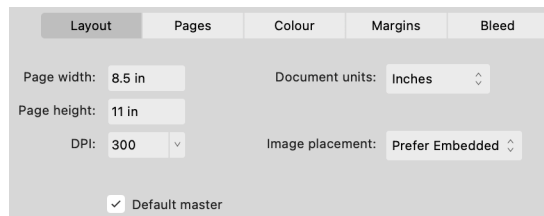
If you're creating a book or magazine you should create the cover as a separate document—most book documents start with an interior title page.

**Tip:** There are two groups of paper size presets but the only differences are colour format (space), colour profile, and bleed; choose a **Press Ready** preset if the document will be printed on a commercial press or a **Print** preset if you will print it on a desktop printer

1. Choose **File > New...**



2. Choose from one of the preset sizes on the left. By default, they are all portrait so to change the orientation click the **Landscape** icon above the presets.
3. Click the **Layout** tab to change the page size, measurement units, resolution, image placement policy, and if a master page should be created.

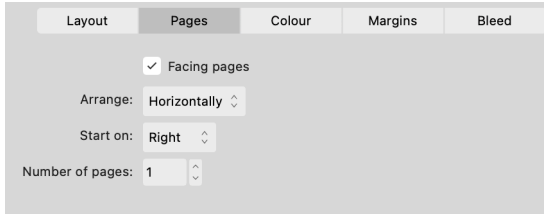


**Tip:** Don't select pixels for the units if the document will be printed

- Enter the **Width** and **Height** and choose the **Units** if you want to customize a preset's size.
- For projects with large images, choose **Prefer Linked** from **Image placement** to avoid embedding them and increasing the file size.

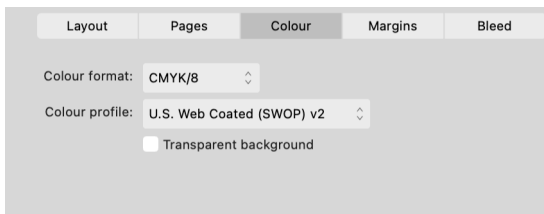


- Select **Default master** so that all pages will be based on a master page unless you're creating a short document such as a brochure or poster.
  - **DPI** impacts only the default dimensions of placed images so it's not that important; you will choose the resolution when printing or exporting.
4. Click the **Pages** tab to change whether a document is made up of single pages or facing pages and if you want to change how they're arranged.



**Tip:** Publisher doesn't offer a starting page number option in New Document but you can change it after creating the document by choosing Window > Section Manager

- Deselect **Facing pages** to create a single-pages document. All of the **Print** and **Press Ready** presets default to facing pages which is commonly used for books and magazines.
  - Choose **Vertically** from **Arrange** for a book bound at its top like a calendar instead of on its side. Choose **Left** from **Start on** to start a document on the left side (top side for vertical books) but most books start on the right because the inside cover is typically blank.
  - Use the **Number of pages** option only for short documents because Publisher doesn't create text frames for the pages created with a document. New documents will be based on a default master page if **Default master** is selected on the **Layout** tab, but they won't have any text frames. If you create many pages when creating a document and later add text frames to their master page, the frames won't be linked from page to page so it's best to create just a single page.
5. Click the **Colour** tab to change the **Colour format** and **Colour profile**.



**Tip:** Publisher doesn't offer a feature similar to the Primary Text Frame option of InDesign® or Automatic Text Box option of QuarkXPress™ so you must create text frames after creating a document



- The default **Colour format** (space) for the **Press Ready** presets is **CMYK/8** and is **RGB/8** for the **Print** presets. In general, select **CMYK/8** when printing in colour on a commercial press or **Grey/8** for a publication that will be printed in black and white. Select **RGB/8** for a digital publication.
- The default **Colour profile** for CMYK documents is *U.S. Web Coated (SWOP) v2*. Always speak with your print partner before selecting a colour profile. Leave this option if you're unsure because you can change it later

**Tip:** Refer to [Colour](#) on page 241 for a description of colour formats (spaces) and profiles

by choosing **Document > Document Setup**, but your colours may be adjusted for the new profile.

- If you don't want an exported document to have a white background then choose **Transparent background**.

**Tip:** You can choose to show or hide margin guides later by choosing **View > Show Margins**

**Tip:** Click the icon to the right of text fields to **Link**  the fields and set all the fields the same when you enter changes, or to **Unlink**  the fields to set them separately

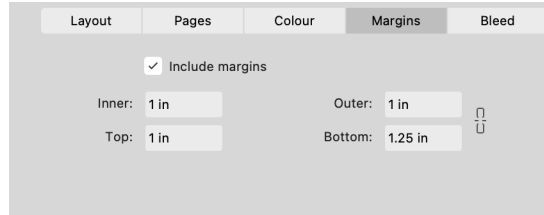
**Definition:** *Bleed* refers to the area beyond the edge of the page in which text and objects will still be printed

**Tip:** Select **View > Show Bleed** to show the bleed guides and the objects in the bleed zone

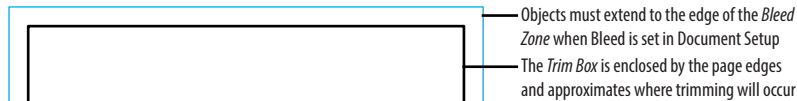
**Tip:** Publisher doesn't offer a separate slug option so create a larger bleed and place your slug information there and ensure **View > View Mode > Clip to Canvas** is not selected



**Tip:** The two preset icons are difficult to see in Light Mode in Publisher 2.3; mouse over the area to the right of the preset name and a tooltip will appear when you are over them

6. Click the **Margins** tab to customize the margins. Almost every document should have margins, even those with images that bleed off the page, but you can choose not to include them if you wish. The margins have no impact on the finished document but serve as guides for you to frame the body content of the page.



7. Click the **Bleed** tab and enter the dimensions if the document will have images that bleed off the page. This option applies only to documents that will be professionally printed and trimmed after printing.



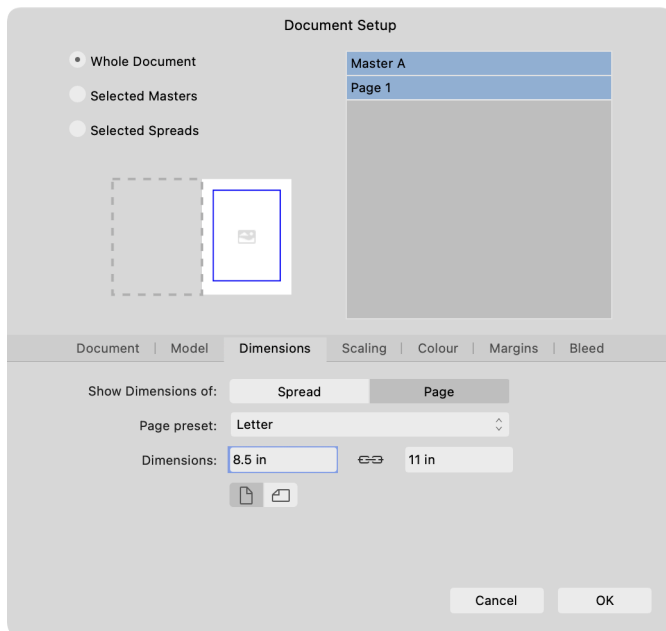
8. To save this customized document setup as a preset to use in the future, click the **Save Preset As**  icon or click the **Save and Overwrite Current Preset**  icon to update an existing preset.
9. Click **Create** and the new document will be displayed in the window.

# Changing layout options

A document doesn't have an intrinsic page size, orientation, or margins—these are properties of the master pages in the document; however, the **Document Setup** window allows you to change the properties of all or selected master pages and spreads (pages) in the document.

**To change the options for a document after creating it:**

1. Choose **File > Document Setup**.



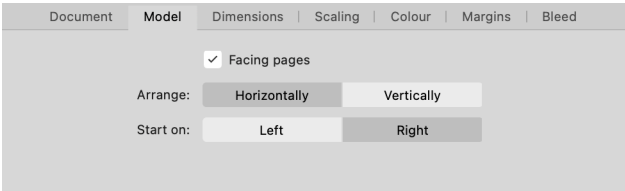
**Tip:** The list of master pages and spreads is clickable only when **Selected Masters** or **Selected Spreads** is selected

**Tip:** If you change master pages or spreads with different page sizes or other options, the options shown will be for the first master or spread you selected; to change all selected masters or spreads to the option of the first one, select a different option and then change it back

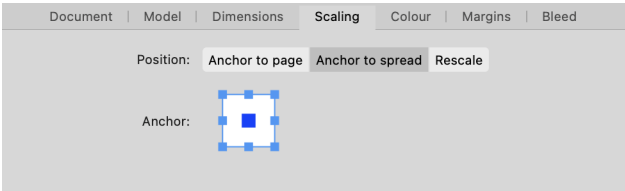
2. To change the entire document, leave the setting in the top left of the **Document Setup** window as **Whole Document**. You can also change one or more master pages or spreads (pages) at once by choosing **Selected Masters** or **Selected Spreads** and then selecting masters or spreads from the list on the right.
3. Most of the options in this window are the same as for creating a new document so refer to [Creating a new document](#) on page 2.
4. While you can turn facing pages on and off with the **Model** tab, it can have a serious impact to your document. Changing a facing-pages document to single pages will separate its facing-page master pages into two single-page master pages, as well as separating all of the document's spreads. Changing a single-page document to facing-pages will convert the document's pages to spreads but the masters will remain single pages.

**Tip:** A few of the options such as **Facing Pages** are under different tabs than in the **New Document** window





5. If you change the page size, you must choose whether to keep the objects and text the same size or to scale them to fit. Click the **Scaling** tab and choose **Rescale** for projects such as posters and brochures, and **Anchor to Spread** for projects such as books because rescaling changes the size of text and not just objects. When you anchor the objects, you can also choose the anchor position by clicking one of the anchor handles.

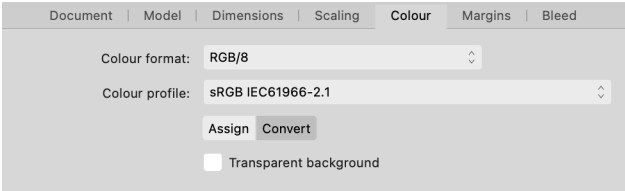


**Tip:** If you're unsure which **Resampling** option to use, select **Lanczos 3 (separable)** for best results

When you rescale the objects, you can select how images are resampled:

Nearest Neighbour	Fast but lower quality; use for hard-edge images
Bilinear	Use when scaling pages smaller
Bicubic	Use when scaling pages larger
Lanczos 3 (separable)	Very high quality but slower than the above options (recommended)
Lanczos 3 (non-separable)	Marginally-higher quality than <i>Lanczos 3 (separable)</i> but slightly slower

6. If you change the **Colour format** (space) or **Colour profile**, choose **Assign** to keep colours unchanged, including 100% Black, although the appearance may change. Choose **Convert** to modify colours to match the new format or profile while maintaining the appearance.



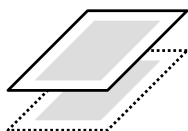
7. Click **OK** to change the layout options.

# Pages and master pages

A document in Publisher can include as many pages or spreads as you need. You can specify the number of pages to add when creating a new document but it is recommended to do that only for short documents. Refer to [Creating a new document](#) on page 2 for more information. Pages are referred to as *document pages* in this manual to distinguish them from the *master pages* on which they can be based.

## Master pages

Document pages are usually based on *master pages* to create consistency between pages. Objects placed on a master page will be visible on all document pages based on that master and later changes made to the master will be replicated on all the pages.



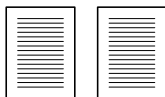
The document page (top) is based on the background master page (bottom)

Objects can't be moved or modified on document pages unless you break the link between them and the master. However, the content of text and picture frames on a master page can be modified on a document page. Master pages are frequently used to contain the text frames for a long publication.

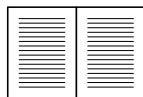
When you create a new document with the **Default master** option selected, Publisher automatically creates a master page named *Master A* and applies it to the page(s) created for the document. You might not need to use a master page for a short document such as a brochure, but they should always be used for long publications such as books, magazines, and newspapers.

## Spreads

A facing-pages document is made up of spreads, pairs of left (verso) and right (recto) pages of the same size and orientation joined together at the spine of the publication and displayed together. Spreads are used for books, magazines, and any document where the left and right page layouts are mirrored.



2 single pages



Spread of left and right pages

Objects and text positioned on the left page of a spread also can extend onto the right page, an approach commonly used in magazines.

Publisher does not support spreads made up of more than two pages. If you need to use a multi-page spread, create a single page and divide it into sections using guides.

**Definition:** *Spread* refers to a pair of left and right pages in a facing-pages document

**Tip:** You can add tens of thousands of pages to a Publisher document but most computers can't handle that many pages so if you run into performance issues you should divide your document into chapter documents; refer to [Books](#) on page 129

**Definition:** A **master page** is a background or parent page that defines the layout and some of the text and objects of the regular document pages based on it; master pages are frequently referred to simply as *masters*

**Tip:** Use **Edit Detached** to modify a master page's objects on a document page; refer to [Overriding master page objects on document pages](#) on page 19

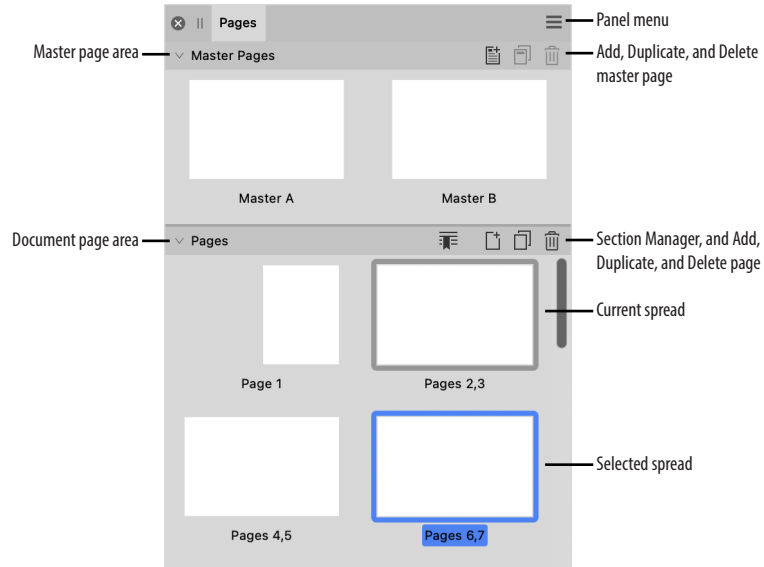
## Using the Pages panel

The **Pages panel** is an important panel to keep open when working on a multi-page document because it allows you to add, move, modify, and delete pages, as well as select which page to view. A thumbnail for each page is displayed and spread thumbnails are shown for facing pages.

**Tip:** The blue highlight colour can be customized on macOS with System Settings > Appearance

### To display and customize the Pages panel:

1. Choose **Window > Pages** to display the **Pages panel** if it is not already open.



The page or spread that you're currently viewing will be indicated with a grey rectangle.

**Definition:** *Absolute* page number refers to the number of the page within the document; the *relative* page number is what is displayed on a page by restarting page numbering

**Tip:** You can't move the **Master Pages** area to the bottom or set its thumbnail size independently, but you can collapse it to save space when you don't need it

Publisher will show both absolute and relative page numbers if you have restarted page numbering in the document. Refer to [Page numbering](#) on page 23 for more information.

2. Change the width of the panel to set how many columns of thumbnails can be shown at once.
3. Collapse or expand the **Master Pages** or **Pages** areas by clicking the caret > icons to the left of their titles.
4. Choose **Small Icons**, **Medium Icons**, or **Large icons** from the panel menu ≡ to change the size of the page thumbnails.
5. Choose **Scroll with View** from the panel menu ≡ so that the page(s) visible in the document window are visible in the panel.




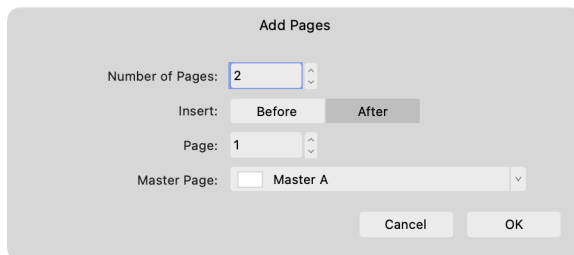
### To select pages to manipulate:

- Single-click a page, spread, or master page thumbnail to select it so you can perform actions to it. For a spread, click its left or right side to select just one side of it or click its centre or label to select the entire spread. The selected page, spread, or master is indicated by a blue rectangle.
- To select a range of pages or spreads, select one by single clicking it and then press **Shift** and click the last one in the range of pages or spreads. Alternatively, you can drag select a range of pages just as you would drag select file icons on your computer.
- To select multiple pages that aren't in a continuous range, press **⌘** (macOS) or **Ctrl** (Windows) and click each page thumbnail.

## Working with pages

### To add multiple pages:

1. Select the page or spread in the **Pages** panel before or after which you want to add pages.
2. Click the **Add Pages**  icon in the panel or choose **Document > Add Pages...**



3. Enter the number of pages to add in the **Add Pages** window.
4. Choose whether to insert them before or after the page you specify.
5. Choose which master page, if any, on which to base them.
6. Click **OK**.

### To add a single page or spread:

1. Drag a master page thumbnail before or after another page or spread thumbnail in the **Pages** area in the **Pages** panel, or choose **Document > Add Page**.

### To view a page or master page:

1. Double-click a page or master page thumbnail in the **Pages** panel, or the page number below the thumbnail. For a spread, double-click its left or right side to centre that side in the document window or double-click its centre or label to centre the entire spread in the window. The page will always be zoomed to fit the window.
2. Or choose **Document > First Page**, **Previous Page**, **Next Page**, **Last Page** or the equivalent navigation icons at the bottom left of the document window.



3. Or choose **Go to Page...** or click in the **Page number** of the page navigation controls in the **Status Bar** at the bottom of the document window and enter a page number.
4. Or use the document window's vertical scrollbar to scroll until the page you want is visible in the document window and then click anywhere on the page.

**Tip:** Adding a single page to a facing-pages document may lead to confusing results; refer to [Working with spreads](#) on page 13

**Tip:** If you don't like the view magnification changing when switching pages, use one of the other methods for switching pages

5. Or to view the master page for the current document page, choose **Document > View Masters** or click the **Toggle Master View** icon. Choose or click it again to view the document page again. If a page has more than one master page applied to it, this command and icon will display the top master page in the layer stack.

### To reorder pages:


You must use the **Pages panel** to reorder pages in Publisher; there is no Move Pages command as in some other applications.

1. Select one or more page thumbnails in the **Pages panel** and drag them before or after another page thumbnail. A blue line will appear to indicate where the page(s) will be moved. You can also drag a single master page thumbnail if you want to change their sort order.

### To duplicate pages:

1. Select one or more page thumbnails in the **Pages panel**.
2. Right-click any of the selected thumbnails and choose **Duplicate # Pages** from the context menu, where # is the number of pages selected. The duplicate pages will be added after the last selected page.

### To delete pages:

1. Select the page thumbnail(s) to delete in the **Pages panel** and click the **Delete Selected Pages**  icon. You can also right-click the thumbnail and choose **Delete** from the context menu.
  - If the deleted page includes a text frame linked to or from another page, the text in the frame will not be deleted. The frame will be removed from the series of linked frames without any impact to the text in its story. The story may overflow the last text frame in the series.

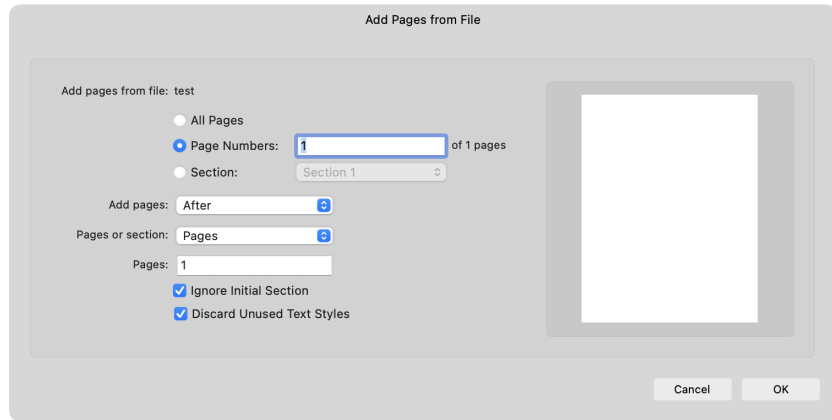
### To copy pages from one document to another:

You can't drag page thumbnails from one document to another as you can in some other applications but you can add pages to another document.

1. Open the document you wish to add page(s) to.
2. Choose **Document > Add Pages from File** and then select the other document from the **Open** window. You can also right-click the thumbnail of the page after which the page(s) should be added and choose **Add Pages from File...** from the context menu.

**Tip:** If you recorder master pages with automatic names (Master A, Master B...), the masters will be reordered but their names will be updated to maintain the A, B, C... sequence

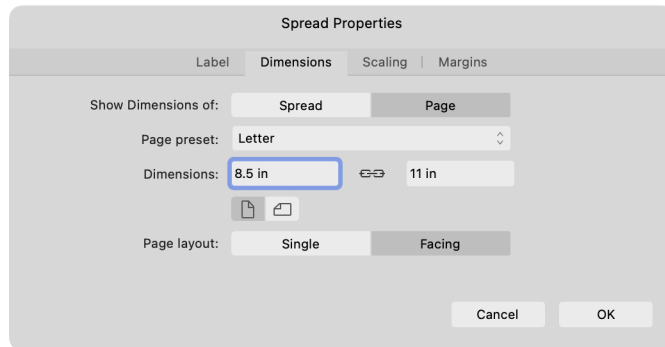
**Tip:** Adding, moving, or deleting a single page in a facing-pages document may lead to confusing results; refer to [Working with spreads](#) on page 13



3. Select the pages or spreads you want to copy.
4. Click **OK**. The pages or spreads will be imported and added to the current document.
5. Delete the page that you imported which will leave just the imported master(s) ready for use.

**To change the size of a page (without using a master page):**

1. Right-click the page or spread thumbnail in the **Pages** panel and choose **Spread Properties...** from the context menu.



2. All of the other options in the **Spread Properties** window are the same as for creating a new document and changing its setup, so refer to [Creating a new document](#) on page 2 and [Changing layout options](#) on page 5.

## Working with spreads

Adding, moving, or deleting a single page in a facing-pages document can lead to confusing results. When you insert a single page before a facing-pages spread, the resulting spread will have a master page applied separately to each side of the spread, even if they're both based on the same master. Objects directly on a document page will remain on the page in the same location as you would expect but objects on a master page layer will be doubled up. If you've modified those objects, for example, by adding text or a picture to a master layer frame, you will see overlapping content.

The best way to resolve this outcome is to re-apply the master page to the entire spread so that it's not applied separately to each side. However, even if you do this the last page in the document may have the same issue.


It is best to avoid adding, moving, and deleting single pages in a facing-pages document if at all possible.

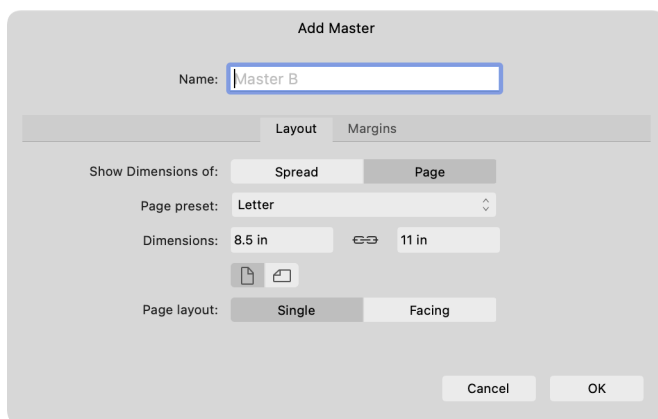
## Creating master pages

You can create additional master pages if you want some pages to have a different layout than others; for example, mixing one- and two-column layouts in the same book.

Although a document has an inherent size, orientation, colour profile, margins, bleed, and more, you can change any of these options for each master page. This is useful if you want to mix page sizes in a document, or insert a landscape page for a large table in an otherwise portrait document.

### To create a master page:

1. If the **Pages** panel is not already open, choose **Window > Pages**.
2. Click the **Add Master**  icon.




3. You can name the master page in the **Add Master** window for clarity but if you don't enter a name then it will be given an automatic name such as

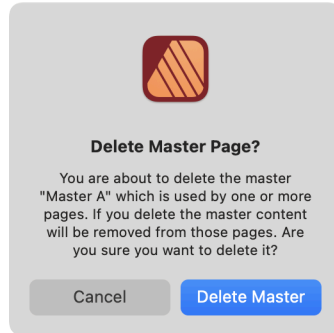


*Master B.* All of the other options in this window are the same as for creating a new document, so refer to [Creating a new document](#) on page 2.

4. Click OK to add the master page.

### To delete a master page:

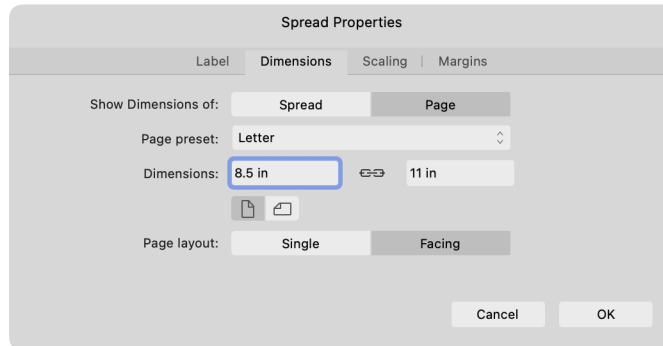
1. Select the master page thumbnail in the **Pages** panel and click the **Delete Selected Master**  icon. You can also right-click the thumbnail and choose **Delete** from the context menu. If the master page is applied to any pages then you will be prompted to confirm deleting the master's content from those pages.



## Changing master page layouts

### To change the layout of a master page after creating it:

1. If the **Master Pages** section of the Pages panel is collapsed, click the > icon to the left of the Master Pages section title to expand it.
2. Right-click the master page thumbnail in the **Pages** panel and choose **Spread Properties...** from the context menu.



**Tip:** Click a page thumbnail once to select it so you can perform actions to it; double-click it to display that page in the document window

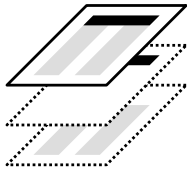
3. All of the other options in the **Spread Properties** window are the same as for creating a new document and changing its setup, so refer to [Creating a new document](#) on page 2 and [Changing layout options](#) on page 5.

## Applying master pages to document pages

You can apply a master page to document page(s) when creating a document or adding pages. After creating a document or adding pages, you can apply a different master page or remove the master applied to the document pages.

If your document requires many similar master pages, you can base a page on two or more master pages to avoid duplicating objects on more than one master and having to update each of them separately if changes are later required.

There are two ways to use multiple master pages. You can apply multiple masters to a document page or you can base one master page on another and apply the combined master to a document page. The examples below illustrate combining two masters but you can apply many masters to the same page.



**Apply multiple masters:** The document page (top) is based on the contents of both background master pages applied to it (middle and bottom)



**Base one master page on another:** The document page (top) is based on a background master page (middle) which is based on the background master page (bottom)

**Tip:** You can apply only one master page to a page at once so it is generally easier to base one master page on another

**Tip:** A popular approach is to create a main master for the guides and header and footer text such as page numbers and running headers, and other masters based on that for the text and picture frames needed for the various page layouts

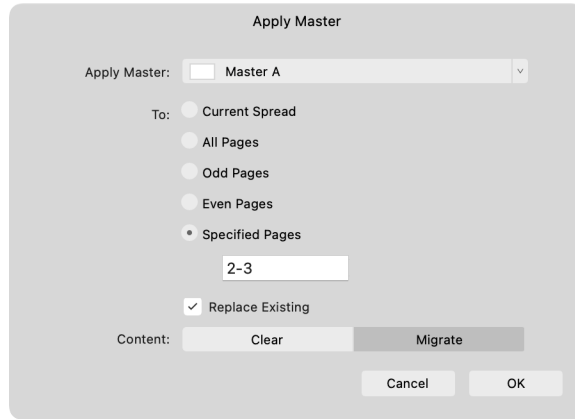
While a non-facing-pages document can include only single-page document pages and master pages, a facing-pages document can include single-page and facing-page document pages and master pages. If you apply a single-page master to a facing-pages spread then it will be applied to both sides of the spread. Adding a single-page master page to a facing-pages book or magazine might seem unusual but some publications have special pages that appear identically on the left or right side and it's easier to use just a single-page master.

You can also apply different master pages to the left and right pages of a spread and apply masters of different sizes to the same page(s). If you apply different-sized masters to a page you will be prompted whether to retain the existing page size or resize it to match the new master.

## To apply a master page to document page(s) or another master:

**Tip:** You can apply only one master page at once so to apply multiple masters, repeat these steps but ensure you deselect **Replace Existing** each time

1. Right-click a page or master page thumbnail in the **Pages panel** and choose **Apply Master...** from the context menu.



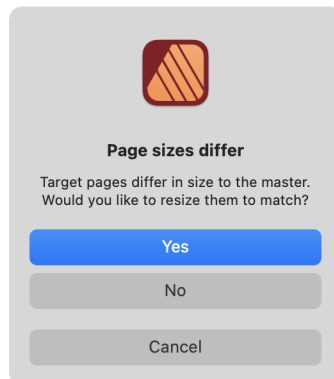
**Tip:** Objects other than frames will be removed regardless of whether **Clear** or **Migrate** is chosen

**Tip:** To migrate some text and images but not all, lock the objects on the new master page that you don't want content migrated into with **Layer > Lock**

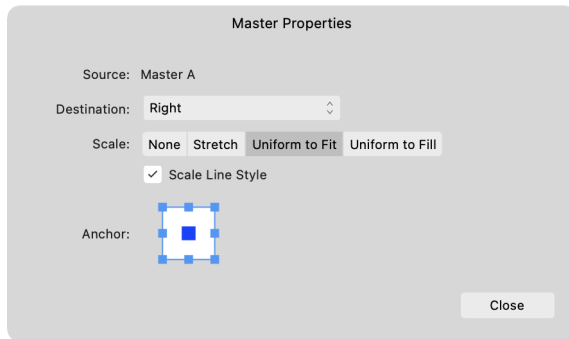
2. Choose which master page to apply in the **Apply Master** window and which page(s) to apply it to.
3. Choose **Replace Existing** to remove the current master page(s) from the selected pages before applying the new master page or deselect it to layer the new master page over the existing one(s).

If you choose **Replace Existing**, choose **Clear** to delete the current master's object(s) or **Migrate** to preserve content in master page text and picture frames. Using migrate will move content from the old master's frames to the most similar frames on the new master. If there isn't a matching object then the objects will be *detached* from the old master and *promoted* to regular objects on the document page.

4. If the new master page is a different size than the page(s) to which it is being applied, you will be prompted whether the page(s) should be resized. If you choose **No** then Publisher will scale the master page's objects and text uniformly from the centre.





5. You can change how master page objects and text are scaled to fit a different page size with the **Layers panel**. If the panel is not already visible, choose **Window > Layers**. Right-click the master page layer (i.e., Master A or the name you have chosen for it) and choose **Properties** from the context menu.



6. The Master Properties window allows you to choose which sides of a spread the master is applied to (facing pages only) and how the content should be scaled. Note that text may not fit in its frame after scaling and may need to be adjusted.
- **None:** Applies the master without scaling, even though the content may be too small or too large for the page size.
  - **Stretch** (not recommended): Stretches the master content in both directions to fill the page.
  - **Uniform to Fit** (default, recommended): Scales the master content uniformly so that the content in the larger direction fits the page, ensuring that no content is cropped. This option will leave white space gaps for the smaller direction.
  - **Uniform to Fill:** Scales the master content uniformly so that the smaller direction fits the page, cropping the content in the larger direction.


### To apply a master page by dragging its thumbnail:

1. If the **Master Pages** section of the **Pages panel** is collapsed, click the caret  icon to the left of the Master Pages section title to expand it.
2. Drag the master page thumbnail onto the thumbnail for a single page, a page spread, or one side of a spread. If multiple page thumbnails are selected, the master will be applied to all of them. The **Apply Master** window will not be displayed, the existing master page(s) will be replaced, edited objects will be migrated, and if the page sizes of the old and new masters do not match you will not be prompted whether to change the page size.

**Tip:** Hold down  (macOS) or Alt (Windows) while dragging the master page icon to apply the new master without replacing the existing one(s)

### To convert a document page to a master page:

You can't directly convert a document page to a master page but there is a way to accomplish this task.

1. Choose the **Move**  tool and then choose **Edit > Select All**.
2. Create a blank master page of the same size and layout. Refer to [Creating a new document](#) on page 2.
3. Choose **Edit > Paste** to duplicate the objects onto the new master page.

#### To unassign a master page from a document page:

1. Right-click a page thumbnail in the **Pages panel** and choose **Clear Master** from the context menu. You can also choose **Apply Master** and then choose **None** from the list of master pages.

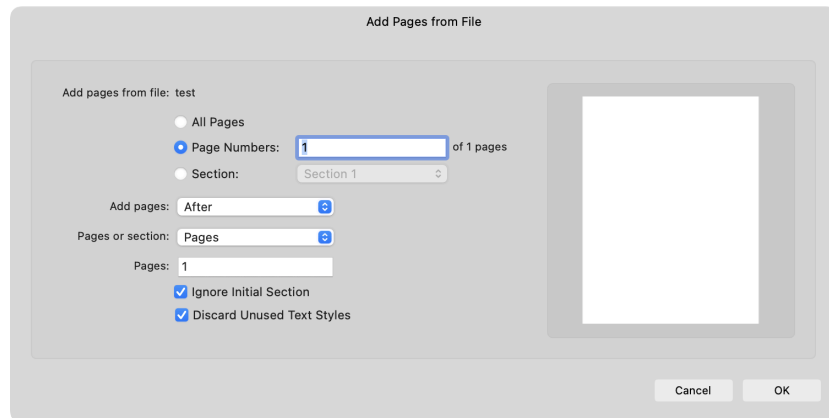
#### To import masters from one document into another:

You can't directly import a master page from another document but there is a way to do this.

1. If you want to import multiple master pages from a document, open that document and using the **Pages panel**, add a new page or spread at the end of the document. Select the first master page you want to import when adding the page.

Right-click the thumbnail of the new page in the **Pages panel** and choose **Apply Master...** Select the name of the second master page you want to import and deselect **Replace Existing**. Repeat this step for each additional master page and then save the document under a temporary filename.

2. Open the document into which you want to import master page(s). Choose **Document > Add Pages from File** and then select the other document from the **Open** window.



3. Select the a page or spread based on the master page(s) you want to import.
4. Click **OK**. The page and its master(s) will be imported and added to the current document.
5. Delete the page that you imported which will leave the imported master(s) ready for use.

## Editing master page objects

You can add, transform, and delete master page objects by viewing the master page and making changes there. Changes made to a master page will be replicated on all the pages. But you can also edit master page objects while viewing a document page so that you can see the impact of the changes in the context of a document page.

### To edit master page objects while viewing a document page:

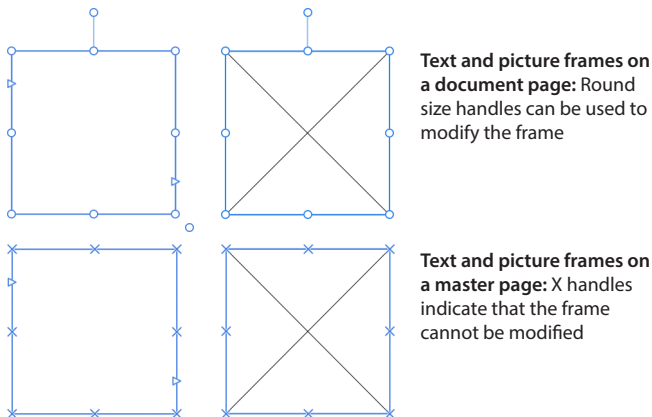
1. Choose **Layer > Master Page > Edit Linked**. A green bar will appear at the top of the document window to inform you that you're editing the master page linked. Note: If there is more than one master page applied to the document page then this will edit the top master in the layer stack. It is advisable to instead right-click the master page layer in the **Layers panel** and choose **Edit Linked** from the context menu.
2. Transform the master page's objects as desired. Expand the master page layer by clicking its caret icon in the **Layers panel** if you want to drag objects into and out of the master page layer.
3. Click **Finish** in the green bar or choose **Layer > Master Page > Edit Frame Content**. The master page will be updated along with all other document pages based on that master.

## Overriding master page objects on document pages

The content of text and picture frames on a master page can be modified on a document page but the frames themselves can't be transformed, nor can other objects such as shapes be changed on a document page.

When editing a document page, you can select a text or picture frame on a master page layer so that you can modify its content but you can't select other master objects such as shapes because they don't have content that can be changed on a document page.

Publisher displays master page frames on document pages with different handles to indicate that they can't be transformed on the document page.



**Tip:** Art text and path text objects work like text frames when placed on a master page; their contents can be changed on a document page

**Tip:** Publisher's **Edit Detached** feature is similar to the **Override** feature in Adobe® InDesign® and shouldn't be confused with its **Detach** feature that completely breaks the link to the master page; to fully detach a master object in Publisher, drag the object's layer out of the master page layer while using **Edit Detached**


Sometimes you may want to change a master page's objects for just one page without creating another master. While you can't transform master objects on document pages, you can *detach* the master page to override it. This allows you to make changes to the master page's objects for the current page.

Objects that are overridden by detaching the master page will still be updated if you change them later on the master page, as long as the updates are different from those you made while editing detached. For example, if you change a master page object's colour from red to green on page 3 but later change it from red to blue on the master page, the object on page 3 will not change. But if you move the object on the master page, the object on page 3 will move.


### To override a master page:

1. Choose **Layer > Master Page > Edit Detached**. A green bar will appear at the top of the document window to inform you that you're editing the master page detached. Note: If there is more than one master page applied to the document page then this will edit the top master in the layer stack. It is advisable to instead right-click the master page layer in the **Layers panel** and choose **Edit Detached** from the context menu.
2. Transform the master page's objects as desired and then click **Finish** in the green bar or choose **Layer > Master Page > Edit Frame Content**.

### To prevent a master page object from being overridden:

1. Select the object on the master page.
2. Choose **Window > Layers** to open the **Layers panel** if it is not already open.
3. Right-click the object in the **Layers panel** and choose **Lock** from the context menu, or click the **Toggle Lock**  icon for the layer. You will be unable to unlock the object while using **Edit Detached** on a document page.

### To hide master page objects on a document page:

1. Choose **Window > Layers** to open the **Layers panel** if it is not already open.
2. Click the **Toggle Visibility**  icon for the master page layer.

### To remove master page overrides from a document page:

1. Re-apply the master page to the page.

## Changing the stacking order of master page objects

Master page objects are on a master page layer which is positioned below document page objects because a master page is the background of a document page. If you have multiple masters applied to the same document page you might want to change the order of the master page layers, and in rare cases you might want the master page layer to be above objects on the document page.

### To change the stacking order of master page layers:

1. Choose **Window > Layers** to open the **Layers panel** if it is not already open.
2. All of the objects on each master page applied to the current page will be grouped together on a master page layer. Click that layer to select it and drag it to a different position in the layer stack.

**Tip:** You can't lock a master page layer to remain at the top of the layer stack—new objects draw on the document page will be created above of the master layer

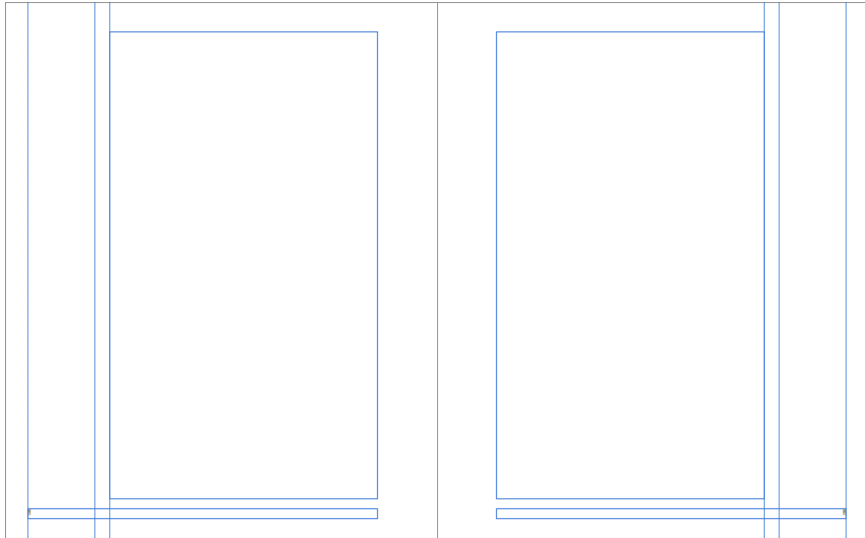
**Tip:** You can reorder the master page layers relative to layers on the document page, but to reorder the layers within a master page layer you must use **Edit Detached** or **Edit Linked**



# Headers, page numbers, and sections

Most books and magazines have headers or footers at the top or bottom of each page to convey information about the document, chapter, and page. Headers and footers should be created on master pages so that they will appear on each document page without duplicating text frames.

If you want some pages to have a different version of the header or footer or none at all, create an additional master page for those pages.



**Master page layout:** This is the master page for this page of this book. Note the mirrored text frames in the footer at the bottom for page numbers, and mirrored text frames which are linked from left to the right. The other lines are guides.

## Sections

**Definition:** A *section* is a range of pages starting on a specific page and continuing until the start of the next section or the end of the document

Publisher uses *sections* to customize page numbering, to name or number chapters, and to exclude a range of pages from being exported.


While it is a best practice to link text frames from page to page in a document, you should break the link at the end of each section because the start pages of sections are fixed and can't *float* with the heading at the start of your next chapter as they do in word processors such as Microsoft® Word.

Most books created as a single document in Publisher will have at least two sections, one for front matter and one for body pages. This book has two sections. Using a section for every chapter is useful if you need to insert chapter names or numbers into a header or footer.

## Page numbering

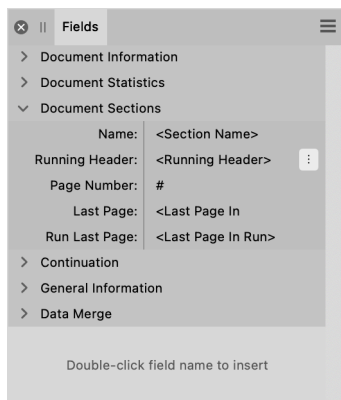
Publisher can number your document's pages automatically. If you want to change the numbering format for different parts of your document, you can divide your document into sections and use a different numbering format for each section.

### To create a header or footer:

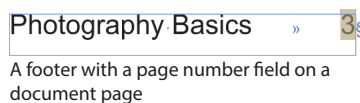
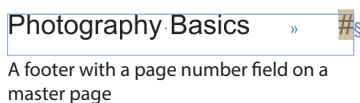
1. Using the **Pages panel**, double-click a master page thumbnail or its name below the thumbnail. If the master is facing pages then you need to add text frames to both sides.
2. Using the **Frame Text**  tool, draw a text frame to include the header or footer information. While formatting a header or footer, it is best to type a placeholder page number or section name even if that information will be updated automatically. Once you have the formatting the way you want it, you can delete the placeholder information.
3. Apply the master page to document page(s). Refer to [Applying master pages to document pages](#) on page 15.


### To add automatic page numbers:

1. View the master page and click in the header or footer where you want the page number to appear.
2. Choose **Text > Insert > Fields > Page Number**, or double-click the **Document Sections > Page Number** field name in the **Fields panel**. The **#** sign will be shown for the page number on a master page.



3. Choose **Text > Highlight Fields** to add shading behind fields such as page numbers to make them easier to see while editing your document. This shading will not be printed.



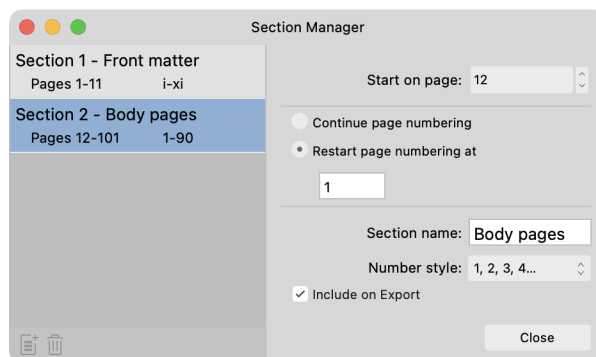
**Tip:** You can also use the **Artistic Text**  tool to create a header or footer but it is easier to draw a text frame aligned to the left and right margins and then to align the text within the frame, especially if you insert fields which have long names when viewed on a master


**Tip:** To right align a page number as shown in this example, choose **Text > Insert > Spaces and Tabs >> Right Indent tab** or use a standard tab and create a right-aligned tab stop set to 0 from right

## To change the page number format:

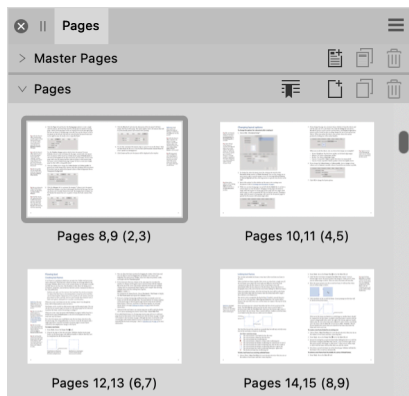
Sections are used to customize the page numbering format.

1. Choose **Window > Section Manager** or click the **Section Manager**  icon in the **Pages** panel.



2. Choose the **Number style** for the default first section. You can also enter a **Section Name** if desired.
3. If you want to change the numbering style for the entire document, click **Close**. Many books use Roman numerals (i, ii, iii, iv...) for the front matter pages and Arabic Numbers (1, 2, 3, 4...) for the body pages. To do this, you will need at least two sections in your document. Change the first section's **Number style** to i, ii, iii, iv...
4. Keep the Section Manager window open and in the document window, switch to the page on which the page numbering should change.
5. Using the Section Manager, create a second section for the body pages starting on the current page by clicking the **Add Section**  icon. You can also right-click the page's thumbnail in the **Pages** panel and choose **Start New Section...** from the context menu.
6. Enter a name for the new section (optional) and enter the absolute page number for its first page in **Start on page**. Set **Restart page numbering** at to 1, and change its **Number style** to 1, 2, 3, 4...

**Definition:** *Absolute* page number refers to the number of the page within the document; the *relative* page number is what is displayed on a page by restarting page numbering



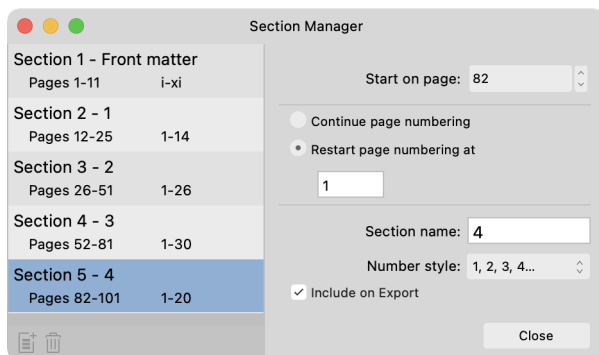
Pages panel showing absolute page numbers (left) and relative page numbers (in parentheses) for a facing-pages document

### To number pages separately in each chapter (section):

Some books number pages in each chapter separately, such as 1.1, 1.2... and 2.1, 2.2... Publisher can't automatically add a section's name as a prefix to the page number like some other applications but you can do this easily by combining two fields.

1. Choose **Window > Section Manager** or click the **Section Manager** icon in the **Pages** panel.
2. Create a section for each chapter of your document by navigating to its first page and clicking the **Add Section** icon. You can also right-click the page's thumbnail in the Pages panel and choose **Start New Section...** from the context menu. Enter the chapter number as the **Section name**, and set **Restart page numbering** at 1 for each section.

**Tip:** Publisher does not offer automatic section numbering so you must enter a number for each chapter as its **Section name**



**Tip:** Be careful numbering your chapters; section 1 for most books will be for front matter so section 2 will be for chapter 1 and so on, as shown in this screenshot

3. View the master page and click in the header or footer where you want the page number to appear.
4. Choose **Text > Insert > Fields > Section Name**, type a period, and then choose **Text > Insert > Fields > Page Number**. You can also double-click the **Document Sections > Name** field name in the **Fields** panel, type a period, and then double-click the **Document Sections > Page Number** field name.

This will be shown as <Section Name>.# on a master page but will appear as 1.1 on the first page of chapter 1.



Photography Basics » <Section Name>.#

A footer with section name and page number fields on a master page

Photography Basics » 6.3


A footer with section name and page number fields on a document page

### To change or delete a section after creating it:

1. Choose **Window > Section Manager** or click the **Section Manager**  icon in the **Pages** panel. You can also right-click the thumbnail of any page in the section and choose **Edit Section...** from the context menu.
2. Make the desired changes to the section or with the section selected in the list on the left, click the **Remove Section**  icon.

### To add last and continued page numbers:

Some books need to display page numbers as # of # (for example, 17 or 98) or continued to/from page numbers (for example, continued on page 17).



1. Using the **Frame Text**  tool, position the text cursor where you want the page numbers to be inserted.
2. Insert the desired fields by double-clicking their names in the **Fields** panel or by choosing it from **Text > Insert > Fields**:
  - **Page # of # for an entire document:** Insert the **Page Number** field followed by “ of ” and then insert the **Total Pages** field. The Page Number field will use the page numbering style defined for the section but the Total Pages field will always be displayed in Arabic numerals.
  - **Page # of # for a section:** Insert the **Page Number** field followed by “ of ” and then insert the **Last Page in Section** field. Both numbers will use the page numbering style defined for the section. You can also choose the **Last Page in Section Run** field which refers to the last page before page numbering is restarted, whether that is in the next section or several sections later.
  - **Continued on page #:** Enter text such as “continued on page ” (or from page) and then insert the **Next** or **Previous Frame Page Number** field into a text frame on a document page (not a master page) that is part of a series of linked frames. These fields display the page number of the previous or next frame.

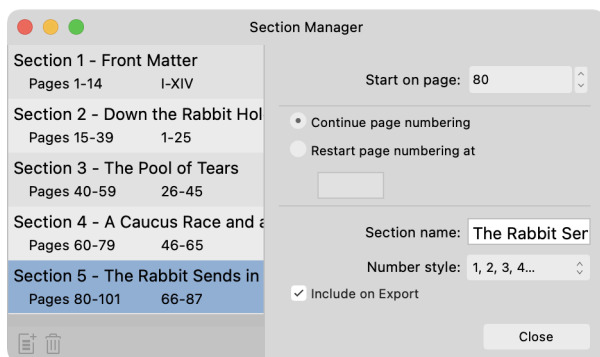
**Tip:** All of these fields are shown as # on a master page but they will display correctly on a document page

## Using sections for chapters

Many books display the chapter name in the header or footer. If you use the Books feature and create each chapter as a separate document you can add the chapter name as static text in a master page's header or footer but if the book is a single document then you would need a separate master page for each chapter. The **Section Manager** provides an easier way to add the chapter name to a header or footer.

### To create sections for a book's chapters:

1. Choose **Window > Section Manager** or click the **Section Manager**  icon in the **Pages** panel.
2. Create a section for each chapter of your document by navigating to its first page and clicking the **Add Section**  icon. You can also right-click the page's thumbnail in the **Pages** panel and choose **Start New Section...** from the context menu. Enter the chapter name as the **Section name**.



### To display the chapter (section) name in a header or footer:

1. Using the **Pages** panel, double-click a master page thumbnail or its name below the thumbnail.
2. Click in the header or footer where you want the chapter name to appear.
3. Choose **Text > Insert > Fields > Section Name**. You can also double-click the **Document Sections > Page Number** field name in the **Fields** panel. This will be shown as **<Section Name>** on a master page but the name of your chapter will appear on each page based on this master.

**Tip:** You cannot use the **Section Name** field for both the chapter name and as a chapter prefix to number pages separately in each chapter, you must choose one or the other

**Tip:** You can drag the **Section Manager** window wider so you can see your full chapter names on the left side

## Running headers

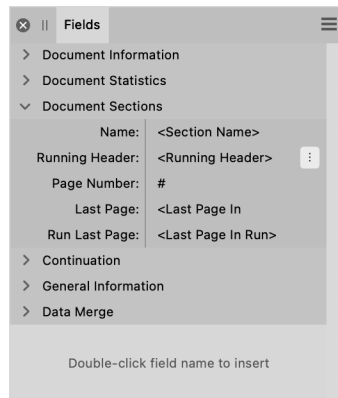
**Tip:** Publisher uses the term *running header* even if it's inserted into a footer

**Definition:** A *run* is the range of text until the next instance of the same level of heading


Publisher can repeat heading text in the header or footer automatically. A running header helps the reader by describing what information will be found on the page. Many books display the current topic within a chapter in the header or footer while dictionaries and similar books might display the first and last headwords on each page. If you format your topics or headwords consistently with a specific heading style then Publisher can display them automatically in a running header.

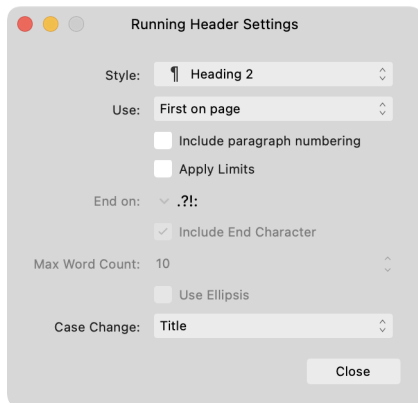
### To create a running header:

1. View the master page and click in the header or footer where you want the page number to appear.
2. Choose **Text > Insert > Fields > Running Header**. You can also double-click the **Document Sections > Running Header** field name in the **Fields** panel. This will be shown as `<Running Header>` on a master page but the header text will appear on each page based on this master.



**Tip:** If you click the icon when a field is not selected or the cursor is not beside it you can set the defaults for all running headers you subsequently create, but formatting a running header will also set the defaults so this is unnecessary

3. If you moved the text cursor since inserting the running header field, select it or position the cursor immediately after the field. Then click the **Edit**  icon to the right of the field in the **Fields** panel. You can also right-click the field in the text frame and choose **Edit Field** from the context menu.
4. Select which headings to display as a running header and how to format it.

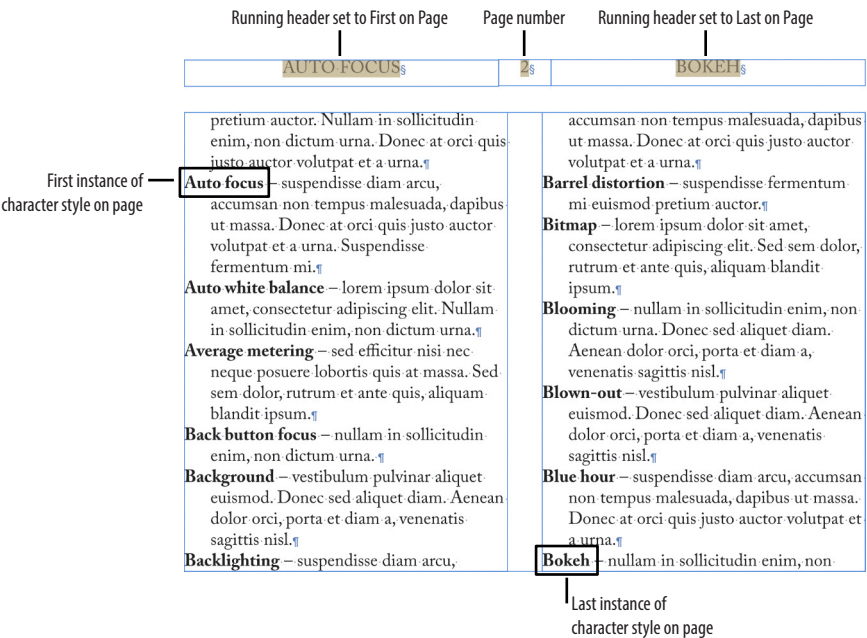


- **Style:** Choose the text style you used for the headings you want to be displayed in the running header. For most publications you would choose *Heading 1* (default), *Heading 2*, or *Heading 3*, but you can choose any paragraph or character text style.
  - **Use:** Choose whether the first or last instance of the selected style should be displayed. The default *First on page* option is recommended for most publications—it will even use the header text from a previous page if there isn't an instance of the text style on the current page. Use *Last on Page* only for the last headword on a page for dictionary-style formats because the running header will be blank if there isn't an instance of the text style on the current page.
  - **Include paragraph numbering:** Choose if the heading is a numbered list and you want the number displayed in the running header.
  - **Apply limits:** Choose to control the running header's length. Specify which character(s) to end on, whether to include the end character, the maximum number of words, and whether a truncated header should be displayed with an ellipsis.
  - **Case change:** Choose whether the header should be displayed in its original case or changed to upper, lower, title (default), or sentence case.
5. Choose **Text > Highlight Fields** to add shading behind fields such as page numbers to make them easier to see while editing your document. This shading will not be printed.



## Sample dictionary-format running header

This example uses three text frames on the master page for the running headers and page number. Both running headers are set to a character style used to bold the dictionary terms but one is set to **First on Page** and the other to **Last on Page**.



### To format a Running Header:

**Tip:** Do not format a running header on a master page layer while on a document page or you will override the field on the master page and impact only the current document page

1. Using the **Frame Text** tool, right-click the running header field in the document text and choose **Edit Field...** from the context menu. You can also select the field or position the text cursor before or after it and then click the **Format** icon to the right of the field in the **Fields** panel.

## Baseline grid

A document's baseline grid will align the baseline of each line of text to horizontal guides spaced equally from the top to the bottom of the page, regardless of the paragraph's leading and paragraph before/after spacing. The baseline grid is like writing on ruled paper and is separate from the drawing grid which is used to snap objects to uniform grid.

The baseline grid is used to align text vertically across text frames and columns on a page and is essential for professional page layout. It is a best practice to set the baseline grid's spacing to the paragraph leading value defined for your body text and to define leading as an exact value rather than using the default automatic setting. Headings are typically spaced by a multiple of the baseline grid and leading values.

For example, for 12 pt body text, you might set paragraph leading to exactly 14 pt and your baseline grid to 14 pt. Because headings would likely be larger than 14 pt they would have leading of 28 pt, double the baseline grid. You would normally set space before and after the paragraph to 0 or an increment of the baseline grid because they would be ignored if they were less than the baseline grid.

[illegible]

**Baseline grid on:** The text in this 2-column text frame is aligned to the baseline grid; the text frame is also aligned to the top margin which itself is a multiple of the baseline grid

[illegible]

**Baseline grid off:** The text in this 2-column text frame is not aligned to the baseline grid so the baselines of the text in the two columns are not aligned

While you don't have to align text frames to the baseline grid—their text baselines will be aligned regardless—it is a best practice to align everything on the page to a multiple of the baseline grid so position and size frames after setting up the baseline grid.

The baseline grid normally starts at the top of the page or spread but you can

**Definition:** The baseline is the invisible line on which the bases of characters without descenders are aligned

**Tip:** The baselines of text in art text and path text objects are not aligned to the baseline grid

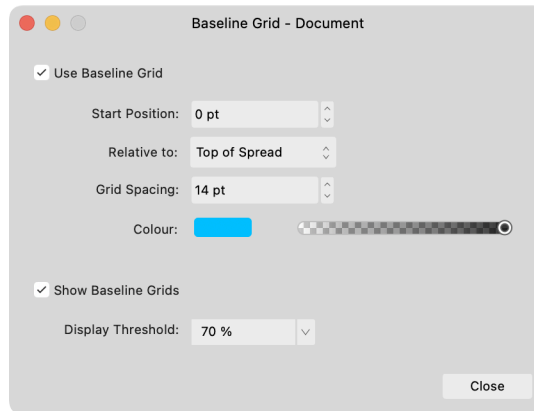
**Tip:** To snap text frames to the baseline grid when drawing, moving, or scaling them, ensure that **Snap to Baseline Grid** is selected in **View > Snapping...**


customize the starting position or align the grid to the top margin; however, most designers start the baseline grid at the top of the page spread and set the top margin to a multiple of the baseline grid.

A document has only one baseline grid but you might choose to ignore or override the grid for specific text frames used for captions, quotations, or margin notes, or for data tables. Refer to [Baseline grid](#) on page 53 for more information on customizing the baseline grid for text frames. You can even ignore the baseline grid for specific paragraphs within a text frame.

### To set and show the baseline grid:

1. Choose **View > Baseline Grid...**



2. Select **Use Baseline Grid** and set the **Grid Spacing** to match the body text's paragraph leading value. You can also set:
  - **Start Position:** Enter a value to offset the baseline grid, the default of 0 is recommended for most documents.
  - **Relative to:** For most documents, *Top of Spread* (default) and *Top of Page* are identical; the latter is relevant only for facing-page documents arranged vertically which will restart the grid at the top of the spread's bottom page.
  - **Colour:** Click the colour sample to set the colour of the baseline grid's lines and drag the slider to change their opacity.
3. Select **Show Baseline Grid**. You can also change the **Display Threshold** value below which the baseline grid will be hidden.
4. Click **Close**.
5. Click the **Show Baseline Grid Manager**  icon in the **Toolbar** or choose **View > Show Baseline Grid** to see the grid's lines when you zoom in to above the chosen display threshold.

Entering and editing text in Publisher is similar to most applications but unlike a word processor, Publisher allows you to create and link your own text frames. You can also create text without using text frames.

Formatting text is somewhat more complex than in most applications due to the range of formatting options available. Text styles, which are explained in the next chapter, can be used to combine formatting options to ensure consistent formatting throughout a long document.

This chapter also details text frame properties which will allow you to style a text frame and control how text is displayed in it.

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# Text objects

All text entered in Publisher is contained within a **text object**. Publisher offers five types of text objects for different purposes:




- **Text frame:** Use text frames for the main text of your documents. Text frames can be linked together so that text flows from one frame to the next. Text frames can be divided into multiple columns so there is no need to draw separate frames for each column. Scaling a text frame scales the frame without scaling the text size unless you use the content scaling handle. Refer to [Text frames](#) on page 36 for more information on text frames.
- **Shape text frames:** Use shape text frames for special effects. Shape text objects are text frames that you have converted from a shape or closed path to a text frame. They function identically to text frames and can be divided into multiple columns and linked to another text frame. Refer to [Shape text frames](#) on page 38 for more information on shape text frames.
- **Art text:** Use art text for short lines or blocks of text such as display type and labels. Art text objects are rectangular like standard text frames but they don't have a constraining frame with a right edge to wrap lines of text so they are *frameless* and scaling them will scale the text size. Typing into an art text object will not wrap and will continue until you press **Return** to start a new paragraph or insert a line break. Art text objects can't be linked together because they have no bottom edge. Refer to [Art text](#) on page 39 for more information on art text objects.
- **Path text:** Use path text to align the baseline of text to a curved or angled path for design effects. Typing into a path text object will continue until the end of the path is reached or until you press **Return** and then will continue on the other side of the path. Pressing **Return** multiple times will enter spaces. Scaling path text will scale the path without scaling the text size. Path text objects can't be linked together, but because the length of the path is finite, it is possible to overflow path text in the same manner as a text frame. Refer to [Path text](#) on page 41 for more information on path text objects.
- **Tables:** Use tables to organize information in rows and columns. Typing into a table cell will wrap at the cell's right edge just as in a text frame. Press **Tab** to move the text cursor to the next cell. Tables are not described in this manual.

**Tip:** *Art text* is short for *artistic text* and is referred to as *point text* or *frameless text* in other applications; you can use them for any purpose, they don't have to be artistic

## Text tools

Publisher provides three text tools to create text objects but once a text object is created you can edit text with any of the text tools.

Publisher works somewhat differently than other applications when it comes to creating point text or frameless text. Instead of clicking with an application's single text tool to create point text, Publisher has separate tools for creating text frames and art text objects.

- **Frame Text**  tool: Select to create text frames and to edit the text in any type of text object.
- **Artistic Text**  tool: Select to create art text objects and to edit the text in any type of text object.
- **Table**  tool: Select to create tables and to edit the text in any type of text object.

Publisher doesn't provide specific tools to create shape text frames and path text objects because those are created by converting shapes and paths to contain text using the commands in the **Layer** menu.

## Stories


The text in a text object is referred to as a *story* so when you create a text object you are also creating a story, even though the text object will be blank until you enter text into it. The text in a series of linked text frames is a single story. Refer to [Single vs. multiple stories](#) on page 132 and [Flowing text](#) on page 43 for more information on stories.

All of the text in a table is a single story with tabs separating the text in each cell.

**Definition:** The term **story** refers to all the text in a text object or in a series of linked text frames

## The Esc key

When text is selected, press **Esc** to deselect the selected text. The text cursor will appear at the end of the selected text range.

When text is not selected but the text cursor is in text, press **Esc** to remove the text cursor from the text. The text frame or object will be selected so that you can modify it instead of the text or press **V** to switch to the **Move**  tool.

When a text frame or object is selected and the text cursor is not in its text, press **Esc** to deselect the object.

**Tip:** To switch to the **Move** tool without having to consider whether or not text is selected, press **Esc** twice before pressing **V**;

# Text frames

**Definition:** A **text frame** is a rectangular text container and can be linked to other text frames to flow text between and pages

**Tip:** You can override a master page on a document page to transform a text frame; refer to [Overriding master page objects on document pages](#) on page 19



**Tip:** Do not drag the content scaling handle below and to the right of the bottom-right size handle because it scales the text in the frame and is difficult to undo

*Text frames* are used to contain the main text of a document but can be used for any purpose. Unlike word processors such as Microsoft® Word that have a fixed text frame on each page linked to the next page, Publisher allows you to create as many frames on each page as you like and link them in any direction. This flexibility is what allows the laying out of newspapers, magazines, and newsletters that have articles continued elsewhere in the same publication.

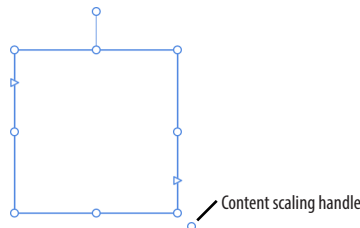
When you create a new document with Publisher, its page(s) will be based on a default master page if **Default master** is selected on the **Layout** tab, but they won't have any text frames. Text frames can be created on master pages or document pages. You can edit the text in a master page's text frame on a document page but not otherwise transform the frame, such as by moving or scaling it.

For a short document, you would likely create the text frames directly on the document page. For a long publication, it is best to create the document with a single page and to create the text frames on master pages to ensure layout consistency and simplify later changes to the layout.

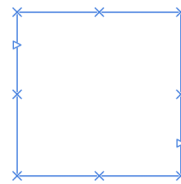
## To create a text frame:

1. From **Tools**, choose the **Frame Text**  tool. The mouse pointer will change to a crosshair with the tool icon appended to it: .
2. Drag diagonally on a blank area of the page. While dragging:
  - Hold **⌘** (macOS) or **Ctrl** (Windows) to draw outward from the centre.
  - Hold **Shift** to constrain drawing to a square.
  - Hold **Spacebar** to move the frame instead of continuing to change its size.

Release the mouse button to finish creating the text frame. Publisher will display the frame with handles to indicate it is selected and can be modified. If you have drawn a text frame on a master page, the frame's handles will be non-editable when viewed on a document page that is based on the master to indicate that it can't be transformed on the document page.



**A text frame on a document page:** Round size handles can be used to modify the frame



**Text frame on a master page:** X handles indicate that the frame cannot be transformed

3. If you want more than one column on the same page you can adjust the number of columns and the gutter (space) between them with the **Context**

**Toolbar** at the top of the screen. This feature will divide the frame into multiple columns that are permanently linked together and is simpler than drawing multiple frames and then linking them together.



For asymmetrical column layouts, choose **Document > Text Frame** to display the **Text Frame panel** and expand the **Columns** section.

4. If you are creating a facing-pages publication then you should create text frames on both the left and right sides. You must link the two frames together on the master page so that document pages based on this master will have linked frames; otherwise, you'll have to link them together on each page spread. Refer to [To link a text frame](#) on page 44 below for more information.
5. Optional: If the text frame is on a master page you can fill it with placeholder text to aid in visualizing your layout. Choose **Text > Insert Filler Text**.

If you added linked frames to a facing-pages master page and were to add more pages based on that master to the document now, the text frame on page 1 would *not* be linked to the text frame on page 2 although the frames on all of the newly-created pages will be linked. It is best to AutoFlow text or you'll have to manually link the frame from page 1. Refer to [AutoFlow text](#) on page 47 for more information.


### To move or scale text frames:

1. To move the text frame, position the mouse pointer over its outline and drag.
2. To scale the text frame, drag the size handles at its corners and midpoints. The corner handles will scale the frame symmetrically and the midpoint handles will scale it asymmetrically unless you hold **Shift** while scaling. The font size will not change unless you drag the content scaling handle at the bottom-right corner.

To scale the text object from its centre rather than the corner handle, hold **⌘** (macOS) or **Ctrl** (Windows) while dragging.

3. To rotate the text frame, drag the rotation handle above the frame. You can also press **⌘** (macOS) or **Ctrl** (Windows) while dragging to rotate the frame around the opposite corner handle at the same time.
4. For more precise changes, enter new values for position, width, height, rotation, and shear with the **Transform panel**.

### To convert a text frame to art text:

1. Select the text frame with the **Move**  tool or any text tool.
2. Choose **Layer > Convert to Art Text**.

**Tip:** If the frame is linked to another frame you must unlink it first




# Shape text frames

**Definition:** A **shape text frame**, commonly referred to as *shape text*, is a text container that functions identically to standard text frames but retains the properties of its original shape

**Tip:** The **Context Toolbar** shows different options for selected text frames and shapes and there isn't room to show both sets of options at the same time so you may need to use other panels to access options that you would normally find in the toolbar



In addition to creating standard text frames, Publisher allows you to convert any shape such as an ellipse, triangle, or closed path to a text frame. You can link these *shape text* frames just as you would any standard text frame.

You can manipulate both the text frame and shape properties for a shape text frame. The **Context Toolbar** will show a combination of options for text and the original shape when you select a text frame converted from a shape using the Move  tool.

All other features of shape text frames are the same as standard text frames.

## To convert a shape to a text frame:

Once converted to a text frame, there is no way to convert shape text back to a standard shape. It's not important because you can format the shape text frame just as you would a standard shape but the **Context Toolbar** will show several text attributes instead of all the object attributes.

1. Draw a shape using the appropriate shape tool.
2. Convert the shape to a text frame by doing one of:
  - Select the shape and using the **Frame Text**  tool, click inside the shape to position the text cursor. When over the shape, the mouse pointer will change to a crosshair with a *T* inside of a shape: 
  - Or with the shape selected, choose **Layer > Convert to Text Frame**.
  - Or right-click the frame and choose **Convert to Text Frame**.

# Art text



*Art text* objects are used for short lines or blocks of text such as display type and labels. Art text objects are rectangular like standard text frames but they don't have a constraining frame with a right edge to wrap lines of text so they are *frameless*. Scaling art text will scale the text size.

Art text is frequently used in short, design-intensive documents such as brochures and posters. It's sometimes better to use a text frame even for short blocks of text such as a caption because a frame provides a right edge to which text can be aligned. For example, all of the captions in this manual are text frames and not art text.

Typing into an art text object will not wrap and will continue until you press **Return** to start a new paragraph or insert a line break. Most art text objects are a single line but you can type an almost unlimited number of lines and paragraphs of text.

Art text objects can't be linked together because they have no bottom edge that would cause text to overflow.

## To create art text:

1. From **Tools**, choose the **Art Text**  tool. The mouse pointer will change to a crosshair with the tool icon appended to it: .
2. Click on a blank area of the page to create a new art text object with the current font size.

Or drag diagonally on a blank area of the page to define a custom text size.

Publisher will display an empty text object with handles to indicate it is selected and can be modified. If you have created an art text object on a master page, the frame's handles will be non-editable when viewed on a document page that is based on the master to indicate that it can't be transformed on the document page.



**Art text object when first created:**  
Round size handles can be used to modify the font size; the bounding box is wide enough to enclose the End of Story § symbol even if **Text > Show Special Characters** is not selected



**Art text object after typing text:** The bounding box changes to match the size of the characters typed



**Art text object on a master page:** X handles indicate that the object cannot be transformed

**Definition:** **Art text** is a frameless text object commonly used for display type and is known as *point text* or *frameless text* in other applications


### To move or scale art text:

1. To move the text object, position the mouse pointer over its outline and drag.
2. To scale the text object, drag the size handles at its corners and midpoints. The corner handles will scale the text symmetrically and the midpoint handles will scale it asymmetrically unless you hold **Shift** while scaling.

To scale the text object from its centre rather than the corner handle, hold **⌘** (macOS) or **Ctrl** (Windows) while dragging.

3. To rotate the text object, drag the rotation handle above the text object. You can also press **⌘** (macOS) or **Ctrl** (Windows) while dragging to rotate the object around the opposite corner handle at the same time.
4. For more precise changes, enter new values for position, width, height, rotation, and shear with the **Transform panel**.

### To convert art text to frame text:

1. Select the art text object with the **Move**  tool or any text tool.
2. Choose **Layer > Convert to Text Frame**. You can also right-click the text object and choose **Convert to Text Frame** from the context menu but only with the **Move** tool selected.

# Path text



*Path text* objects are used to achieve special design effects by aligning the baseline of their text to a curved or angled path.

Typing into a path text object will continue until the end of the path is reached or until you press **Return** and then will continue on the other side of the path. Pressing **Return** multiple times will enter spaces.

Any path can be converted to a path text object, including closed paths. Path text objects can't be linked together, but because the length of the path is finite, it is possible to overflow path text in the same manner as a text frame.

**Definition:** *Path text*, sometimes referred to as a *text path*, is a text object that curves the baseline to align to the path

## Overflow control meaning

- 
-  The selected path text has hidden overflowing text: click the Eye to view it
  -  The selected path text has visible overflowing text: click the Eye to hide it
- 



Ellipse converted to a path and text centred on its first side







After pressing **Return** and typing text for the second side



After adjusting the baseline offset for the second side

## To create path text:

1. Draw a path using the **Pen**  tool.  
  
Or draw a shape and convert it to a path by selecting it and choosing **Layer > Convert to Curves**.
2. Using the **Context Toolbar**, set the path's stroke to solid to make it easier to work with, even if it will eventually be turned off.
3. Convert the path to a text path by doing one of:
  - Select the path using the **Move**  tool, and then using the **Art Text**  tool, click on the path. When over the path, the mouse pointer will change to a crosshair with a *T* on a path: 
  - Or with the shape selected, choose **Layer > Convert to Text Path**.
4. Select the path text object with a text tool and type onto the path. Green and orange triangles will indicate the start and end of the path. Optional: Drag the triangles to limit the amount of the path used for text.
5. Set the paragraph alignment to centred if appropriate or scale the text to fill the path.

**Tip:** After conversion to a path, you can set the path's stroke and fill with the **Text Frame** panel


6. Press **Return** to start a new paragraph on the other side of the path. Dark green and red triangles will indicate the start and end of the second side. Drag these triangles to limit the amount of the second side used for text. Publisher can snap the triangles to the 25%, 50%, and 75% points along the path to help you align the triangles with logical points. This is especially useful with ellipses and other regular shapes.

If you type more text than will fit on the first side, the text will flow to the second side automatically without pressing **Return**.

7. Set the paragraph alignment and baseline offset to position the text on the path and adjust tracking to avoid character collisions. Fonts are designed so that characters are positioned on a straight baseline so you may need to adjust tracking to avoid characters colliding if the path includes sharp turns.

### **To convert a path text object back to a path:**

There isn't a direct way to convert a path text object back to a path and delete its text but it's easy to do.



1. Select the path text object with any tool and choose **Layer > Convert to Curves**.
2. Using the **Layers panel**, click the caret  icon to the left of the group to expand it. Drag the original path (curve) layer out of the group; it will be the bottom object in the group.
3. Delete the group. If there was text in the path text object, the characters would have been converted to individual curve layers which can be deleted with the group.

### **To move or scale a path text object:**

1. To move the path text object, position the mouse pointer over its outline and drag.
2. To scale the path but not the text, drag the size handles at its corners and midpoints. The corner handles will scale the text symmetrically and the midpoint handles will scale it asymmetrically unless you hold **Shift** while scaling.

To scale the path and text together, drag the content scaling handle at the bottom-right corner. Hold **Shift** to scale it asymmetrically.

To scale from its centre rather than the corner handle, hold  (macOS) or  (Windows) while dragging.

3. To rotate the path text object, drag the rotation handle above the text object. You can also press  (macOS) or  (Windows) while dragging to rotate the object around the opposite corner handle at the same time.
4. For more precise changes, enter new values for position, width, height, rotation, and shear with the **Transform panel**.

# Flowing text

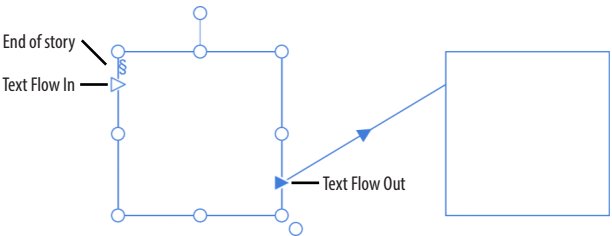
You can link and unlink text frames at any time to flow text from one frame to the next. When you link two frames together their stories are joined into a single story. If the text frames were empty this won't make any difference but if they both contained text then the first character of the second frame's story will immediately follow the last character of the first frame. Ensure that there is a paragraph return at the end of the first story before linking two filled text frames.

When you unlink two frames, all of the text from the story will be in the frame before the broken link while the frame(s) after the broken link will be empty—they will have a new blank story.

The end of a story is marked by the End of Story ¶ symbol, a special character you can see by selecting **Text > Show Special Characters**. The symbol will be shown at the end of the story text, or if the frames are empty, at the top-left of the story's first text frame.

Every text frame has two controls that define the flow of text in and out of the frame. The **Text Flow In** control near the top-left corner is used to link to a previous frame while the **Text Flow Out** control near the bottom-right corner is used to link to the next frame. These controls will have a hollow icon if the frame is not linked in that direction or a solid icon if it is linked.

**Definition:** The **Text Flow In** and **Out** controls will be hidden if you zoom out too far due to lack of space



The **Text Flow In** and **Out** controls will change from blue to red if the story text for the text frame or frames is overflowing.





## Text Flow control meaning

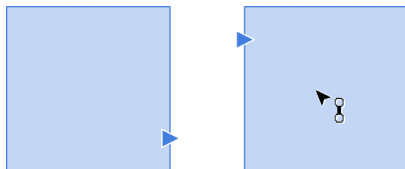
▷	The selected frame is not linked in this direction
▶	The selected frame is linked in this direction
▷	The selected frame has overflowing text or is linked to an overflowing frame
▶	The selected frame is linked to a frame with overflowing text
▷	The selected frame has hidden overflowing text: click the Eye to view it
▷	The selected frame has visible overflowing text: click the Eye to hide it
▷	The selected frame has hidden overflowing whitespace; ignore this
▷	The selected frame has visible overflowing whitespace; ignore this
○	The deselected frame has overflowing text or is linked to an overflowing frame*

\* Shown only when **View > Show Text Flow** is enabled

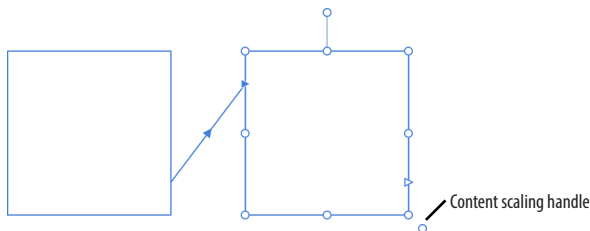
**Tip:** If you find the **Text Flow In** and **Out** controls are too small, you can increase their size; open **Settings ...**(Preferences), select **Tools** in the left pane, and select a different **Tool Handle Size**


### To link a text frame to an existing unlinked frame:

1. Choose **View > Show Text Flow** if it is not already selected so that you can see the outlines of text frames and their connecting lines.
2. From **Tools**, choose the **Frame Text**  tool or the **Move**  tool.
3. Click the first text frame's triangular **Text Flow Out** control  near its bottom-right corner; the mouse pointer will change to a **link arrow**  when you are within range to click it. The frame will turn blue after you click it.
4. Move the mouse pointer over the second text frame. It will turn blue when you are within range to click it.







5. Click anywhere on the second text frame. A non-printing text flow line will be shown between the frames.




If the text in the frame you linked to is scaled larger or smaller than it should be compared to the first frame, you likely scaled that frame's contents with the content scaling handle below and to the right of the bottom-right size handle which scales the text in the frame and is difficult to undo. To fix it, you should select the frame with the **Move**  tool and choose **Edit > Defaults > Revert**. If your defaults don't match what you wanted for the frame then delete the frame and create a new one.






### To create a new frame linked to an existing one:

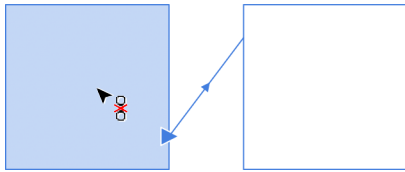
1. Choose **View > Show Text Flow** if it is not already selected so that you can see the outlines of text frames and their connecting lines.
2. From **Tools**, choose the **Frame Text**  tool or the **Move**  tool.
3. Instead of creating the second text frame before linking the first to it, click the first frame's triangular **Text Flow Out** control  near its bottom-right corner. The mouse pointer will change to a **link arrow**  when you are within range to click it and the frame will turn blue after you click the control.
4. Now draw a second text frame on the desired page. Publisher will link the first frame to the second one automatically.

### To remove a text frame from the middle of a series of linked frames:

1. From **Tools**, choose the **Move**  tool.
2. Select the text frame to remove.
3. Choose **Edit > Delete** or press **Backspace**—the frame will be deleted and the previous text frame will be linked to the next frame in the series.

### To unlink text frames:

1. Choose **View > Show Text Flow** if it is not already selected so that you can see the outlines of text frames and their connecting lines.
2. From **Tools**, choose the **Frame Text**  tool or the **Move**  tool.
3. Select the text frame that you want to unlink. To unlink it from the next frame, click its triangular **Text Flow Out** control  near its bottom-right corner or to unlink it from the previous frame click the matching **Text Flow In** control near the top-left corner. The mouse pointer will change to a **link arrow**  when you are within range to click it. The frame will turn blue after you click it.
4. Mouse anywhere over the text frame. The mouse pointer will change to a **link arrow** .



5. Click anywhere on the text frame to unlink it. The story for the linked frames will now be entirely in the frame(s) before the one you unlinked from and any text that does not fit will be overset (overflowing). The frame after the point at which you unlinked will have a new blank story.

### To split a story when unlinking frames:

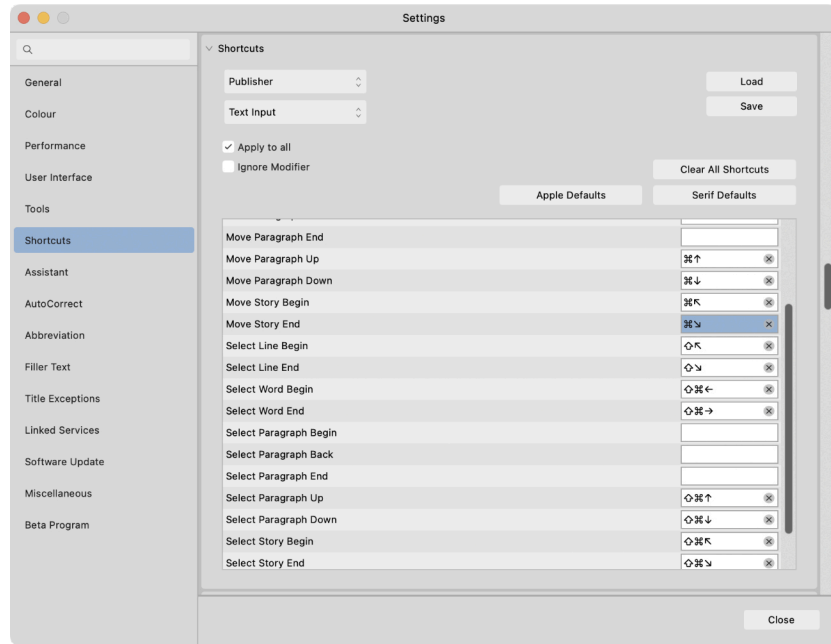
Publisher doesn't provide an automatic way to split a story between frames but it's not hard to copy and paste the text. Follow the instructions above to unlink text frames and then follow these steps.


1. Ensure you have a keyboard shortcut for **Select Story End**. Unless you have changed it, the shortcut will be **Shift + ⌘ + End** (macOS) or **Shift + Ctrl + End** (Windows).

If you use a keyboard without an End key you will need to modify the default shortcut first because you'll be unable to type it. Go to **Settings...** (Preferences), select **Shortcuts** in the left pane, and choose **Text Input** from the list under the persona list set to Publisher. Scroll down the list of shortcuts until you find the one for **Select Story End** and change it to something that works



for your keyboard. The arrow pointing down to the right in this macOS screenshot is for a Mac's End key.



2. From **Tools**, choose the **Frame Text**  tool.
3. Position the text cursor at the end of the text in the last frame before you unlinked.
4. Press the keyboard shortcut for **Select Story End** to select all of the text from the text cursor to the end of the story. All of the text that is overset (overflowing) from the text frame will now be selected even though you can't see it.
5. Choose **Edit > Cut** to cut the text to the clipboard.
6. Click in the empty text frame where you want the text to appear and then choose **Edit > Paste** to paste the text into the frame.



If you split a story that has anchors generated by the Table of Contents feature, the links between the table of contents and the anchors will be broken and Publisher will insert duplicate anchors when you next update the table. If you don't want the duplicate anchors, delete them before updating the table of contents.

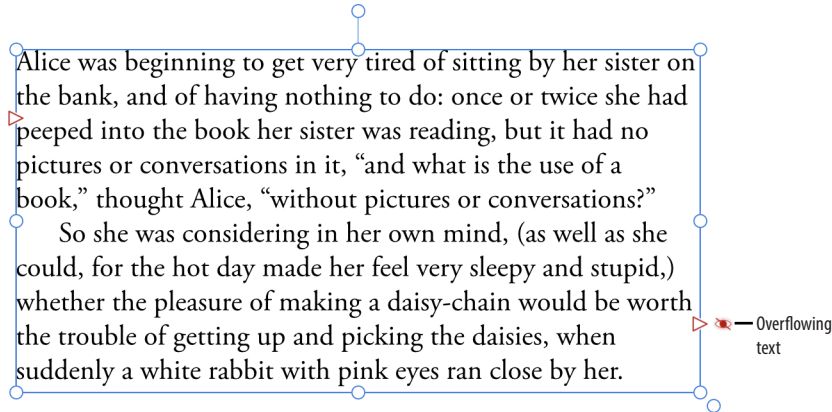
**Tip:** If the missing targets were to anchors generated by the Table of Contents feature, fix the table of contents first

If you split a story that includes the targets for cross-references the cross-references will be broken because their target will be missing. To fix these, double-click each cross-reference that has a **Target Missing**  icon in the **Cross-References** panel and reselect the target.

## AutoFlow text





Publisher doesn't create additional pages automatically if there's too much text to fit in a text frame or in the last text frame of a series of linked frames. The excess text, known as **overset text**, will be hidden by default.

When there is overflowed text Publisher will change the **Text Flow** controls from blue to red and the last text frame will have an eye icon to indicate if the overflowing text is hidden  or visible  below the frame. Refer to the list of text flow control shapes and colours in [Flowing text](#) on page 43 for more information.







You could create additional text frames to contain the overflowed text but Publisher can do this for you. AutoFlow will create as many additional pages of text frames as required to contain all the text in a story, all linked together automatically.

### To AutoFlow text to as many new text frames as required:

1. From Tools, choose the **Frame Text**  tool or the **Move**  tool.
2. Press **Shift** and click the red **Text Flow Out** control  near the overflowing text frame's bottom-right corner; the mouse pointer will change to a **link arrow**  when you are within range to click it. Publisher will create as many pages of text frames as required.

### To AutoFlow text to a single new text frame:

1. From Tools, choose the **Frame Text**  tool or the **Move**  tool.
2. Press **⌘** (macOS) or **Alt** (Windows) and click the red **Text Flow Out** control  near the overflowing text frame's bottom-right corner; the mouse pointer will change to a **link arrow**  when you are within range to click it. If the new frame is not large enough to contain all the overflowing text, it will also have a red Text Flow Out control.






## Interrupting text flow

You can interrupt the text flow of story text to force it to start at the top of a new column, frame, or page by inserting a break. Using breaks is preferable to adding blank lines because if you add or remove text earlier in the story you can be assured that the text after the break will remain at the top of the column, frame, or page.

**Tip:** Choose **Text > Show Special Characters** when working with breaks to see their invisible symbols and avoid accidentally deleting them

### To insert a break:

1. Position the text cursor before the text you want to shift to the new column, frame, or page.
2. Choose **Text > Insert > Breaks** and select one of the following:

Break type	Description	Symbol
Column break	Forces text to the next column, regardless of whether that column is in the same frame or in the next linked frame	
Frame break	Forces text to the next text frame	
Page break	Forces text to the next page, even if there are other linked frames before it	
Odd page break	Forces text to the next odd page, even if there are other linked frames before it	
Even page break	Forces text to the next even page, even if there are other linked frames before it	

# Setting text frame properties

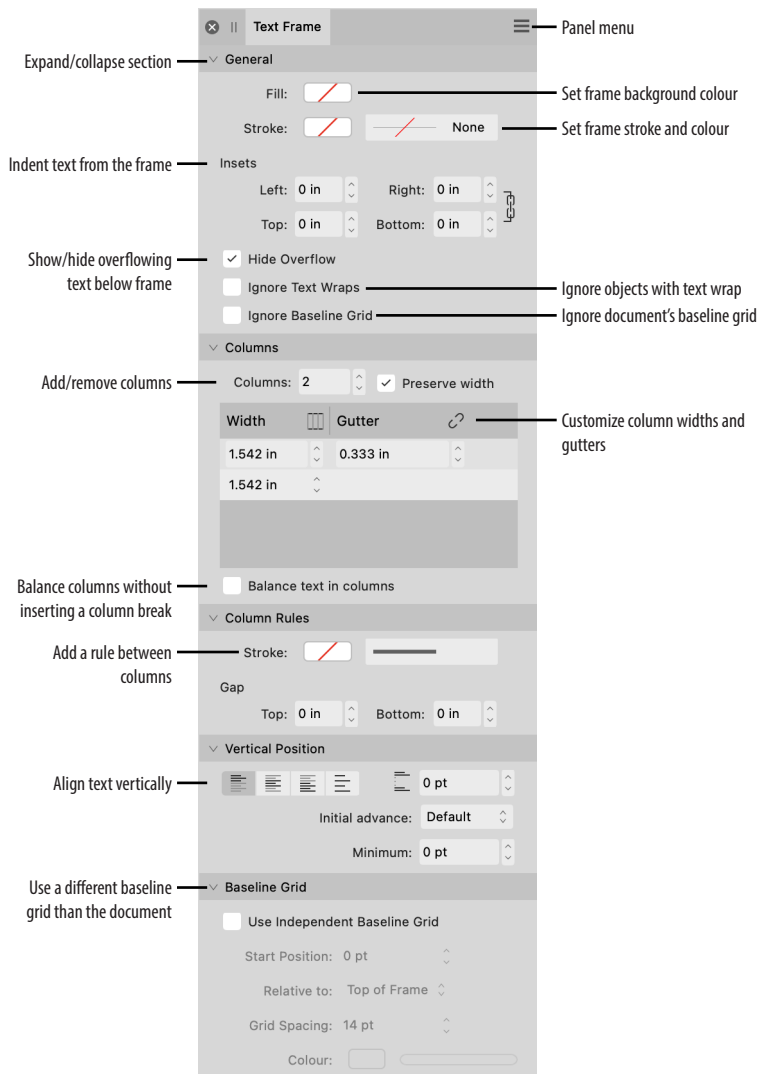
Text frames and other text objects have properties to control their appearance and change how text within them is displayed. New text objects will be created with the properties you last used. Some properties can be changed directly from the **Context Toolbar** but most require use of the **Text Frame panel**.

## Using the Text Frame panel

To display the Text Frame panel:

1. Click the **Show Text Frame panel**  icon in the **Context Toolbar** or choose **Window > Text > Text Frame** to display the **Text Frame panel**.

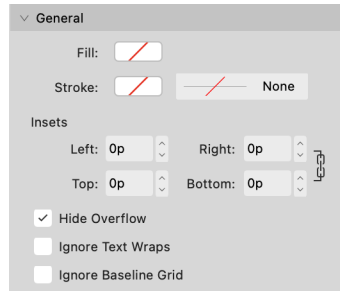
**Tip:** The **Text Frame** panel is misleadingly named because it is used to change the properties of all text objects, including art text and path text; controls that don't apply to art text or path text will be disabled




2. Collapse and expand the panel's sections by clicking the caret  icons to the left of their titles.

## General

The **General** section of the panel allows you to change the text object's fill and stroke and the inset of the text from a frame's edges.



- **Fill:** Click the colour sample to set the colour of the text object's fill.
- **Stroke:** Click the colour sample to set the colour of the text object's stroke (outline) and click the stroke control on its right to set its thickness, dash pattern, and other properties.
- **Insets:** Enter values for how much text should be inset from a text frame's borders. Click the **Link** icon to their right so that they all change together.
- **Hide Overflow:** Select to hide overflowing text for a text frame or path text or deselect to show the overflowing text below the frame or after the end of the path. You can also click the **Text Flow Out**  control to toggle this setting on and off.
- **Ignore Text Wraps:** Select so that text in the frame will not wrap around objects with text wrap set.
- **Ignore Baseline Grid:** Select so that text in the frame will not be aligned to the document's baseline grid. Selecting this option will disable **Independent Baseline Grid** at the bottom of the panel.

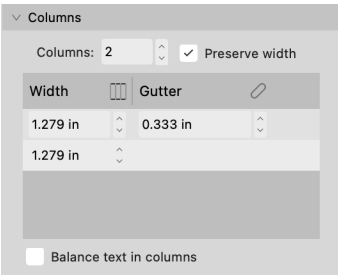
**Tip:** Although art text and path text are frameless text objects, the **Text Frame panel** allows you to set their fill colour and stroke

**Tip:** Specify **Insets** when you assign a fill or stroke to a text frame to avoid having the text immediately adjacent to the frame's borders

**Tip:** Disable **Hide Overflow** if you want to edit the overflowing text to make it fit in the frame

Columns

The Columns section of the panel allows you to set the number of columns, the gutter (space) between them, and whether text should be balanced across the columns.



- **Columns:** Enter the number of columns to create within the text frame. You can also choose this from the **Context Toolbar**.
- **Width:** Specify the width of each column. Select **Preserve Width** to maintain the width of the frame when changing a column’s width or deselect it to preserve the width of the adjacent column.
- **Gutter:** Specify the space between columns. By default, the gutters are linked so changing one value will change them all. Click the **Link** icon to the right of the Gutter label to change the gutter values separately. You can also specify gutter from the **Context Toolbar** but not separately for each pair of columns.
- **Balance text in columns:** Select to distribute text evenly across the columns in a text frame. This will have no effect if the story is longer than the text frame.

Alice was beginning to get very tired of sitting by her sister on the bank, and of having nothing to do: once or twice she had peeped into the book her sister was reading, but it had no pictures or conversations in it, "and what is the use of a book," thought Alice	"without pictures or conversations?" So she was considering in her own mind (as well as she could, for the hot day made her feel very sleepy and stupid), whether the pleasure of making a daisy-chain would be worth the trouble of getting up and picking	the daisies, when suddenly a White Rabbit with pink eyes ran close by her.
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Balanced columns off

Alice was beginning to get very tired of sitting by her sister on the bank, and of having nothing to do: once or twice she had peeped into the book her sister was reading, but it had no pictures or conversations in it,	"and what is the use of a book," thought Alice "without pictures or conversations?" So she was considering in her own mind (as well as she could, for the hot day made her feel very sleepy and stupid), whether the	pleasure of making a daisy-chain would be worth the trouble of getting up and picking the daisies, when suddenly a White Rabbit with pink eyes ran close by her.
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Balanced columns on

## Column rules

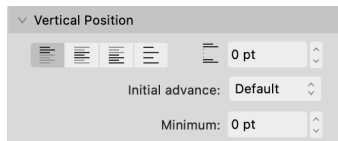
The **Column Rules** section of the panel allows you to specify if a rule should be drawn between multiple columns and how the rule should appear.



- **Stroke:** Click the colour sample to set the colour of the vertical rule (line) between columns and click the stroke control on its right to set its thickness, dash pattern, and other properties.
- **Gap:** Enter how much the rule should be inset from the top or bottom of the frame—you cannot enter negative values to extend the rule outside of the frame.

## Vertical position

The **Vertical Position** section of the panel allows you to set how the text should be vertically aligned within the frame and the baseline of the first line of text.



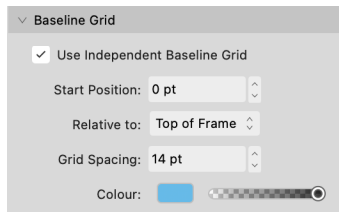
- **Alignment:** Choose whether to align text to the top, centre, or bottom of the text frame, or whether it should be vertically justified (distributed). You can also choose this from the **Context Toolbar**.
- **Maximum Paragraph Space:** When text is vertically justified, enter the maximum space between the baseline of the last line in one paragraph and the first baseline of the next.
- **Initial Advance:** Choose how the baseline of the first line of text in the frame is positioned relative to the top inset of the frame:
  - **Default:** For a standalone text frame, this is the same as **Cap Height**, it uses the largest cap height of all the characters on the first line as the baseline value. For a text frame pinned in another frame or for a footnote or sidenote, it defaults to the **Initial Advance** value of the parent frame.
  - **Leading:** Uses the first paragraph's leading as the baseline value.
  - **Pointsize:** Uses the largest point size of all the characters on the first line as the baseline value.
  - **Ascent:** Uses the largest ascent of all the characters on the first line as the baseline value to ensure that the top of a lowercase “d” fits inside the top inset of the frame; for most fonts there will be space between the top of the frame and the top of the “d”.

**Tip:** Set the maximum to the height of the text frame to add space only between paragraphs and not lines

- **Cap Height:** Uses the largest cap height of any character on the first line as the baseline value to align the flat tops of uppercase letters with the top inset of the frame; rounded or pointed tops may appear above.
- **X Height:** Uses the largest x height of any character on the first line as the baseline value.
- **Fixed:** Specify the baseline value in **Minimum**; a value of 0 will set the baseline to the top inset of the frame.
- **Minimum:** Enter a minimum value for the baseline; will have no effect unless you enter a value greater than it would otherwise be

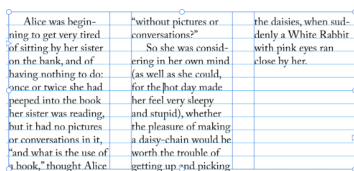
## Baseline grid

The **Baseline Grid** section of the panel allows you to override the document's baseline grid for a text frame. These options are disabled if you select **Ignore Baseline Grid** near the top of the panel.

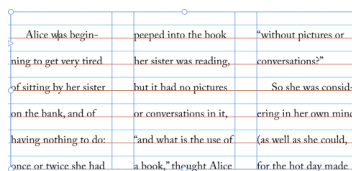


**Tip:** To see the baseline grid, choose **View > Baseline Grid** and select **Show Baseline Grids**; note that the grid will not be shown if you zoom out below the threshold set in that window

- **Use Independent Baseline Grid:** Select to override the document's baseline grid; refer to [Baseline grid](#) on page 31 for more information.
- **Start Position and Relative to:** Enter an offset from the top of the page, top margin, top of the frame, or its top inset. You can also set the start position relative to the artboard but that feature is less relevant in Publisher.
- **Colour:** Click the colour sample to set the colour of this baseline grid to differentiate it from the document's baseline grid.



Independent baseline grid off







Independent baseline grid on



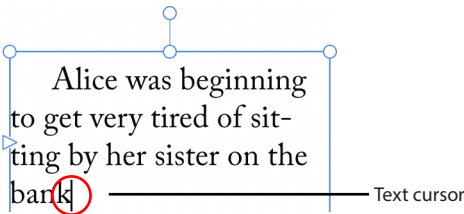
# Word processing

## Positioning the text cursor

### To position the text cursor with the mouse

1. Choose the Frame Text , Artistic Text , or Table  tool.
2. Position the mouse pointer  between the characters where you want to make changes and click the mouse. You can click anywhere on an empty text frame.
























A blinking vertical bar will appear to represent the text cursor position, also known as the insertion point.



### To change the position of the text cursor with the keyboard:

1. Press one of the following keyboard shortcuts. You can press all of the keys at the same time, or the modifier keys first (, Shift, Ctrl) followed by the action key (such as an arrow key).

**Tip:** If you've changed your shortcuts by choosing Apple Defaults (macOS only) or creating custom shortcuts, your actual modifiers may vary

macOS	Windows	Action
 or 	 or 	Move one character left or right
 or 	 or 	Move one line up or down
 +  or 	Ctrl +  or 	Move to the start or end of the current word and then to subsequent words
 +  or 	Ctrl +  or 	Move to the start or end of the current paragraph and then to subsequent paragraphs
fn +  or 	Home / End	Move to the start or end of the current line
fn +  +  or 	Ctrl + Home / End	Move to the start or end of the story

## Typing text

### To type basic characters:

1. Position the text cursor in a text frame or other text object.
2. Enter text as you would in any text editor or word processor. Publisher will automatically wrap text to a new line when it reaches the right edge of the text frame or table cell. For an art text object, you must press **Return** to start a new paragraph.
3. Press **Return** to start a new paragraph or **Shift + Return** to start a new line within a paragraph.
4. Press **Delete** (macOS) or **Backspace** (Windows) to erase characters, including erasing a paragraph or line break.

### To type special characters:

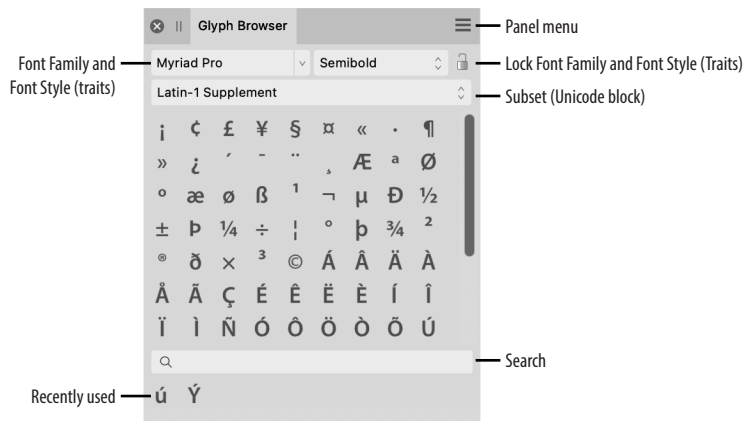
1. Position the text cursor in a text frame, art text object, or table.
2. Type the character's Unicode value and choose **Text > Toggle Unicode**, or choose **Text > Insert** and select from the list.
3. Choose **Text > View Special Characters** to show the invisible symbols for special characters.


**Tip:** A list of the most common special characters is provided in [Appendix A](#) on page 259

### To choose characters from a list of those available in the selected font:

Publisher allows you to select characters to insert from a visual browser.



1. Position the text cursor in a text frame or other text object.
2. Choose **Window > Text > Glyph Browser** to display the **Glyph Browser** panel.



3. Publisher will select the **Font Family** and **Font Style** automatically based on the text cursor position but you can change these options. Publisher will display a list of all of the characters (glyphs) for the selected font. If the glyphs are too small, choose **Large Size** or **Largest Size** from the panel menu .

**Tip:** Many Unicode character names are descriptive so typing “a” will display unexpected results

**Tip:** You can change the sort order from *Unicode ID* to *Glyph ID* but this is not recommended as the same Glyph ID may be used for a different character in another font

4. Select the **Subset** (Unicode block) to reduce the number of characters shown and find one more easily. You can search for glyphs by name; for example, type “a” into **Search** to filter the list to glyphs that include “a” in their Unicode names, including all of the variations with accents, or type “acute” to see glyphs that include an acute accent.
5. Double-click a glyph symbol to insert it at the text cursor position. The glyph, including the font family and font style (traits) selected will be added to **Recently used** in case you need to insert it again this session. Choose **Clear Recently Used** from the panel menu  to clear the list of recently-used characters.
6. Select the **Lock Font Family and Font Style** (Traits)  icon to prevent the font family and style from changing automatically when you position the text cursor in text with different formatting.

macOS users can also use the system-wide **Emoji & Symbols** feature but while it's the best choice for inserting the wide range of emojis, it's not as useful for inserting standard characters and typographic symbols because it's harder to know what characters are available in certain fonts.




### To insert filler text, also known as placeholder text or lorem ipsum:


1. Position the text cursor in a text frame; filler text cannot be inserted in other types of text objects.
2. Choose **Text > Insert Filler Text**. Publisher will fill the text frame (and any linked frames) with enough filler text to fill all of the frames. There will never be overflowing text even if you reduce the size of a frame because Publisher will add and remove filler text automatically.

The filler text is actually a text field so it will not be directly editable unless you right-click it and choose **Expand Field** from the context menu.


3. To modify the **Insert Filler Text** command to always insert filler text as regular, editable text, choose **Affinity Publisher 2 > Settings...**, click **General** in the left pane, and then select **Text > Insert filler text as text**.
4. To modify the filler text that is inserted, choose **Affinity Publisher 2 > Settings...**, click **Filler Text** in the left pane, select the language you wish to customize, enter the new filler text, and click **Save as Default**. Refer to [Filler text](#) on page 253 for more information.


# Selecting text


Before you can modify text and applying formatting, you need to select the text using the **Frame Text** , **Artistic Text** , or **Table**  tool.

- **Select any range of text:** Click the mouse pointer  at the start or end of the text you want to select and then drag to the other end. Publisher will indicate the selected text by highlighting it. If you drag past an edge of the document window then Publisher will scroll the page in the window automatically.


Or click the mouse pointer at the start or end of the text and **Shift** + click at the other end.
























- **Extend or shorten the selected text range:** Hold **Shift** and click again to select the text from the start of the text selection range to where you clicked.
- **Select an additional range of text without deselecting the selected text:** Hold  (macOS) or **Ctrl** (Windows) and click. This modifier key enables you to select multiple disconnected ranges of text in the same story.
- **Select a word, line, or paragraph:** Double-click to select a word, triple-click to select a line of text, or quadruple-click to select an entire paragraph.

To select an entire story, quintuple-click, choose **Edit > Select All**, or press  + **A** (macOS) or **Ctrl** + **A** (Windows).

- **Select a word, line, or paragraph without deselecting the selected text:** Hold  (macOS) or **Ctrl** (Windows) while double-, triple-, or quadruple-clicking to add disconnected words, lines, and paragraphs to the selected text.

## To select text with the keyboard:

1. Position the text cursor at the start or end of the text to select.
2. Press one of the following keyboard shortcuts. You can press all of the keys at the same time, or the modifier keys first (, **Shift**, **Ctrl**) followed by the action key (such as an arrow key).

macOS	Windows	Action
<b>Shift</b> +  or 	<b>Shift</b> +  or 	Extend selection one character left or right
<b>Shift</b> +  or 	<b>Shift</b> +  or 	Extend selection one line up or down
<b>Shift</b> +  +  or 	<b>Shift</b> + <b>Ctrl</b> +  or 	Extend selection to the start or end of the current word and then to subsequent words
<b>Shift</b> +  +  or 	<b>Shift</b> + <b>Ctrl</b> +  or 	Extend selection to the start or end of the current paragraph and then to subsequent paragraphs
<b>Shift</b> + <b>fn</b> +  or 	<b>Shift</b> + <b>Home</b> or <b>End</b>	Extend selection to the start or end of the current line
<b>Shift</b> + <b>fn</b> +  +  or 	<b>Shift</b> + <b>Ctrl</b> + <b>Home</b> or <b>End</b>	Extend selection to the start or end of the story

**Tip:** You don't have to use the **Frame Text** tool to edit text in a text frame, the **Frame Text**, **Art Text**, and **Table** are interchangeable when editing text in a text frame, art text object, path text object, or table

**Tip:** If you've changed your shortcuts by choosing Apple Defaults (macOS only) or creating custom shortcuts, your actual modifiers may vary

### To deselect text:

1. Press **Esc** to deselect text without moving the text cursor.
2. Or press any of the arrow keys or click the mouse to reposition the text cursor which will deselect the text.

## Copying and deleting text

You can move and duplicate text from one location to another with copy and paste or by dragging selected text. Both methods will move or duplicate pinned objects, note and index mark, and anchors.

Publisher uses the shared macOS and Windows pasteboard (clipboard) so copying text or objects in Publisher or any other application will overwrite whatever was previously copied.

### To move or duplicate text with menu commands:

You can also use the equivalent keyboard shortcuts or right-click to access the same commands in the context menu.

1. Select the text to move or duplicate.
2. Choose **Edit > Cut** to move it or **Edit > Copy** to duplicate it.
3. Position the text cursor at the location where the text should appear, or select a range of text to replace with the pasted text.
4. Choose **Edit > Paste**.

### To move or duplicate text with the mouse:

1. Select the text to move or duplicate.
2. Drag the selected text to move it or press **Option** (macOS) or **Ctrl** (Windows) and drag it to duplicate it.

### To paste text without formatting:

You can paste the contents of the pasteboard (clipboard) without its formatting so that you're pasting just plain text. This is known on macOS as *Paste and Match Style* and on Windows as *Paste Plain Text* or *Keep Text Only*. This feature is especially useful when pasting text from another document or application to avoid importing its text styles.

1. Cut or copy the text.
2. Position the text cursor at the location where the text should appear, or select a range of text to replace with the pasted text.
3. Choose **Edit > Paste Without Format**.

### To delete selected text:

1. Press **Delete** or Choose **Edit > Delete**. Pressing any character key will also delete selected text while typing that character.

**Tip:** Text can be dragged within the same document or from another application into a Publisher document, but not between documents or from Publisher to another application

**Tip: Paste Without Format** will not remove anchors, note and index marks, or pinned objects; to remove them, paste the text into a text editor and then copy it from there back to Publisher

**To delete unselected text:**

- 1. Position the text cursor at the start or end of the text to select.
- 2. Press one of the following keyboard shortcuts. You can press all of the keys at the same time, or the modifier keys first (**⌘**, **Shift**, **Ctrl**) followed by the action key (such as an arrow key).

macOS	Windows	Action
Delete	Backspace	Delete the previous character
fn + Delete or ⌘ Delete	Delete	Delete the next character
Option + Delete	Ctrl + Backspace	Delete to the start of the current word and then to subsequent words
Option + fn + Delete or Option + ⌘ Delete	Ctrl + Delete	Delete to the end of the current word and then to subsequent words
fn + ⌘ + Delete	n/a	Delete to start of line

**Tip:** If you've changed your shortcuts by choosing **Apple Defaults** (macOS only) or creating custom shortcuts, your actual modifiers may vary

## Copying text formatting

**Tip:** Unlike Microsoft® Word's **Format Painter** tool which loads (picks up) formatting when the tool is chosen, Publisher's **Style Picker** tool does not load formatting until you first click with it

**Tip:** You cannot copy and paste formatting between documents with the **Style Picker** tool

**Tip:** The **filled** pointer will include a *T* next to the eyedropper when it is positioned over text to indicate that clicking will now apply formatting to text





**Tip:** It is difficult to know where to stop dragging so it is recommended that you apply copied paragraph formatting with **Text > Show Special Characters** enabled which will reveal the hidden paragraph break marker ¶

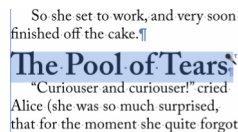
**Tip:** To apply loaded paragraph formatting to the last paragraph in a text frame, you must press **Return** after it to create a blank paragraph


**Tip:** The **Style Picker** tool does not unload formatting automatically when you change tools


Publisher allows you to copy and paste text character and paragraph styles and attributes between blocks of text. You can also copy stroke and fill attributes from objects to apply to text.

### To copy text formatting to unselected text:









1. Ensure that the text cursor is not positioned in text or Publisher will treat the word containing it as selected. To remove the text cursor from a text frame, click once on a blank area of the page—pressing **Esc** is not sufficient to cause Publisher to forget the cursor's last position.
2. Choose the **Style Picker**  tool. The mouse pointer should change to an **unfilled**  pointer to indicate that formatting has not been loaded. If it changes to a **filled**  pointer, press **Esc** or click the **Unload** button in the **Context Toolbar** to unload the formatting.
3. Click on the text with the formatting you want to copy or on an object whose line or fill attributes you want to copy. The mouse pointer will change direction to a **filled**  pointer to indicate that formatting has been loaded.
4. Do one of:
  - Click a word to apply the loaded character formatting to a single word.
  - Drag select a range of text to apply the loaded character formatting to it.
  - Drag select past the last character of a paragraph to apply the loaded character and paragraph formatting to the paragraph. For an art text object, press **⌘** (macOS) or **Ctrl** (Windows) and click on the object to easily apply the loaded formatting to the entire object



A paragraph, including the paragraph break marker at the end, is selected with the **filled**  pointer to apply character and paragraph formatting

5. Continue applying the loaded formatting to additional text if desired. To load formatting from different text, press **Option** (macOS) or **Alt** (Windows) and click on that text. The mouse pointer will change to an **unfilled**  pointer while you hold down the key to indicate that formatting can be loaded. If you release the key without clicking then the loaded formatting will not be changed.
6. When you are done, press **Esc** or click **Unload** in the **Context toolbar** before changing tools to unload the formatting to avoid a future mistake.


## To copy text formatting to selected text:

1. Using the **Frame Text** , **Artistic Text** , or **Table**  tool, select the text to which you want to copy formatting. If you want to apply formatting attributes, ensure you select the paragraph break marker at the end of the paragraph as shown above.
2. Choose the **Style Picker**  tool. The mouse pointer should change to an **unfilled**  pointer to indicate that formatting has not been loaded. If it changes to a **filled**  pointer, press **Esc** or click the **Unload** button in the **Context Toolbar** to unload the formatting.
3. Click on the text with the formatting you want to copy or on an object whose line or fill attributes you want to copy. The loaded formatting will be applied to the selected text and the mouse pointer will change direction to a **filled**  pointer to indicate that formatting has been loaded.
4. Continue applying the loaded formatting to additional text if desired. To load formatting from different text, press **Option** (macOS) or **Alt** (Windows) and click on that text. The mouse pointer will change to an **unfilled**  pointer while you hold down the key to indicate that formatting can be loaded. If you release the key without clicking then the loaded formatting will not be changed.
5. When you are done, press **Esc** or click **Unload** in the **Context toolbar** before changing tools to unload the formatting to avoid a future mistake.

**Tip:** The **filled** pointer will include a *T* next to the eyedropper when it is positioned over text to indicate that clicking will now apply formatting to text

**Tip:** The **Style Picker** tool does not unload formatting automatically when you change tools

## To change which text formatting is loaded:

When you choose the **Style Picker**  tool, the **Context Toolbar** will change to show options to control its behaviour when applying formatting, not when loading formatting. It is recommended not to change these options when copying and pasting formatting for text but you must select both *Character Settings* and *Paragraph Settings* to properly copy paragraph styles.



1. Choose a combination of options from the Context Toolbar before applying loaded formatting to text. Click the **All** button to select all of the checkboxes or **None** to deselect all of them. *Layer Opacity*, *Layer Effects*, and *Object Settings* are not applicable to text and can be ignored.
  - **Stroke:** Apply the loaded stroke attributes to the text's stroke.
  - **Fill:** Apply the loaded fill attributes to the text's stroke.
  - **Character Settings:** Apply the loaded character attributes, including character style and stroke and fill.
  - **Paragraph Settings:** Apply the loaded paragraph attributes, including paragraph style but not the character attributes of the paragraph style.



## Finding and replacing text

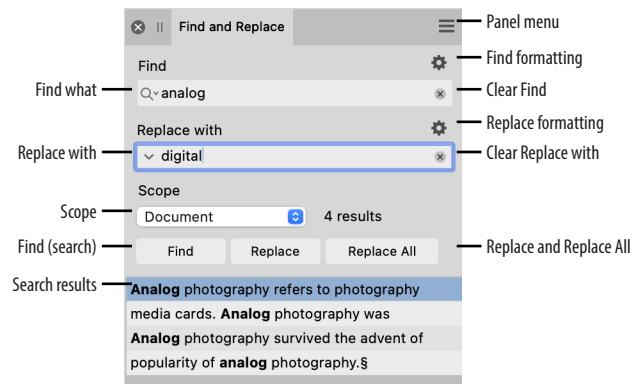
**Tip:** You can search only the current document and not all open documents

You can use the **Find and Replace** panel to search for and replace plain text, formatted text, and text formatting in the current document.

While find and replace text is a basic feature, you can also search for text formatted with a text style and change its text style. Publisher also allows you to search for text with specific formatting attributes and replace those attributes with a text style, or to search for fields and change their formatting or replace them with other fields.

### To find or replace text and/or text formatting:

1. Choose **Text > Find...** to display the **Find and Replace** panel. You can also choose **Window > Find and Replace** if the panel isn't visible but the first option also makes the **Find** field active so you can immediately type the text to find, so it's always better to use the **Find...** command.



2. Enter the text to find in the **Find** field and if you want to replace it with different text, enter the replacement text in the **Replace with** field. Leave these fields blank if you want to search for or replace text formatting only.

To enter special characters, click the **magnifying glass** icon on the left side of the **Find** or **Replace with** fields and select one from the **Special Characters** list. For other special characters, copy and paste them from the main document text.

To enter a field, click the **magnifying glass** icon on the left side of the **Find** or **Replace with** fields and select one from the **Fields** list. Replacing with a field creates a new one with the current formatting defaults for that field.

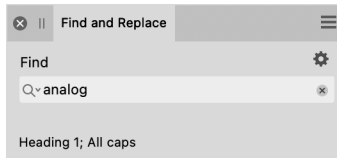
3. To find text formatting on its own or in combination with the text you entered into the **Find** or **Replace with** fields, click the **Formatting** icon to the right of **Find** or **Replace with**. From the popup menu, choose:
  - **Format:** Select individual text formatting; this window is identical to the options for creating and editing text styles and is described in [Creating text styles](#) on page 121.

**Tip:** Click the **Clear** icon to quickly delete entered text


**Tip:** Finding a straight apostrophe (') will not find a typographic (') apostrophe or vice versa so finding contractions such as *isn't* requires typing the apostrophe exactly as it appears in the document

- **Character Style:** Select a character style from the list.
- **Paragraph Style:** Select a paragraph style from the list.
- **Reset Format:** Select to clear the above three formatting options.

The selected formatting will be shown below the **Find** or **Replace with** fields.



**Tip:** Choose **Reset Format** from the Formatting icon's popup menu to clear the selected formatting



- To limit the search results by case and whole words, click the **Formatting**  icon to the right of **Find**. From the popup menu, choose:
  - **Match Case:** select to find only text that exactly matches the case of the text in the **Find** field; for example, *Analog* won't find *analog*.
  - **Match Whole Word Only:** select to find only text that isn't part of a longer word; for example, *log* won't find *analog*.
- Select from the **Scope** popup menu to set the search scope to the current *Document*, *Section*, *Spread*, *Page*, *Story* (all the text in the text object or a series of linked text frames), or *Selection*. The latter refers to either selected text or to the story in a selected text object. If you select multiple text objects with different stories, all of their stories will be searched.
- Click **Find** to search and display the page containing the first result forward in the document from the current position. Click **Find** again or choose **Text > Find Next** to move to the next search result or choose **Text > Find Previous** to move the previous search result. Click a search result in the list to jump to that result.
- If you are replacing text or formatting, click **Replace** to replace the selected search result and move to the next result.
- Click **Replace All** to replace all remaining search results.

**Tip:** **Match Case** and **Match Whole Word Only** are *sticky* options that will persist for the rest of the session, including when you switch documents

**Tip:** With **Scope** set to *Selection* and a text frame in a linked series of frames selected, Publisher will search the entire story and not just the text in the selected frame

### To reuse previous search strings:

Publisher automatically keeps remembers the last 20 search and replacement strings so you can reuse them to save time. It does not save the formatting or options that you used with that search.

- To select a recently-used search or replacement string, click the magnifying glass  icon on the left side of the **Find** field or the caret  icon on the left of the **Replace with** field, and select from the list.
- Select **Clear Recent Finds** or **Clear Recent Replaces** to clear the list.

**Tip:** Although Publisher stores recent searches, you cannot save search strings for future use

## Using regular expressions (GREGP)


You can use regular expressions to find and replace text patterns. For example, you could search for all of the numbers in your document and change their numeric formatting.

Learning how to use regular expressions is beyond the scope of this manual but some examples are provided further below.

Regular expressions normally use the ANSI C or POSIX *locale* and ignore the text's language setting so they are limited to the 7-bit ASCII character set. For example, entering `[a-z]` will match any lower- or uppercase letter but not accented characters such as `åêïøü`. With **Locale Aware Regular Expression** selected, entering `[a-z]` will also match the accented characters because they will use the full Unicode character set.

**Tip:** Regular Expression is *sticky* and will persist for the rest of the session, including when you switch documents; ensure you switch back to **Normal** when you are done or it will appear that Find and Replace doesn't work

### To find and replace using regular expressions:

1. Choose **Text > Find...** to display the **Find and Replace** panel.
2. Click the **Formatting**  icon to the right of **Find**. From the popup menu, choose **Regular Expression** or **Locale Aware Regular Expression**.
3. Enter the regular expression to search for in the **Find** field and if applicable, its replacement in the **Replace with** field.
4. Click **Find**, **Replace**, and **Replace All** to find and replace as you normally would.

### Examples

Find	Replace with	Description
<code>\s+\$</code>	blank	Removes a space at the end of a paragraph
<code>\b(\w+)\b\b 1</code>	<code>\$1</code>	Removes duplicate words
<code>((\.\! \?))\s\s+</code>	<code>\$1 and a space</code>	Replaces two spaces after periods, exclamation points, and question marks with a single space
<code>^\d+\.(.)</code>	<code>\$1 and a style</code>	Changes paragraphs starting with "1.", "2.", etc. to a numbered list if you also set a replacement paragraph style that is numbered, such as the default <i>Numbered 1</i> style
<code>\b(one two three)</code>	<i>any text</i>	Replaces any of a list of words separated by a vertical bar   (the words in this example are <i>one</i> , <i>two</i> , <i>three</i> ) with any text
<code>(?&lt;=\d)[, ](?=\d\d\d\d)</code>	<i>a space</i>	Replaces the comma separator in numbers with a space
<code>(?&lt;!\d)\d{4}(?!\\d)</code>	<i>Bold</i>	Makes 4-digit numbers such as years that aren't part of longer numbers bold, if you set replacement formatting to <i>Bold</i>

Find	Description
colou?r	Finds <i>color</i> and <i>colour</i>
[\\x7f-\\xff]	Finds non-ASCII characters
[[=e=]]	Finds any <i>e</i> character, including uppercase and accented
(?<=\\d)(st nd rd th)	Finds ordinals (1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> , 4 <sup>th</sup> ...), regardless of superscripting
\\d+\\/d+	Finds fractions, but will also find dates written as 10/21/2023
[-\\u\\d_]+@[\\-\\u\\d_]+\\.([u\\l]){2,4}	Finds most email addresses
\\b\\w+\\s+\\1\\b	Finds repeated words

## Spell checking

Publisher can check spelling as you type or on demand. Spell checking requires that you specify the language for text. Refer to [Language](#) on page 80 for more information and to ensure you have the appropriate dictionaries installed.

Words you add to your custom dictionary will be available to all applications (macOS) or to all three Affinity applications (Windows). Affinity does not use the macOS **Automatic by Language** spelling option which mixes learned words of all languages together in one dictionary, so words you learn in other applications may not be available to Affinity and vice versa.

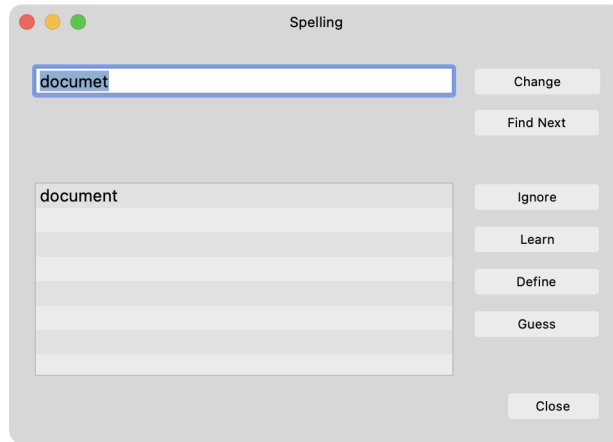
### To enable or disable spelling as you type:

1. Choose **Text > Spelling > Check Spelling While Typing**. Misspelled words will be underlined in red.

### To spell check manually:

1. Choose **Text > Spelling > Check Spelling** to highlight the next misspelled word and then right-click the misspelled word to see a list of spelling suggestions.
  - **Spelling suggestion:** Select a suggestion to correct the word.
  - **Ignore Spelling:** Select to ignore all instances of the word in this document only. You can also choose **Text > Spelling > Ignore Misspelled Word**.
  - **Learn Spelling:** Select to add this word to your custom spelling dictionary. To later remove the word from the dictionary, right-click the word again and choose **Unlearn Spelling**.
2. For a longer document, choose **Text > Spelling > Spelling Options...** to display the **Spelling Options** window.

**Tip:** The **Check Spelling** command (more commonly known as **Check Document Now** on macOS) is most useful with a keyboard shortcut to it and to **Ignore Misspelled Word** to make it easy to navigate between misspelled words



- **Change:** Click to change the word highlighted in the document to the first word in the list below, or to the one you have selected in the list.
- **Find next:** Click to skip this word and move to the next misspelled word.
- **Ignore:** Click to ignore all instances of the word in this document only.
- **Learn:** Click to add this word to your custom spelling dictionary. To later remove the word from the dictionary, right-click the word and choose **Unlearn Spelling**.
- **Define:** Click to see definitions for the selected word. (macOS only)
- **Guess:** Shows a list of suggestions for the word highlighted in the document.

## AutoCorrect

Publisher can convert straight quotation marks to typographic ones, convert paragraphs to lists, change capitalization, set superscripts, and correct common errors as you type. For example, you can replace *teh* with *the*. AutoCorrect can also automatically capitalize the first word of a sentence and you can define exceptions to automatic capitalization to avoid capitalizing the word after an abbreviation, such as the word following *vs*.

Publisher uses its own lists for each type of text replacement for every language it supports and doesn't rely on the similar text replacement features built into macOS and Windows. This is important because while you might want the same corrections for basic text some of the corrections you use in Publisher may be more typographic and not suitable for your other applications. macOS also lacks separate text replacement lists for each language so Affinity's custom feature is important for those who work in multiple languages.

You can customize how AutoCorrect works by setting its options, defining the text to correct, and defining the abbreviation exceptions. Refer to [AutoCorrect, Abbreviations, and Title exceptions](#) on page 249 for information.

## Word count

Publisher can display the count of the words, characters, lines, and paragraphs for the selected text, current story, or entire document. The current count is displayed in the **Status Bar** at the bottom of the document window to the right of the **Preflight status indicator** but can be hidden if you find it distracting. The count is updated when you pause during typing.

You can customize the count feature to display the count of words, characters, characters including spaces, lines, or paragraphs and you can view the other counts by clicking the count number.

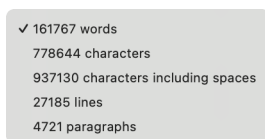
If there is overset (overflowing) text, the

### To show the count:

1. Choose **View > Show Word Count** to display the count if it's not currently displayed.



2. Choose what you want to count:
  - **To display the count for the entire document:** deselect all text and text objects.
  - **To display the count for a single story:** select a text object or position the text cursor in a text object.
  - **To display the count for a range of text:** select the text range.
3. Click the count number to display a popup menu with the other statistics. Select a different statistic to change the default count to be displayed. Or press **Esc** or click outside of the popup to close it without selecting a statistic.



# Importing (placing) text

Publisher can place (import) text from word processors and text editors into text frames and other text objects. It supports the most common file formats but not the .odf (OpenDocument) format used by Google Docs™ and LibreOffice or the .pages format used by Apple® Pages®. It is recommended that you export from those applications to the .docx format used by Microsoft® Word for best results.

Format	Description	Notes
.docx	Microsoft® Word	Supported by most word processors
.rtf	Rich Text Format	Supported by most word processors and some text editors
.txt	Plain text format	Supported by most word processors and text editors

**Tip:** Refer to [Importing notes from Microsoft® Word](#) on page 196 for more information on importing documents that include footnotes or endnotes




Imported text retain all of its text styles, formatting attributes, footnotes, and endnotes. Embedded images and tables will be imported although shapes are limited to rectangles and ellipses.

When you import text, it will be placed into a text frame or other text object in an existing document; you are not opening a document or adding its pages to the Publisher document. The layout of the placed text and images will differ from the original document, especially if the size of the text frame does not match the original document's main text area.


You can also copy and paste text from a word processor or text editor, but unless you're pasting a small block of text, you will lose so much formatting that it's better to place text.

Copy from	Results when pasting
Microsoft® Word	Will lose images and shapes; tables will be converted to text
Apple® Pages®	Will lose text styles, notes, images, and shapes; tables will be converted to text
LibreOffice	Will lose text styles, images, and shapes; tables will be converted to text
Google Docs™	Will import as plain text; everything else will be lost


## To place text into an empty text frame or text object, or at the cursor position in a range of text:

1. Using the **Frame Text** , **Artistic Text** , or **Table**  tool, position the text cursor where the imported text should be placed.
2. Choose **File > Place...**
3. Select a file from the window and click **Open**.

**To append text to the end of the text in a text frame or text object:**

1. Deselect any selected object(s) by clicking on a blank area of the page.
2. Choose **File > Place...**
3. Select a file from the window and click **Open**. The mouse pointer will change to a place cursor .
4. Click the text frame or text object in which to append the text. As you move the mouse pointer over the frame or object, the text will appear to show you a preview of how it will be placed.

**To replace all the text (the story) in a text frame or text object:**

1. Using the **Move**  tool, select the text frame or text object. Do not double-click it or Publisher will position the text cursor in it.
2. Choose **File > Place...**
3. Select a file from the window and click **Open**.



# Formatting characters

**Tip:** Refer to [Setting default text formatting](#) on page 104 for information on changing Publisher's default character attributes




Character attributes are those that can be applied to one or more characters and include font family, size, kerning, tracking, and spelling language. While you can apply these attributes to an entire paragraph, they are applied to a range of text and not to the paragraph. For formatting attributes that can be applied only to entire paragraphs, refer to [Formatting paragraphs](#) on page 82.

If you regularly use the same combination of character attributes, consider creating a character text style to ensure consistency and save time. Refer to [Creating text styles](#) on page 121 for more information. Character attributes are applied over the attributes defined in paragraph and character styles and are sometimes referred to as *character overrides*.

## To apply character attributes:

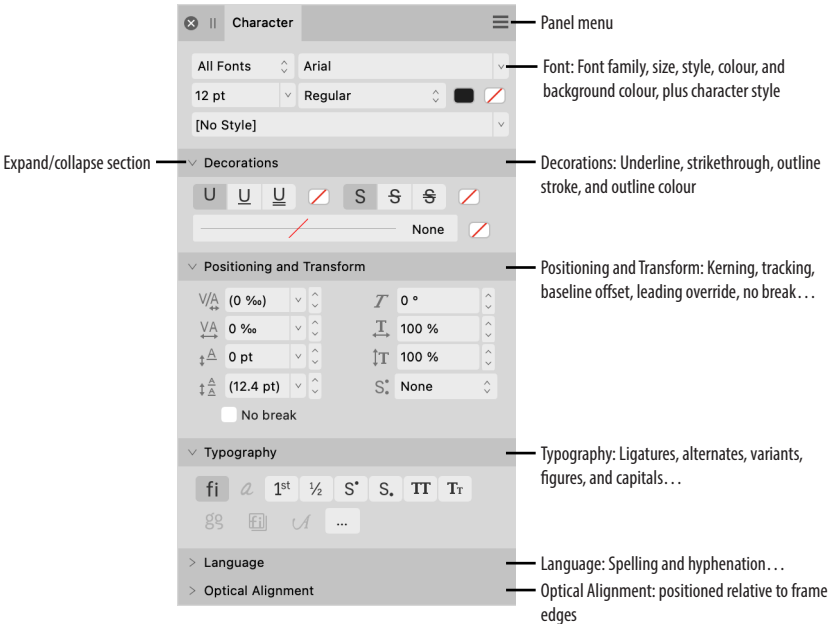
All character attributes can be selected from the **Character panel**. Some of the most common ones are also available from the **Context Toolbar** and those you might want to use with a keyboard shortcut are also available in the **Text** menu.

**Tip:** If you select an entire text object instead of selecting text or placing the text cursor, the attributes will be applied to all the text in the object

1. Using the **Frame Text** , **Artistic Text** , or **Table**  tool, select the text to which you want to apply formatting or place the cursor in a word to apply the formatting to that word.
2. Select the character attributes. These are described in the following sections.

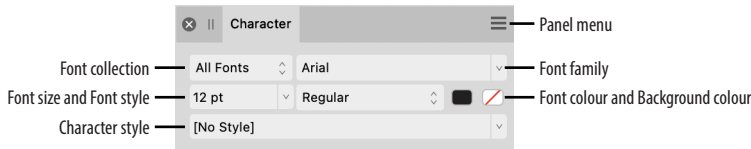
## To display the Character panel:

1. Click the **Character panel**  button in the **Context Toolbar** or choose **Window > Text > Character**.

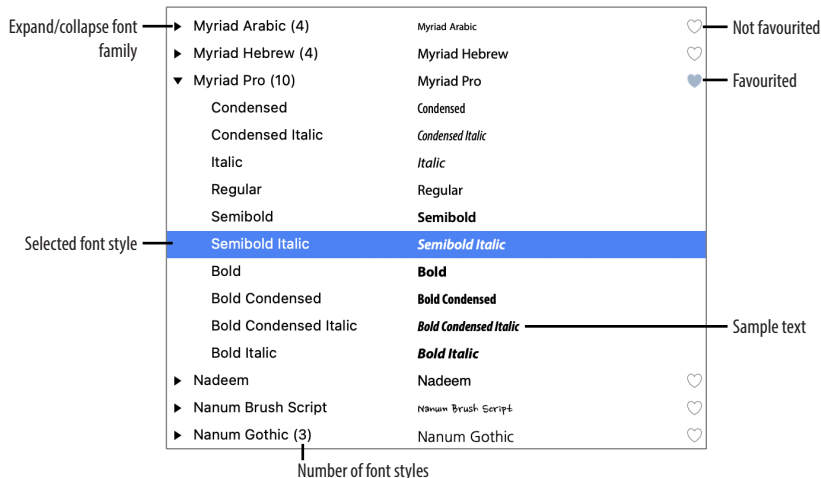


## Font

The top section of the **Character panel** allows you to set the font and character style. To specify the font, you must select the font family (typeface), font size, and font style (traits). These three elements make up a digital font. For example, *12-pt Myriad Pro Semibold Italic* is a font.



- **Font Collection:** Select a collection to narrow the number of font families listed. macOS: You can create and modify the font collections using the **FontBook** application included with macOS. There are three other collections in the list:
  - **Recents:** Lists the 10 most recently-used font families.
  - **Missing:** Lists the fonts used in the document that are not installed on this computer.
  - **Favourites:** Lists the font families you have marked as a favourite.
- **Font Family:** Select a font family (typeface) from the popup menu of those installed on your computer, for example, *Myriad Pro*. Expand a font family to see the available font styles and select one without having to select font style separately.



**Tip:** Publisher supports fonts in the OpenType, TrueType, and Affinity Font formats but cannot use variable fonts or colour fonts

**Tip:** You can also select **Font Family** from the **Context Toolbar**

**Tip:** Click the **Favourite** ♥ icon to add the font family to your Favourites collection

**Tip:** You cannot customize the sample text in the font list but if you select text first it will change as you scroll through the list, allowing you to preview fonts

**Tip:** You can also select **Font Size** from the **Context Toolbar**

**Tip:** If you don't need these shortcuts, remove them to avoid accidentally changing font size; refer to [Keyboard shortcuts](#) on page 246

**Tip:** You can also select **Font Style** from the **Context Toolbar**

**Tip:** You can also choose the faux **Bold** and **Italic** traits from the **Text > Character Traits** menu or click from the equivalent buttons in the **Context Toolbar**

**Tip:** You can create your own faux italic by setting **Shear** to approximately 14°

- **Font Size:** Select a preset font size or enter a custom size. By default, Publisher measures text in points (abbreviated as *pt*). Points are a traditional measurement system for type but there wasn't a universal standard for its size until the advent of desktop publishing. A point is defined now as 1/72 of an inch. You can use the document's measurement system instead of points by choosing **Affinity Publisher 2 > Settings...**, clicking **User Interface** in the left pane, and then deselecting **Show Text in points**.

Instead of specifying a size you can also choose to make the text larger or smaller by a set increment. Choose **Text > Size > Bigger, Smaller, Precise Bigger**, or **Precise Smaller** or their keyboard shortcuts:

Command	Shortcut	Increment
Bigger	⌘ + > (Ctrl + >)	1 pt, 0.01 in, 0.1 mm
Smaller	⌘ + < (Ctrl + <)	1 pt, 0.01 in, 0.1 mm
Precise Bigger	⌘ + ⇧ + > (Ctrl + Alt + >)	0.1 pt, 0.001 in, 0.01 mm
Precise Smaller	⌘ + ⇧ + < (Ctrl + Alt + <)	0.1 pt, 0.001 in, 0.01 mm

- **Font Style (traits):** Select a font style for the selected font family, for example, *Semibold Italic*. Font style is a combination of traits, including weight (thin, medium, bold, black...), width (condensed, regular, expanded...) and slope (roman, also referred to as regular or plain, and italics). The name of a font style may not include all of its traits, for example, a font style named *Italic* implies that it is for the roman (regular or plain) weight and is not condensed.

Many users simply refer to font style as the font weight. Font style should not be confused with **Character Style** which is a combination of character attributes you create to format text.

### Faux bold and italic

Some display fonts used for large headings, titles, and other non-body text purposes are available in just one or two font styles. For example, macOS and Windows include just the *Regular* style of the font *Impact* because it is already bold and there is no italic version. The **Bold** and **Italic** buttons in the **Context Toolbar** and the equivalent commands in the **Text > Character Traits** menu will be disabled when a bold or italic font style is not available. Some applications, including Microsoft® Word, will allow you to make it bold and italic even if there isn't a bold or italic font style, a technique known as *faux bold* and *faux italic*. These applications smear the font to make it appear bold and slant the characters to make them appear italic. Publisher does not support faux bold and italic if they shouldn't be used in professional typesetting.



**Tip:** Be careful when using the **Bold** button or menu command. If you're using a professional body font with several weights, such as *Light*, *Regular*, *Medium*, *Bold*, and *Black*, the **Bold** button will not make the text the next bolder weight but make it *Bold*. If it's already *Bold* or *Black*, the **Bold** button will make it *Regular*.

- **Font Colour and Background Colour:** Click the colour samples to set the text fill colour and background or highlight colours.



- **Character Style:** Select the character text style. Any other attributes you select in the **Character panel** will override the character style. Refer to [Creating text styles](#) on page 121 for more information.

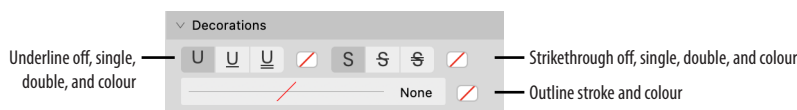
## Decorations

The **Decorations** section of the **Character panel** allows you to specify underline, strikethrough, and the text outline, modifications (decorations) to the character appearance.

Underline thickness and positioning are defined in the font and are scaled automatically based on font size. If you format text of varying sizes with underline, Publisher will use the thickness and positioning of the larger text for a seamless underline.

Small Large Small Continuous underline is based on largest font size in the selected range

Small Large Small Interrupted underline is based on individual font sizes



- **Underline and Colour:** Select **Single Underline** or **Double Underline** to enable one of these or **No Underline** to disable underline. Click the colour sample to set the underline colour. Setting to *None* will use the **Font Colour** and will not make it invisible.
- **Strikethrough and Colour:** Select **Single Strikethrough** or **Double Strikethrough** to enable one of these or **No Strikethrough** to disable strikethrough. Click the colour sample to set the strikethrough colour. Setting to *None* will use the **Font Colour** and will not make it invisible.
- **Outline Stroke and Colour:** Click the stroke control to set the text outline's thickness, dash pattern, and other properties. Click the colour sample to set the text outline colour. Setting to *None* will cause the text will appear un-stroked (default).

**Tip:** You can also select **Font Colour**, but not **Background Colour**, from the **Context Toolbar**

**Tip:** Use the **Outline Colour** control in the **Decorations** section to set the text outline colour

**Tip:** You can also select the character style from the **Text Styles panel** and **Context Toolbar**

**Tip:** You cannot adjust Underline and Strikethrough thickness or positioning in Publisher

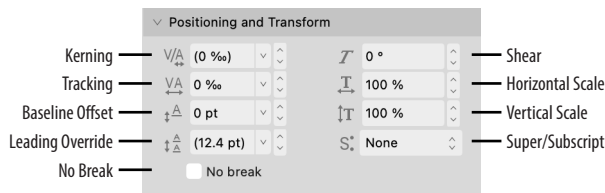
**Tip:** You can also choose single **Underline** and **Strike-through** from the **Text > Character Traits** menu or click the equivalent buttons in the **Context Toolbar**

**Tip:** You can also set **Outline Stroke** with the **Stroke panel** and **Outline Colour** with the **Colour panel**

**Tip:** Use the **Font Colour** control in the top section of the panel to set the text fill colour

# Positioning and Transform

The **Positioning and Transform** section of the **Character panel** allows you to change how the characters are positioned relative to neighbouring characters and lines of text and how they are scaled.



**Tip:** Publisher does not offer an **Optical Kerning** feature to automatically kern characters based on their shapes

- **Kerning:** Kerning adds and removes space between specific pairs of characters to correct visual gaps caused by adjacent characters with overhanging shapes. Most quality fonts have kerning values defined for character pairs that would produce a gap but at large display sizes you may wish to override the value set by the font designer.

To Av We      To Av We  
Auto                      0‰

**Tip:** Choose **Text > Spacing > Use Default** to set kerning and tracking back to **Auto**, the font's default

- **Auto:** Select to use the font's defined kerning pair values. This field will show *Auto* only when a range of text set to *Auto* is selected and it will show the font's kerning value in parentheses when the text cursor is between two characters. If there is not a kerning pair value defined for the two characters then (0‰) will be shown.
- **0‰:** Select to turn off kerning for a pair of character or range of text. The field will show 0‰ if you have set it to zero or (0‰) if you have set it to *Auto*.
- **Preset or custom value:** When the text cursor is between two characters, select a preset value or enter a custom value in permilles (thousandths of an em space). Positive values will loosen spacing and negative values will tighten spacing.

**Tip:** Choose **Text > Spacing > Use None** to set both kerning and tracking to 0‰

**Tip:** You can't change kerning when a range of text is selected, except to *Auto* or 0‰

**Tip: Tighten and Loosen** change kerning when the text cursor is between two characters, or tracking when text is selected

**Tip:** If you don't need these shortcuts, remove them to avoid accidentally changing kerning or tracking; refer to [Keyboard shortcuts](#) on page 246















Instead of specifying a kerning value you can also tighten or loosen kerning by a set increment. Choose **Text > Spacing > Tighten, Loosen, Tighten More, or Loosen More** or their keyboard shortcuts:

Command	Shortcut	Increment
Loosen	⌘ + → (Ctrl+ →)	10‰
Tighten	⌘ + ← (Ctrl+ ←)	10‰
Loosen More	⌘ + ⌘ + → (Shift + Alt + →)	50‰
Tighten More	⌘ + ⌘ + ← (Shift + Alt + ←)	50‰

- **Tracking:** While kerning is used to add and remove space between specific character pairs, tracking adds and removes space between all characters. Tracking can be used in conjunction with kerning. For example, you could increase tracking to loosen the overall spacing but keep *Auto* kerning enabled to avoid unsightly gaps with overhanging character shapes. Select a preset value or enter a custom value in permilles (thousandths of an em space). Positive values will loosen spacing and negative values will tighten spacing.

In general, display type should be tracked tightly with a negative value while you may not need to adjust tracking at all for body text. White text on a solid background may need to be loosened to avoid having the characters seem closer than they are.

Instead of specifying a tracking value you can also tighten or loosen tracking by a set increment. Choose **Text > Spacing > Tighten, Loosen, Tighten More, or Loosen More** or their keyboard shortcuts:

Command	Shortcut	Increment
Loosen	 +  (Ctrl+  )	10‰
Tighten	 +  (Ctrl+  )	10‰
Loosen More	 +  +  (Shift + Alt +  )	50‰
Tighten More	 +  +  (Shift + Alt +  )	50‰



















Tightened  
-50‰

Normal  
0‰

Loosened  
50‰ loose

- **Baseline Offset:** Select a preset baseline offset or enter a custom value. Positive values will raise the character above the baseline and negative values will lower the character below the baseline.

Instead of specifying an offset you can also choose to raise and lower the baseline by a set increment. Choose **Text > Size > Raise Baseline, Lower Baseline, Precise Raise Baseline, or Precise Lower Baseline** or their keyboard shortcuts. You can also choose **Use Default** to reset the baseline to normal.

Command	Shortcut	Increment
Raise Baseline	 +  +  (Shift + Alt +  )	1 pt, 0.01 in, 0.1 mm
Lower Baseline	 +  +  (Shift + Alt +  )	1 pt, 0.01 in, 0.1 mm
Precise Raise	 +  +  +  (Ctrl + Shift + Alt +  )	0.1 pt, 0.001 in, 0.01 mm
Precise Lower	 +  +  +  (Ctrl + Shift + Alt +  )	0.1 pt, 0.001 in, 0.01 mm

**Tip:** Choose **Text > Spacing > Use Default** to set kerning and tracking back to **Auto**, the font's default

**Tip:** Choose **Text > Spacing > Use None** to set both kerning and tracking to 0‰

**Tip:** **Tighten** and **Loosen** change kerning when the text cursor is between two characters or tracking when text is selected

**Tip:** If you don't need these shortcuts, you can remove them to avoid accidentally changing kerning or tracking; refer to [Keyboard shortcuts](#) on page 246

**Definition:** The baseline is the invisible line on which the bases of characters without descenders are aligned

**Tip:** Use **Baseline Offset** to adjust the vertical position of an inline image to align it with neighbouring characters

**Tip:** If you don't need these shortcuts, remove them to avoid accidentally changing the baseline; refer to [Keyboard shortcuts](#) on page 246


**Tip:** Setting **Leading Override** to less than the paragraph leading value will have no effect

- **Leading Override:** Leading (line spacing) is normally set for an entire paragraph but you can override it for specific characters. The paragraph leading value will be shown in parentheses if you have not overridden it.
- **Shear:** Enter a value to slant the characters to create the appearance of an italicized font. Positive values will slant the characters to the right and negative values to the left. A *faux italic* can be created with a shear of approximately 14% and while it is not a replacement for a true italic font style, it can be useful for display type.

Shear  
-14°

Shear  
0%

Shear  
14°

**Tip:** Scaling art text with the **Move**  tool will adjust its horizontal scale

- **Horizontal Scale:** Enter a value to horizontally scale the characters and the space between them. Positive values will stretch the text and negative values will condense it. Scaling is not a replacement for a true condensed or expanded font style, but it can be useful for display type.
- **Vertical Scale:** Enter a value to scale the characters vertically. Positive values will increase the height while negative values will decrease it.
- **Super/Subscript:** Select *Superscript* or *Subscript* to automatically decrease the font size and increase or decrease the baseline offset. You cannot adjust the changes applied and the changed values are not shown in the **Font Size** and **Baseline Offset** fields. It is better to use a font's true superscript or subscript characters than this automatic option because it results in thinner strokes than normal characters, but some fonts don't include true super- and subscript characters. Refer to [Super/Subscript:](#) on page 78 for more information.

Super<sup>1</sup> Sub<sub>2</sub>  
True super- and subscript

Super<sup>1</sup> Sub<sub>2</sub>  
Automatic super- and subscript

**Tip: No Break** has no impact on art text or path text because there is no right frame edge to wrap the text



- **No Break:** Select to disable automatic word wrapping inside of a text frame. This feature is useful to prevent automatic hyphenation of proper nouns (for example, *Southampton*), breaking at manual hyphens (for example, *90-degree*), or to keep certain words together (for example, *4K TV*).

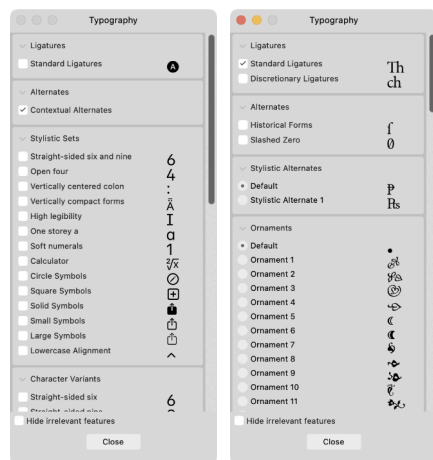
**Tip:** There is no visual indication of text that is formatted with **No Break** but you can search for it with the **Find and Replace** panel

# Typography


The **Typography** section of the **Character** panel allows you to access the extended characters of some fonts including ligatures, ordinals, super- and subscripts, and small caps. The options available will vary with the font selected and in some cases are impacted by the **Typography script** and **Typography language** you have set as described in the section on [Language](#) on page 80.



Fonts often have more options than can fit in the **Character** panel. You can access the full set of options and view samples with the **Typography** window that can be opened by clicking the **More** ... icon, by choosing **Show Typography** from the panel menu , or by clicking the **Show Typography**  icon in the **Context Toolbar**.



Two views of the **Typography** window for different fonts

- **Standard Ligatures:**  Select to use ligatures in place of the standard character glyphs for the most common ligatures. This option is on by default because it is almost always a good idea to use these ligatures. **Discretionary ligatures**, ones that you might not want to use in all cases, are available for some fonts in the **Typography** window.

fi ff fl ffi ffl  
Standard ligatures on

fi ff fl ffi ffl  
Standard ligatures off

ct st sp  
Discretionary ligatures on

ct st sp  
Discretionary ligatures off


**Tip:** The typography options change the appearance of characters but do not change the characters you have entered; for example, lowercase letters will still be lowercase when applying **All Caps**

**Tip:** The **Typography** window is a floating window and not a panel


**Tip:** The **Typography** options in the **Character** panel are listed as radio buttons and checkboxes in the **Typography** window; the options available depend on the selected font

**Definition:** A ligature is a single character glyph that replaces two or more single glyphs to improve readability and aesthetics




- **Contextual Alternates:**  Select to use the alternate or variant form of a character glyph depending on the context. They are commonly used to improve the joining of specific characters but in this example, the alternate form of the colon is raised above its normal position when used with digits to express a time. The **Contextual Alternates** option is on by default if supported by a font. Refer to the font's documentation for a list of the supported alternates.

9:15 Time:      9:15 Time:  
Contextual Alternates on      Contextual Alternates off



- **Ordinals:**  Select to format ordinal numbers such as 1<sup>st</sup> as superscripted with characters scaled relative to adjoining characters of the same size. While it may be more convenient to use the **Superscript ordinals as they are typed** feature in **Settings...**, it is better to disable it and use ordinals as intended by the font designer if they are available. This option is off by default because it should be applied only to the ordinal number or else you will inadvertently superscripting body text.

1<sup>st</sup> 2<sup>o</sup> 3<sup>re</sup>      1<sup>st</sup> 2<sup>o</sup> 3<sup>re</sup>  
Ordinals on      Ordinals off and superscript on



**Tip:** Always precede a fraction with a space or it will not be properly formatted

- **Fractions and Figure Position:**  Select to use formatted fractions for numbers separated by a forward slash with digits scaled relative to adjoining characters of the same size. This option is off by default because it should be applied only to the fraction itself. Some fonts support only basic fractions such as ½ while others allow you to compose your own complex fractions such as 11/476. For the latter, format the numerator and denominator with the options of the same names in the **Figure Position** section of the **Typography window**. Format the forward slash with **Fraction**.

1/2      3/8      11/476  
Basic fractions      Composed fraction


- **Super/Subscript:**   Select to raise or lower characters from the baseline and scale them relative to adjoining characters of the same size. While it may be more convenient to use the similar **Supers/Subscript** feature in the **Positioning and Transform** section, it is better to use superscripts as intended by the font designer if they are available. Some fonts may also offer **Superior** and **Inferior** options for scientific notation which can be found in the **Figure Position** section of the **Typography window**.

Super<sup>1</sup> Sub<sub>2</sub>      Super<sup>1</sup> Sub<sub>2</sub>  
True super- and subscript      Automatic super- and subscript

- **All/Small Caps and Case-Sensitive Forms:**   Select **All Caps** or **Small Caps** to use a font's style for real all or small capital letters. You can also use the **Text > Capitalization > All Caps** and **Small Caps** commands to access this feature. If the font supports it, selecting All Caps will also select the **Case-Sensitive Forms** and **Capital Spacing** options which can be accessed separately in the **Capitals** section of the **Typography** window. Case-Sensitive Forms shifts characters such as parentheses up to align better with all capital characters and lining figures while Capital Spacing improves the spacing for all capital characters.

(CAPS 12)      (Caps 12)

All Caps + Case-Sensitive Forms + Capital Spacing      Standard characters


- **Character Variants:**  Click to select from a menu of the variants available for the font. Applying these options to characters other than those in the menu will have no effect so if you want to use certain variants throughout a document you can enable them in a text style. Each of the characters in the example below is a variant form of the standard character. Slash zero is a common one used to distinguish between a zero and capital O.

qll 4069

Character variants

all 4069

Standard characters


- **Stylistic Sets:**  Click to select from a menu of the stylistic sets available for the font. A stylistic set is a group of character variants or alternates that can be applied together. For example, the font used in the example above allows selecting the *straight-sided six and nine* separately as variants to combined as a set. Not all of the characters in a set are available separately as character variants so refer to the font's documentation for a list, especially since sets are not always clearly named.

Galf

Stylistic set on

Galf

Stylistic set off (standard characters)

- **Swash:**  Click to select from a menu of the swash style sets available for the font in place of the standard characters. Swash characters are often used at the start or end of a word for a flourish. Be careful when using them in the middle of a word because the swash may collide with another character.

Kick

Swash characters

Kick

Standard characters

- **Figure Style:** Select **Old Style** from the **Figure Style** section of the **Typography Window** for non-lining figures, also known as lowercase or hanging figures, which have varying heights and baseline positions.

1 2 3 4 5 6 7 8 9 0      1 2 3 4 5 6 7 8 9 0  
 Old Style figures      Lining figures

- **Figure Width:** Select **Tabular** from the **Figure Width** section of the **Typography Window** when numbers in columns should align.

1 2 3 4 5      1 2 3 4 5  
 6 7 8 9 0      6 7 8 9 0  
 Tabular      Proportional

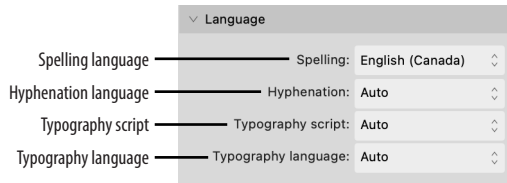
**Tip:** Use *Tabular* figures in conjunction with *Lining* (non-Old Style) figures for columns of numbers

## Language

**Tip:** The user interface language set in **Settings** has no impact on the language of your text; refer to [Setting default text formatting](#) on page 104 for information changing Publisher's default attributes

The **Language** section of the **Character panel** allows you to specify the language for spelling and hyphenation, as well as the typography script and language.

You can add words to the included spelling dictionaries or the ones you install (refer to [Installing additional dictionaries](#) on page 255) by right-clicking a misspelled word and choosing **Learn** from the context menu, but you cannot add words to the hyphenation exception dictionary.



**Tip:** You cannot automatically disable spell checking for capitalized words

**Tip:** There is no reason to use the *None* option for Hyphenation; insert a soft hyphen before a word to disable automatic hyphenation for a word; you can also format it with **No Break**

**Tip:** You cannot automatically disable hyphenation for capitalized words

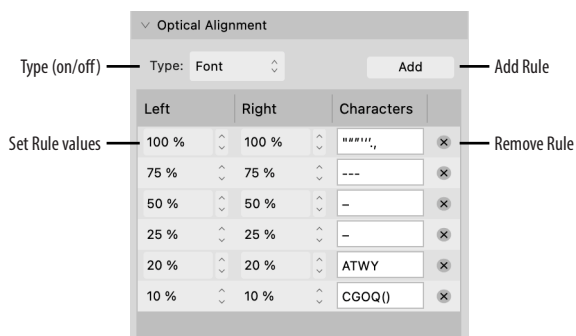
- **Spelling language:** Select the language for the text. Select *None* to turn off automatic spell checking.
- **Hyphenation language:** Select *Auto* to allow Publisher to select the most appropriate hyphenation dictionary. For most languages, this will exactly match the spelling language but some languages such as *English (Canada)* don't have their own hyphenation dictionary so choosing *Auto* would use *English (US)*.
- **Typography script and language:** The typography script and language determine how OpenType rules are applied and thus which alternate characters are available. You can ignore these controls and leave them set to *Auto* if you don't need to access certain alternate characters. **Typography script** specifies the way text is written, for example, *Arabic*, while **Typography language** specifies the actual language, for example, *Persian*. Select *Auto* to allow Publisher to select the most appropriate option or *Default* to use the font's default option. The typography scripts and languages available will depend on the selected font.


## Optical Alignment

The **Optical Alignment** section of the **Character panel** allows you to specify how punctuation and certain characters are positioned relative to the left and right edges of the text frame. Optical alignment is off by default but is commonly used in magazines, brochures, and books to ensure that a page of text is visually aligned. It is generally used for body text and not for headings or tables.

Optical alignment makes the left and right edges of a column of text look more uniform to the eye by slightly shifting certain characters and by *hanging* punctuation (positioning it) outside of the text frame. With a bit of manual adjustment to find the right value, you can even hang entire words outside of the text frame.

**Tip:** Optical Alignment is not recommended for use with art text or path text because they lack a frame



- **Type:** Select *Font* to enable optical alignment and use the font's values or *Manual* to use custom values. Select *None* to disable optical alignment. Few fonts offer optical alignment values so selecting *Font* will almost always use Publisher's default values.
- **Add:** Click to add an optical alignment rule to the table below. Click the Remove Rule  icon to delete a rule from the table.
- **Left/Right:** Set how far the character should extend outside of the text frame's left or right edge. This value is specified as a percentage of the character width.
- **Characters:** List the characters (without separators) to which the rule applies. For example, *CGOQ()* characters extend 10% of their width out of the text frame because they have curved sides.

# Formatting paragraphs




**Tip:** Refer to [Setting default text formatting](#) on page 104 for information on changing Publisher's default paragraph attributes

Paragraph attributes are those that can be applied only to entire paragraphs and include justification, indents, paragraph leading, tab stops, hyphenation, and much more. For formatting attributes that can be applied only to any range of characters, refer to [Formatting characters](#) on page 70.

If you regularly use the same combination of character attributes, consider creating a character text style to ensure consistency and save time. Refer to [Creating text styles](#) on page 121 for more information. Character attributes are applied over the attributes defined in paragraph and character styles and are sometimes referred to as *character overrides*.

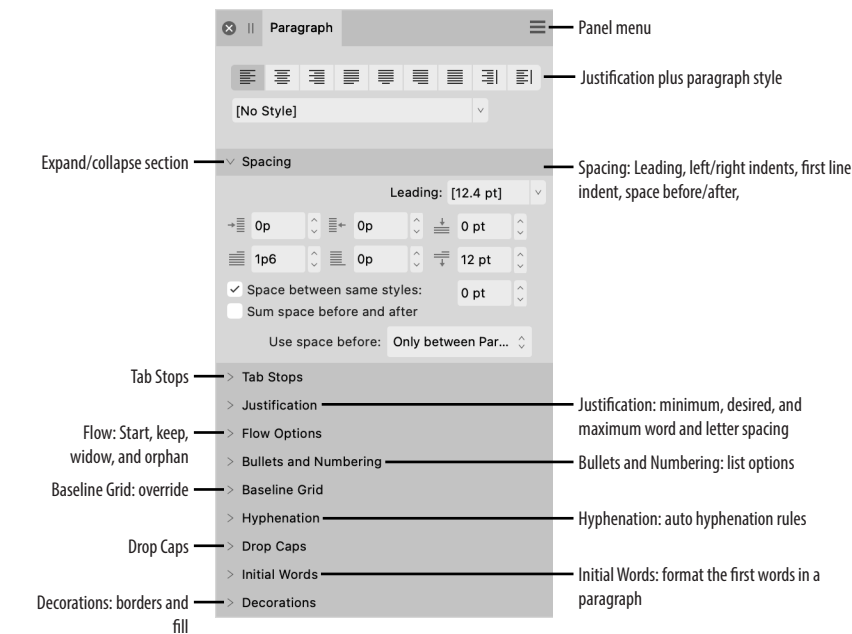
## To apply paragraph attributes:

All paragraph attributes can be selected from the **Paragraph panel**. Some of the most common ones are also available from the **Context Toolbar** and those you might want to use with a keyboard shortcut are also available in the **Text** menu.

1. Using the **Frame Text** , **Artistic Text** , or **Table**  tool, position the text cursor in the paragraph to which you want to apply the formatting, or select a range of paragraphs.
2. Select the paragraph attributes. These are described in the following sections.

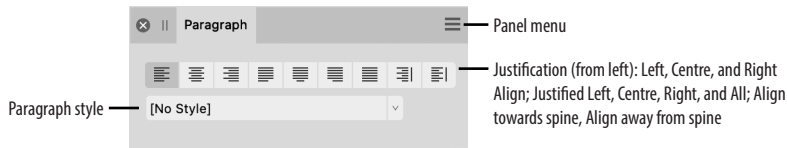
## To display the Paragraph panel:

1. Click the **Paragraph panel**  button in the **Context Toolbar** or choose **Window > Text > Paragraph**.



## Alignment (justification)

The top section of the **Paragraph** panel allows you to set the alignment of the paragraph to the left or right edges of the text frame or text object and the paragraph style.



- **Left Align** (default): Select to left align all lines of text; also known as *rag right*.
- **Centre Align**: Select to centre align all lines of text.
- **Right Align**: Select to right align all lines of text; also known as *rag left*.
- **Justified Left**: Select to align text to both the left and right edges and to left align the last line of the paragraph (recommended for justified text).
- **Justified Centre**: Select to align text to both the left and right edges and to centre align the last line of the paragraph.
- **Justified Right**: Select to align text to both the left and right edges and to right align the last line of the paragraph (not recommended for languages written left-to-right).
- **Justified All**: Select to align text to both the left and right edges and to force justify the last line of the paragraph, even if it's a single word (not recommended).
- **Align Towards Spine**: Select to left align text on right pages and right align text on left pages.
- **Align Away from Spine**: Select to right align text on right pages and left align text on left pages.
- **Paragraph Style**: Select the paragraph text style. Any other attributes you select in the **Paragraph** panel will override the paragraph style. Refer to [Creating text styles](#) on page 121 for more information.

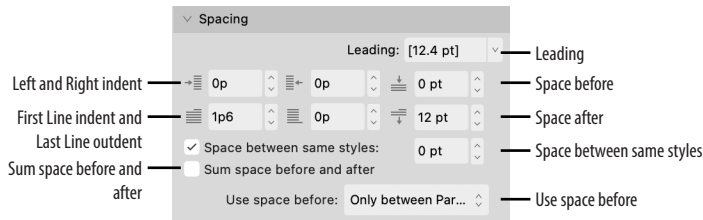
**Tip:** You can also choose all of these options from the **Text > Alignment** menu or click from the equivalent buttons in the **Context Toolbar**

**Tip:** Publisher does not offer a **Flush Space** (variable space) character which is sometimes used with *Justified All* text

**Tip:** You can also select the paragraph style from the **Text Styles** panel and **Context Toolbar**

## Spacing

The **Spacing** section of the **Paragraph** panel allows you to set the space between paragraphs and lines of text as well as how much text is indented from the left or right edges.

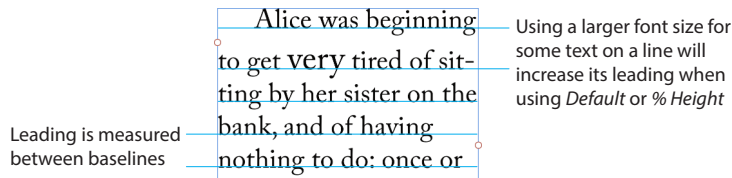


**Tip:** Leading is pronounced *leading* because it refers to the metal lead which was previously used to set type

**Definition:** The baseline is the invisible line on which the bases of characters without descenders are aligned

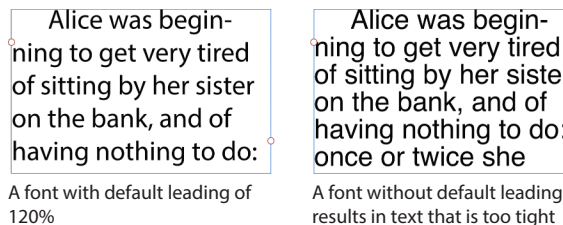
**Tip:** You can also select Leading options from the **Context Toolbar**

- **Leading:** Leading controls the space between lines of text and is measured from the baseline of a line of text to the line above it. Word processors usually refer to leading as line spacing. To override leading for a range of characters in a paragraph, refer to [Leading Override](#) on page 76.



- **Default** (not recommended): Select to use the font's defined leading. The calculated leading value for the font size will be shown as *[value]* in square brackets when you have selected *Default*. For example, if the font's default leading is 120% and the font size is 12 pt, then Publisher will show *[14.4 pt]*.











**Tip:** The *Default* leading option works very differently than the *Auto* leading option in Adobe® InDesign® which uses leading of 120% (a value you can customize) while Publisher uses the value the font designer intended. Unfortunately, many fonts, including those from major type foundries, lack a default leading value or have a poorly defined one which results in very tight leading in Publisher. Unless you're using a font that has properly-defined default leading such as fonts from Adobe, it is recommended to avoid the *Default* option and to instead use *Exactly* or *% Height*.





- **Exactly** (recommended): Select to specify an exact leading value and then enter the value into the field. You can also choose from a list of preset leading values. If the font size is greater than the leading then characters in the lines of text may overlap.

- **% Height** (recommended): Select to specify a percentage of the font size. The calculated leading value will be shown as (*value*) in parentheses when you have selected **% Height**. For example, if you enter 120% for a font size of 12 pt then Publisher will show (14.4 pt). If you click in the **Leading** field again, the percentage you entered will be shown.
- **At Least**: Select to specify the minimum leading for the font size. This option is similar to *Exactly* and will generally result in a fixed leading amount but if you increase the font size then leading may increase. The value you enter will be shown as (*value*) in parentheses when you have selected *At Least* to differentiate it from an exact value. For example, if you enter 14 pt then Publisher will show (14 pt).
- **Multiple** (not recommended): Select to specify leading as a multiple of the font's default leading. Selecting *Multiple* will initially set leading to 1.5 times the font's default leading. If you click in the **Leading** field, the multiple will be shown but otherwise the field will show the calculated leading value for the font size will be shown as [*value*] in square brackets. For example, if the font's default leading is 120%, the font size is 12 pt, and the multiple is set to 1.5, then Publisher will show [21.6 pt].

Instead of specifying a leading value you can also increase or decrease leading by a set increment. Choose **Text > Paragraph Leading > Increase, Decrease, Precise Increase, or Precise Decrease** or their keyboard shortcuts:

Command	Shortcut	Increment
Increase	 +  (Alt + ↓)	2 pt, 0.02 in, 0.2 mm, 21%, 0.21x
Decrease	 +  (Alt + ↑)	2 pt, 0.02 in, 0.2 mm, 21%, 0.21x
Precise Increase	 +  +  (Ctrl + Alt + ↓)	0.2 pt, 0.001 in, 0.01 mm, 3.6%, 0.03x
Precise Decrease	 +  +  (Ctrl + Alt + ↑)	0.2 pt, 0.001 in, 0.01 mm, 3.6%, 0.03x

-  **Left/Right Indent**: Enter the amount that the paragraph should be indented from the left and right edges of the text frame or object. Entering a value for **Left Indent** will automatically change **First Line Indent** by the same amount, and entering a value for **Right Indent** will change **Last Line Outdent** by the same amount.
-  **First Line Indent**: Enter the amount that the first line should be indented from the left edge of the text frame or object. A typical value for a book is one or two times the font size. To creating a hanging indent, enter the indent value into **Left Indent** and then set **First Line Indent** to zero.

Publisher uses the macOS approach to first line indent and doesn't work the same way as Adobe® and Microsoft® applications. To create an indented first line, set **Left Indent** to 0 and **First Line Indent** to a positive value. To create a hanging indent, set **Left Indent** to a positive value and set **First Line Indent** to 0.

**Tip:** If you don't need these shortcuts, remove them to avoid accidentally changing leading; refer to [Keyboard shortcuts](#) on page 246



**Tip:** You can set **Left**, **Right**, and **First Line Indent** visually with the **Text Ruler**; refer to **Tab Stops** in the following section for an example

**Tip:** Instead of using **Left** and **Right Indent**, You can inset all text in a text frame with the **Insets** fields in the **Text Frame** panel



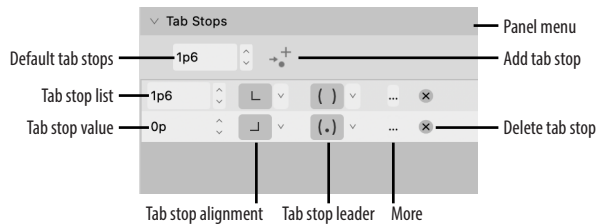
**Tip:** Always use **Space Before** or **Space After** to add space between paragraphs instead of pressing **Return** a second time so that you can control the amount of space

**Tip:** Use **Space Between Same Styles** to reduce the space between items in a bulleted or numbered list while continuing to add more space before and after the first and last list paragraphs

-  **Last Line Outdent:** Enter the amount that the last line should be indented from the right edge of the text frame or object. This feature works best with full justification and is not frequently used.
-  **Space Before/After:** Enter the amount of space that should be added between paragraphs. You can add space before or after the paragraph, or add both. The behaviour of these controls is modified by **Space Between Same Styles**, **Sum Space Before and After**, and **Use Space Before** which are described below.
- **Space Between Same Styles:** Select to override the defined **Space Before** and **Space After** values and enter the amount of space to add between two paragraphs of the same paragraph style.
- **Sum Space Before and After:** Select to add both **Space Before** and **Space After**. When deselected, Publisher will use only the larger value.
- **Use Space Before:** Select *Only Between Paragraphs* to avoid adding **Space Before** the first line of text in a column or text frame or select *Always* to allow space to be added at the top of a column or frame. You can also select *Only at Column Top* but there is no reason to use that option.

## Tab Stops

The **Tab Stops** section of the **Paragraph** panel allows you to indent text with tab characters to specific positions relative to the left edge of a text frame or object. You can also specify that the tab's space be filled with a visible character to form a *dot leader* or other type of leader.



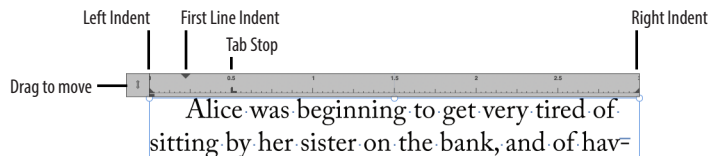
**Tip:** For text frames or objects with curved or irregular left edges, tab stops are relative to the leftmost point; for Path Text, the tab stops are positioned along the path and not necessarily in a straight line

Click the **More** icon for a tab stop or click a tab stop in the **Text Ruler** to display a popup window and edit additional tab stop settings:



When working with tab stops you may wish to choose **View > Show Text Ruler** so that you can visually set and modify tab stops. The **Text Ruler** will appear above the active text frame or object. You can move the ruler closer to the text you are formatting by dragging the handle on the left side of the ruler.

**Tip:** The **Text Ruler** is not available for path text objects



Drag an indent or tab stop marker in the **Text Ruler** to change its position. Click a tab stop marker to edit its values in the same popup window above that is opened from the **Tab Stops** section of the **Paragraph** panel.

- **Default tab stops:** Set the default spacing for tab stops. Adding tab stops will override the default spacing until the last added tab stop at which point the default spacing will resume.
- **Add tab stop:** Click the plus icon to create a new tab stop. Its default position will be the sum of the last tab stop and the default tab spacing. You can also add a tab stop by clicking on the **Text Ruler**.
- **Tab stop position:** Set the position for the tab stop. You can also change a tab stop's position by dragging its marker in the **Text Ruler**. Click the **More** icon and select **From Right** to measure the position from the right edge of the ruler; this option is commonly used in conjunction with a *leader*.

- **Tab stop alignment:** Select the alignment for the tab stop. You can also change a tab stop's alignment by clicking its marker in the **Text Ruler** and selecting an alignment from the popup window.

-  **Left:** Select to left align text to the tab stop.




Left » \$12,035.25

-  **Centre:** Select to centre align text to the tab stop.





Centre » \$12,035.25

-  **Right:** Select to right align text to the tab stop.









Right » \$12,035.25

-  **Decimal:** Select to align the next decimal in the text to the tab stop. The default decimal character is a period but you can change it by clicking the **More**  icon and entering a different character into the **Decimal** field.



Decimal » \$12,035.25

**Tip:** You can also double-click a tab stop in the **Text Ruler** to cycle through the types of tabs until you reach the one you want

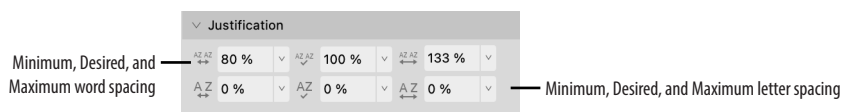
- **Leader type (dot leader):** Click the **More**  icon for a tab stop or click a tab stop in the **Text Ruler** and select a dot leader type:
  -  **None:** Select to use a normal blank tab.
  -  **Character:** Select to fill the tab space with a leader. The default period character will create a dot leader but you can enter a custom leader **Character**.
  -  **Underline:** Select to fill the tab space with underline characters which is useful for creating printed forms.
  -  **Strikethrough:** Select to fill the tab space with strikethrough characters.
- **Delete tab stop:** Click the **Delete**  icon to delete the corresponding tab stop. You can also delete a tab stop by dragging it off of the **Text Ruler** and then releasing the mouse button.

## Justification Options

Justifying text, aligning it to both the left and right edges of the text frame or object, requires adding and removing space between words and letters to balance lines of text. The **Justification** section of the **Paragraph** panel allows you to set the minimum, desired, and maximum word- and letter-spacing options for the justification options in the top section of the panel.

The minimum and maximum options will have no impact on left-, centre-, or right-aligned text. For both the word and letter spacing options, enter values from 0 to 250% but minimum must be less than desired which must be less than maximum.

Publisher will do its best to honour the values you set and will never use less than the minimum spacing, but if it is impossible to fit or break a word, Publisher will exceed the maximum as required.



- **Minimum, Desired, and Maximum word spacing:** Set the desired space between words and sentences. Change the desired word spacing to reduce or increase the width of the space character. Change the minimum and maximum word spacing to avoid unsightly *rivers* of white space in justified text; minimum and maximum will have no effect on non-justified text. The default values of 80, 100, and 133% will work well for most text.
- **Minimum, Desired, and Maximum letter spacing:** Set the desired space between characters, before the application of kerning and tracking. These values will be set to zero by default so that space will be added and removed only between words. You would not normally set desired spacing to more than zero but if your text has unsightly *rivers* of white space, you might consider increasing the maximum; minimum and maximum will have no effect on non-justified text. Changing the desired spacing is similar to changing tracking at the paragraph level.

**Tip:** If you don't want to change the Justification options, review your text for incorrect hyphenation and insert soft hyphens where possible

**Tip:** Using two spaces between sentences will interfere with the word spacing settings

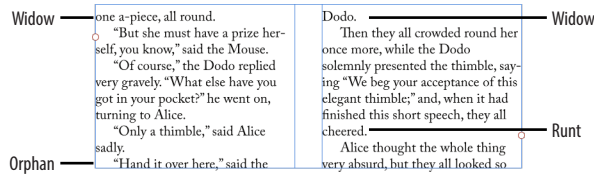
**Tip:** Publisher does not also offer **Glyph Scaling** (horizontal scaling) for automatic justification

## Flow

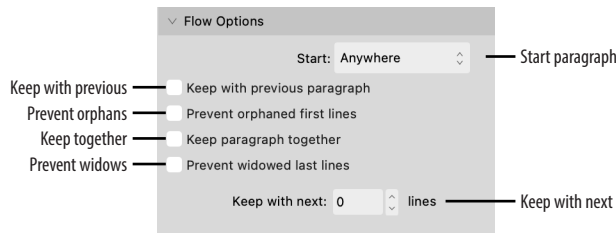
**Tip:** Publisher does not offer an option to avoid runs; one way to fix a runt is to select the runt and the preceding word and set **No Break** so that the last two words will be on a new line

The **Flow** section of the **Paragraph** panel allows you to direct Publisher to avoid creating widows and orphans and to set where a paragraph should start.

Incorrect use of these options can lead to unusual text flow with entire paragraphs moved to the next page.



A *widow* occurs when the last line of a paragraph can't fit at the bottom of the previous text frame or column and is positioned on its own at the top of a column. An *orphan* occurs when the first line of a paragraph is all that can fit at the bottom of a text frame or column. A *runt* occurs when the last line of a paragraph has only a single word.



- **Start anywhere:** Set where the paragraph will start. This option is often used to start certain levels of headings at the top of the next page, text frame, or column as an alternative to manually inserting a page, column, or frame break.
  - **Anywhere:** Select to allow the paragraph to start anywhere after the previous paragraph.
  - **In Next Column:** Select to force the paragraph to start in the next column.
  - **In Next Frame:** Select to force the paragraph to start in the next text frame.
  - **On Next Page, Next Odd Page, Next Even Page:** Select to force the paragraph to start on the next page or next odd or even numbered page. *Next page* refers not to the next sequential page but to the next text frame in the linked series that is not on the current page.
- **Keep with previous paragraph:** Select to keep at least the first line of the paragraph with the last line of the previous paragraph. Setting this option for a paragraph following a heading will avoid the heading being positioned at the bottom of a text frame or column without text beneath it.

- **Prevent orphaned first lines:** Select to keep the first two lines of a paragraph together to avoid an orphan at the bottom of a text frame or column.
- **Keep paragraph together:** Select to keep the entire paragraph together. If the next text frame or column isn't large enough to fit the entire paragraph then Publisher will be forced to break it.
- **Prevent widowed last lines:** Select to keep the last two lines of a paragraph together to avoid a widow at the top of a text frame or column.
- **Keep with next:** Enter the number of lines of the next paragraph that the last line of a paragraph should be kept with. Always use this option together with **Prevent widowed last lines** to avoid creating widows.

## Bullets and Numbering



**Tip:** Bullets and Numbers are not plain text so their characters cannot be found with **Find and Replace** and are not counted by **Word Count**

**Tip:** It is recommended to use paragraph styles to format bulleted and numbered lists to ensure consistent formatting

The **Bullets and Numbering** section of the **Paragraph** panel allows you to create and set the formatting of bulleted and numbered lists. Publisher allows you to create multi-level (hierarchical) lists as well as those spanning an entire document.

Each item in a list must be a separate paragraph; entering a line break will not create a new item in the list.

### To create a bulleted or numbered list:

1. Position the text cursor in a paragraph or select a range of paragraphs.
2. Select the **Bulleted List**  or **Numbered List**  icons in the **Context Toolbar** or choose **Text > List > Bullet** or **Number**.
3. Set the list formatting options as described below.
4. To add another item to the list, position the text cursor at the end of a list paragraph and press **Return**.
5. To end the list, press **Return** to start a new paragraph and set **List Type** to **No List**.



### To change a bulleted or numbered list to regular paragraphs:










1. To remove the bullets or numbers entirely, select the paragraph(s) and deselect the **Bulleted List**  or **Numbered List**  icon in the **Context Toolbar**.

You can also deselect the **Text > List > Bullet** or **Number** command or set **Type** to **No List** in the **Bullets and Numbering** section of the **Paragraph** panel.

2. To convert the bullets or numbers from a list to editable text, select the paragraph(s) and choose **Text > Expand > Expand List**. The visual appearance of the paragraphs will be unchanged but you will now be able to format or delete the bullets and numbers.

### To create a multi-level (hierarchical) list:

1. Create a bulleted or numbered list.
2. Position the text cursor at the start of a list paragraph that should be a child of the item before it, or select a range of paragraphs.
3. Press **Tab** to increase the list level or press **Shift + Tab** to decrease the list level. This will change the **List Level** and **Left Indent** values without entering a tab character.
4. To include the parent's number in the list number (for example, 1.1, 1.2...), insert the parent's level number  into the **Text** field by clicking the caret  icon at its left and selecting from the popup menu. For example, the **Text** field should contain the following for these number formats:

Format	Text value	Notes
7.1, 7.2, 7.3...	 	 refers to the parent level
7.2.1, 7.2.2, 7.2.3...	 	 refers to the first parent level and  refers to the second parent level
7a, 7b, 7c...	 	This is the same as the first level but with a different number format and without the decimal

### To format list markers (bullets and numbers):

If you apply character formatting to the first character in a bulleted or numbered paragraph, the formatting will also be applied to the list marker, the bullet or number.

1. Create a character style for the list marker that specifically defines the attribute you do not want changed by the following paragraph text's formatting. For example, if you apply *Bold* to the following text, define this style as *Regular*.
2. Select the list paragraphs and select the character style from the **Character Style** option in the **Bullets and Numbering** section of the **Paragraph** panel.


**Tip:** An alternative to using a character style to avoid the formatting of the first character changing the list marker is to insert a Zero-Width Space between the marker and first character

### To create a named list for global numbering:

In addition to creating a list of consecutively numbered paragraphs, you can name a list and add new items to it anywhere in your document or Book. Named lists are especially useful for naming figures and illustrations.

If you add paragraphs to the same list in multiple text frames on the same page, they could be numbered incorrectly depending on the position of the text frames in the layer stack. The text frame that should be numbered before another should be lower in the layer stack than the other frame.

1. Select a numbering style from the **Type** field.
2. Enter the text to define the list marker in the **Text** field. You can include *Figure* or a similar word as a prefix.

Format	Text value
Figure 1: some text...	Figure  .

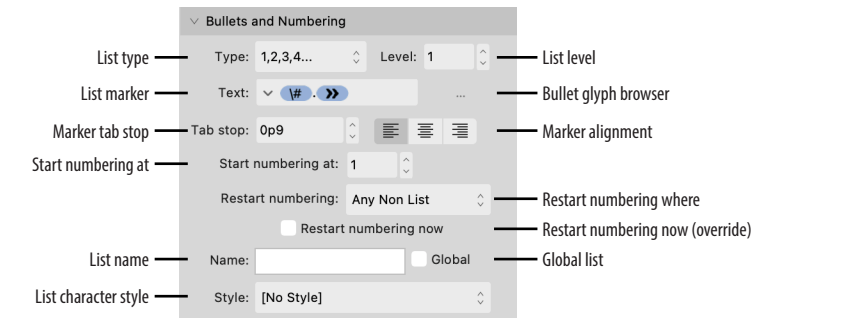
3. Set **Tab Stop** to 0 if the list marker (Text) includes or will be followed by a space and set **Marker Alignment** to *Left*.
4. Set **Start numbering at** to 1.
5. Select **Restart numbering** to *Manual Only*.
6. Enter a unique list **Name** and select **Global**.
7. Optional: Select a character style to apply to the list marker (Text).



**Tip:** Test with the largest number to determine the appropriate **First Line Indent** value

- 8. Optional: To right-align the numbers, set **Marker Alignment** to *Right*. Using the **Spacing** section of the panel, set **First Line Indent** to greater than zero.
- 9. Create a paragraph style for this list. For all subsequent items in this nonconsecutive list, you must set every item in the **Bullets and Numbering** panel exactly for the list to continue and be formatted consistently so it is easier to do this using a paragraph style. Refer to [Creating text styles](#) on page 121 for more information.

**Using the Bullets and Numbering panel:**



- **List type:** Select *Bullet* for a bulleted list or select one of the number formats for a numbered list to change a regular paragraph to a list. Select *No List* to change a list paragraph back to a regular paragraph.

It is recommended to use this setting only when editing paragraph styles and formatting lists and to instead select the **Bulleted List** or **Numbered List** icons in the **Context Toolbar** or choose **Text > List > Bullet** or **Number**. These options don't provide the means to select the bullet character or number format but they will automatically indent the list paragraph, saving you from having to manually format a standard list.

- **List level:** Set the list level to a value between 1 and 9 for a multi-level (hierarchical) list or choose **Text > List > Increase Level** or **Decrease Level** or their keyboard shortcuts:

Command	Shortcut
Increase Level	Ctrl + Shift + ] (Alt + Shift + I)
Decrease Level	Ctrl + Shift + [ (Alt + Shift + J)

Changing this number will not automatically change the list paragraph's left indent. It is recommended to use this setting only when editing paragraph

**Tip:** If a paragraph was previously formatted as a list, using the menu commands or **Context Toolbar** icons will restore its prior format

**Tip:** If you don't need these shortcuts, remove them to avoid accidentally changing leading; refer to [Keyboard shortcuts](#) on page 246

styles and to instead position the text cursor at the start of a paragraph or select the paragraphs and press **Tab** or **Shift + Tab** to change the **Left Indent** value at the same as the list level is changed.

- **Text (list marker):** Enter the text to define the list marker:

**Bulleted list:** Enter a bullet character followed by a tab **>>**. Click the caret **>** icon at the left of the field to select from a list of common bullet characters or click the more **...** icon to select a bullet from the **Glyph Browser**. A bulleted list will normally have the same bullet character(s) for each list paragraph but it is possible to use a different bullet for each item.

**Numbered list:** Click the caret **>** icon at the left of the field to select from a list of options including list number levels. The default value of the current number level **1#** followed by a tab **>>** is suitable for basic lists. To format a number such as 1.2.3, use the parent number levels for the first two levels separated by periods, for example, **12 . 11 . >> >>**

- **Tab stop:** Enter the amount of space from the list marker (text) to the start of the paragraph text because lists don't use the default or set tab stops but have their own tab stop value. Choose a value that is wide enough to fit the largest number and the white space before the paragraph text.

7. » Exposure¶  
7.1 » Aperture¶  
7.2 » Shutter speed¶  
7.3 » ISO¶  
7.4 » Light meter¶

Example of a multi-level numbered list with Marker Alignment set to *Left*

- for level 1, Tab Stop and Left Indent are set to 2p (24 pt) and First Line Indent is set to 0
- For level 2, Tab Stop is set to 4p (48 pt) and Left Indent and First Line Indent are set to 2p (24 pt)

- **Marker alignment:** Select the alignment of the bullet or number Text (marker). This is normally used only with numbered lists so that the numbers can be right aligned, but it can also be used with bulleted lists that have glyphs of varying widths.

7. » Exposure¶  
8. » Focusing modes¶  
9. » White balance¶  
10. » Lens¶  
11. » Viewfinder§



7. » Exposure¶  
8. » Focusing modes¶  
9. » White balance¶  
10. » Lens¶  
11. » Viewfinder§

To right align the numbers, set **Marker Alignment** to *Right* and **First Line Indent** to a value that is greater than zero, less than **Left Indent** and **Tab Stop**, but wide enough to fit the numbers

- **Start numbering at:** To start numbering at a value other than 1, enter a different starting number.
- **Restart numbering:** Set when numbered should be restarted.
  - **Any Non List (default):** Select to restart numbering after any paragraph that isn't numbered and at the next paragraph with a higher **List Level**.
  - **Manual Only:** Select to allow numbering to continue throughout a story even if there are intervening paragraphs that aren't numbered.

**Tip:** When using **Tab** to indent selected paragraphs, you must start the selected text range at the beginning of a paragraph or a tab character will be entered, deleting the selected text

**Tip:** Refer to [Glyph Browser](#) on page 55

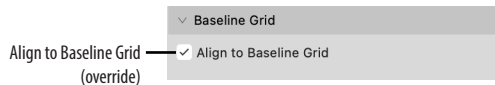
**Tip:** **First Line Indent** must be set to greater than zero with centre- and right-aligned markers

**Tip:** Test with the largest number to determine the appropriate **First Line Indent** value

- **Below Current Level:** Select to allow numbering to continue throughout a story as with **Manual Only** but to restart numbering at the next paragraph with a higher **List Level**.
- **Below Level #:** Same as above but below a specified level number. This option is available only when there is already at least a second level.
- **Restart numbering now:** Select to restart numbering at 1 with the current list paragraph and override the **Restart numbering** setting.
- **Name and Global:** Enter a name for a list to be continued throughout multiple stories in a document or in a Book's chapters. For each list in each story, set **Restart numbering** to *Manual Only*, enter a list name, and select **Global**. The names you enter must exactly match for list numbering to be continued.
- **Style:** Select a character style to apply to the list marker (Text). Use this option if you want the bullets to be a different colour than the text or the numbers to be bold.

## Baseline Grid

The **Baseline Grid** section of the **Paragraph** panel allows you to override the baseline grid for a paragraph. Refer to [Baseline grid](#) on page 31 for information on using a baseline grid.

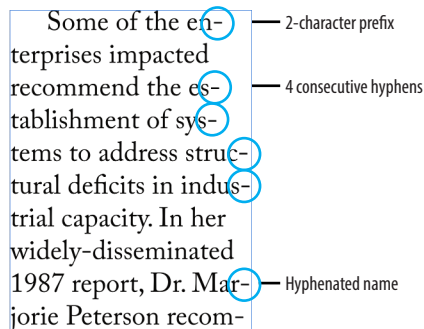


- **Align to Baseline Grid:** Select to ignore the baseline grid(s) of the document or text frame, allowing the paragraph to be positioned according to the text formatting.

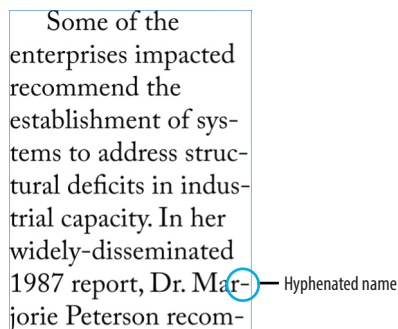
## Hyphenation

The **Hyphenation** section of the **Paragraph** panel allows you to enable automatic hyphenation and configure how it functions.

Using hyphenation with the default settings, especially in narrow columns, can lead to hyphenation issues.



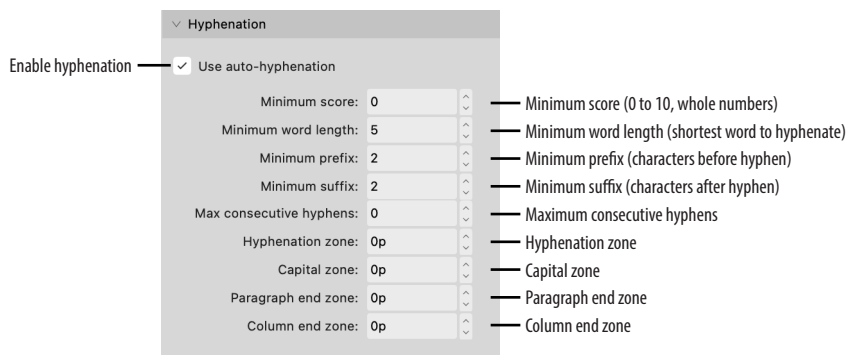
Example of hyphenation issues using default settings



Setting Max Consecutive Hyphens, Minimum Prefix, and Maximum Prefix to 3 corrects the issues except for the hyphenated name which can be fixed by inserting a soft hyphen before the name

Customizing the default settings will correct most issues but the ideal settings depend on the font, column width, language, and content type. Words containing a soft hyphen (discretionary hyphen) will never be hyphenated at any other position. You can prevent a word such as a name from being hyphenated by inserting a soft hyphen before the word; it will never be visible.

**Tip:** Choose **Text > Insert > Dashes and Hyphens > Soft Hyphen** to insert a soft hyphen



- **Use auto-hyphenation:** Select to enable hyphenation or deselect to disable it. It is recommended that hyphenation be disabled for heading styles.
- **Minimum score (not recommended):** Enter a whole number between 0 (default) and 10 to control how aggressively text is hyphenated. Publisher will hyphenate at any point with a score of 0 but only at the most preferable points with a score of 10. In practice, scores higher than 5 will lead to no hyphenation. Scores of 0 or 1 are recommended for strong hyphenation or 2 or 3 for less hyphenation.

- **Minimum word length:** Enter the minimum number of characters a word must have for it to be hyphenated. The default value of 5 is recommended for English text.
- **Minimum prefix and suffix:** Enter the minimum number of characters before the first hyphen in a word and after its last hyphen. For example, changing these options from their default of 2 to 3 would cause *automatic* to be hyphenated only as *auto-matic* instead of as *au-tomatic* in addition to *auto-matic*. It is recommended changing these options to 3 for English text.
- **Max consecutive hyphens:** Enter the maximum number of consecutive hyphens that should be allowed. The default of 0 will allow unlimited consecutive hyphens. Values of 2 or 3 are recommended.
- **Hyphenation zone:** Enter the amount of space from the right edge allowed at the end of a line before hyphenating the next word. The default of 0 will allow any hyphenation while increasing the value will result in less hyphenation. Commonly-used values are 2–3p, 24–36 pt, 0.3–0.5 in, or 8–12 mm.
- **Capital zone:** Enter the hyphenation zone for words in all uppercase. Set a value larger than the width of most uppercase words to prevent them from being hyphenated.
- **Paragraph end zone:** Enter the hyphenation zone for the end of the paragraph. It is a best practice to avoid hyphenating the last word so set this value larger than **Hyphenation Zone**. A commonly-used approach is to set this value to 150% of Hyphenation Zone.
- **Column end zone:** Enter the hyphenation zone for the end of a column. It is recommended to avoid hyphenating the last word in a column so set this value larger than **Hyphenation Zone** and to at least the value of **Paragraph End Zone**. Set this value to a very large value to prevent the last word in a column from ever being hyphenated.

**Tip:** Publisher does not offer an option to prevent capitalized words, including proper names, from being hyphenated; it is recommended that you review your text and address issues by inserting a soft hyphen before a hyphenated name to disable automatic hyphenation; you can also format it with **No Break**

## Drop Caps

The **Drop Caps** section of the **Paragraph** panel allows you to scale and position the first character or characters of a paragraph so they occupy the space of multiple lines of text. Drop caps are commonly used in books at the start of a chapter.

Alice was beginning to  
get very tired of sitting  
by her sister on the  
bank, and of having nothing to  
do: once or twice she had  
peeped into the book her sister

Example of a 3-line drop cap

Alice was beginning to  
get very tired of  
sitting by her sister on the bank,  
and of having nothing to do:  
once or twice she had peeped  
into the book her sister was

Example of a 5-character wide drop cap

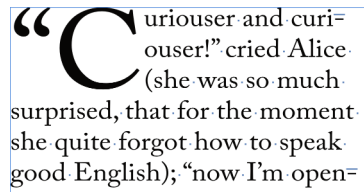
### To create a basic drop cap:

1. Position the text cursor in a paragraph or select a paragraph.
2. Select **Enabled** in the **Drop Caps** section of the **Paragraph** panel.
3. Increase the **Distance to text** value to add white space to the right of the drop cap character to avoid a drop cap with a vertical right stroke encroaching on the neighbouring characters.
4. Select **Align left edge** so that the enlarged drop cap character is better aligned with the text below it.
5. To create a drop cap of more than one character, deselect **Auto** and enter the number of characters.

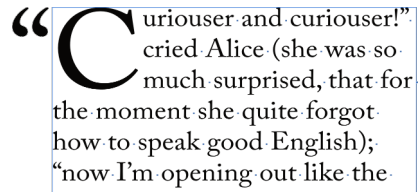


- **Enabled:** Select to create a drop cap at the start of the paragraph or deselect to remove the drop cap.
- **Height in lines:** Enter the height of the drop cap in lines of text. You may enter values of 1 to 20 and the default is 3. A value of 1 will appear as normal text.
- **Characters:** When **Auto** is deselected, enter the number of characters that should be formatted as a drop cap. You can enter any number of characters but this is normally limited to the first word.
- **Auto:** Select to convert the first alphanumeric character and any preceding punctuation to a drop cap. Deselect to specify the number of characters to include in the drop cap.

The **Auto** setting is better than specifying one character manually because if the first letter is preceded by a quotation mark, they will be converted together into a drop cap together. To hang the quotation mark outside the left edge of the text frame, select the quotation mark and set **Type** to *Font* in the **Optical Alignment** section of the **Character** panel.

A text frame containing the text: “Curiouser and curi-  
ouser!” cried Alice  
(she was so much  
surprised, that for the moment  
she quite forgot how to speak  
good English); “now I’m open-  
ing out like the  
king of the forest.”  
The first letter 'C' is a large drop cap, and the opening quotation mark is positioned to the left of the text frame.

Example of a drop cap using *Auto*

A text frame containing the text: “Curiouser and curiouser!”  
cried Alice (she was so  
much surprised, that for  
the moment she quite forgot  
how to speak good English);  
“now I’m opening out like the  
king of the forest.”  
The first letter 'C' is a large drop cap, and the opening quotation mark is positioned to the left of the text frame, aligned with the top of the drop cap.

Example of a drop cap using *Auto* with  
Optical Alignment enabled

- **Distance to text:** Enter a value to add white space to the right of the drop cap character to avoid a drop cap with a vertical right stroke encroaching on the neighbouring characters.
- **Align left edge:** Select so that the enlarged drop cap character is better aligned with the text below it.
- **Scale for descenders:** Select if you are converting a lowercase letter with a descender to a drop cap to avoid the descender overlapping the text below. Publisher will automatically scale the drop cap so that the entire glyph is inside the specified number of lines.
- **Style:** Select a character style to apply to the drop cap. Use this option to change the font or colour for the drop cap rather than directly applying formatting attributes.

## Initial Words

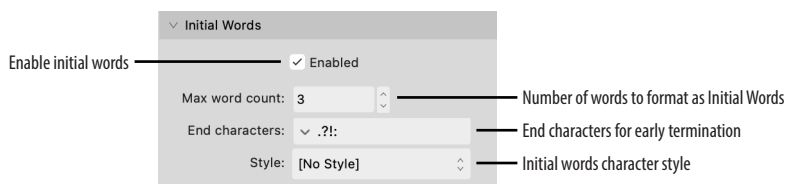
The **Initial Words** section of the **Paragraph** panel allows you to apply different formatting to the first few words of a paragraph. This option is used with some books that apply formatting such as uppercase letters to the first few words but it can also be used to apply formatting such as bold to the text in a bulleted list until a punctuation character is encountered.

ALICE WAS BEGINNING to get very tired of sitting by her sister on the bank, and of having nothing to do: once or twice she had peeped into

Example of initial words using default settings with a bold character style

“CURIOUSER AND CURIOUSER!” cried Alice. (she was so much surprised, that for the moment she quite forgot how to speak good English); “now

Example of initial words using default settings with a bold character style and Optical Alignment enabled



- **Enabled:** Select to format the first words with different formatting at the start of a paragraph or deselect to remove the Initial Words. There is no default formatting for initial words so this setting will have no apparent impact until you select a **Style**.
- **Max word count:** Enter the number of words to format as Initial Words.
- **End characters:** To end the Initial Words formatting before the Max Word Count limit is reached, enter one or more characters at which to automatically end the formatting. The most common end characters are included in the field by default but you can enter any character. Click the caret > icon at the left of the field to select from a list of common special characters.
- **Style:** Select a character style to apply to the initial words.



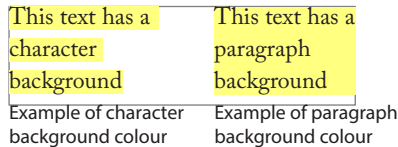
## Decorations (background and borders)

**Tip:** Publisher does not offer separate **Rule Above/Below** and **Border** features but instead offers the more flexible **Decorations** feature that allows you to create any combination of rules and borders

**Tip:** To add a fill behind the entire text frame instead of just the paragraph or characters, use the **Text Frame** panel

The **Decorations** section of the **Paragraph** panel allows you to set the stroke and background fill for paragraphs. Strokes on all four sides can be combined to create a box around a paragraph while strokes on the top and bottom can be used for rules above or below a paragraph.

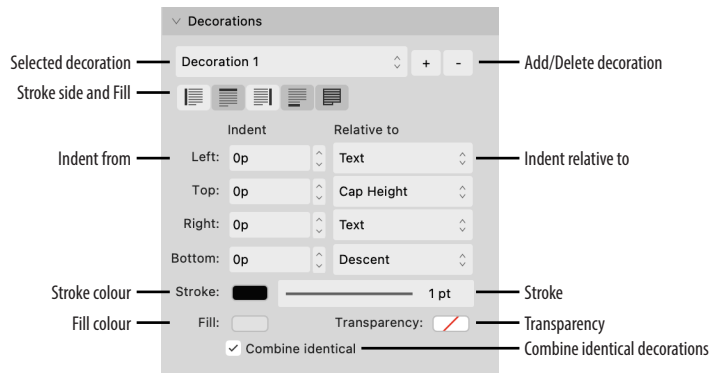
The background fill for a paragraph extends to its left and right edges and fills the space between lines of text while the similar **Background Colour** option in the **Character** panel only fills behind the individual characters.



A *decoration* is made up of one or more stroked sides and the background fill. You can create multiple decorations for a paragraph which will be automatically named *Decoration 1*, *2*, *3*... Strokes will be applied in numerical order so if you set *Decoration 1* to have a 10 pt black stroke and *Decoration 2* to have a blue fill, the blue fill of *Decoration 2* will obscure the inner half of *Decoration 1*'s stroke.

Use paragraph decorations to create callouts

Example using a background fill and left stroke



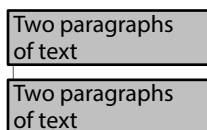
- **Selected decoration:** When using more than one decoration, select the decoration to edit or delete.
- **Add/Delete decoration:** Click **Add** + to create an additional decoration or **Delete** - to delete the selected decoration. New decorations will be created with the same settings as the selected decoration.
- **Stroke side and fill:** Select the left, top, right, or bottom side(s) to which to add a stroke (border or rule) or fill.
- **Indent from:** Enter a positive value to indent the stroke and fill or a negative value to outdent the stroke and fill.

**Tip:** There is no limit on the number of decorations you can add

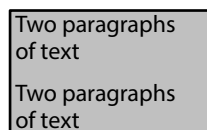
- **Indent relative to:** Select how the stroke and fill are aligned. The left and right sides can be aligned to:
  - **Column:** Select to align to the left or right edge of the column.
  - **Indents:** Select to align to the **Left Indent** and **Right Indent** values specified in the **Spacing** section of the panel.
  - **Text** (default): Select to align to the left or right edge of the longest line of text in the paragraph. For text that is left-aligned, setting the left side to **Text** will have the same result as selecting **Column** while setting the right side to **Text** will usually result in a stroke and fill that are inset from the column's edge.

The top and bottom sides can be aligned to:

- **Ascent:** Select to align to the highest ascent of all the characters on the first (top) or last (bottom) line of text. This option is not recommended for *bottom* because the stroke and fill would be above the line of text.
- **Baseline:** Select to align to the baseline of the first (top) or last (bottom) line of text. This option is not recommended for *Top* because the stroke and fill would be below the line of text, overlapping only the descenders.
- **Cap Height** (default for Top): Select to align to the highest cap height of any character on the first (top) or last (bottom) line of text. This option is not recommended for *bottom* because the stroke and fill would be above the line of text.
- **Descent** (default for Bottom): Select to align to the lowest descent of all the characters on the first (top) or last (bottom) line of text. This option is not recommended for *top* because the stroke and fill would be below the line of text.
- **X Height** (not recommended): Select to align to the largest x height of any character on the first (top) or last (bottom) line of text.
- **Stroke:** Click the colour sample to set the colour of the border stroke and click the stroke control on its right to set its thickness, dash pattern, and other properties.
- **Fill colour:** Click the colour sample to set the colour of the fill.
- **Transparency:** Click to set the transparency of the stroke and fill.
- **Combine identical decorations:** Click to combine overlapping decorations from multiple paragraphs. The horizontal strokes will be removed and the fill extended to include the space between the paragraph.



Combine identical off



Combine identical on




# Setting default text formatting

Publisher has default values for all character and paragraph formatting. You can customize the defaults by setting all of the formatting settings to the state you would like them to be and then saving that group of settings as the new defaults. You can also revert to Publisher's original defaults at any time.




In addition to the default formatting used for new documents, Publisher also has session defaults, the formatting that is currently in use. For example, Publisher's *factory* default formatting is Arial 12 pt and if you choose Garamond 14 pt that will be the current session default. Setting the default formatting saves the current session defaults.

Setting the default formatting will save character, paragraph, and the default text styles but it will not save the text style definitions. If you set the defaults while a paragraph or character style is in use, the text style name will be saved in your defaults, but for that to be effective you would also need to save that text style as a default style for new documents. Refer to [Importing and setting default text styles](#) on page 126.

## To set the default formatting based on formatted text:

1. Using the Frame Text , Artistic Text , or Table  tool, position the text cursor in the text whose formatting you want to set as the default formatting.
2. Choose Edit > Defaults > Synchronize from Selection to set Publisher's session defaults to match the text's formatting.
3. Choose Edit > Defaults > Save to save the session defaults as Publisher's new defaults.

## To change only specific attribute(s) in the current default formatting:

1. Create a temporary new document; its settings are unimportant because it will be deleted when you're done.
2. Choose the Frame Text , Artistic Text , or Table  tool.
3. Set the attributes you wish to change.
4. Choose Edit > Defaults > Save.

## To revert to the factory default formatting:

1. Choose Edit > Defaults > Factory Reset.
2. Choose Edit > Defaults > Save.

# Default font

If you enter text in Chinese, Japanese, or Korean you should change the default font from Arial to avoid missing characters. You can use any font you want but the default fonts included with macOS and Windows are listed below. Follow the instructions above for changing the default text formatting.

Language	macOS font	Windows font
Simplified Chinese	PingFang SC	Microsoft YaHei UI
Traditional Chinese (Taiwan)	PingFang TC	Microsoft JhengHei UI
Traditional Chinese (Hong Kong and Macau)	PingFang HK	Microsoft JhengHei UI
Japanese	Hiragino Sans (sans serif) Hiragino Mincho (serif)	Yu Gothic UI
Korean	Apple SD Gothic Neo	Malgun Gothic

# Text wrap


**Tip:** Text in art text and path text objects is not affected by text wrap

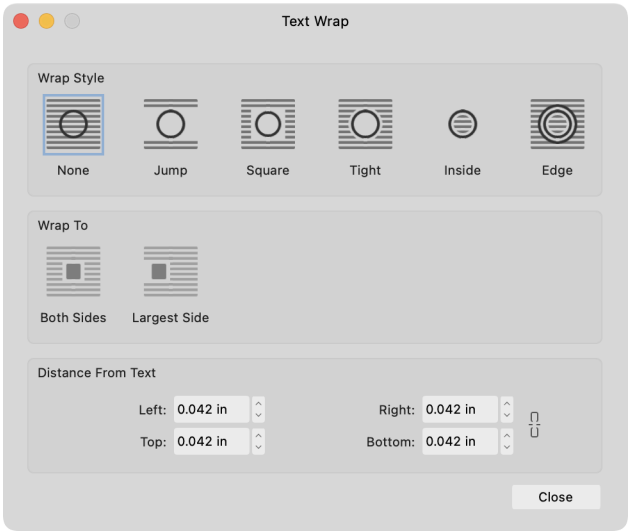
**Tip:** Unlike most applications, text wrap in Publisher also applies to text frames above the wrapped object; you must set **Ignore Text Wraps** for a text frame above a wrapped object to avoid the object impacting the frame

**Tip:** To ensure a wrapped object moves with the relevant text, pin the object and choose **Float With Text**

Publisher will flow text in text frames without regard to an overlapping object unless you specify that text should be wrapped around it. The text wrap feature creates an editable and invisible outline around which the text will wrap.

## To wrap text around an object:

1. Select one or more objects to modify.
2. Click the **Show Text Wrap Settings** icon  in the **Toolbar** or choose **Text > Text Wrap > Show Text Wrap Settings** to open the **Text Wrap** window.



3. Select a **Wrap Style**:

Wrap Style	Description
None (default)	Text will not wrap around the object
Jump	Text will flow above and below the object
Square	Text will flow on all four sides of the object's bounding box
Tight	Text will flow around the object's invisible wrap outline; the outline will match the object's shape unless you change it
Inside	Text will flow inside the object's invisible wrap outline, as well as above and below the object
Edge	Text will flow on both sides of the object's invisible wrap outline, as well as above and below the object

- For *Square* and *Tight*, select where to **Wrap To**:


Wrap To	Description
<b>Both Sides</b> (default)	Text will wrap on both the left and right sides
<b>Largest Side</b>	Text will wrap only on the wider side; if the object is positioned in the centre of the text frame, text will wrap on the left side

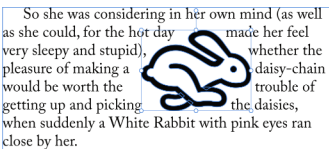
**Tip:** Publisher does not offer options to wrap toward or away from the document's spine

- Set the **Distance from Text** offsets to adjust the space between the object and text.

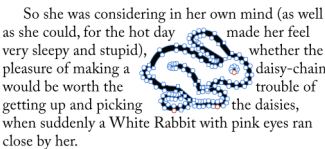
### To customize the wrap outline to wrap text around the subject of an image:

When you select the *Tight*, *Inside*, or *Edge* wrap styles, Publisher flows text around the object's invisible wrap outline rather than its bounding box. For a non-rectangular shape, the wrap outline will match the shape's path until you change it. Paths and shapes converted to paths

- Select the object to modify.
- Click the **Edit Wrap Outline** icon  in the **Toolbar** or choose **Text > Text Wrap > Edit Wrap Outline**. Publisher will display node handles along the object's path which you can drag and modify like any other path to change the shape of the wrap outline.



Text wrap set to *Tight*




Editing the wrap outline

**Tip:** Publisher does not include a feature to set the wrap outline to match the subject of a photograph—you must manually trace the subject by editing the wrap outline

**Tip:** To ensure a wrapped object moves with the relevant text, pin the object and choose **Float With Text**

- Deselect the object to end editing of the wrap outline.

### To reset the wrap outline to the object's shape or path:

- Select the object to modify.
- Click the **Reset Wrap Outline** icon  in the **Toolbar** or choose **Text > Text Wrap > Reset Wrap Outline**. Publisher will restore the original wrap outline.

### To ignore text wrap for a text frame:

- Select a text frame or position the text cursor in a frame.
- Choose **Text > Text Wraps > Ignore Text Wraps** or select **Ignore Text Wraps** in the **General** section of the **Text Frame** panel. Objects with text wrap applied will no longer impact text in the selected text frame.

**Tip:** **Ignore Text Wraps** applies to the text frame and not to a selected range of text

# Pinning (anchoring) objects

**Tip:** Pinning is referred to as anchoring in some applications

**Tip:** All of the images in this manual are pinned inline, including both the icons placed between words and the larger illustrations between paragraphs

**Definition:** Extra-columnar object refers to objects outside of the column

You can pin an object to a position in text to enable the object to move with the text to which it is pinned as you continue to edit the text.

Publisher allows you to pin objects to text so they *float* relative to a position in the text or to position objects *inline* so that they are treated similar to a character. The examples below are a group of images and text frames grouped together and pinned inline.

So she was considering in her own mind (as well as she could, for the hot day made her feel very sleepy and stupid), whether the pleasure of making a daisy-chain would be worth the trouble of getting up and picking the daisies, when suddenly a White Rabbit with pink eyes ran close by her.



**Float With Text:** Example of a columnar object with **Text Wrap** set to **Tight**



So she was considering in her own mind (as well as she could, for the hot day made her feel very sleepy and stupid), whether the pleasure of making a daisy-chain would be worth the trouble of getting up and picking the daisies, when suddenly a White Rabbit with pink eyes ran close by her.

**Float With Text:** Example of an extra-columnar object

So she was considering in her own mind (as well as she could, for the hot day made her feel very sleepy and stupid), whether the pleasure of making a daisy-chain would be worth the trouble of getting up and picking the daisies, when suddenly a White Rabbit with pink eyes ran close by her.

There was nothing so very remarkable in that; nor did Alice think it so very much out of the way to hear the Rabbit say to itself, "Oh dear! Oh dear! I shall be




**Inline In Text:** Example of a columnar object in a paragraph by itself; the multiple objects were first grouped together

There was nothing so very remarkable in that; nor did Alice think it so very much out of the way to hear the Rabbit say to itself, "Oh dear! Oh dear! I shall be late!" (when she thought it over afterwards, it occurred to her that she ought to have wondered at this, but at the time it all seemed quite natural); but when the Rabbit actually took a watch out of its waistcoat-pocket, and looked at it, and then hurried on,

**Inline In Text:** Example of a columnar object positioned between two characters; the tool icons in this manual are created in this manner

Pinned objects can be scaled, rotated, and deleted like any other object but moving them may be limited by the options you select in the Pinning panel.

## To pin an object or change its pinning type:



1. Select the object. If there are multiple text objects on the page, move it near to where it should be pinned.
2. Do one of the following:
  - Click the **Float With Text**  icon or the **Inline In Text**  icon in the **Toolbar**
  - Click the **Float With Text** or **Inline In Text** buttons in the **Pinning** panel.
  - Choose **Layer > Float With Text** or **Inline In Text**.
3. The object will be pinned to text in the nearest text object. A blue pin  icon will indicate where the object is pinned.

4. Drag the pin icon to the position in the text where you want to anchor the object. The object will remain in the same position but the horizontal and vertical offset values in the **Pinning panel** will change.
5. If necessary, set the pinning options with the **Pinning panel**. If the panel is not visible, choose **Window > Text > Pinning**.


#### **To import an image and pin it inline:**

1. Position the text cursor in text.
2. Choose **File > Place...** and select an image to import. Publisher will position it inline.
3. If necessary, set the pinning options with the **Pinning panel**. If the panel is not visible, choose **Window > Text > Pinning**.

#### **To unpin a pinned object:**

1. Select the object and do one of the following:
  - Deselect the **Float With Text**  icon or the **Inline In Text**  icon in the **Toolbar**
  - Click the **Unpin** button in the **Pinning panel**.
  - Choose **Layer > Float With Text** or **Inline In Text** to deselect it.

#### **To view pin icons:**

Blue pin  icons will indicate where objects are pinned. The pins are always visible when a pinned object is selected but hidden when special characters are not shown.

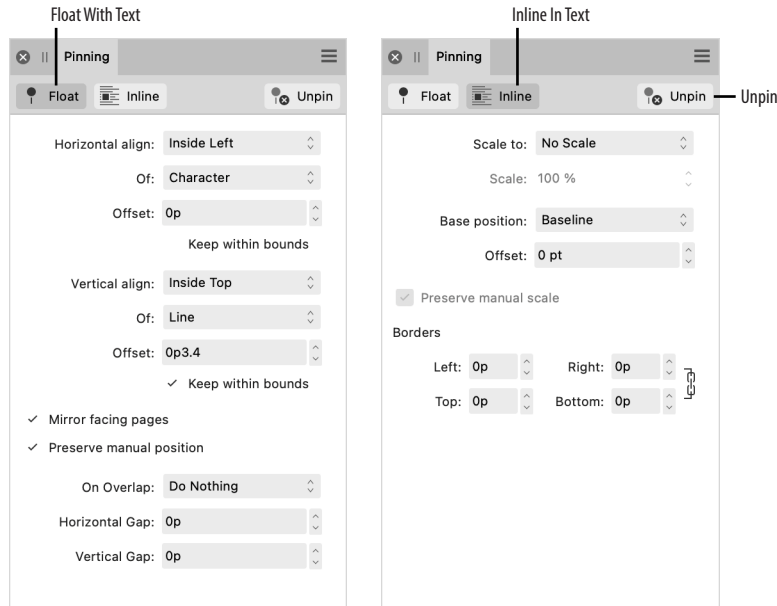
1. Choose **Text > Show Special Characters** to display pins for all pinned objects.



## Using the Pinning panel

### To display the Pinning panel:

1. Choose **Window > Text > Pinning** to display the **Pinning** panel.
2. Set the pinning options:



**Tip:** This tip could have been created as a floated object but was actually created using the **Sidenotes** feature for better automatic positioning

**Tip:** Changing the **Horizontal Align** and **Of** options will change the **Offset** to maintain the object's current horizontal position

- **Float With Text:** Click to pin the object relative to a position in the text. This option is used for extra-columnar objects often placed outside of the text frame. It can also be used for objects inside the text frame if text wrap is enabled.
- **Inline in Text:** Click to position objects inline so that they are treated similar to a character.
- **Unpin:** Click to disconnect the object from the text.
- **Horizontal align, Of, and Offset:** Select how the object should be positioned horizontally. To float an object in a consistent horizontal position outside of a text frame, set **Of** relative to the *Column*, *Frame*, *Page Margin*, or *Page Edge*.
  - **Horizontal Align:** *Outside Left*, *Inside Left* (default), *Inside Centre*, *Inside Right*, or *Outside Right*. If **Mirror Facing Pages** is selected, this option will alternate between left and right as the pin is moved between facing pages.
  - **Of (what):** *Character* (default, not recommended), *Text (Indented)*, *Column*, *Frame* (recommended), *Page Margin*, or *Page Edge*.

- **Offset:** Enter the amount the object should be offset horizontally from the selected page element.
- **Keep within bounds:** Select to prevent the floated object from being shifted to the left or right of the text column.
- **Vertical align, Of, and Offset:** Select how the object should be positioned horizontally. To float an object outside of a text frame without it appearing above or below the column, select **Keep within bounds**.
  - **Vertical Align:** *Outside Above, Inside Top* (default), *Inside Centre, Inside Bottom*, or *Outside Below*.
  - **Of (what):** *Line* (default, recommended), *Frame, Page Margin*, or *Page Edge*.
  - **Offset:** Enter the amount the object should be offset vertically from the selected page element.
  - **Keep within bounds:** Select to prevent the floated object from being shifted above or below the text column.
- **Mirror Facing Pages:** Select to automatically alternate Horizontal Align between left and right as the pin is moved between facing pages.
- **Preserve Manual Position:** Select to allow the object to be moved manually within the limits imposed by the other options. Deselect to prevent the object from being moved manually.
- **On Overlap:** Select what to do if two or more floated objects would overlap at their optimal positions. This option must be set for all of the floated objects to be of any use.
  - **Do Nothing** (default): Select to allow objects to overlap.
  - **Pack Horizontally:** Select to adjust the object's horizontal position so that more than one object can be positioned at the same vertical position. This option is not recommended for large objects because they may overlap the adjacent text even if positioned in the page margin.
  - **Stack Vertically:** Select to adjust the object's vertical position so that the objects are spaced vertically, even if they're not directly aligned to the pin position.
- **Horizontal/Vertical Gap:** Enter the gap between objects when **On Overlap** is set to *Pack Horizontally* or *Stack Vertically*.
- **Scale to:** Select to scale the inline object to match the adjacent text. Select *No Scale* (default) to set the size manually, *Point Size* to match the font size, or *Ascent, Cap Height*, or *X-Height* to match these font measurements.

**Tip:** Changing the **Vertical Align** and **Of** options will change the **Offset** to maintain the object's current vertical position

- **Scale:** When **Scale To** is set to an option other than *No Scale*, set how much the image should be scaled relative to the selected option. For example, if *Point Size* is selected for 24 pt text then setting Scale to 50% would cause the inline object to be scaled to 12 pt tall.
- **Base position:** Select to align the bottom of the object with the text's *Baseline* (default) or *Descender*.
- **Offset:** Enter the offset of the object from the **Base Position**.
- **Preserve manual scale:** Select to allow the object to be scaled manually. Scaling an object manually will adjust the **Scale** value.
- **Borders:** Enter the gap between the object and adjacent text. Enter negative values to allow adjacent text to overlap the object.

# Text styles

Text styles, also known as character and paragraph styles or style sheets, are essential for creating a consistently-formatted document. You can use text styles in documents of any length but they are critical for long publications such as books, magazines, and newspapers.

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# Using text styles

**Tip:** Don't confuse *text styles* with *object styles*, which Publisher refers to simply as *styles*

**Tip:** Publisher allows you to apply paragraph styles to characters with the **Show in both panels** option but this is not recommended for beginners

**Tip:** Publisher allows you to apply only a single character style to a range of text

**Tip:** Publisher does not offer GREP styles or nested styles

A text style is a collection of paragraph and character attributes that you can apply to text without having to apply the attributes individually to save time and ensure consistent formatting.

Publisher offers paragraph and character text styles which are applied to paragraphs and characters. A *paragraph style* is a collection of any paragraph and character attributes while a *character style* is limited to character attributes. Applying a paragraph style to one or more characters will apply it to the entire paragraph while applying a character style will apply it only to the selected characters.

You can apply only a single paragraph style to a paragraph and a single character style to a range of text. For example, you can't apply both *Heading 1* and *Bullet 1* to the same paragraph—if you want *Heading 1* to have a bullet you would need to edit the style or create a version of it with that formatting. Likewise, you can't apply both the *Emphasis* and *Highlight* character styles to the same text.

You can override a paragraph or character style with individual formatting attributes. This capability should be used sparingly because if you were to override the *Body* style with *Bold* and then later decided that *Semibold* was more appropriate, you'd have to change all instances of *Bold* manually. With a character style, you could change the style's definition to update all instances automatically. Individual attributes are best reserved for text that already has a character style applied or for rare exceptions.

Most users define a paragraph style for each type of paragraph, such as *Heading 1*, *Heading 2*, and *Body*, and apply a style to every paragraph in the main text. Most text will not have a character style applied because they are used to modify the formatting of selected words and phrases in a paragraph, such as *Emphasis* to make text stand out or *Hyperlink* to indicate that the text is a clickable link.

## Text style and formatting precedence:

If you apply conflicting formatting to the same text, Publisher uses a hierarchy to determine which formatting to display. For example, if you defined a paragraph style as *Helvetica*, a character style as *Garamond*, and then formatted the text as *Caslon*, Publisher would display the text as *Caslon* regardless of the order you applied the paragraph style, character style, and font family.

### Formatting precedence (from top to bottom)

---

Character attributes (style overrides)

---

Character style

---

Paragraph attributes (style overrides)

---

Paragraph style

---

Application defaults

---

## Text style example

**Lorem ipsum** ————— *Heading 1 paragraph style*

Dolor sit amet, consectetur adipiscing elit, sed ————— *Body paragraph style*

do eiusmod tempor.

Incididunt ut labore et **½ aliqua.** ————— *Body paragraph style + Strong Emphasis character style*

————— *Body paragraph style + Strong Emphasis character style + a character attribute (Fractions)*

## How text styles affect formatting

Text formatting is a combination of the default text attributes, the paragraph style, the character style, and any paragraph or character attributes applied to override the styles.

Text styles can be based on another text style and attributes defined in the parent style will be inherited by the child style. For example, it is common to base *Heading 2* on *Heading 1*. Publisher also offers *style groups* which aren't applied directly to text but which can be used as the base for other styles and to group styles in the **Text Styles** panel. For example, all of Publisher's default paragraph styles are based on the *Base* style group.

If you do not define an attribute such as font family or size for a text style that is based on another style or style group, it will inherit the parent's attribute. If you do not define an attribute for a text style that is not based on another style or style group, applying the text style will not change those attributes. For example:

	Based on	Font family	Weight	Size/Leading	Colour
Default attributes	n/a	Arial	–	12/Default	Black
"Base" style group	[No Style]	Garamond	–	10/12	–
"Heading 1"	Base	Myriad Pro	Bold	24/28	–
"Heading 2"	Heading 1	–	–	12/14	–

**Tip:** 12/Default means 12 pt type on Default leading while 10/12 means 10 pt type on 12 pt leading

If you applied *Heading 2* to text formatted as Arial 12/Default Green, it would become Myriad Pro Bold 12/14 Blue—the Myriad Pro Bold and Blue attributes would be inherited from *Heading 1* while 12/14 were defined in *Heading 2*.

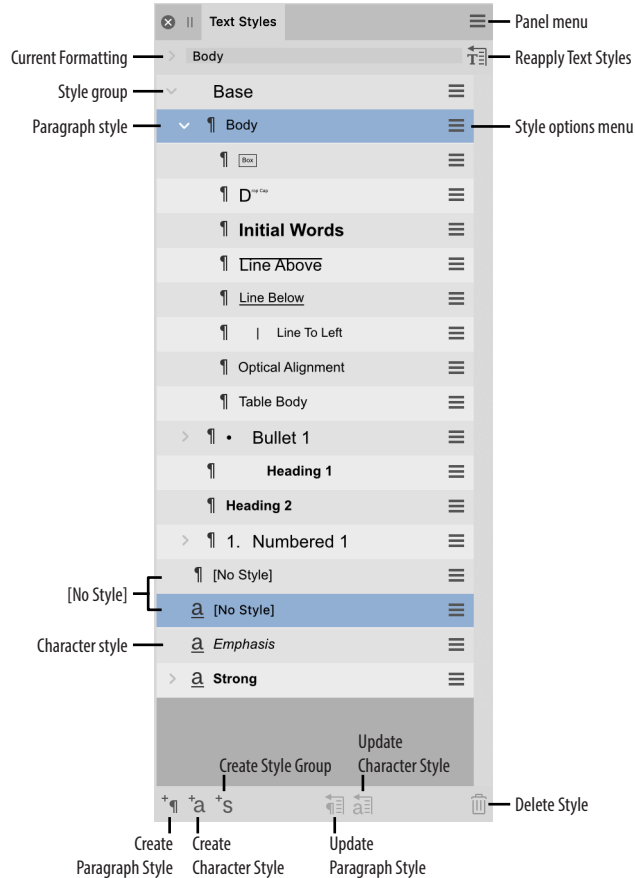
If it had not been defined as Blue, applying *Heading 2* to the green text would not change the colour was not defined in *Base*, *Heading 1*, or *Heading 2* and you had already overridden the default text attributes with Green. However, if *Base* had been defined as Black and *Heading 1* did not define the colour, applying *Heading 2* would have made the green text black because *Heading 1* and *Heading 2* would have inherited it from *Base*.



## Using the Text Styles panel



The formatting applied to text is expressed as paragraph style + character style + individual attributes. For example, *Body* + *Strong Emphasis* + *Font size: 24 pt*. The Text Styles panel shows

### To display the Text Styles panel:

1. Choose **Window > Text > Text Styles** to display the Text Styles panel.



2. Click the caret  icon to the left of the **Current Formatting** field to view overflowing information. This field lists the formatting in use at the text cursor position or for the first character in a selected range of text. The presentation format is Paragraph Style + Character Style + individual formatting attributes.
3. Choose **Show Hierarchical** from the panel menu  to toggle between listing text styles as children of the styles or groups on which they are based (default) and showing styles as a flat list (recommended). *Hierarchical* makes it easy to see at a glance how your styles are structured while a flat list makes it easier to find styles by name.

4. Choose **Show Samples** from the panel menu  to toggle between listing text styles with their formatting (default) and as plain text (recommended). *Samples* makes it easy to find certain styles such as *Drop Caps* at a glance but it gives too much weight to lesser-used such as *Initial Words* compared to *Body* and *Heading 1*.
5. Choose **Sort by Type** from the panel menu  to toggle between listing style groups first followed by paragraph and then character styles (default, recommended), and listing all styles and groups in alphabetical order regardless of type. Styles are listed alphabetically within the three types when sorted by type.
6. Click the **Style options menu** for a text style to see options specific to that style. You can also right-click a style name to see the same options.




# Applying text styles

There is more than one way to apply character styles but the most common way is to select a range of text or position the text cursor in text and then select a paragraph or character style. This option will clear existing formatting. If you want to preserve or control the existing formatting when applying text styles, refer to the next section.



## To apply a text style:

**Tip:** You don't need to select an entire paragraph to apply a paragraph style; the style will be applied even to partially selected paragraphs



**Tip:** Although text styles are normally applied with a text tool, you can apply text styles to entire text frames selected with the **Move**  tool; this can lead to unexpected results for text in linked frames because the styles will be applied only to the text that was in the frame when the style was applied, and the frame may end up containing more or less text depending on the style's formatting



1. Position the text cursor in text or select a range of text.
2. Select a style by doing one of:
  - Click the character or paragraph style name in the **Text Styles** panel.
  - Select the style from the **Character Style** or **Paragraph Style** popup menus in the **Context Toolbar**.






- Select the style from the **Character Style** popup menu in the **Character** panel or **Paragraph Style** popup menu in the **Paragraph** panel.
- Choose **Apply “Style Name” to Paragraphs** from the style options menu  to the right of the text style's name in the panel, but there's no reason to use this more cumbersome method. This option is available only for paragraph styles.
- Choose **Apply “Style Name” to Characters** from the style options menu  to the right of the text style's name in the panel. Paragraph styles can be applied to selected characters with this option—doing so applies only their character attributes.

## To apply a text style to and preserve or control existing formatting:

1. Position the text cursor in text or select a range of text.
2. Apply a paragraph style by doing one of:
  - Choose **Apply “Style Name” to Paragraphs and Clear Character Styles** from the style options menu  to the right of the text style's name in the panel to clear existing character styles from a paragraph but not individual character attributes. For example, if you applied *Body* to a paragraph with some text formatted with the *Emphasis* character style and, this option would remove *Emphasis* from the text.
  - Choose **Apply “Style Name” to Paragraphs and Preserve Character Formatting** from the style options menu  to the right of the text style's name in the panel to retain the existing character attributes as overrides. For example, if you applied *Body* to a paragraph formatted as Garamond 14, those attributes would override the Arial 12 defined for *Body*.

- Choose **Apply “Style Name” to Paragraphs and Preserve Local Formatting** from the style options menu  to the right of the text style’s name in the panel to retain all character and paragraph attributes and character styles as overrides. For example, if you applied *Body* to a paragraph formatted as Garamond 14 and with some text formatted with the *Emphasis* character style, those attributes and the *Emphasis* style would override *Body*.
3. Or apply a paragraph or character style by choosing **Apply “Style Name” to Characters and Preserve Local Formatting** from the style options menu  to the right of the text style’s name in the panel to retain all character attributes and character styles as overrides. For example, if you applied *Emphasis* to text formatted as Garamond 14, those attributes would override *Emphasis*.

### To remove a text style from text:

1. Position the text cursor in text formatted with the style.
2. To remove the style and its formatting, click *[No Style]* in the **Text Styles panel**. There are two *[No Style]* options in the panel so be sure to click the one with the pilcrow (paragraph)  icon to remove the paragraph style or the lowercase *a*  icon to remove the character style.
3. Or to remove the style and retain its formatting, choose **Detach Paragraphs from “Style Name”** or **Detach Characters from “Style Name”** from the style options menu  to the right of the text style’s name in the panel.


### To override a style:


A style override is any attribute you’ve applied to text formatted with a text style. If there are overrides applied to the selected text or text cursor position, a plus sign will be shown beside the style name in the **Current Formatting** field in the Text Styles panel as well as in the **Context Toolbar**, **Paragraph panel**, or **Character panel**.

**Tip:** The plus sign will not be shown next to the style name in the **Text Styles** panel list

1. Position the text cursor in text or select a range of text.
2. Apply any character or paragraph formatting attributes.





### To clear text style overrides:

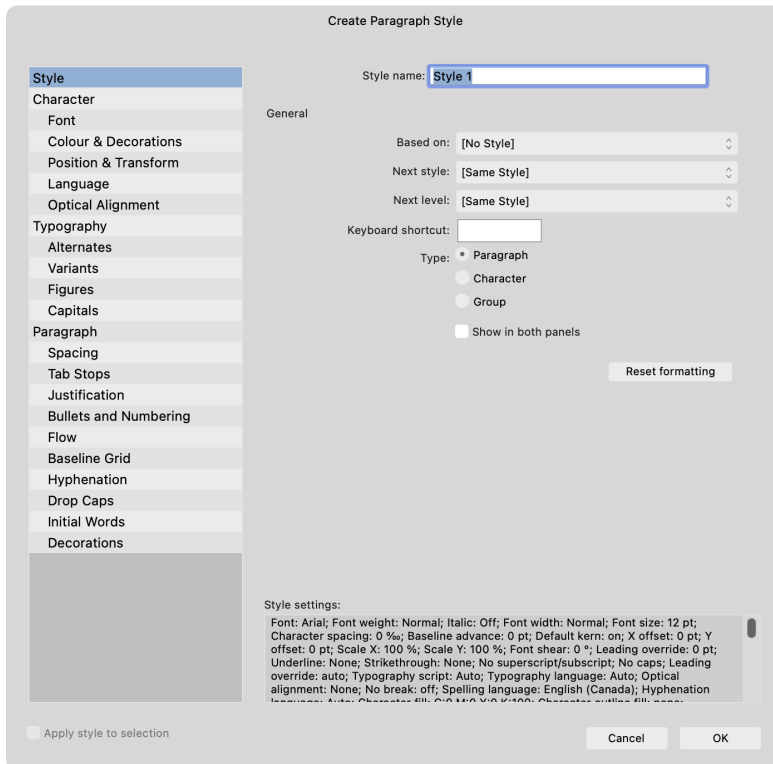
1. Position the text cursor in text or select a range of text.
2. Reapply the style by doing one of:
  - Click the style name in the **Text Styles panel**.
  - Click the **Reapply Text Styles**  icon to the right of the **Current Formatting** field at the top of the **Text Styles panel** or choose **Text > Reapply Text Styles**. These options will reapply the paragraph and character style and remove all paragraph and character overrides.

- Choose **Text > Reapply Base Styles**. This option will reapply the paragraph style but remove character styles in addition to paragraph and character overrides.
- Choose **Apply “Style Name” to Paragraphs** or **Apply “Style Name” to Characters** from the style options menu  to the right of the text style's name in the panel, but there's no reason to use this more cumbersome method.

# Creating text styles

## To manually create a new text style:

1. Optional: Position the text cursor in a text frame or other text object. The new style will be based on the text style and formatting in use. For example, if you place the cursor in text formatted as *Body* with 14 pt overriding the style, the new style will be based on *Body* and have 14 pt already defined.
2. Choose the type of style to create. You can change the type of style after starting but choosing the right type now will *pick up* the current text style and formatting in use.
  - Click the **Create Paragraph Style**  icon or choose **Text > Text Styles > Create Paragraph Style** to create a paragraph style.
  - Click the **Create Character Style**  icon or choose **Text > Text Styles > Create Character Style** to create a character style.
  - Click the **Create Style Group**  icon. There is not a matching menu command.
  - Or if you want to create a text style based on another style, choose **Create Style based on “Style Name”** from the style options menu  to the right of the text style's name in the panel.




**Tip:** Consider how the text style will be sorted alphabetically when choosing a name; for example, numbering heading styles as 1, 2, 3 makes them easier to find than naming them *Title*, *Heading*, and *Sub-heading*

**Tip:** Consider how the text style will be sorted alphabetically when choosing a name; for example, numbering heading styles as 1, 2, 3 makes them easier to find than naming them *Title*, *Heading*, and *Sub-heading*

**Tip:** You can't edit *[No Style]* with the **Text Styles** panel but you can assign a keyboard shortcut by choosing **Affinity Publisher 2 > Settings... (macOS)** or **Edit > Settings...** (Windows), clicking **Shortcuts** in the left pane, choosing **Text** from the menu list, and then selecting **Text Styles > Set No Character Style**

**Tip:** The *both panels* name refers to applying text styles via the **Character panel** and **Paragraph panel** and via the **Context Toolbar**, not via the **Text Styles panel**

3. **Style name:** Enter a unique name for the text style.
4. **Based on:** Select another text style or style group on which to base this style. The new style will inherit all of the base style's attributes. This is especially useful if there are only minimal differences between styles, such as a heading that is smaller than the heading on which it is based. Select *[No Style]* if you don't want to base this style on another.
5. **Next style:** Select another text style for the paragraph following one formatted with this text style. For example, setting **Next style** to *Body* for *Heading 1* would automatically set *Body* for the next paragraph when pressing **Return** in a *Heading 1* paragraph. Select *[Same Style]* if you don't want the text style to change when you press **Return**; you would use this option for body, numbered, and bulleted styles
6. **Next level:** Select another style for the next lower text style in a hierarchy of styles. For example, you would set **Next level** to *Heading 2* for *Heading 1*, and to *Heading 3* for *Heading 2*. This feature allows you to press **Tab** or **Shift + Tab** at the start of a paragraph to switch to the next lower or higher level of the style hierarchy. For example, pressing **Tab** at the start of a *Heading 1* paragraph would switch automatically to *Heading 2* instead of entering a tab character.
7. **Keyboard shortcut:** Assign a custom keyboard shortcut for commonly-used text styles by clicking in the text field and pressing the shortcut combination you want to use. If that shortcut is already in use a warning  icon will appear. Mouse over that triangle to find out which shortcut is in conflict.

If you assign a keyboard shortcut to a character style and want to be able to turn it off (set it back to *[No Style]*) *turn it off* with a shortcut, too, you must assign a shortcut to *[No Style]* because shortcuts can't be used as toggles.

The keyboard shortcut will be shown in the Text Styles panel as a reminder.

 Emphasis  Shortcut is set to **Shift + ⌘ + B**

8. **Type:** Choose between *Paragraph*, *Character*, and *Group* style types. Regardless of which type of style you started to create, you can change this setting to create a different type of style. The title of the window will not update to reflect the change in the type of text style.

A style group has all of the same options as a paragraph style.

9. **Show in both panels:** Select this option if you want to be able to apply the character attributes of a paragraph style as a character override to text set in a different paragraph style, or to apply a character style as a paragraph style. For example, you might choose this option if you wanted to be able to apply the font family, weight, and size attributes of *Heading 2* to text set as *Body*.

In the above example both *Body* and *Heading 2* would be listed in the **Text Styles panel** as the selected paragraph style, but *Body* would be applied to the paragraph and *Heading 2* to just a range of characters. Look at the **Context Toolbar** or **Character** and **Paragraph** panels for clarity.

- 10. **Reset formatting:** Click to remove all attributes defined for the text style.
- 11. **Style settings:** This field displays a summary of the text style definition.
- 12. **Apply style to selection:** Select to apply the new text style to the selected text or text cursor position when you click **OK**; deselect it to create the style without applying it to the text. This option is not applicable to style groups.
- 13. **Category:** Click each category of character or paragraph attributes in the left pane and define the values you wish to include in the text style. The options are the same as those in the **Character** and **Paragraph** panels.

**Tip:** **Reset formatting** does not change the options in the **Style** category (Style name, Based on, Next style, Next level, Keyboard shortcut, Type, and Show in both panels)

**Character**

Font	Set the font family, traits (font style) weight, width, and size
Colour & Decorations	Set the fill and highlight colours, underline, etc.
Position & Transform	Set the kerning, tracking, baseline offset, leading override, superscript, etc.
Language	Set the spelling and hyphenation language
Optical Alignment	Set how punctuation and certain characters are positioned relative to the frame edges
Typography	Specify ligatures, alternates, variants, figures, and capitals

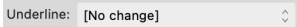
**Tip:** Weight and Width will be disabled if you select a font style because it combines the weight, width, and slope (italic) traits

**Paragraph**

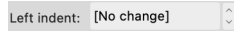
Spacing	Set the alignment, indents, leading, space before, and after
Tab Stops	Set tab stops and leaders
Justification	Set minimum, desired, and maximum word and letter spacing
Bullets & Numbering	Set bulleted and numbered list options
Flow	Set start, keep together, widow, and orphan options
Baseline Grid	Set to override a baseline grid
Hyphenation	Set hyphenation rules
Drop Caps	Set to create automatic drop caps
Initial Words	Set formatting for the first words in a paragraph
Decorations	Set paragraph borders and fill

If you don't want the style to change the existing formatting for an attribute, leave the option set to *[No change]*. If you edit a value and want to restore it to *[No change]*, the way you do that depends on the type of control:

- **Popup menu:** Select *[No change]* from the list.



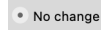
- **Text field:** Delete the value to clear the field and then press **Tab**.



- **Checkbox:** Click the checkbox until the mixed-state value appears (a horizontal line instead of the usual checked or unchecked appearance).



- **Radio button:** Click the No Change radio button option.




- **Colour sample:** Deselect the neighbouring checkbox; the colour will be ignored if the checkbox is deselected.








**Tip:** A white colour sample with a red line through it means no colour

14. Click **OK** to create the style.

### To duplicate a text style to create a new text style:

1. Choose **Duplicate “Style Name”** from the style options menu  to the right of the text style's name in the panel.
2. The **Edit Text Style** window will be displayed with the same options as creating or editing a text style. Name the new style and change its formatting attributes as required. Publisher will show the effect of the changes live as you modify the attributes in the window.
3. Click **OK** to create the style.

### To delete text style(s):

1. To delete a single text style, choose **Delete “Style Name”** from the style options menu  to the right of the text style's name in the panel.  
  
Or select the text style name in the panel list and then click the **Delete Style**  icon or choose **Text > Text Styles > Delete Paragraph Style** or **Delete Character Style**. Note that selecting a style will apply it to the selected text or text cursor position so this method is often less convenient.
2. To delete all text styles, choose **Detach and Delete All Styles** from the panel menu  or choose **Text > Text Styles > Detach and Delete All Styles**. No formatting will be lost as the formatting attributes will be *detached* from the text styles and applied directly to any styled text. There is no confirmation for this command but you can undo it.
3. To delete only the text styles that are not in use, choose **Delete Unused Styles** from the panel menu  or choose **Text > Text Styles > Delete Unused Styles**. There is no confirmation for this command but you can undo it.
4. To delete a style group or a text style, as well as all the styles based on it, choose **Delete “Style Name” Group** from the panel menu . There is no confirmation for this command but you can undo it.




# Changing text styles

You can change text styles at any time using the same options as when you created the style.

One of the first things you might do after creating a new document with the default text styles is edit the *Base* style group. With the default text styles, *Body*, *Heading 1*, *Bullet 1*, and *Numbered 1* are all based on the *Base* style group so instead of changing the font family for each from Arial to your preferred font you could edit *Base* and the styles would be updated automatically.

You can even change a paragraph style to a character style or vice versa. You can even change a paragraph or character style to a style group but these types of changes can have confusing consequences so it's best to avoid changing a style's type. For example, if you changed the *Body* style to a style group then all text formatted as that style would appear to be formatted with a style group. You would also no longer be able to apply the style directly via the **Text Styles** panel without using the group's style options menu.

## To update a text style to match the current formatting:

1. Format text with the text style and then adjust its formatting attributes as desired using the **Paragraph** and **Character** panels. Position the text cursor anywhere in the formatted text. If you leave a range of text selected, Publisher will use the formatting at the start of the text range.
2. Update the paragraph or character style by doing one of:
  - Click the **Update Paragraph Style**  icon or the **Update Character Style**  icon at the bottom of the **Text Styles** panel or in the **Context Toolbar**.
  - Choose **Update "Style Name"** from the style options menu  to the right of the text style's name in the panel.
  - Choose **Text > Text Styles > Update Paragraph Style** or **Update Character Style**.

## To manually change a text style's definition:

1. Choose **Edit "Style Name"** from the style options menu  to the right of the text style's name in the panel.

Or double-click the style name in the **Text Styles** panel. Note that double-clicking a style will apply it to the selected text or text cursor position so this method is not recommended unless the cursor is in text of the text style you want to edit.


2. The **Edit Text Style** window will be displayed with the same options as creating or editing a text style. Name the new style and change its formatting attributes as required. Publisher will show the effect of the changes live as you modify the attributes in the window.
3. Click **OK** to create the style.



# Importing and setting default text styles

Newly-created documents include Publisher's default text styles. You can save your current collection of text styles for use in future documents or import text styles from one document into another.

## To save the current text styles as the default:

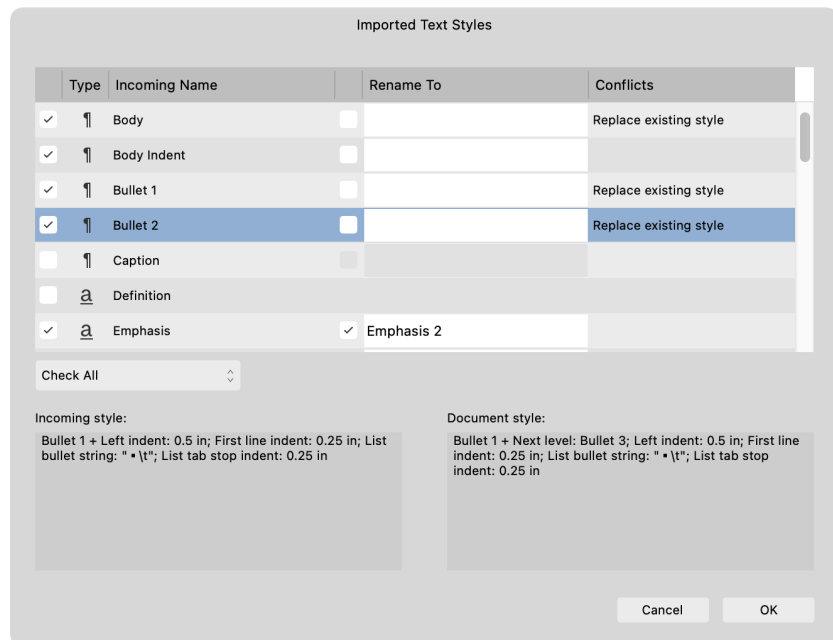
1. Choose **Save Styles as Default** from the panel menu  or choose **Text > Text Styles > Save Styles as Default**.

## To revert to the factory default text styles:

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Miscellaneous** in the left pane.
2. Click **Reset Text Styles**.
3. Click **Close**.

## To import text styles from another document:

1. Choose **Import Styles...** from the panel menu  and then select the other document from the **Open** window.





2. Select which text styles to import by selecting or deselecting the checkboxes to the left of their names. Publisher will display the formatting attributes of the selected text style and for a style in the document of the same name at the bottom of the window.

Choose **Check All** from the popup menu below to select or deselect all text styles, or choose **Check Paragraphs** or **Check Characters** to select or deselect all paragraph or character styles.

3. Publisher will indicate which text styles will replace and overwrite an existing style. To import a style but not replace an existing one with the same name, enter a new name for the style in the text field to the right of the style name.
4. Click **OK** to import the selected text styles into the document.

#### **To export text styles to share them with another user:**

Publisher doesn't provide a way to export text styles because you can import styles from another document, but if it's easy to share text styles without sharing the contents of your document.

1. Create a new document.
2. Choose **Detach and Delete All Styles** from the panel menu  or choose **Text > Text Styles > Detach and Delete All Styles** to delete all text styles from the document.
3. Choose **Import Styles...** from the panel menu  and then from the **Open** window select a document that contains the text styles you want to share.
4. Click **OK** in the Imported Text Styles window. The blank document now contains just the text styles you want to share.
5. Save the document and send it to the other user.



There are many different ways to create a book with Affinity Publisher, including creating it as individual chapter documents combined together as a Book file. The best approach to use for your book project will depend on the type of book you plan to publish, its design, and your preferred workflow.

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# Parts of a book

Books are typically divided into front matter, body pages, and end matter, also known as back matter. Below is a list of the most common parts of a book but not all books will have every part or have them in the same order:

Front Matter	Body	End Matter
Accolades	Prologue or Introduction	Appendices
Half title	Chapters	Endnotes
Frontispiece	Epilogue	Bibliography
Title page	Afterword/Conclusion	Glossary
Copyright/Colophon	Postscript	Index
Also by the author		Acknowledgements
Dedication		Author bio
Table of contents		Accolades
Epigraph		Colophon
List of figures		
Preface		
Foreword		

## Static layouts vs. automatic text flow

Many books have text that flows automatically from page to page like a word processor. The text and images pinned into it will flow as you add and edit text as long as the text frames are linked together. To change the order of pages you would cut and paste the text from one page to another, just as you would with a word processor.

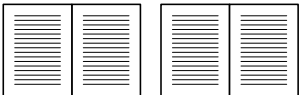
**Definition:** The term **story** refers to all the text in a text object or in a series of linked text frames



**Automatic Text Flow:** text frames are linked from page to page into one story

**Tip:** Adding, moving, or deleting a single page in a facing-pages document can lead to confusing results; refer to [Working with spreads](#) on page 13

Other books use a static layout with text that does not flow automatically from page to page. To move a page to another position in the document you would change the order of the pages. These books are sometimes designed around complex illustrations with text edited to fit the available space.



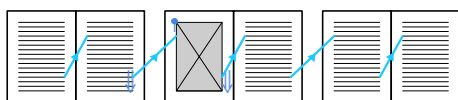
**Static layout:** text frames are not linked, each frame contains its own story

A novel or textbook will almost always use automatic text flow while a photo book or children's story book will almost always use a static layout. This manual uses automatic text flow with inline images that are pinned to the text, as well as page breaks to interrupt the flow where required.

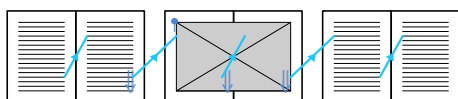
Some books can be laid out either way and the choice is a personal preference. For example, a cookbook could be created as a static layout if you want to position each page element manually and be able to change the order of recipes easily. But you could also use automatic text flow and pin each recipe's sidebars and photos.

## Using static layouts with automatic text flow

If a chapter's body text skips a page or spread due to the use of a full-page or full-spread photo or illustration, you can insert a page break before the photo or illustration and pin the full-page image followed by another break. Be careful using this approach with full-spread images because if you add or remove text before the image it could shift to the right side and not fit onto the page. You could avoid this by inserting an even page break before the image but that could lead to a preceding blank page.

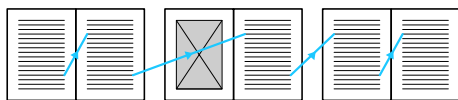


**Automatic text flow with a pinned image:** a page break is inserted before the pinned full-page image, followed by another page break

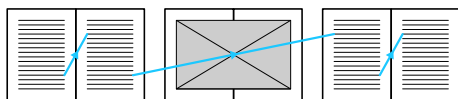


**Automatic text flow with a pinned spread:** a page break is inserted before the pinned full-spread image, followed by two page breaks

Alternatively, you can also place the images on static pages and link the previous and following text frames to skip over them. If you add or remove a substantial amount of text before the static page or spread you may need to rearrange the pages because the static page or spread may become distant from the text that describes it.



**Automatic text flow with a static page:** the story is linked from the frame before the static page to the frame after it, jumping over the image



**Automatic text flow with a static spread:** the story is linked from the frame before the static spread to the frame after it, jumping over the image

**Tip:** You can pin images with the **Pinning panel** so they move with the associated text; refer to

**Tip:** Refer to [Interrupting text flow](#) on page 48 for information on page breaks

**Definition:** A *spread* is a pair of left and right pages in a facing-pages document

# Sections and stories in books

**Tip:** Use the Section Manager to create sections; refer to [Sections](#) on page 22 for more information

**Definition:** *Front Matter* refers to the pages before the body of a book, including the title page, copy-right page, table of contents, and preface

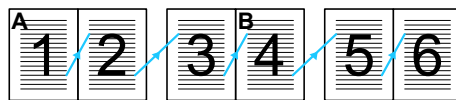
Publisher uses the term **section** to refer to a range of pages but sections don't have to correspond to your book's chapters. You might use sections even if your book doesn't have chapters because most books have *front matter*, pages before the first body page. Using a section for your front matter and one or more sections for the body of the book will allow you to restart page numbering at the first body page and to change the page numbering style.

A book with a static layout might not use linked frames so each frame would contain a separate story, or it might have frames on the left and right side of each spread that are linked together as pairs, but not linked to frames on other spreads.

For a book with automatic text flow there would be many pages of linked frames containing one story. You must choose whether to use a single story for all of the text in the body of your book or whether to use a separate story for each chapter. And you must also choose whether to create a section for each chapter.

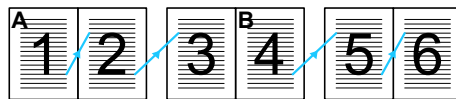
## Single vs. multiple stories

Use a single story for simplicity. With a single story, all of the text in the body of the book in a single series of linked frames. You can start a new chapter by inserting a page break. You can move a chapter by cutting and pasting all of its text as you would in a word processor. You may need to add or remove pages at the end of the book as you add and remove text.



**Single story:** the last text frame of chapter A on page 3 is linked to the first text frame of chapter B on page 4 so there is only a single story

Use multiple stories in a single document, one for each chapter, to simplify reordering chapters, add endnotes at the end of each chapter, and improve performance. You can move a chapter by dragging all of its pages to a new position with the **Pages panel**. You may need to add or remove pages at the end of each chapter as you add and remove text.



**Multiple stories:** the text frames in chapter A are linked from pages 1–3 and the frames in chapter B are linked from 4–6 but there is no link between the chapters

Using multiple stories reduces the load on your computer because Publisher only has to reflow a single chapter instead of the entire book when you add or delete a line of text. Although modern computer hardware makes this less of a concern, performance can still be an important factor in a document with many inline images.

Regardless of which approach you select, adding pages and linking their text frames is easy with **AutoFlow**. Refer to [AutoFlow text](#) on page 47 for more information.

## Single vs. multiple sections

Use a separate section for each chapter if you want chapter-specific page numbering or to easily change the chapter name shown in the header or footer. But if your chapters require master page objects unique to each chapter, such as tabs that bleed off the right edge of pages, sections will be of little value because master pages must be applied manually to pages. You could apply a master page manually to all of the pages in a section but if you do that you might as well place the chapter name on the master page.

If you use separate sections for each chapter then you should use a separate story for each chapter, too. Unlike word processors such as Microsoft® Word which allow you to insert a section break at any point in your text, sections in Publisher are a grouping of pages. If you had a section starting on page 50 but the chapter heading on that page re-flowed to page 51 when you added more text, your chapter headings would be off by one page. If you used separate stories, the story for the previous chapter would be overset (overflowing) when you added more text. Publisher will warn of this you through Preflight so that you could add another page with AutoFlow.

**Tip:** Use the **Fields panel** to insert a Section Name into a header or footer



# Books: splitting a book into chapter documents

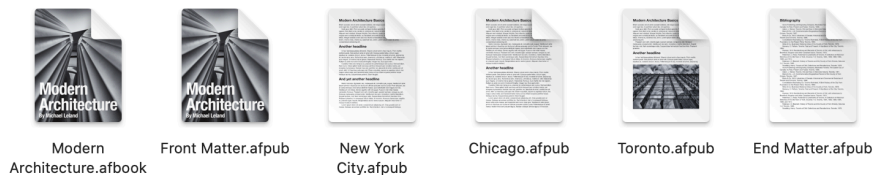
**Tip:** Books is capitalized in this manual when referring to the Books feature of Affinity Publisher, and uncapitalized when referring to the book you are creating

**Tip:** You can use the Books feature even if your project doesn't have chapters because you can divide your Book into whatever groups of pages you want

**Tip:** Do not add a chapter document to more than one Book because it will impact synchronization

**Tip:** Do not duplicate a Book and its chapters, other than for archiving, because Books use absolute links to their chapters so opening the duplicate Book will modify the original chapters

You can create a book as a single file or as separate files for each chapter joined together into a book. Many people used to create separate files for chapters due to limited computer hardware but today's computers are more than sufficient to create a long, complex document with hundreds of images without needing to use separate files. But if you do need or prefer to work this way, the **Books panel** allows you to create a **Publisher Book** comprised of multiple chapter documents. A chapter document is just a regular Publisher document that has been added to a Publisher Book. Working on a single chapter at once lowers the demands on your system's memory and it's much easier to reorder chapters with the Books panel.



A Publisher Book is stored as a .afbook file which combines the pages of separate document .afpub files together when you export or print the Book

The disadvantage of using the Books feature is increased complexity and the inability to package a Book for publication—at this time the **Save As Package** command works only with individual documents. Publisher simplifies most of the complexity for you by synchronizing text styles, page numbers, and more across the Book but you may need to add or remove pages to the end of chapters to achieve the layout you desire.

## Undo and Books

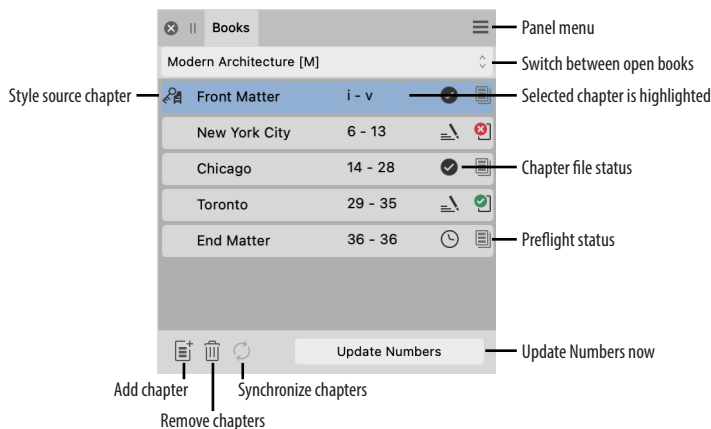
When you undo an action in Publisher it is added to the undo history which you can view with the **History panel**. Each document has its own undo history so the list of actions in the History panel will change when you switch documents.

A Book does not have its own undo history so the actions you perform on a book cannot be undone.

# Using the Books panel

## To display the Books panel:

1. Choose **Window > Books** to display the **Books** panel.



The first icon to the right of each chapter's name and page number indicates its chapter file status:

### Chapter file

#### Status Description

	The chapter is open for editing
	The chapter is closed and there are no issues
	The chapter is closed and was edited while the Book was closed—open it to update the Book
	The chapter could not be found and you opted not to locate it when opening the Book—close and reopen the Book to resolve this the Book
	The chapter is locked because it's in use by another user or application

The second icon to the right of each chapter's name and page number indicates its Preflight status:

### Preflight

#### Status Description

	Preflight not completed because <b>Check</b> is set to <i>Never</i>
	All Preflight tests passed
	One or more Preflight warnings
	One or more Preflight errors and possibly one or more warnings

**Definition:** *Spread* refers to a pair of left and right pages in a facing-pages document

## Managing stray pages

Most books use facing pages to mirror headers and footers on the left and right side or to allow for different inner and outer margins, so pages are paired into spreads. The term **stray page** refers to a single page at the start or end of a chapter document that isn't part of a spread in that chapter. Stray pages from adjoining chapter documents need to be joined together into a spread and sometimes a blank page needs to be added to maintain the proper order of pages.

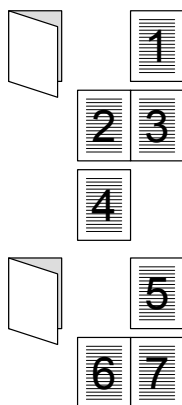
Publisher's Books feature does not support books with chapters that can start on the left side of a spread. Novels, biographies, and some other text-focused books often start chapters on either side to avoid blank pages. If you were to use the Books feature for this type of book and chapter 1 ended on a right page but you created the chapter 2 document with its first page on the right, as a new document is normally created, Publisher would have to change the side for every page in chapter 2. This would result in unsatisfactory results so it's best to avoid this issue.

If your chapters always start on the right side of a spread then you can use the Books feature but you will have to add and remove blank pages manually if you don't want two successive blank pages.

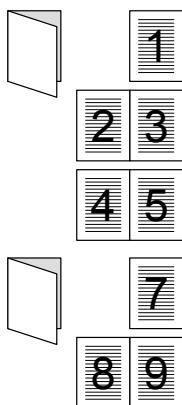
The Books panel's menu offers two **Stray Pages** commands:

- **Merge Where Possible:** If a chapter ends on a left page and the following chapter starts on a right page this command will merge those two stray pages into a single spread when printing or exporting the Book.
- **Pad:** If a chapter ends on a right page and the following chapter starts on a right page this command will add a blank page to maintain the facing pages.

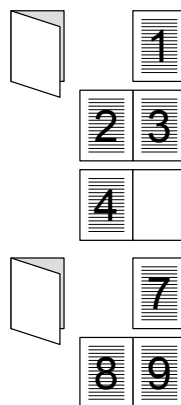
By default, **Merge Where Possible** is enabled and **Pad** is disabled but this is not an optimal combination. Leaving Pad off will result in a single-page spread when a chapter document ends with a right page which must be avoided.



**Chapter ends on left:** The Merge Where Possible command can merge pages 4 and 5 into a single spread



**Chapter ends on right:** The Pad command can insert a blank page before page 7 to maintain facing pages



**Chapter ends on a blank right page:** The Pad command will insert a blank page before page 7 but Merge Where Possible won't merge the two blank pages

When **Pad** is used, as is shown in the middle and right scenarios above, a completely blank page will be added; you cannot choose a master page to be applied to it. If you want your blank pages to display a chapter name or page number then you must add your own blank pages.

The right scenario above shows how a chapter document ending with a blank right page can result in two successive blank pages. The blank page at the end of the first chapter document would not be completely blank—it would typically be based on a master that displays the page number and perhaps the chapter name, but from a book design perspective it's effectively blank. Because you would have **Pad** enabled to avoid single-page spreads, Publisher will add a blank page before page 7. **Merge Where Possible** merges only stray pages as shown in the left scenario and **Pad** will have created two spreads, albeit ones with two blank pages.


If you want to avoid two successive blank pages you must first delete the blank right pages from the end of your chapter documents. If you later need another page in that chapter, you must manually add a new page—do not use **AutoFlow** because it always inserts an even number of pages, and in this case that would leave you with a blank left page.

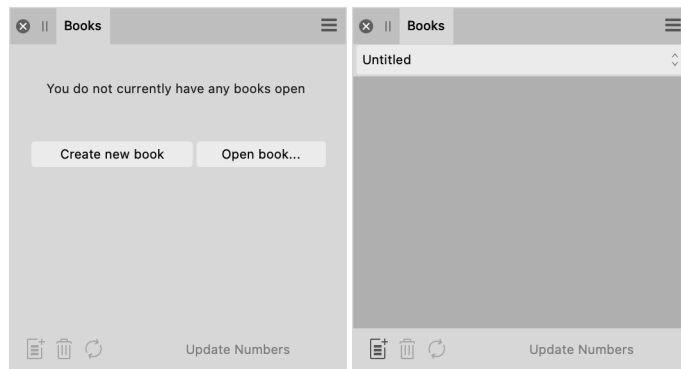
If you don't want to deal with the complexity of adding and removing pages in your chapter documents then you may wish to refrain from using the **Books** feature.



## Creating a Book

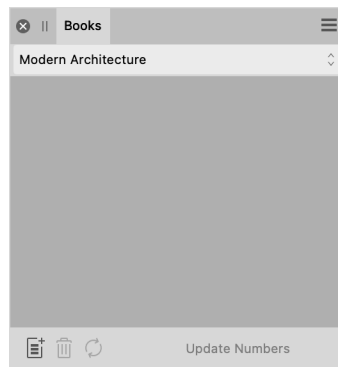
Create at least one of the chapter documents before you create a Publisher Book. Although you can update the design and formatting of chapters later, it's a best practice to finalize the document size, margins, colour profile, master pages, notes formatting, and other basics before creating additional chapter documents. Some information can be synced across chapters, but other options such as endnote placement would have to be changed manually in each chapter.


### To create a Book:

1. Choose **File > New Book**. The **Books** panel will be displayed if it is not already shown. You can also open the Books panel with **Window > Books** and then click its **Create new book** button or choose **New Book** from the panel menu .





2. Choose **Stray Pages > Pad** from the panel menu  to avoid single-page spreads.
3. Choose **Save Book** from the panel menu  and give your project a name.

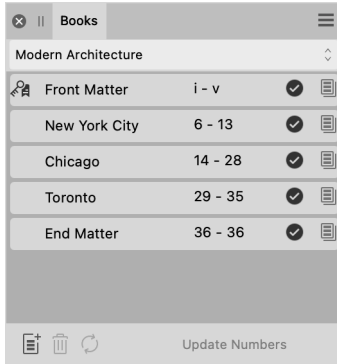


**Tip:** You can only save a Book from the panel menu ; it doesn't allow for the use of keyboard shortcuts like the File menu

## To add chapters to a Book:




1. Click the **Add Chapter** icon  or choose **Add Chapter...** from the panel menu .
2. Select one or more Affinity Publisher document files to add.

**Tip:** It is a best practice to add separate chapters for Front Matter and End Matter




3. If your chapters aren't in the right order, you can drag them to the correct order in the panel.

## To remove chapters from a Book:

1. Select the chapter name(s) in the **Books panel**; press **Shift** and click to select a range of chapters, or press **⌘** (macOS) or **Ctrl** (Windows) and click to select multiple discontinuous chapters.
2. Click the **Remove Chapter**  icon or choose **Remove Chapter** from the panel menu .
3. Choose **Replace Chapter** from the panel menu  to remove one selected chapter document and replace it with another of your choosing in a single step.

## To open a Book:



You can open more than one book simultaneously. Only one Book is active at once, similar to how only one document is active at once.

1. You can open a Book with the same **File > Open...** command used to open a document. The **Books panel** will be displayed if it is not already shown. When no Book is open, the **Books panel** will display an **Open book...** button and you can also open a Book by choosing **Open Book...** from the panel menu .
2. To change which Book is active, click the current Book's name at the top of the Books panel to choose from the list of open Books.


**Tip:** Recently-used books can be opened by choosing them from the **File > Open Recent** menu or the **Recent** pane of the **New Document** window

**Tip:** Saving a Book will not save its chapter documents

### To save a Book:

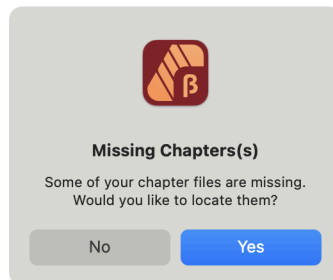
1. Choose **Save Open Chapters** from the **Books** panel menu  to save any modified (un-saved) chapters you have open, or choose **File > Save** for each of them.
2. Choose **Save Book** or **Save Book As...** from the **Books** panel menu . These commands are not in the **File** menu and a keyboard shortcut cannot be assigned; however, if you quit Publisher with a modified Book open then Publisher will prompt you to save it.


### To close a Book:

1. To close the active Book, choose **Close** from the **Books** panel menu . You can close only one Book at a time but if you quit Publisher with open Book(s) they will be closed automatically and you will be prompted to save modified Book(s).

### To duplicate a Book:

1. Using macOS Finder or Windows File Explorer, duplicate the folder containing the Book and its chapter documents; for example, name this folder *Project-Copy*.
2. Temporarily rename the original folder; for example, rename it to *Project-Temp*.
3. Open the duplicate Book's .afbook file in Publisher.
4. Publisher won't be able to locate its chapter documents because a Book uses absolute paths to its chapters and you renamed the original folder. Click **Yes** and in the file window that appears select the chapter document in the *Project-Copy* folder. Ensure you don't select the same chapter in the original folder.



5. Publisher will relink all the remaining chapter documents if they're in the same folder. Save the Book now by choosing **Save Book** from the **Books** panel menu .
6. Using macOS Finder or Windows File Explorer, rename the original folder back to its original name.

## Syncing styles, formats, and masters in a Book

Each chapter document has its own master pages, text styles, table formats, and swatches but Publisher can sync this information across the Book. By default, the first chapter you add is designated the Book's **Style Source Chapter**, the master copy for this information.

You can synchronize formatting to other chapters even while those chapters are closed. Publisher will open the chapter documents in the background, update them, save changes, and close them. Note that chapters that are currently open will be updated but changes will not be saved; you should save those chapters when you're done with your other edits.

### Syncing text styles and table formats

If a text style or format one with the same name doesn't exist in the target chapter, it will be copied from the Style Source Chapter. You can add a new text style or table format in the Style Source Chapter and sync it to all other chapters.

If a text style or format with the same name exists in the target chapter, it will be updated to have the same attributes. You can update a text style or table format in the Style Source Chapter and sync the change to all other chapters.

If you rename a text style or table format in the Style Source Chapter, syncing will create a new one in the target chapters because the names won't match. Text formatted with that text style won't be formatted with the renamed style. For example, consider the case of renaming the *Body* style in the Style Source Chapter to *Body Text* and then syncing to another chapter. The text formatted as *Body* in the target chapter will still be formatted as *Body* and a new *Body Text* style will be created. You would need to use **Find and Replace** to search for all instances of *Body* to replace format them as *Body Text*.

### Syncing swatches

Syncing swatches is identical to syncing text styles and table formats with the addition of syncing document palette categories.

### Syncing master pages

Syncing master pages is more complex. If a master page with the same name doesn't exist in the target chapter, it will be copied from the Style Source Chapter.

If a master page with the same name exists in the target chapter but anything about that master is different, it will not be updated and instead a new master page will be created and copied from the Style Source Chapter. Making any change to a master page in the Style Source Chapter can result in duplicate master pages in the target chapters.

If you rename a master page in the Style Source Chapter, syncing will create a new master page in the target chapters because the names don't match.

If you must adjust your master pages—for example, adjusting page size, margins,

**Tip:** Note that custom variables are not synced across chapters and are available only in the chapter document in which they were created


**Tip:** It is important to finalize your text style names before creating additional chapters or your chapters will end up with multiple copies of your styles with different names

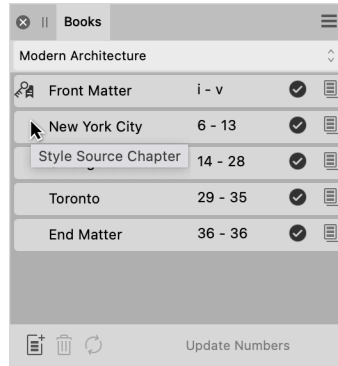
**Tip:** It is important to finalize your master pages before creating additional chapters or your chapters will have multiple copies of your master pages




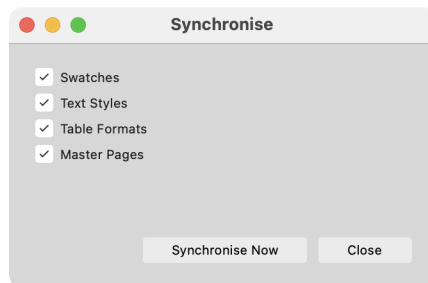
or bleed, or adding an object—it is best to make the changes manually to each chapter and disable the synchronization of master pages in **Synchronize Settings**.



### To synchronize chapter documents:

1. If necessary, select a chapter in the **Books panel** and choose **Set Style Source Chapter** from the panel menu . Or click in the blank *well* area to the left of the chapter name in the Books panel—a tooltip will be displayed when the pointer is over the well. This action cannot be undone.



2. Select the chapters you want synchronized. To synchronize only specific chapters, select just those chapters in the panel list. To synchronize all chapters, deselect any selected chapters by clicking in a blank area of the chapter list or by holding **⌘** (macOS) or **Ctrl** (Windows) while clicking the selected chapter.
3. If desired, you can customize which information is synced by choosing **Synchronize Settings** from the panel menu . The settings you select will be saved with the Book.



4. Choose **Synchronize** from the panel menu , **Synchronize Now** from this window, or click the **Synchronize Chapters**  icon to sync the information from the Style Source Chapter to the selected chapters.

**Tip:** Be careful when clicking near the **Style Source Chapter well** because there is no visual cue that clicking in the well will do anything, nor is there a confirmation alert to avoid accidental changes

**Tip:** As with other Book actions, synchronizing chapters cannot be undone

## Number pages, notes, and lists in a Book

Publisher can number pages, notes, and global list items automatically across chapters even while chapters are closed. Publisher will open the chapter documents in the background, update them, save changes, and close them. Note that documents that are currently open will be updated but changes to them will not be saved.

**Page numbers** are updated automatically and there is no need to manually update them unless you turn off automatic numbering. Note and list item numbers are updated only when you choose to update them. All numbers can be updated automatically when you print or export a Book.


**Notes** will be numbered across chapters only if **Restart Every > Book** is chosen from the **Notes panel** for all of the chapter documents.

**List items** will be numbered across chapters only if the lists at the start and end of each chapter are the same level and if the following options are chosen from the **Bullet and Numbering** section of the **Paragraph panel**:

- **Restart numbering > Manual Only**
- **Restart Numbering Now** set to **Off**
- **Global** set to **On**.



### To update page numbers automatically across chapters:

If you turn off automatic page numbering Publisher will change the **Start page number** at setting in the **Section Manager** for the first section of each chapter document to a fixed number.


1. Choose **Update Numbers > Update Page Numbers Automatically** from the **Books panel** menu  to enable or disable automatic page numbering. This is on by default.

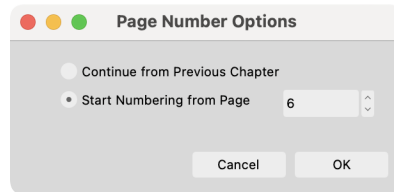
### To modify the page numbering for a chapter:

Many books have front matter with pages numbered in Roman numerals (i, ii, iii, iv...) followed by body pages numbered in Arabic numerals (1, 2, 3, 4...) To create this common numbering approach in a Publisher Book:

1. Ensure **Update Numbers > Update Page Numbers Automatically** is selected from the **Books panel** menu .
2. Open the front matter chapter and choose **Window > Section Manager** or click the **Section Manager**  icon in the **Pages panel**.
3. Set the **Number style** to **i, ii, iii, iv...**
4. If there are no other sections in this chapter, open the next chapter. Otherwise, select the next section in this chapter.

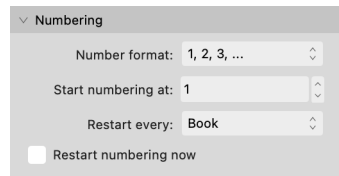
**Tip:** With a Book you cannot select **Continue page numbering** for the first section of a chapter document in the **Section Manager** because this feature is controlled at the Book level


5. Set the **Number style** to 1, 2, 3, 4... in the Section Manager. The remaining chapters will continue this numbering style automatically unless you wish to change it again.
6. To restart page numbering at the start of a chapter, select that chapter in the Books pane and choose **Page Number Options** from the panel menu .





### To number notes across chapters:

1. Choose **Numbering > Restart Every > Book** from the Notes panel.




2. Create or edit an endnote and then choose **Update Document Settings from Selected Endnotes** from the panel menu . If you've already created multiple chapter documents you will need to repeat these steps for each chapter.

### To update page, note, and list numbers before printing or exporting:

1. Choose **Update Numbers > Update Numbers Before Output** from the panel menu . This is on by default. Note that this affects only the **Export...** and **Print...** commands in the panel menu . Choosing the same commands from the File menu will not update numbers because those export only the current chapter and not the whole Book.

### To manually update page, note, and list numbers:

1. Select the chapter(s) to update in the **Books** panel.
2. To update just one type of number, select **Update Numbers > Page Numbers**, **List Numbers**, or **Note Numbers** from the panel menu .
3. To update all numbers at the same time, choose **Update Numbers > All Numbers** or click the **Update Numbers** button at the bottom of the panel.

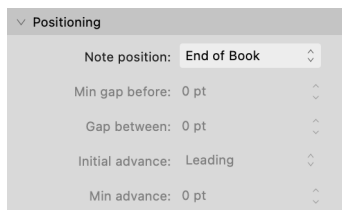
**Tip:** Although this command is named **Update Numbers** it will also update the text of endnotes so there is no need to use the similarly-named command for endnotes


## Positioning endnotes at the end of a Book

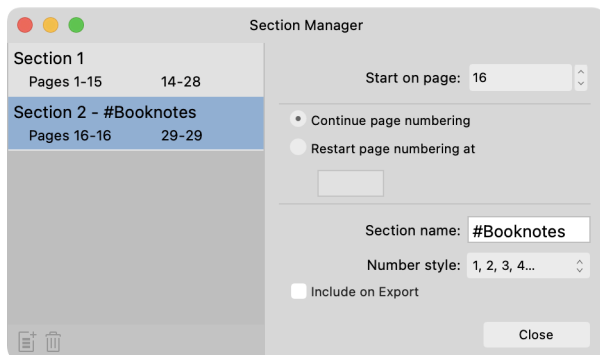
Many books include endnotes at the end of chapters which Publisher does by default. If you want to consolidate all of your endnotes at the end of a Book, Publisher can do this automatically but you should learn how it works to avoid confusion.


### To position endnotes at the end of a Book:

1. Choose **Positioning > Note position > End of Book** from the **Notes** panel.



2. Create or edit an endnote and then choose **Update Document Settings from Selected Endnotes** from the panel menu . If you've already created multiple chapter documents you will need to repeat these steps for each chapter.
3. When the **End of Book** option is chosen, Publisher will create a non-printing section named **#Booknotes** at the end of each chapter to make it convenient to edit its endnotes without having to keep switching between the current chapter and the endnotes at the end of the Book.



4. Create an End Matter document for your endnotes and index to avoid adding a printing section for them after the non-printing #Booknotes section in your last actual chapter.
5. Add the End Matter document to the Book as a chapter.
6. Place the cursor in a text frame in the End Matter chapter and choose **Endnotes > Insert Endnotes** from the **Books** panel menu . All of the Book's endnotes will be added to that text frame. These endnotes are not editable so they are similar to an inserted index or table of contents.



**Definition:** *End Matter* is also known as *Back Matter* and includes the appendices, endnotes, glossary, index, and bibliography

## Adding references to a Book

Publisher can create the table of contents and index for an entire Book and cross-reference text across its chapters but the features function slightly differently in a Book.


### To add a table of contents to a Book:

Refer to [Creating a table of contents](#) on page 158 for general information on tables of contents.

1. Place the cursor in a text frame in your Front Matter chapter and click the **Insert**  icon in the **Table of Contents** panel.
2. No entries will be shown for the inserted table of contents unless your Front Matter chapter has applicable headings. Click **Scope > Book** in the panel to include all chapters in this table of contents.
3. Click the **Update**  icon in the **Table of Contents** panel to reflect the table's right-click scope.
4. To update tables of contents automatically before printing or exporting, choose **Update Numbers > Update Tables of Contents Before Output**.


### To add an index to a Book:

Refer to [Creating an index](#) on page 172 for general information on indices.

1. Place the cursor in a text frame in your End Matter chapter and click the **Insert Index**  icon in the **Index** panel. Unlike the table of contents feature, the scope for a Book's index is always the entire Book so there is nothing else you need to do. Publisher will automatically sync index topics across chapters, even if you rename them.
2. To update the index automatically before printing or exporting, choose **Update Numbers > Update Index Before Output**.


### To add cross-references to a Book:

Refer to [Creating cross-references](#) on page 150 for general information on cross-references. The Book and the chapters to target (add a cross-reference to) must be open when you add or remove a cross-reference. You can edit a cross-reference without the Book and target chapter being open as long as you don't need to change the target paragraph, anchor, or index mark.


1. Open the Book and the chapter(s) you want to target.
2. Follow the steps for creating a cross-reference. A **Target Chapter** option will appear in the **Insert Cross-Reference** window to select a chapter for the target paragraph, anchor, or index mark. The remainder of the options are the same as for standard documents.
3. To update all cross-references in a Book, choose **Cross-References > Update Cross-References** from the **Book** panel menu .





4. To update cross-references automatically before printing or exporting, choose **Cross-References > Update Cross-References Before Output**.

## Printing and exporting a Book

The **Print** and **Export** commands in the **File** menu will print and export the current document, not an entire Book. To print and export a Book you must use the **Book panel**. Likewise, the **Preflight panel** will check for errors in the current document, not an entire Book. To preflight a Book you must use the command in the panel menu .


### To preflight a Book:

1. Select one or more open chapter documents in the **Books panel** to preflight the selected chapter(s), or deselect all chapter documents to preflight all open chapters.
2. Choose **Preflight** from the panel menu . The Preflight panel will not be displayed and no window will open; instead, the Preflight status icons for the chapter(s) will update to reflect the results of the Preflight check:

Status	Description
	Preflight not completed because <b>Check</b> is set to <i>Never</i>
	All Preflight tests passed
	One or more Preflight warnings
	One or more Preflight errors and possibly one or more warnings

3. Click the Preflight status icon to open a chapter and display the **Preflight panel** to see the list of warnings or errors.

### To print or export a Book:

1. To export specific chapters, select the chapters in the **Books panel**.
2. Choose **Print...** or **Export...** from the panel menu . The Print and Export windows will include a **Range** option (for Print) and an **Area** option (for Export) to let you choose whether to export the entire Book or the chapters selected in the panel.

**Tip:** Refer to [Preflighting documents](#) on page 214 for more information on Preflight

**Tip:** You can only preflight chapters that are currently open

**Tip:** Refer to [Printing on a commercial press](#) on page 228 for more information on printing



The features described in this chapter are critical to creating books, newspapers, magazines, academic papers, reports, and other long documents.

Cross-references are used to refer readers to another place in the same publication and can be updated automatically as the document changes. A table of contents is used to list the topics for the publication or one of its chapters in page number order. The index is used to list topics and keywords in alphabetical order, typically at the end of a publication.

Notes, including footnotes, sidenotes, and endnotes, are used to cite other works or to provide comments on the main text.

Anchors and hyperlinks are used to link to other places in the publication or to another document or website URL.

Fields are used to insert information about the document, such as the page number or section name, and can be updated automatically as the document changes.

Together these features simplify the effort required to create a long and complex publication. Mastering these features will save you time as you prepare a document for publication and help ensure a more consistent publication with fewer errors.

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# Creating cross-references

A cross-reference refers the reader to another place in the same publication, whether through a page or chapter reference or a hyperlink in a PDF or eBook.

A cross-reference in Publisher is a field that refers to the position of an anchor elsewhere in your publication. The cross-reference field will update automatically when its target changes pages and you can choose to update cross-references when the paragraph text changes.

Publisher can generate many complex types of cross-references by combining *subfields* including the paragraph text following the anchor position. You can save combinations of subfields and text as presets to make it easy to add cross-references.

You can format cross-references automatically with a character style but the style can be applied only to the entire cross-reference. If you want to format only part of a cross-reference or format two parts of it separately, you would need to combine it with plain text or a second cross-reference to the same target.

refer to "Aperture" on page 192

refer to "Depth of field" above

see Understanding Exposure on page 87 of chapter 2

See [Depth of Field](#)

See [Depth of field](#) for more information

See [Depth of field](#) on [page 73](#) for more information

See [Depth of field](#) on page 73 for more information

The boxed text in these examples can be inserted automatically as a cross-reference

## Cross-reference targets

You can choose to target a cross-reference to an anchor, paragraph, or index mark, but targeting a paragraph or index mark will generate a new anchor automatically. Anchors generated automatically by cross-references will not be exported as PDF bookmarks unless you modify them.

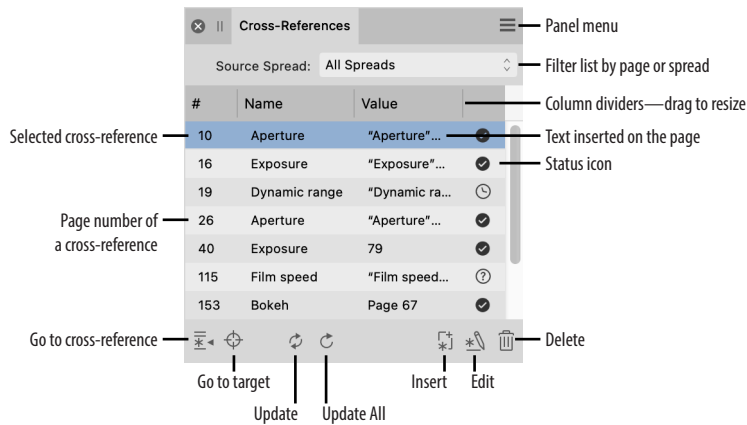
The choice of which to target depends on your work style:

- If you cross-reference a heading and target the paragraph, Publisher will insert an anchor at its start. If you later insert a table of contents, Publisher will insert a second anchor because the table of contents feature also relies on anchors.
- If you insert the table of contents first and update it as you edit your document, Publisher can reuse the table of content's anchor when adding a cross-reference.
- If you cross-reference an index mark, Publisher will create an anchor using the index mark's name rather than the paragraph text.

## Using the Cross-References panel

### To display the Cross-References panel:



1. Choose **Window > References > Cross-References** to display the **Cross-References** panel.

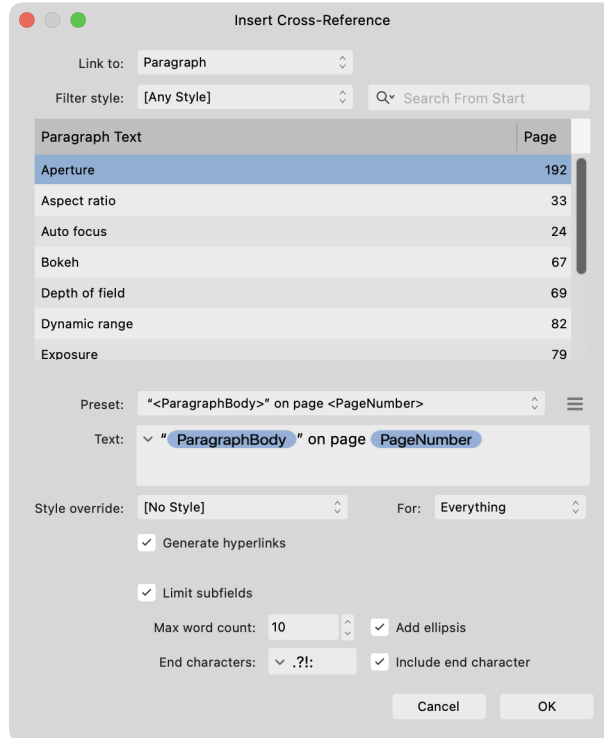



2. Choose **Edit Strings...** from the panel menu to change the **Above/Below** text used for certain cross-references.
3. Drag the column dividers to see more of a particular column.

## Adding a cross-reference



### To insert a cross-reference:

1. Using the **Frame Text**  tool, position the text cursor where you want the cross-reference to be inserted.
2. Click the **Insert Cross-Reference**  icon in the **Cross-References** panel or choose **Text > Cross-References > Insert Cross-Reference**, and select the target.



- **Link to:** Select *Paragraph* (default), *Anchor*, or *Index Mark*. You must have previously defined anchors or index marks to use the latter options.
  - **Filter style (Optional):** Select a text style name to filter the list by style.
  - **Search (Optional):** Enter a search phrase to filter the list by text. Publisher will search anywhere in the paragraph, anchor name, or index mark name. To search only from the start, click the caret  icon and select *Search from Start*.
  - **List:** Select one of the listed paragraphs, anchors, or index marks.
3. Format the cross-reference:
    - **Preset:** Choose one of the default cross-reference presets. You can create a custom format with the **Text** option below and create your own presets.


**Tip:** Presets are language specific

- **Language:** If the cross-reference's language doesn't match the language of the surrounding text, click the menu icon  beside the **Preset** list, choose **Language** from the popup menu, and then select the language to use.
- **Text:** Create a custom format for the cross-reference. Enter plain text and click the caret  icon on its left side to easily enter relevant special characters and select from a list of cross-reference components or building blocks.

Component	Text	Result
Page Number	on page <b>PageNumber</b>	on page 192
Section Name	in chapter <b>SectionName</b>	in chapter 3
Chapter Name	in the <b>ChapterName</b> chapter	in the Exposure chapter
Object Description	see figure <b>ObjectDescription</b>	see figure 46
Anchor Name	see <b>AnchorName</b>	see Depth of field
Above/Below	continued <b>AboveBelow</b>	continued below
Numbered Paragraph	see <b>NumberedParagraph</b>	see 3. Aperture
Paragraph Body	see <b>ParagraphBody</b>	see Aperture
List Number	see <b>ListNumber</b>	see 3
Note Number	in footnote <b>NoteNumber</b>	in footnote 17

- Combine components together to create complex cross-references:

Text	Result
refer to " <b>ParagraphName</b> " on page <b>PageNumber</b>	refer to "Aperture" on page 192
refer to " <b>ParagraphName</b> " <b>AboveBelow</b>	refer to "Depth of field" above
see <b>AnchorName</b> on page <b>PageNumber</b> of chapter <b>SectionNumber</b>	see Understanding exposure on page 87 of chapter 2
on page <b>SectionName</b> . <b>PageNumber</b>	on page 12.10

- For Above/Below, you can change the text that will be inserted by choosing **Edit Strings...** from the panel menu .

Cross-Reference Strings

Language: English

Above: above

Below: below


Cancel
OK

**Tip:** You could type text such as "refer to" and "on page" directly in the text frame but including this text in the cross-reference format helps ensure consistency throughout a long publication

**Tip:** Do not use a component with a paragraph that doesn't make sense, such as *List Number* for a paragraph that isn't numbered because the cross-reference will be shown as out-of-date until you remove the component



**Tip:** Object Description inserts the layer's name which you can use as a way to insert text that doesn't appear in the document

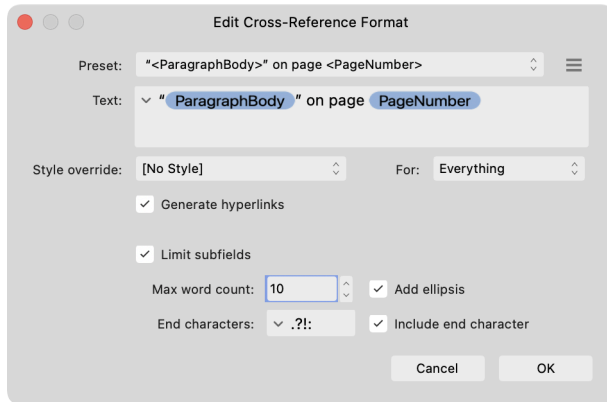
**Tip:** Note Number inserts the number of a footnote, endnote, or sidenote, use Paragraph Body to insert its text

4. Optional: To create a preset for your custom cross-reference format, click the menu icon  beside the **Preset** list and choose **Create Preset...** from the popup menu. Enter a preset name and then click **OK**. If you later modify the preset, choose **Save Preset** from the menu icon to update it. Choose **Rename Preset...** or **Delete Preset...** to rename or delete the selected preset.
5. Optional: To apply a character style to the cross-reference, choose one from **Style override**. Choose what the style is applied to with **For**.
  - **Everything**: Select to apply the character style to the entire cross-reference
  - **All Fields**: Select to apply the style to just the fields and not the plain text you enter. For example, for a cross-reference of “**ParagraphBody** on page **PageNumber**”, the style would be applied to **ParagraphBody** and **PageNumber** but not to the words in between.
  - **Text Fields**: Select to apply the style just to text fields such as **ParagraphBody**.
  - **Number Fields**: Select to apply the style to just the number fields such as **PageNumber**.
6. Optional: Deselect **Generate hyperlinks** if you don’t want cross-references to be clickable in an exported PDF file. It is recommended to leave this on because you can control whether hyperlinks are included when exporting. Hyperlinks added for cross-references will not appear in the **Hyperlinks panel** because they are not editable. Ensure **Include Hyperlinks** is selected when exporting to PDF if you want them included.
7. Optional: If you cross-reference short paragraphs such as headings, you’ll likely want to include the full heading name in the cross-reference but if you cross-reference a full paragraph or a long section name then you may wish to truncate the inserted text. Select **Limit subfields** to choose from two options to shorten the text:
  - Enter the **Max word count** to limit the text by number of words. Select **Add ellipsis** to add an ellipsis to truncated text. For example, setting Max word count to 3 and adding an ellipsis to “Introduction to digital photography” would result in “Introduction to digital...” being inserted.
  - Enter one or more characters into **End characters** to choose which characters mark the end of the text to include—if an end character is not encountered the full paragraph will be inserted. Select **Include end character** if you want it included in the inserted cross-reference. For example, setting End characters to a colon would insert “Chapter 6” for a paragraph with the text “Chapter 6: Exposure”.
8. Click **OK** to insert the cross-reference.
9. Optional: If you created a cross-reference to a *Paragraph* or *Index Mark* you can rename the generated anchor with the **Anchors panel**. Refer to [Using the Anchors panel](#) on page 205.

**Generate hyperlinks** does not apply formatting automatically; it’s up to you to apply an appropriate character style with **Style override**

### To edit a cross-reference:

1. To edit one cross-reference, position the text cursor before or after its field in the document text and choose **Text > Cross-References > Edit Cross-Reference...** You can also double-click its name in the **Cross-References** panel or select the cross-reference in the panel and click the **Edit Cross-References**  icon.
2. To edit the format of multiple cross-references at once, press **Shift** and click to select a range of cross-references, or press **⌘** (macOS) or **Ctrl** (Windows) and click to select multiple discontinuous cross-references, before clicking the **Edit Cross-References**  icon. You can't set the target for multiple cross-references and the formatting options of the first one will be shown in the Edit Cross-Reference Format window



3. All of the options for editing a cross-reference are the same as for creating a new one. When editing a single cross-reference, you can change its target to a different paragraph, anchor, or index mark.


### To find a cross-reference in the document:

1. Select a cross-reference in the **Cross-References** panel and click the **Go to Cross-Reference**  icon.

### To view the target of a cross-reference:

1. Select a cross-reference in the **Cross-References** panel and click the **Go to Target**  icon.

### To delete cross-references:




1. Select one or more cross-references in the **Cross-References** panel and click the **Remove Cross-References**  icon. The cross-reference field in the document text will be *expanded* to become regular text which you can then edit. You can also simply delete the cross-reference field directly in the document's text.

### To convert a cross-reference to regular text:

1. Right-click a cross-reference field and choose **Expand Field** from the context menu. The cross-reference field will be *expanded* to become regular text which you can then edit and the cross-reference will be removed from the panel. Deleting a cross-reference with the panel will also convert a cross-reference to regular text.
2. If the text in a cross-reference was hyphenated by automatic hyphenation, the hyphen will be included in the expanded field. Fields are expanded automatically when copying text from Publisher to a word processor such as Microsoft® Word so it is a good practice to scan expanded fields for misplaced hyphens. Spell checking text copied to Word will usually find these hyphens.

### To share a cross-reference preset with another computer or user:






Presets are not saved in your user settings but there is a way to share them with another computer or Publisher user.

1. Click the **Insert Cross-Reference**  icon in the **Cross-References** panel.
2. Choose the preset you want to copy.
3. Click in the **Text** field and press **⌘ + A** (macOS) or **Ctrl + A** (Windows) to copy the cross-reference format to the clipboard. Click **Cancel**. To close the **Insert Cross-Reference** window.
4. Create a new document and draw a text frame.
5. Paste the clipboard into the text frame. It will appear empty because you have pasted invisible control codes that don't have associated special character symbols.
6. Save this document and transfer it to the other computer.
7. Open the document on the other computer.
8. Click in the text frame and press **⌘ + A** (macOS) or **Ctrl + A** (Windows) to copy the cross-reference control codes to the clipboard.
9. Click the **Insert Cross-Reference**  icon in the **Cross-References** panel.
10. Paste the clipboard into the **Text** field.
11. Click the menu icon  beside the **Preset** list and choose **Create Preset...** from the popup menu. Enter a preset name and then click **OK**.



## Updating cross-references

Cross-references aren't updated automatically when you edit your document and the target of a cross-reference changes. It's up to you to update the cross-references before printing or exporting.

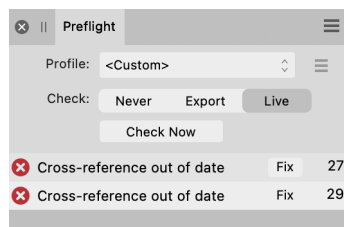
The **Cross-References** panel shows a status icon for each cross-reference:

Status	Description
	OK – there are no issues with the cross-reference
	The cross-reference target is missing because the paragraph, anchor, or index mark was deleted; copying and pasting text that includes a target anchor will result in a missing target
	The cross-reference is out-of-date, the anchor or index mark is no longer on the same page; click the Update  or Update All  icon

### To update cross-references:

1. Click the **Update All Cross-References**  icon in the **Cross-References** panel to update all in the document. This is the right of the two Update icons and is always available, regardless of what part of the document you are viewing or which tool you have selected.
2. To update one or more specific cross-references, select the cross-references in the **Cross-References** panel. Click the **Update Cross-Reference**  icon to update the selected items.

Publisher can also warn you of an outdated cross-reference through the **Preflight** panel which offers a convenient **Fix** button to update it, but each outdated cross-reference will have its own **Fix** button so it's usually faster to update cross-references with the **Cross-References** panel.





# Creating a table of contents

Publisher can generate one or more table of contents for your publication based on the selected paragraph styles. While most publications will have just one table of contents near the front of the document, some may have a second table of contents to list figures, illustrations, or photo credits. Some textbooks also have a table of contents at the start of each chapter to list its topics.

A table of contents is a block of special text that you can modify but when you update the table of contents any edits you made to it will be lost. You should avoid making any edits until the last stage before publishing. The table of contents can be updated at any time and can be generated from a single document or from all of the chapter documents in a Publisher Book.

## Sort order

A table of contents is sorted in the order the headings are used in your publication, from the first to last page and from the bottom to top of the layer stack on each page.

The layer stack order is important only if you use more than one text frame for your headings. Most long documents have just one main text frame per page for all of the page's text, with separate frames only for the header and footer. If your document uses a separate text frame for each heading then your table of contents entries could be in the wrong order unless you pay attention to the layer stack order. Ensure the heading at the top of the page is on the bottom of the layer stack with additional headings on top.

## Parts of a table of contents

A table of contents is a list of entries that are made up of a heading and a page number. You can select how many levels of headings to include and you can modify the formatting, including the separator between the heading and page number and whether the page number is shown before or after the heading. You can even hide the page number entirely.

## Sample table of contents

¶ TOC 1: Heading 1	Exposure .....	5	¶ TOC 1: Heading 1 Number
	Aperture .....	12	
¶ TOC 1: Heading 2	Shutter speed .....	15	¶ TOC 1: Heading 2 Number
	ISO.....	17	
	Light meter .....	21	
	Focusing modes.....	27	
	Manual focus.....	28	
	Auto focus.....	39	
	Continuous focus .....	42	
	White balance .....	44	
	Types of lenses .....	58	

**Tip:** You cannot sort a table of contents alphabetically

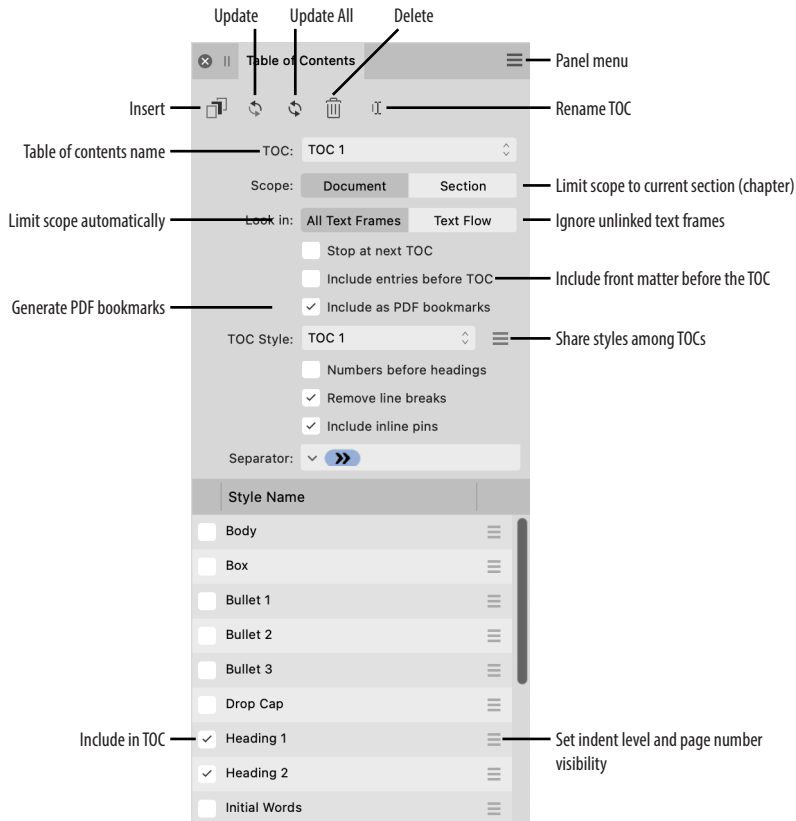
**Tip:** Master page text frames will be on the bottom of the layer stack unless you have edited the master layer detached

**Tip:** If you number chapter pages using a combination of section name and page number (for example, 1.1, 1.2, 1.3...), the section prefixes will not be included in the table of contents because they are not part of the page number

# Using the Table of Contents panel

## To display the Table of Contents panel:

1. Choose **Window > References > Table of Contents** to display the **Table of Contents** panel.



## Generating a table of contents

**Tip:** You cannot choose the text styles to include in the table of contents before generating it

**Tip:** When a TOC is first created, an anchor is added for each style that matches the standard Heading 1, 2, 3 naming convention, so if you don't want anchors generated for one of them rename it temporarily, insert the table of contents, and then rename it back

**Tip:** For information on generating an table of contents for a Book made up of separate chapter documents, refer to [Adding references to a Book](#) on page 146




You must use paragraph styles for the text to include in a table of contents. You can use any styles that you want but for the main table of contents there are some advantages to using the standard Heading 1, 2, 3... naming convention, or Publisher's equivalent for the user interface language in use.

It's difficult to see the start and end of a table of contents because Publisher doesn't display it with any shading as in other applications. Until you're experienced with working near the table of contents text block, it is recommended that you insert the table of contents into a separate text frame without any other text to avoid losing text when the table of contents is updated.


The table of contents inserted by Publisher does not include the title *Table of Contents* and you might consider placing even the title in a separate frame so that updating the table of contents can replace all the text in the frame(s).

It doesn't matter whether you create text frames for the table of contents on a master page or whether you create them directly on a document page.

### To insert a table of contents:

1. Using the **Frame Text**  tool, create a text frame for the table of contents and position the text cursor in it.
2. Click the **Insert Table of Contents**  icon in the **Table of Contents panel** or choose **Text > Table of Contents > Insert Table of Contents**. Publisher will insert the table into the frame.
3. Review the list of paragraph styles in the panel. Select any additional styles you want to include in the table and deselect any selected ones that you want to exclude.
4. If the table of contents' text frame has an overflowing **Text Flow Out**  control near the frame's bottom-right corner, press **Shift** and click the control. The AutoFlow feature will create as many pages of text frames as required to contain the table of contents.
5. Refer to [Formatting a table of contents](#) on page 162 for information on the formatting options and instructions for editing the table of contents text styles.

### To delete a table of contents:



1. To delete a table of contents, select the table name from TOC popup menu and click the **Delete**  icon.

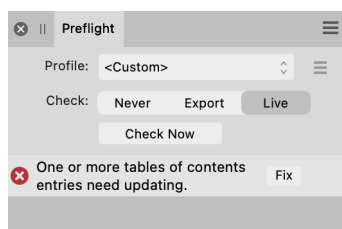
### To update a table of contents:

The table of contents isn't updated automatically when you add, edit, and delete headings. It's up to you to update the table of contents before printing or exporting.

**Tip:** Each time you edit a heading used in the table of contents and update the table, Publisher will insert a new anchor before the heading. Editing your headings and

generating the index multiple times can lead to duplicate anchors that will make a mess of a PDF file's bookmarks. To avoid this, delete the anchor when editing a heading before updating the table of contents.

1. Click the **Update All Tables of Contents**  icon in the **Table of Contents panel** to update all the tables in the document. This is the right of the two Update icons and is always available, regardless of what part of the document you are viewing or which tool you have selected.
2. To update a specific table of contents, position the text cursor in the table of contents frame or choose the table name from the **TOC popup menu** in the **Table of Contents panel**. Click the **Update Table of Contents**  icon to update the selected table. Publisher can also warn you that a table of contents is outdated through the **Preflight panel** which also offers a convenient **Fix** button to update it.



### To set the scope for a table of contents:

If your publication has only one table of contents, Publisher will automatically add all headings that are *after* the table of contents. You can also choose to include headings in the publication before the table of contents.

If you wish to limit the table's scope or are working with multiple tables of contents, you can choose from these options.

1. To include front matter headings on pages before the table of contents, select **Include entries before TOC** in the **Table of Contents panel**.
2. To limit the scope until the next table of contents is found, select **Stop at next TOC** in the **Table of Contents panel**.
3. Or to limit the scope to the current section, change **Scope** from Document to Section in the **Table of Contents panel**.

**Tip:** For tips on formatting and setting the scope of multiple tables of contents, refer to [Pinning \(anchoring\) objects](#) on page 108




# Formatting a table of contents


Publisher provides several formatting options in the **Table of Contents** panel to modify the table text that will be inserted.

Because a document can have more than one table of contents, the formatting options are saved as a *TOC style*. A TOC style is not a text style but a group of text styles used to format a table of contents. You can use the same TOC style for multiple tables of contents or a different style for each table, but you'll need to use separate styles if you want modify formatting or the included heading levels.

## To set the table of contents options:

1. To choose a different TOC style, select from the **TOC Style** popup menu in the **Table of Contents** panel.
2. **TOC Style formatting options:** Use these options to customize the text inserted into the table of contents.


Item	Purpose
Numbers before headings	Position page numbers to the left of headings
Remove line breaks	Replace manual line breaks in headings with spaces
Include inline pins	Include images pinned in headings
Separator	Inserted between the heading and page number; click the caret  icon on its left side to easily enter relevant special characters
Style Name	Select which paragraph styles to include in the table of contents; click the menu icon  to the right of a selected style to <b>Include Page Number</b> (default) or change the <b>Indent Level</b> <div></div>
Include page number	Deselect to not display page numbers for this level of the table of contents; this is useful when you want to summarize the contents of a major topic
Indent level	Set the hierarchy level for TOC anchors so book-marks are organized correctly in exported PDF files; Publisher will do this automatically if you use the standard Heading 1, 2, 3... text styles or Publisher's equivalent for the user interface language in use; indent levels are numbered from 1

3. To rename a TOC style, click the menu  icon to the right of the **TOC Style** popup menu and choose **Rename...** from the context menu.

**Tip:** Table of contents text styles are based on the document's *Base* text style but you cannot change Publisher's default formatting for a table of contents so refer to [To import TOC styles from another document](#) on page 168 for more information

**Tip:** Changes you make to a TOC style's text styles or to the options in the **Table of Contents** panel are made immediately to the TOC style—there is not a command to save changes to the TOC style



**Tip:** **Indent level** does not indent the text; edit the associated TOC text style to change the left indent value

4. To delete a TOC style, click the menu  icon to the right of the **TOC Style** popup menu and choose **Delete** from the context menu.
5. You can also create a new TOC style with the **Create New...** command but it's unnecessary unless you deleted the automatic style created for an additional table of contents.

### Using numbered headings in a table of contents:

If you create a table of contents for numbered headings the numbers cannot be removed automatically when the table is created; editing the TOC heading style will have no effect because the numbers are included as text.

When you insert the table of contents, the numbered headings will be poorly formatted because the number and heading are separated by a tab but the table of contents text styles have only one tab stop for between the heading text and page number. To fix this:

1. Position the text cursor in the table of contents heading you want to correct.
2. Using the **Text Styles panel**, click the menu  icon to the right of the heading text style and choose **Edit “TOC #: Heading #”**, where *TOC #* is the name of the table and *Heading #* is the name of the heading style.
3. Click **Tab Stops** in the left pane.
4. Click the **Add New Tab Stop**  icon and adjust the value for the new tab stop.



5. Click **OK**.

**Tip:** Publisher creates the table of contents text styles for you; while you can redefine the character and paragraph attributes of these styles, do not rename them because the modified name will not be shown

**Tip:** TOC 1: Entry will be based on whatever style your level 1 heading is based on; it is not advisable to change this

**To reformat the table of contents by editing its text styles:**

When you insert a table of contents in a document for the first time, Publisher will create a number of additional text styles to control the table formatting. You can modify the attributes of these styles as required for your publication. These text styles are grouped into a table of contents style, referred to as a TOC style.




Each TOC style has its own set of text styles numbered in the order you create them so you can format each one separately. Because this can result in many text styles, table of contents styles are displayed in the **Text Styles panel** only when the text cursor is placed in a table of contents.

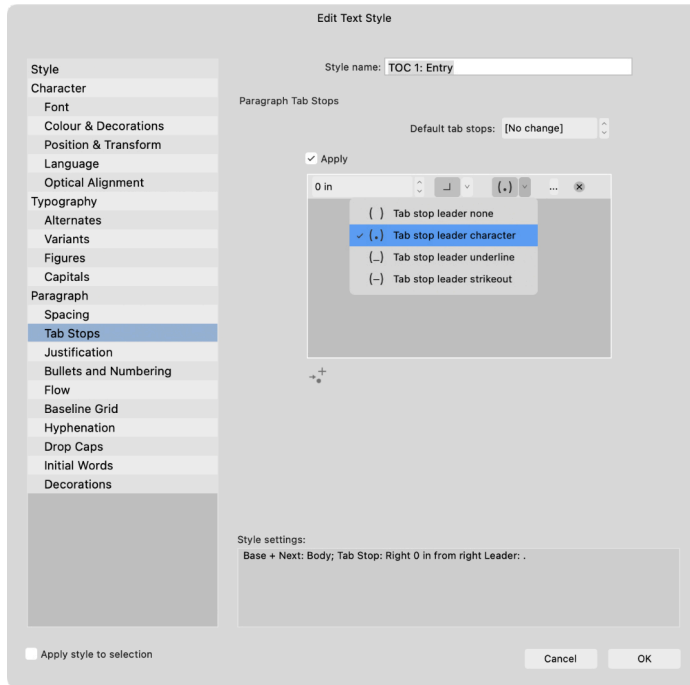
The styles are:

Style	Purpose
¶ TOC 1: Entry	Base style, not applied directly to the TOC; the TOC style for the first TOC you insert is named <i>TOC 1</i> and additional ones are numbered sequentially
¶ TOC 1: Heading 1	For all TOC entries, numbered by level; if you use custom heading style names, they will be prefixed with the TOC name
a TOC 1: Number	Base style, not applied directly to the TOC
a TOC 1: Heading 1 Number	For the page number

**To add a dot leader:**

The default formatting for tables of contents doesn't include a dot leader but you can add one.

1. Ensure **Separator** in the **Table of Contents** panel is set to  (tab), the default value.
2. Using the **Frame Text**  tool, position the text cursor in the table of contents.
3. Double-click the *TOC 1: Entry* style in the **Text Styles panel** to edit it, where TOC 1 is the name of the TOC style.
4. Select **Tab Stops** from the left pane. There will already be a right-aligned tab stop set to 0 from right.
5. Select **(.) Tab stop leader character** or one of the other leader characters from the list. You can also click the **More**  icon to chose a custom character.



6. Click OK.



### To create clickable bookmarks for an exported PDF:

1. Select **Include as PDF bookmarks** in the **Table of Contents** panel. This option is specific to each table of contents so if you have more than one you can choose whether to select it for each table.
2. When exporting to PDF, you must also select **Include bookmarks** in the Export window.



### To exclude specific headings from a table of contents:




Sometimes you might want to exclude a specific heading from a table of contents yet wish to use the same heading style for that paragraph. There is more than one way to do this but the best option is:

1. Using the **Frame Text**  tool, position the text cursor in the heading to exclude.
2. Click the menu icon  beside the heading style name in the **Text Styles panel** and choose **Duplicate** from the popup menu.
3. Name the new style *Heading # Copy*, where # is the number of the original heading.
4. Click **OK**. Paragraphs formatted with this new style won't be included in the table of contents. Changes you make to the original heading style will be made to the duplicate style, too.

### To include headings that do not appear in a publication:

Sometimes you might want to include headings that do not appear in a publication, such as list of advertisers, or perhaps the actual headings are images but you need plain text equivalents to appear in the table of contents.

In this manual, the chapter headings are written as “References 3” but as “3. References” in the table of contents. This was achieved by formatting the actual chapter headings with a paragraph style not used by the table of contents and then following the steps below to add a hidden layer for the heading used by the table of contents.


1. Using the **Frame Text**  tool, create a separate text frame for a heading that should be invisible. The frame does not need to be in the exact position because it will not be printed or exported to PDF.
2. Type the heading text and apply the heading style to it.
3. If the heading should move with the text on page, select the heading's text frame and click the **Float with Text**  icon in the **Toolbar** at the top of the screen to pin the heading's frame into the main text frame.
4. Choose **Layer > Hide** to make the heading's frame invisible. The heading will still be included in the table of contents but it will not be printed on the page. You can also click the **Toggle Visibility**  icon next to the heading's text frame's layer in the **Layers panel** to show and hide the frame but you might have to expand the master page layer and the main text frame's layer to find it.

## To include a chapter number prefix in the table of contents:

If you number chapter pages using a combination of section name and page number (for example, 1.1, 1.2, 1.3...), the section prefixes will not be included in the table of contents because they are not part of the page number. You must use a workaround to include the chapter's section name prefix.

1. After each heading that will be included in the table of contents, type a tab character, insert a **SectionName** field, and type a period. An entry will look like this for a chapter with a section name of "7":


White balance » 7.

2. Select the tab and field and using either the **Context Toolbar** or **Character Panel**, set their text fill colour to none  to make them invisible. Repeat this for each heading.
3. Generate the table of contents but remove the tab from the **Separator** field in the **Table of Contents** panel because you already inserted a tab manually into each heading. The resulting entry will look like this:

White balance..... 7.44


## To switch between print and digital table of contents formatting:

If you want to be able to export your document with hyperlink style formatting for digital but plain text for print, you can do this with two TOC styles.

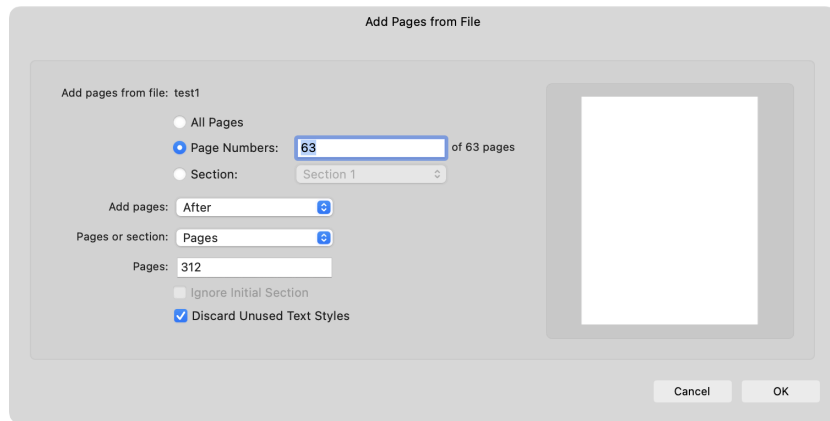
1. After generating the table of contents and adjusting the TOC text styles for print (or digital), click the menu  icon to the right of the **TOC Style** popup menu and choose **Rename...** from the context menu. Name it *Print* (or *Digital*, as appropriate) or another name of your choosing.
2. Click the menu icon again and choose **Create New...** from the context menu. Name this style *Digital* (or *Print*, as appropriate) or another name of your choosing.
3. Adjust this TOC style's text styles for digital (or print).
4. To switch between the two styles, select the *Print* or *Digital* style name from the **TOC Style** popup menu and your table of contents will be reformatted automatically.

## To import TOC styles from another document:

TOC styles cannot be exported independently but you can import a TOC style by adding a page from another document.

1. In the document from which you want to import a TOC style, rename the desired TOC style to something unique by clicking the menu  icon to the right of the **TOC Style** popup menu and choosing **Rename...** from the context menu. For example, *My TOC Style*
2. Save that document and switch to the document in which you want to import the TOC style.
3. Using the **Pages panel**, note the absolute page number of the last page.
4. Choose **Document > Add Pages from File...** and select the first document.

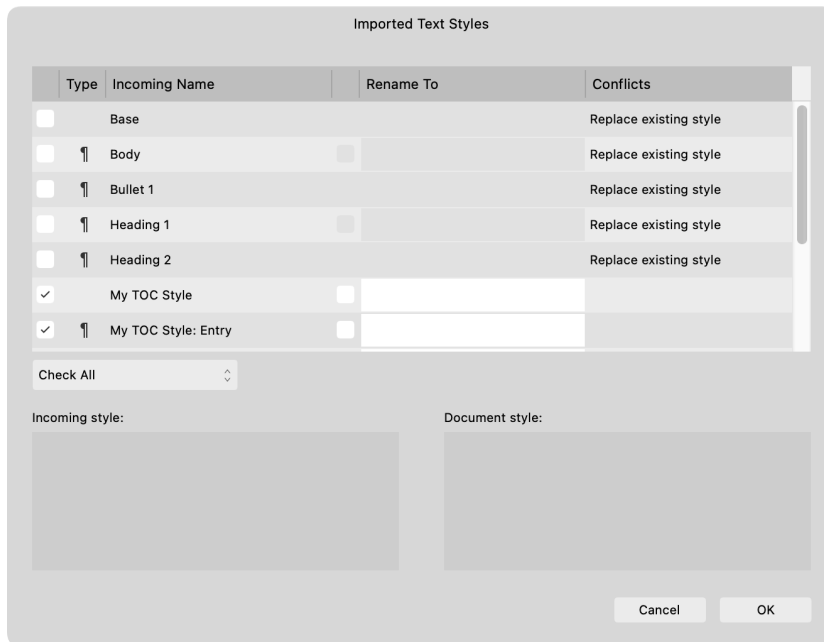
**Tip:** The Pages panel will only show absolute page numbers unless you use a section to restart page numbering, and then it will show the absolute page number followed by the relative number in parentheses, for example, *Pages 60,61 (54,55)*



- **Page Numbers:** There is no need to import all of the document's pages since you just want the TOC style so enter the number of a single page to import.
- **Pages:** Enter the absolute page number of the last page you noted above. This will ensure the imported page is placed at the end of the document so it won't disrupt an existing page spread.


Click **OK**.

5. Publisher will display a window listing the source (incoming) document's text styles and noting any conflicts. Assuming you named the TOC style with a unique name, those styles will not have any conflicts.



- Deselect all text styles except for those that are part of the TOC style group that you named to avoid replacing an existing text style such as Body or Heading 1.



Click **OK**.

6. The page you chose will be added to the document. Select that page in the **Pages panel** and click its Delete  icon to remove it.
7. Using the **Table of Contents panel**, select the table of contents you want to style from the **TOC popup menu** near the top of the panel. If there is only one table of contents and you haven't renamed it, it will be named TOC 1.
8. Choose the name of the TOC style you imported from the **TOC Style popup menu** in the panel. The table of contents will be reformatted using the imported TOC style.

## Working with multiple tables of contents

Most books have a single table of contents. If a book has more than one table of contents they can share a single TOC style as long as they have identical formatting, but if their formatting or settings differ you will need at least a second TOC style.

For demonstration purposes, this book also has chapter-specific tables of contents at the start of each chapter, listing only the topics in that chapter. While Publisher provides the tools to do this, it takes some effort to format the tables consistently. The steps below instruct you to match the approach used for this book.


1. Follow the instructions in [Using sections for chapters](#) on page 27 to create a section for each chapter in the book.
2. Follow the instructions in [Generating a table of contents](#) on page 160 to insert the main table of contents. This first table will be named *TOC 1* in the **TOC** popup menu near the top of the **Table of Contents** panel. To rename this table of contents for your own convenience, click the **Rename**  icon, but this will not change its appearance.
3. Follow the instructions in [Formatting a table of contents](#) on page 162 to format this first table of contents. The first table will have a TOC style named *TOC 1*. To rename this TOC style for your own convenience, click the menu  icon to the right of the **TOC Style** popup menu and choose **Rename...** from the context menu, but this will not change its appearance.
4. Sometimes you might need to customize a heading. For example, if your chapter headings are numbered and you use the same heading style for *Introduction*, it would be left aligned with the “1” for the following chapter name as shown in this example. One solution is to insert a tab before the word *Introduction* in that heading but to make it invisible. To do this, a tab stop can be created at 0.0001 pt for that heading. This invisible tab would become visible in the table of contents because its tab stop was set to match the other chapter headings.

**Tip:** Publisher doesn't allow tab stops at 0 pt so 0.0001 pt was used as an approximation of 0 pt without adding so many decimal places that Publisher rounded it to zero

»	INTRODUCTION	vii
1 »	DOCUMENT SETUP	1
	Creating a new document .....	2
	Changing layout options .....	5

5. Insert the second table of contents at the start of the first chapter. The second table and its TOC style will be named *TOC 2*.
6. Deselect *Heading 1* from the **Style Name** popup menu because the chapter headings are formatted as **Heading 1** and are not included in the chapter-specific tables.
7. Deselect **Include as PDF bookmarks** because you only want bookmarks generated from the main table of contents. While Publisher will not create

duplicate bookmarks for the same heading, leaving this on will break the hierarchy of the PDF bookmarks because you deselected *Heading 1* for this table.

8. By default, the scope for these chapter tables will be the same as for the main table. **Include entries before TOC** is not selected so the second table will start with subsequent headings. You could choose **Stop at next TOC** to prevent this table from including entries in the next chapter's table but in this book the *Appendices* chapter heading needed to be excluded from the last chapter's table. It's possible to do that with a table of contents in a hidden layer just before the *Appendices* page but the better approach is to create sections, as you did in step 1, and to limit the scope of this table of contents to the current section by changing **Scope** from **Document** to **Section**.
9. Repeat steps 5 to 8 for each of the chapter-specific table of contents.
10. The panel's controls act on the table selected in **TOC list**. To switch between tables of contents, select the table name from **TOC popup menu** or click in the table of contents' text frame. All of the chapter-specific tables of contents share the same formatting but as each table was inserted, Publisher created TOC styles for each chapter. Only two TOC styles are needed, *TOC 1* for the main table and *TOC 2* for the chapters, so the excess TOC styles were deleted to avoid later confusion. To delete a TOC style, select the table name from **TOC list**, click the menu  icon to the right of the **TOC Style** list, and choose **Delete** from the context menu. Ensure you choose *TOC 2* from **TOC Style** for each of the chapter tables.
11. The left indent for the new chapter-specific tables is different than the main table because *Heading 1* is not included. Unfortunately, it's not possible to base one TOC style on another nor is it possible to make a copy of a TOC style and customize it. The *TOC 2* style created by Publisher has none of the formatting that was set for the main table so all of the formatting would normally have to be repeated but there is a workaround. To do this, go to a chapter-specific table of contents and:
  - Change *TOC 2: Entry* to be based on *TOC 1: Entry* instead of *Base*
  - Change *TOC 2: Heading 2* to be based on *TOC 1: Heading 2* instead of *TOC 2: Entry*
  - Change *TOC 2: Heading 3* to be based on *TOC 1: Heading 3* instead of *TOC 2: Entry*The *TOC 2: Heading 1* style was skipped because *Heading 1* is not included in this table. There is no need to change the number styles.
12. Adjust the left indent for the *TOC 2: Heading 2* and *3* text styles to complete the formatting of the chapter-specific tables of contents.

# Creating an index

Publisher can generate an index for your publication based on index marks that you add into your text. The index is normally placed at the end of the document and there can be only one index per document so you can't create multiple specialized indices unless you use a workaround such as the one described in [Creating multiple indices](#) on page 183.

Publisher sorts index entries alphabetically with punctuation and symbols first, followed by numbers, A–Z, and then non-Roman language characters. You cannot customize the order of these categories but you can manually change the sort order of individual index entries.

An index is a block of special text that you can modify but when you update the index any changes you made to it will be lost. You should avoid making any edits to the generated text until the last stage before publishing. The index can be updated at any time and can be generated from a single document or from all of the chapter documents in a Publisher Book.

Publisher offers two approaches for creating an index. You can create its topics and then find the topics in the document to reference them or you can add index marks to create topics and references at the same time. Both approaches will create the same results but which approach is best for you depends on the publication and your working style. You can also use a combination of both approaches,

## Parts of an index

The key parts of an index are the index topics, the words you have indexed, and the references which can be either the page numbers or cross-references to other index topics. A topic and reference are together referred to as an index entry. Some topics may not have a reference because they may list only subtopics.

**Tip:** If you number chapter pages using a combination of section name and page number (for example, 1.1, 1.2, 1.3...), the section prefixes will not be included in the index because they are not part of the page number

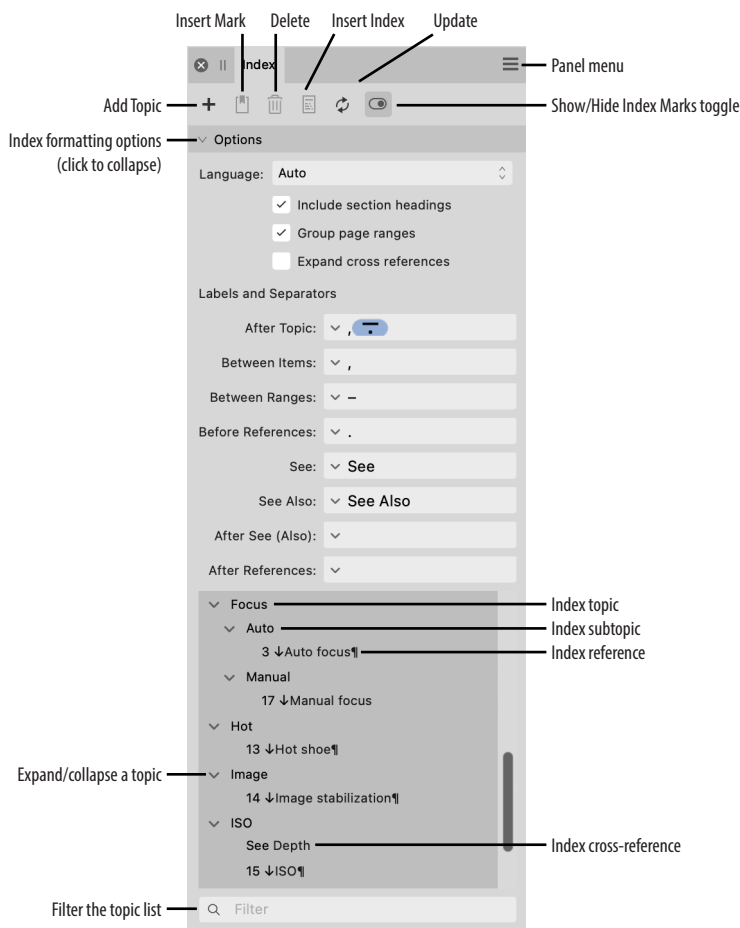
### Sample index

<b>A</b>	<b>F</b>
Aperture, 17, <b>192</b> , 223	Film speed, 54, 86
Aspect ratio, 33	Focal length, 16, 81
Auto focus, 24	Focus
<b>B</b>	Auto focus, 29
Bokeh, 67. See also Focus	Manual focus, 25–27
<b>D</b>	<b>H</b>
Depth of field, 69	Hot shoe, 29
Dynamic range, 82	<b>I</b>
<b>E</b>	Image stabilization, 18, <b>30</b>
Exposure, 31–34, <b>79</b>	ISO. See Film speed

## Using the Index panel

### To display the Index panel:

1. Choose **Window > References > Index** to display the **Index panel**.



2. Choose **Show Topics** from the panel menu  to view topics without references. This view saves space and allows you to focus on the topics. Choose **Show Topics and References** to restore the default view.



## Adding index topics

You don't have to create index topics manually because Publisher will create them automatically when you insert an index mark. These instructions are for those who prefer to create topics on their own before they add index references.

### To create a topic list (optional):

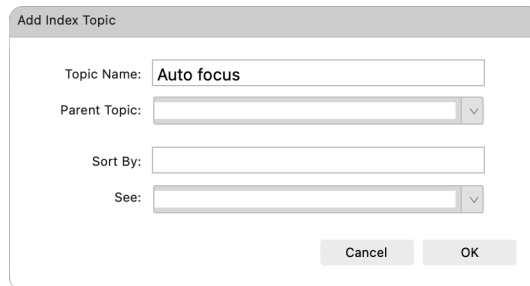
If you want to create topics before reviewing where they are mentioned, you can add a list of topics to have available during indexing.

Creating topics in advance is optional because you can create a topic at the same time as you insert an index mark. Topics without any references added to them will not be listed in the index.

Publisher does not provide an option to import a topic list. The best way to create a list quickly is to enter the topic names into a temporary text frame and to copy the topic names to the clipboard one by one as you add them. Once you've added all of the topics, use the **Find in document** feature to quickly index all of the added topics.

### To add an index topic:

1. Click the **Add Topic**  icon. This feature does not have a matching menu command so you can't assign a keyboard shortcut to it.



The dialog box titled "Add Index Topic" contains four input fields: "Topic Name:" with the text "Auto focus", "Parent Topic:" with a dropdown arrow, "Sort By:" with an empty text field, and "See:" with a dropdown arrow. At the bottom right are "Cancel" and "OK" buttons.

2. Enter the **Topic Name**, for example, *Auto focus*. Ensure the capitalization is correct because there isn't a global setting to adjust the capitalization of index topics.
3. Optional: To create a subtopic, select a **Parent Topic** from the list of existing topics. For example, select *Focus* to add *Auto focus* as a subtopic of *Focus*.
4. Optional: To override the automatic sorting of the topic, enter text for a custom sort order. For example, to sort *van der Linden* as *Linden* you would enter *Linden* for **Sort By**.
5. Optional: To create a cross-reference to another index topic, select the other topic from the list of existing topics under **See**. For example, select *Focus* to append *See also Focus* to the *Bokeh* topic. Refer to adding cross-references below for more information on *See* vs. *See Also*.
6. Click **OK**. The index topic will appear in the **Index panel** list.

**Tip:** The **Find in Document** feature only searches the current document, not a Book comprised of multiple chapter documents

**Tip:** You can create sub-subtopics to as many levels as required by selecting a subtopic as the Parent Topic

### To add a subtopic:

1. Right-click an index topic title in the **Index panel** and choose **Edit topic...** from the context menu.
2. The features of the **Add Index Topic** window are the same for adding topics and subtopics.

### To rename or edit an index topic:

1. To rename it, select an index topic title in the **Index panel** and then click it a second time—do not double-click. Enter a new name and press **Return**.
2. Or right-click an index topic title in the **Index panel** and choose **Edit topic...** from the context menu. The features of the **Edit Index Topic** window are the same for adding topics.

### To change the index topic for an index reference:

1. Using the **Index panel**, drag the index reference below another index topic.

### To change the index parent topic for an index topic:



1. Using the **Index panel**, drag the index topic below another index topic.

### To delete an index topic:

1. Select an index topic in the **Index panel** and then click the **Delete**  icon. The topic and all of its references will be deleted.


### To import index topics from another document:

Publisher doesn't provide a way to import or export index topics but it's relatively easy to copy index topics, but only for those that have at least one reference (index mark).

1. Open the document containing the index topics to be copied.
2. Using the **Frame Text**  tool, select and copy the text containing the index references. If the references are in more than one story you will need to repeat this for each story.
3. Open the document to which the topics should be copied.
4. Using the **Frame Text**  tool, create a temporary text frame.
5. Paste the copied text into the frame using **Edit > Paste** or **Paste Without Format**. The latter will paste the text and index marks without importing any text styles.
6. Delete the pasted text. The text and its index references will be deleted but the index topics will remain.

## Adding index entries


An index entry is made up of an index topic and a reference which is either a page number or a cross-reference to another topic. When you insert an index mark in your text, you can create a new topic or choose an existing topic to associate it with.

**Tip:** Click the Show/Hide Index Marks toggle  icon in the Index panel or Choose Text > Index > Show Index Marks to see the invisible index markers and avoid accidentally deleting them



When you insert an index mark a special character is inserted at the text cursor position or at the start of the selected word.

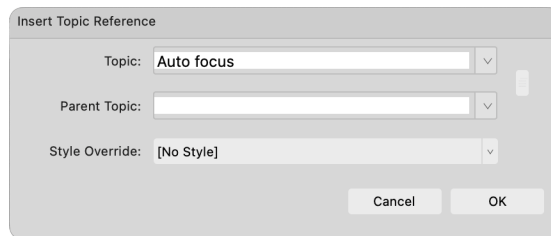
Publisher does not allow you to enter multiple references simultaneously so if you want to insert marks for multiple topics you will need to repeat the steps below.

### To add a new reference to an index topic:


1. Using the **Frame Text**  tool, position the text cursor before, in, or after a word, or select a word.
2. Double-click the desired index topic or subtopic in the **Index panel**. Publisher will insert an index mark for the topic before the text cursor or selected text.

### To add an index entry:

1. Using the **Frame Text**  tool, position the text cursor before, in, or after a word, or select a word. To index a phrase, select the range of text to index.
2. Click the **Insert Mark**  icon in the **Index panel** or choose Text > Index > Insert Index Mark.



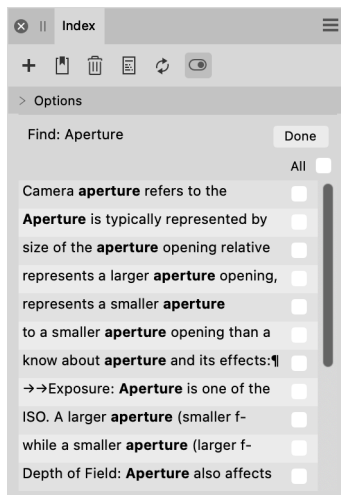
The dialog box titled "Insert Topic Reference" contains three fields: "Topic:" with a dropdown menu showing "Auto focus", "Parent Topic:" with an empty dropdown menu, and "Style Override:" with a dropdown menu showing "[No Style]". At the bottom right are "Cancel" and "OK" buttons.

3. The **Topic** field will be pre-filled with the word you clicked in or the words you selected. If the pre-filled text matches any topics in the list they will be suggested. If you select a subtopic from the list, it will also pre-fill the **Parent Topic** field. Alternatively, you can delete the pre-filled text and select from the full Topic list.
4. Optional: To make the topic a subtopic of another topic, select the **Parent Topic** or enter a new one. For example, to index *Auto Focus* as a subtopic of *Focus*, you would enter *Auto Focus* as the Topic and *Focus* as the Parent Topic. If the text pre-filled for Topic should be the Parent Topic, click the **Move to Parent**  icon to the right of the two fields.

- Optional: To indicate the primary reference for a topic, choose a character style from **Style Override**. This is typically used to bolden or italicize the page number of the most important page for an index topic.
- Click **OK**. Publisher will insert an index mark before the text cursor or selected text. If the **Topic** or **Parent Topic** fields contains a topic that is not already in the list, Publisher will create it when inserting the index mark.


### To quickly index many occurrences of a topic:

- Right-click an index topic in the **Index panel** and choose **Find in document...** from the context menu. The panel will list all occurrences of the topic title in the document with a checkbox beside them. The checkboxes for the existing reference(s) will be selected.



- Click a list item to view it in context in the document window. Select its checkbox if you want to add an index mark for that occurrence.
- Click the **Done** button after you have selected the desired occurrences of the topic.

### To view an index mark in the document:

- Double-click an index reference in the **Index panel**. Publisher will change the page displayed in the document window so that the index mark is visible.
- Click the Show/Hide Index Marks toggle  icon in the **Index panel** or Choose **Text > Index > Show Index Marks** to see the invisible markers.



An index mark between two characters

**Tip:** Index cross-references are unrelated to the general [Creating cross-references](#) feature described on page 150

## Adding index cross-references (See or See Also)

A cross-reference is an index reference that points to a related index topic rather than a page number in the document. For a topic that has a page number reference, a cross-reference will insert *See also* in the index entry. In the [Sample index](#) on page 172, *Bokeh* has another page number reference so the cross-reference to *Focus* creates an index entry of:

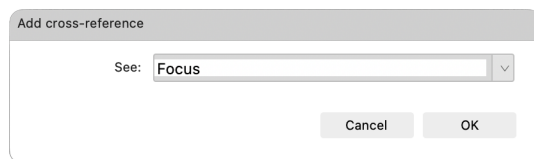
Bokeh, 67. See also Focus

For a topic that has no page number references of its own, a cross-reference will insert *See* in the index entry. In the sample index, *ISO* doesn't have a page number reference so the cross-reference to *Film speed* creates an index entry of:

ISO. See Film speed



### To add a cross-reference to another index topic:

1. Right-click an index topic in the **Index panel** and choose **Add cross-reference...** from the context menu.



2. Select a topic from the **See** topic list.
3. Click **OK**. Publisher will add the cross-reference.
4. To customize the *See* and *See also* text that Publisher adds to the index, refer to [Formatting an index](#) on page 180.

### To delete an index entry:

1. To delete the entire index entry, include the topic and its references, select an index topic in the **Index panel** and then click the **Delete**  icon.
2. To delete only the reference to a page number or a cross-reference, select the reference in the **Index panel** and click the **Delete**  icon.




## Generating an index

It's difficult to see the start and end of an index because Publisher doesn't display it with any shading as in other applications. Until you're experienced with working near the index text block, it is recommended that you insert the index into a separate text frame without any other text to avoid losing text when the index is updated.

The index inserted by Publisher does not include the title *Index* and you might consider placing even the title in a separate frame so that updating the index can replace all the text in the frame(s).


It doesn't matter whether you create text frames for the index on a master page or whether you create them directly on a document page.

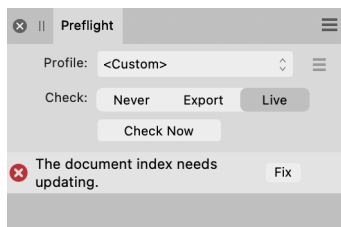
### To insert the index:

1. Using the **Frame Text**  tool, create a text frame for the index and position the text cursor in it.
2. Click the **Insert Index**  icon in the **Index** panel or choose **Text > Index > Insert Index**. Publisher will insert the index into the frame.
3. If the index's text frame has an overflowing **Text Flow Out**  control near the frame's bottom-right corner, press **Shift** and click the control. Publisher will create as many pages of text frames as required to contain the index.


### To update the index:

The index isn't updated automatically when you add and delete index marks. It's up to you to update the index before printing or exporting.

1. Click the **Update Index**  icon in the **Index** panel. The **Preflight** panel can also warn you when the index needs to be updated and offers a convenient **Fix** button that to update it.



### To delete the index:

1. There isn't a command or button to delete the index, so using the **Frame Text**  tool, select all the text in the index text block and press **Backspace** or **Delete**.

**Tip:** For information on generating an index for a Book made up of separate chapter documents, refer to [Adding references to a Book](#) on page 146

# Formatting an index

Publisher provides several layout options in the **Index panel** to modify the index text that will be inserted. The options you select and the text you enter in this panel will be saved in your user defaults for future documents.


**Tip:** To insert empty space between letters instead of section headings, edit the Index Section Heading style and change the text fill colour to white

1. **Language:** Use this to specify the language of the index for spell checking and hyphenation.
2. **Include section headings:** Use this to add heading characters before all of the indexed words starting with A, B, C, etc. Publisher will add a letter for each character, including non-Roman alphabets, but not for the punctuation and numbers section. For example, *6-pack* starts with a number so it would be sorted into the punctuation and numbers section but would not have a section heading.
3. **Group page ranges:** Use this to group references on sequential pages rather than listing each of them separately. For example, 7–9 instead of 7, 8, 9
4. **Expand cross-references:** Use this to replace the *See* cross-reference for a topic that has no page number references of its own with the page number(s) of the cross-referenced topic. With this setting off, the [Sample index](#) on page 172 inserted these entries in their respective sections:

Film speed, 54, 86  
ISO. See Film speed

But with this setting on, it would insert:

Film speed, 54, 86  
ISO, 54, 86

5. **Labels and separators:** Use these options to customize the text inserted into the various parts of the index. Click the caret  icon on their left side to easily enter relevant special characters.

Item	Purpose
After Topic	Inserted after the topic name, default is comma + en space
Between Items	Inserted between references, default is comma + space
Between Ranges	Inserted between grouped page ranges, default is en dash
Before References	Inserted before cross-references, not page numbers, default is period + space
See	Inserted as part of a cross-reference, default is See
See Also	Inserted as part of a cross-reference, default is See Also
After See (Also)	Inserted after the <i>See</i> or <i>See Also</i> text, default is space
After References	Inserted after the last cross-reference, default is space

**To reformat the index by editing its text styles:**

When you insert an index in a document for the first time, Publisher will add a number of additional text styles to your document to control the index formatting. You can modify the attributes of these styles as required for your publication. The styles are:

Style	Purpose
¶ Index	Base style, not applied directly to the index
¶ Index Entry	Base style, not applied directly to the index
¶ Index Entry 1	For topics
¶ Index Entry 2	For subtopics, if they exist
¶ Index Section Heading	For section headings (there is no option to insert a section heading for a character that lacks matching entries)
<u>a</u> Index Cross-reference	Base style, not applied directly to the index
<u>a</u> Index Cross-reference Label	For the words <i>See</i> and <i>See Also</i>
<u>a</u> Index Cross-reference Topic	For the cross-reference topic name
<u>a</u> Index Entry Number Separator	For the characters between multiple index entry page numbers; for example, 7–9, or 14, 22, 36
<u>a</u> Index Entry Page Number	For the page numbers

**Tip:** Publisher creates the index text styles for you; while you can redefine the character and paragraph attributes of these styles, do not rename them or Publisher will generate a new version when you update the index



**To right align index page numbers or add a dot leader:**

Publisher left aligns index page numbers but you can change this with text styles.

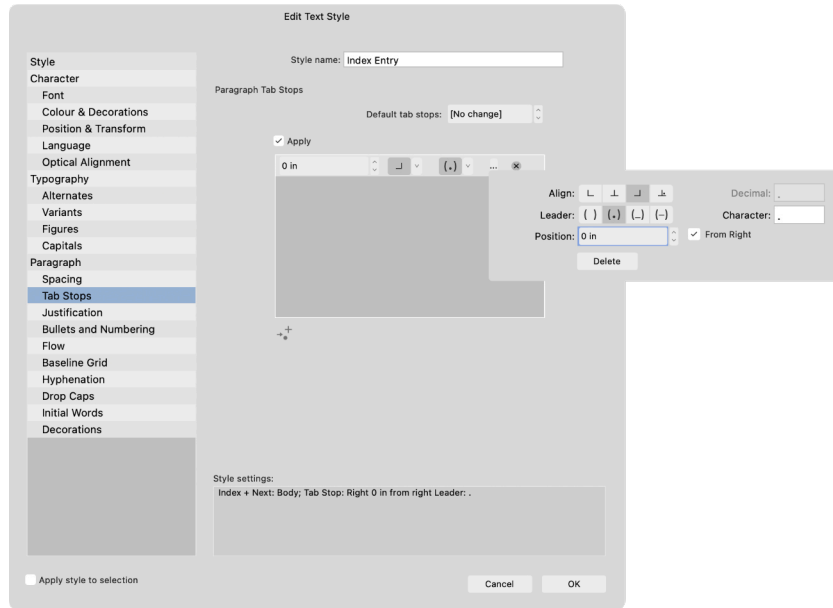
Aperture, 17, **192**, 223  
Aspect ratio, 33  
Auto focus, 24

Follow the steps below to format an index with this formatting:


Aperture ..... 17, **192**, 223  
Aspect ratio ..... 33  
Auto focus..... 24

1. Delete all of the characters from the **After Topic** field of the **Index panel**.
2. Choose **Tab** from the field's menu (click the caret  icon on its left side).
3. Double-click the *Index Entry* style in the **Text Styles panel** to edit it.
4. Select **Tab Stops** from the left pane and click the **Add New Tab Stop**  icon.





**Tip:** If you can't type 0 into the Position field, use the down arrow to its right to reduce it to 0

5. Click the **More**  icon to display the popup settings window. Choose right alignment, select (.) (the tab stop leader), select **From Right**, and set **Position** to 0.
6. Click **OK**.

## Creating multiple indices

While you can create only one index with Publisher, there is a workaround but it involves manual work that must be repeated each time you update the index.

Index topics for a secondary index can be created as subtopics for a *dummy* parent topic that you will later delete. After updating the index, you would simply cut the secondary index from the main index, paste it elsewhere, and reformat it to correct the indentation level.

The dummy topic can be named anything but it's easiest to choose a name that will be sorted to the top of the index. If you chose one that sorted to the end of the index, the secondary index text might be overflowed from the main index's text frame, making it difficult to select.

Publisher sorts punctuation before numbers and letters so it's recommended to prefix the dummy topic name with an underscore. In the example below, the dummy topic is named *\_Film brands*. When the index is generated, all of the subtopics of the dummy topic are sorted below it before the first entry of the main index.

### Sample multiple indices

Punctuation and numbers section	—_Film brands	Italy
	Austria	Ferrania, 314
	Lomography, 322	Japan
	Belgium	Fujifilm, 307
	Dan-Di, 306	Konica, 316
	Germany	...truncated example
	ADOX, 324	<b>A</b> ————— First section heading
	AGFA, 338	Aperture, 17, <b>192</b> , 223
	Rollei, 306	Aspect ratio, 33
	Hungary	Auto focus, 24
	Forte	<b>B</b>

### To add an index entry for a secondary index:

1. Index the term as you normally would but enter the dummy topic name into the **Parent Topic** field.


Insert Topic Reference

Topic:

Parent Topic:

Style Override:

### To generate and format a secondary index:

1. Using the **Frame Text**  tool, create a text frame for the secondary index just as you did for the main index.
2. Insert or update the main index as you normally would.
3. Select all the text from the start of the dummy topic name up to and including the paragraph break ¶ at the end of the last secondary index entry.
4. Choose **Edit > Cut**.
5. Position the text cursor in the secondary index's text frame and choose **Edit > Paste**.
6. Select the dummy topic name, including its paragraph break ¶, and press **Delete**.
7. The secondary index entries are indented one level more than they should be since they were created as children of the dummy parent topic. If they are all the same indent level, you can simply choose **Edit > Select All** and then use the **Paragraph** panel, change the **Left Indent** and **First Line Indent** to match the main index's first level index entry. If the secondary index has subtopics of its own, you must adjust the indent values for each entry manually because Publisher can't change varying indent values by a relative amount.

### To update a secondary index:

1. Each time you update the main index, the secondary index's entries will be added to it. Repeat the steps for generating and formatting a secondary index each time you update the main index.

# Creating notes

A note is text positioned at the bottom or side of a page or at the end of the chapter or publication and is used to cite other works or to provide comments on the main text. A note is made up of two parts: the note reference marker in the text and the note body.

Publisher offers three types of notes which you can use together in the same document. For each you can control the formatting of the note reference and the note body as well how the body is positioned. You can choose whether long notes can be split and continued in the next column or frame. Publisher will keep footnote and sidenote references and bodies on the same page, where possible.

- **Footnotes** are positioned at the bottom of the column or frame and can be positioned inside or below the frame. If a frame has more than one column you can choose whether they should span columns. They can be separated from the main text by a horizontal rule.

Quisque consequat malesuada lacinia. Interdum et malesuada fames ac ante ipsum primis in faucibus. Aliquam pulvinar rutrum magna in commodo. Vestibulum quis malesuada arcu. Morbi vel aliquet diam. Vestibulum facilisis Donec at orci quis justo auctor volutpat et a urna. Suspendisse fermentum mi.

- **Sidenotes** are positioned to the left and/or right side of frames and are vertically aligned with the marker, although multiple or long sidenotes may cause the vertical position to change.

Quisque consequat malesuada lacinia. Interdum et malesuada fames ac ante ipsum primis in faucibus. Aliquam pulvinar rutrum magna in commodo. Vestibulum quis malesuada arcu. Morbi vel aliquet diam. Vestibulum facilisis egestas dapibus. Vivamus a libero eros. Nunc pretium tortor vitae libero Donec at orci quis justo auctor volutpat et a urna. Suspendisse fermentum mi.

- **Endnotes** are positioned at the end of the story, chapter, or document and don't affect the layout of the main text but readers must navigate to the end of the text to find the corresponding endnote. Publisher can also insert a title for the endnotes.

Quisque consequat malesuada lacinia. Interdum et malesuada fames ac ante ipsum primis in faucibus. Aliquam pulvinar rutrum magna in commodo. Vestibulum quis malesuada arcu. Morbi vel aliquet diam. Vestibulum facilisis egestas dapibus. Vivamus a libero eros. Nunc pretium tortor vitae libero condimentum, a fermentum risus euismod. Mauris sagittis nisl vitae

**Endnotes:** Donec at orci quis justo auctor volutpat et a urna. Suspendisse fermentum mi.

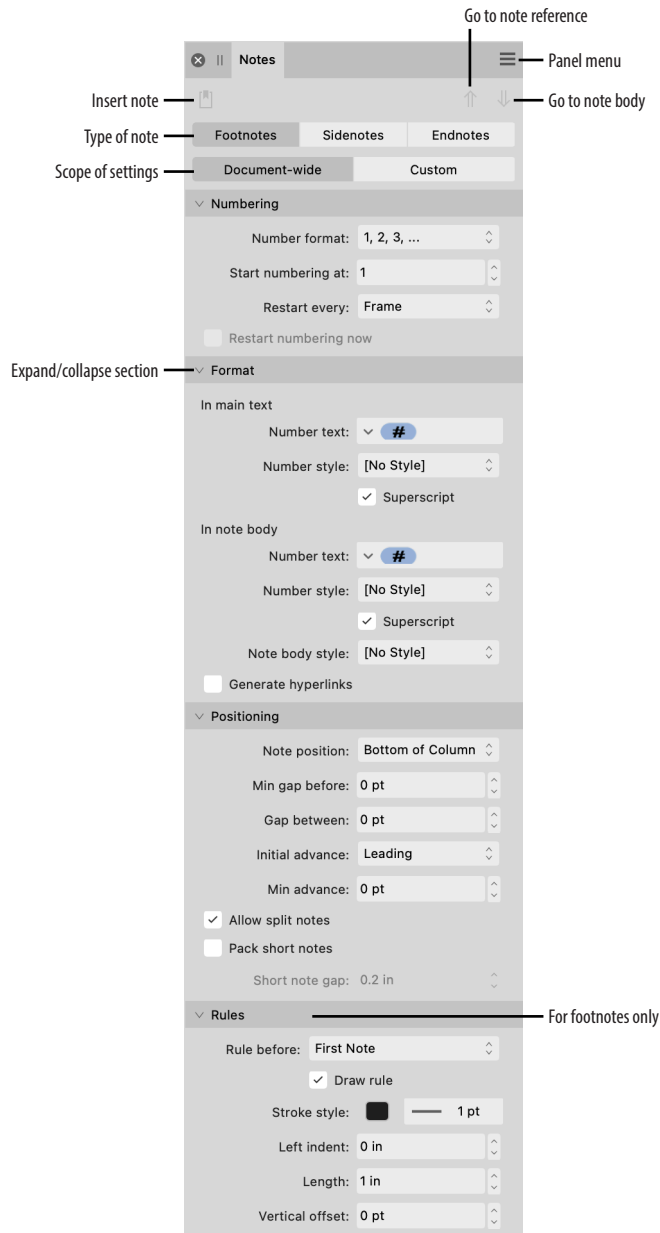
**Tip:** Choose **Text > Notes > Show Note Markers** when working with notes to see their markers more easily, and never edit endnotes without this selected

**Tip:** Note references are not plain text so their characters cannot be found with **Find and Replace** and are not counted by **Word Count**

## Using the Notes panel


### To display the Notes panel:

1. Choose **Window > References > Notes** to display the Notes panel.



## Adding notes

### To insert a note into text:


1. Using the **Frame Text**  tool, position the text cursor where you want the note reference to be inserted.
2. Choose one of **Text > Notes > Insert Footnote**, **Insert Sidenote**, or **Insert Endnote**. Notes inserted via the menu will always use **Document-wide** settings.

Or to insert a note using the **Notes panel**, choose **Footnotes**, **Sidenotes**, or **Endnotes** and choose **Document-wide** or **Custom**. Click the **Insert Note**  icon.


Publisher will insert the note reference and for a footnote or sidenote will adjust the text flow to accommodate the note body. The text cursor will move automatically to the note body to allow you to type the note.

3. When you have finished typing the note body, click the **Go to Reference**  icon to return to the main text.

### To view the note body for a note reference:

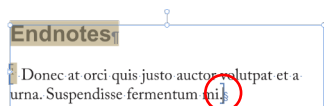
1. Click the **Go to Body**  icon to move the text cursor from the note reference to the note body.

### To view the note reference for a note body:

1. Click the **Go to Reference**  icon to move the text cursor from the note body to the note reference.

### To edit a note:

1. Edit a note body as you would any other text. Choose **Select All** to select all the text in the note without selecting text outside of the note.
2. For endnotes, you must first select **Text > Notes > Show Note Markers** to see their enclosing brackets. Be very careful when placing the text cursor at the start or end of an endnote. If you start typing and notice that the text is outside of the endnote brackets you must undo what you have typed and move the cursor inside of the brackets.



The text cursor may look like it is to the left of this end bracket but it is actually to its right

3. If you copy and paste a range of story text that includes a note marker, the note will be pasted along with the text.

### To delete a note:

1. You must delete the note reference to delete a note body. You can delete the note reference as you would any other character with **Backspace** or **Delete**. A field is treated as a single character so you need only press the key once.

**Tip:** For information on using notes in a Book made up of separate chapter documents, refer to [Adding references to a Book](#) on page 146


**Tip:** You cannot navigate from one note to the next so position the text cursor in a different note using the mouse

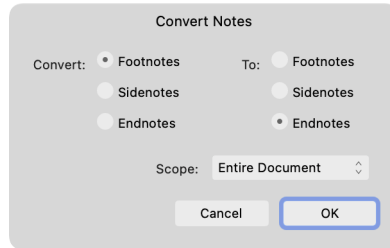
**Tip:** You can include inline and floating images in the note body; text wrap for floating images will apply only to the note body and not to the story text

## Converting one type of note to another

You can convert footnotes, sidenotes, and endnotes to either of the other types. You can convert all the notes in your document at once or just those in a selection.


### To convert notes from one type to another:

1. Choose **Convert Notes...** from the **Notes** panel menu .



2. Choose the types of note you want to convert from and to.
3. Set Scope to **Entire Document** to convert all notes or to **Current Selection** to modify only the notes in the selected text.

### To convert notes in selected text only:

1. Choose **Convert Selection to Footnotes/Sidenotes/Endnotes**, as applicable, from the **Notes** panel menu . This has the same effect as choosing **Convert Notes...** and setting the scope to **Current Selection**.

## Note settings

Note settings includes all of the numbering, formatting, and positioning options in the **Notes panel**. When you create a new note you can choose whether to create it with the **document-wide settings** or with **custom settings** for a specific note. The document-wide settings for a new document will be based on Publisher's **default settings** which you can change to match those of the current document.


It is important to understand that the settings used to create a note depend on the **Document-wide / Custom** toggle. Once the note is created the toggle will have no further effect on the note and there is no user interface feedback as to which settings were used to create the note. Clicking in a note will not change the toggle to reflect whether it uses document-wide or custom settings.

You can revert the document-wide settings for a document back to Publisher's default settings, and revert the default settings back to the original **factory defaults**. Changes are saved and reverted to all three types of notes at once.



Changing the document-wide settings will update the settings for all notes created using those settings but will have no impact on custom notes which each have their own individual settings. To change custom notes to the document settings you must use **Revert Selected/All Notes to Document Settings**.


You can't create custom presets nor can you copy custom settings from one note to another, but you can copy a note reference (marker), paste it at the desired location, and then change its note body text.

### To set the document-wide note settings:

1. If the text cursor is positioned in text, click on a blank area of the page or change to the **Move**  tool.
2. Choose one of **Footnotes**, **Sidenotes**, or **Endnotes** in the **Notes panel**.
3. Choose **Document-wide**.
4. Set any note options to update the document-wide settings.

### To convert custom-formatted notes to the document-wide settings:

1. Using the **Frame Text**  tool, position the text cursor in a note with custom settings or select a range of text containing one or more note reference markers.
2. Choose **Revert Selected Footnotes/Sidenotes/Endnotes to Document Settings**, as applicable, from the **Notes panel** menu . The command you choose will have no impact on the other two types of notes. Or choose **Revert All Footnotes/Sidenotes/Endnotes to Document Settings** to change all custom notes of the chosen type at once.


**Tip:** The only way to know if a note uses document-wide or custom settings is to look in the panel menu;  if the **Revert Selected Notes to Document Settings** command is disabled then the note uses document-wide settings and if it is enabled then it uses custom settings

**Tip:** After using **Custom** to format a specific note, change the toggle back to **Document-wide** or the next note you insert with the panel will use custom settings

**Tip:** You can set document-wide settings only when the text cursor is not placed in a text frame or when the cursor is placed in a note of the same type that was created with document-wide settings




**To convert notes using document-wide settings to custom settings:**

1. Using the **Frame Text**  tool, position the text cursor in a note with document-wide settings or select a range of text containing one or more note reference markers with document-wide settings.
2. Choose **Custom** from the **Notes** panel and define the settings for the selected notes.



**To save the current document's document-wide note settings as Publisher's defaults:**

1. Choose **Save Document Settings as New Defaults** from the **Notes** panel menu .

**To revert the current document's note settings to Publisher's defaults:**

1. Choose **Reset Document Settings to Factory defaults** from the **Notes** panel menu .
2. This will change only the current document's settings, not Publisher's current defaults. To change the defaults to the *factory* defaults, now choose **Save Document Settings as New Defaults**.

**To change the current document's note settings to match those of the current custom-formatted note:**

1. Using the **Frame Text**  tool, position the text cursor in a note with custom settings.
2. Choose **Update Document Settings from Selected Footnotes/Sidenotes/Endnotes**, as applicable, from the **Notes** panel menu . The command you choose will have no impact on the other two types of notes.

## Numbering notes

Notes are numbered automatically within a document, from the first to last page and from the bottom to top of the layer stack on each page, but you can restart numbering for each frame, page, story, or section. In the case of a Book you can also restart numbering every chapter.

There is one significant exception to the numbering of endnotes. Note references that are in text frames or tables pinned in another text frame will be numbered after the end of the story. If the story spans dozens of pages and you pin a text frame containing a note reference on the first page, it will be numbered after the last note on the last page of the story. If you must use notes in a pinned text frame then you should consider using footnotes in that frame and numbering them separately.

You can choose whether to restart note numbering every frame, page, story, section, document, or Book.

### To change note numbering:

1. Choose one of **Footnotes**, **Sidenotes**, or **Endnotes** in the **Notes panel**. Each type of note can be numbered separately.
2. Choose **Document-wide** to change the document's settings or **Custom** to change the selected note(s) or the next one you insert. It is generally best to maintain a consistent numbering system within a document but you are able to use 1, 2, 3... for the document and A, B, C... for a custom note. However, if you restart numbering in a custom note it will impact subsequent document-wide notes.
3. In the **Numbering** section, choose a **Number format** from the list. In addition to the standard number and letter options, you can choose symbols which numbers notes as \*†‡\$%# , duplicating each symbol when the pattern repeats.
4. Choose the **Start** number and when to **Restart** numbering. By default, Publisher will restart numbering footnotes for each frame which you may want to change to story, section, or document. Numbering for sidenotes and endnotes restarts by default for each story which you may want to change to section or document.
5. For Custom-formatted notes you can also choose to **Restart numbering now**.

**Tip:** You cannot change Document-wide settings while a Custom-formatted note is selected

**Tip:** When using symbols for numbering, restart numbering every frame for best results due to the limited range of symbols


## Formatting notes

### Before changing note formatting:

1. Choose one of **Footnotes**, **Sidenotes**, or **Endnotes** in the **Notes panel**. Each type of note can be formatted separately.
2. Choose **Document-wide** to change the document's settings or **Custom** to change the selected note(s) or the next one you insert. Refer to [Note settings](#) on page 189 for more information.


### To format the note reference marker:

In the **Format** section of the **Notes panel**, use the settings under **In main text**:

1. By default, the **Number text** will appear as a pound sign or hashtag **#** which inserts an automatic note number. You can enter additional character(s) such as enclosing brackets **[#]** or click the caret  icon on its left side to easily enter relevant special characters.
2. Choose a character style from **Number style** to format the note reference marker. Ignore this if you are satisfied with the default reference marker's appearance.
3. The reference marker is superscripted by default but you can deselect **Superscript** for formats such as **[#]**.

### To format the note body text:

In the **Format** section of the **Notes panel**, use the settings under **In note body**:

1. The **Number text**, **Number style**, and **Superscript** options apply to the note number in the note body and are identical to those for the reference in the main text so refer to the above description. Number text in the note body defaults to **#** plus a space to provide a separator before the note text.
2. Choose a paragraph style from **Note body style** to format the text of the note's text. The default is the **Body style** but you may want to create a unique style.
3. You can apply character styles and attributes directly to the note body text. If you apply formatting to the first character of the note body, the note body's number will be formatted, too. To avoid this, position the text cursor before the first character, choose **Text > Insert > Spaces and Tabs > Zero-Width Space**. Then while pressing **Shift**, use  (Right Arrow) to select the text you want to format. As long as you don't select the Zero-Width Space and apply formatting to it, the note number will be unaffected.

### To link note references to note bodies:

1. Choose **Generate hyperlinks** if you want the note references to be linked to and from the note bodies in an exported PDF file. This is useful mainly for endnotes that are separated from the note references. Hyperlinks added for notes will not appear in the **Hyperlinks panel** as they are not editable.
2. Ensure **Include Hyperlinks** is selected when exporting to PDF.

**Tip:** You cannot change Document-wide settings while a Custom-formatted note is selected

**Tip:** The **Superscript** option scales the font size so the character strokes will be thinner than normal text; disable this feature and apply a character style with **Typography > Superscript** enabled to take advantage of a font's true superscript characters, if available

**Tip:** You can also avoid this by selecting a character style from **In Note Body > Number Style** but it must have the same type of character attributes defined; for example, if the first word of the note body is italicized and you don't want the Number Text to be italicized, select a character style that has **Italics** set to off

## Positioning notes

These controls determine how notes are positioned.

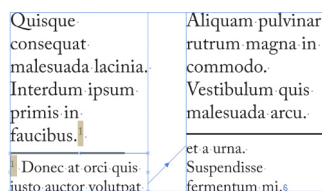
### Before changing note positioning:

1. Choose one of **Footnotes**, **Sidenotes**, or **Endnotes** in the **Notes panel**. Each type of note can be formatted separately.
2. Choose **Document-wide** to change the document's settings or **Custom** to change the selected note(s) or the next one you insert. Refer to [Note settings](#) on page 189 for more information.

**Tip:** You cannot change Document-wide settings while a Custom-formatted note is selected

### To position footnotes:

1. In the **Positioning** section of the **Notes panel**, choose a **Note position** option from the list.
  - **Below Text:** Notes appear below the last line of story text in the text frame or column.
  - **Bottom of Column** (default): Notes appear inside the bottom of the frame, spanning only one column if there are multiple columns. This is the most common setting for books.
  - **Bottom of Frame:** Notes appear inside the bottom of the frame and span the width of the frame if there are multiple columns.
  - **Below Frame** (not recommended): Notes appear below the text frame in an adjacent note frame. You can specify their maximum height to ensure they don't flow off the bottom of the page.
2. Set **Min gap before** to define the desired whitespace between the story text and the start of the first footnote and set **Gap between** to define the vertical space between each footnote. You can also set **Initial advance** and **Min advance** to define the position of the footnote's first baseline; refer to [Initial Advance](#) on page 52.
3. Set **Allow split notes** to allow footnotes to be continued in the next column or frame to reduce undesired whitespace.



**Tip:** Unlike in Adobe® InDesign®, the **Keep Together** paragraph flow setting does not override **Allow split notes**

**Tip:** Choose **Text > Insert > Breaks > Column Break** to split a footnote earlier than **Allow split notes** will do

4. Set **Pack short notes** to start footnotes on the same line as the previous footnote's body, and **Short note gap** to define the horizontal distance between them.

Quisque consequat malesuada lacinia.  
 Interdum et malesuada fames ac ante-  
 ipsum primis in faucibus. Aliquam  
 pulvinar rutrum magna in commodo.  
 Vestibulum quis malesuada arcu. Morbi  
 vel aliquet diam. Vestibulum facilis-  
 egestas dapibus. Vivamus a libero eros.  
 Donec at orci quis. Volutpat et a urna.

**Tip:** To change the space before the rule, use **Min gap before** in the Positioning section

5. In the **Rules** section, select **First Note** from **Rule before** to define the rule above a footnote, or **Continued Note** to define the rule above a note split from the previous column or text frame with **Allow split notes**.
6. Select **Draw rule** if you want a rule (line) to separate the first or continued footnote and then select the **Stroke style** including colour, width, and other options. Set **Left indent** and **Length** to define the width of the rule and **Vertical offset** to define the rule's position relative to the start of the first note.

### To position sidenotes:

1. In the **Positioning** section of the **Notes panel**, choose a **Note position** option from the list.
  - **Left of Frame:** Notes appear to the left of the text frame, even if the note reference is not in the leftmost column of the frame.
  - **Right of Frame:** Notes appear to the right of the text frame, even if the note reference is not in the rightmost column of the frame.
  - **Away From Spine** (recommended): In a facing-pages document, in the outer margin. In a non-facing-pages document, this is the same as Left of Frame.
  - **Towards Spine:** In a facing-pages document, in the inner margin. In a non-facing-pages document, this is the same as Right of Frame.
  - **Alternate Sides:** The first note in the frame will be on the outer (or left) side, the next on the inner (or right) side, etc.
  - **Closest Side** (default): Notes appear on the side that is closest to the note reference. Adding and removing text will cause the notes to change sides.
2. Set **Width** and **Distance from frame** to define the size and position of the sidenote.
3. Set **Min gap between** to define the vertical space between each sidenote. You can also set **Initial advance** and **Min advance** to define the position of the sidenote's first baseline; refer to [Initial Advance](#) on page 52.
4. Set **Allow split notes** to allow sidenotes to be continued on the side of the next text frame for the main story. Split sidenotes are less common than split footnotes.

### To position endnotes:

1. In the **Positioning** section of the **Notes panel**, choose a **Note position** option from the list.
  - **End of Story:** Notes appear below the last line of text in the story in the same text frame.
  - **Separate Frame:** Notes appear in a new text frame after the story's last text frame to create separate endnotes for each story.
  - **Shared Section Frame:** Notes appear in a new text frame after the section's last page to create separate endnotes for each section.
  - **Shared Document Frame** (default): Notes appear in a new text frame after the document's last page to create endnotes for the entire document. This is the most common setting for books.
  - **End of Book:** Refer to [Adding references to a Book](#) on page 146.
2. Set **Min gap before** to define the desired whitespace between the story text and the start of the first endnote and set **Gap between** to define the vertical space between each footnote. You can also set **Initial advance** and **Min advance** to define the position of the footnote's first baseline; refer to [Initial Advance](#) on page 52.
3. In the **Title** section of the **Notes panel**, enter the **Title text** and select a paragraph style from **Title style** to create an automatic heading for endnotes displayed in a separate frame than the story text. To create your own heading, leave the Title text field blank.




### How notes work:

Footnotes and sidenotes, as well as endnotes positioned at the end of a story, are stored in individual text frames associated with a note reference marker. These frames are similar to a pinned text frame so if you expand the main text frame's layer in the **Layers panel** you'll see that the note frames are child layers.

Publisher will display X handles at the corners and midpoints of a selected note to indicate that you cannot move or scale the layer. The width of the text frame for footnotes and endnotes is determined by the column or frame they are associated with while the width of the frame for sidenotes is set in the **Notes panel**. The height is always determined by the note's content.

## Importing notes from Microsoft® Word

Footnotes imported from a Microsoft® Word .docx file will all use custom settings because they won't match the document's Document-wide settings. They will likely all have a paragraph style named *Footnote Text* which you could redefine in Publisher but footnotes aren't properly formatted after importing from Word so it is recommended you reformat them in Publisher.

1. After importing the .docx file, choose **Revert all Footnotes to Document Settings** from the **Notes panel** menu .
2. The footnotes will now be formatted with the document-wide settings (which default to *Body* as the **Note body style**) and likely the *Footnote Reference* character style imported from Word. *Footnote Reference* was intended for the note reference marker and the number in the note body and not the rest of the note body, so you should remove it from the note bodies. First, define a new character style for the note bodies named *Note Body* and base it on the *Body* paragraph style, you can change the attributes for it later as desired. The choice of name is unimportant.
3. Using the **Find and Replace** panel, click the **Find formatting**  icon for **Find** and select *Footnote Reference* from the **Character Style** menu and *Body* from **Paragraph Style**. Click the **Find formatting**  icon for **Replace** and select the new *Note Body* style you created above. Do not enter text in the Find or Replace fields. This step assumes that the document-wide settings for footnotes uses *Body* as the **Note body style** and that the body text imported from Word is not formatted with *Body*.
4. Click **Find** and then click **Replace All**.

# Using fields

A field is variable text that you insert into your document and which Publisher can update. Fields are used to insert information such as page numbers, section names, dates, and metadata. If you insert them on a master page the information displayed on a document page will be relative to that page and its section.

Publisher offers three types of fields:

- **Metadata:** These fields store information about the document such as title, author, and keywords and you can edit their values. All fields can be inserted into document text but these fields are commonly used for PDF metadata.
- **Variables:** These fields display dynamic values such as page number, section name, and saved date. Their values cannot be edited.
- **Custom variables:** You can also create your own fields and edit their names and values.

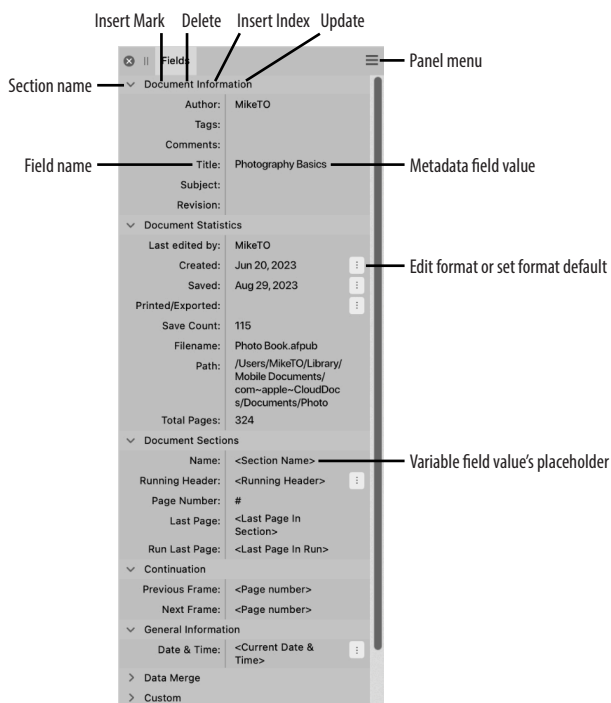
**Tip:** Fields are specific to a document and cannot be synced across chapters of a Book or imported into another document

**Tip:** A field is not plain text so its value cannot be found with **Find and Replace** and is counted as one character and one word by the **Word Count** feature regardless of how many characters or words it displays

## Using the Fields panel

To display the Fields panel:

1. Choose **Window > References > Fields** to display the Fields panel.




2. Collapse and expand the panel's sections by clicking the caret > icons to the left of their titles.



## Inserting fields

Some of the common fields are available from the **Text > Insert > Fields** menu but you must use the **Fields panel** to access most of them.

### To insert a field:

1. Using the **Frame Text**  tool, position the text cursor where you want the field to be inserted.
2. Insert the desired field by double-clicking its name in the **Fields panel** or by choosing it from **Text > Insert > Fields**.
3. Choose **Text > Highlight Fields** to add shading behind fields such as page numbers to make them easier to see while editing your document. This shading will not be printed.

**Tip:** You can also double-click the value to insert non-editable fields such as dates but it's better to always double-click the field names because some fields can be edited in the panel by clicking them

### To edit the value of a metadata field:

1. Click a field value in the **Fields panel** and then click it a second time—do not double-click. Enter a new value and press **Return**.

### To delete a field:

1. Delete a field as you would any other character with **Backspace** or **Delete**. A field is treated as a single character so you need only press the key once.

### To expand a field and convert it to regular text:

1. Using the **Frame Text**  tool, right-click the field in the document text and choose **Expand Field** from the context menu.

## Field types

All page number fields display page numbers in the numbering format defined for the field's section and are relative to the section's starting page number. If you haven't used sections in the document, page numbers will be numbered 1, 2, 3...

Section	Field	Displays
Document Information	Author	User who created the document; you can change the name
	Tags	Keywords, used for PDF export; use commas to separate them
	Comments	Freeform text of your choice, this isn't displayed anywhere else
	Title	Freeform text for a PDF file's title
	Subject	Freeform text for a PDF file's subject
	Revision	For your own use, this isn't displayed anywhere else
Document Statistics	Last edited by	User who last saved the document; you can change the name
	Created	Date the document was created or last use of Save As
	Saved	Date the document was last saved
	Printed/Exported	Date the document was last printed or exported
	Save Count	Number of times the document has been saved since creation or last use of Save As
	Filename	Name of the .afpub file on your computer
	Path	Path to the .afpub file on your computer
	Total Pages	Number of pages in the document
Document Sections	Name	Name of the section in which the field is inserted
	Running header	First or last use of styled text on a page; refer to <a href="#">Running headers on page 28</a>
	Page Number	Page number on which the field is inserted; refer to <a href="#">Page numbering on page 23</a>
	Last Page	Page number of the last page in the section in which the field is inserted
Continuation	Run Last Page	Page number of the last page before which page numbering is restarted
	Previous Frame	Page number of the page for the previous text frame the field's frame is linked to; if there isn't a previous frame then it will be blank
General Information	Next Frame	Page number of the page for the next text frame the field's frame is linked to; if there isn't a previous frame then it will be blank
	Date & Time	Date and time when the field was inserted or last updated



**Tip:** To set the default value for Author, edit this field when no documents are open

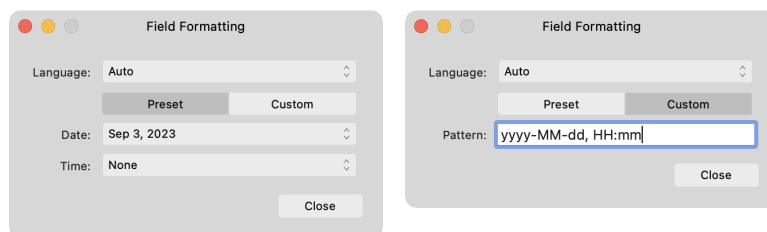
Section	Field	Displays
Data Merge	Source	Filename of the external data source
	Merge Index	Numerical order of the merged record from the filtered index
	Unfiltered Index	Numerical order of the merged record from the unfiltered index
Data Merge - filename	<dynamic>	Fields are generated from the external data source
Custom	<user defined>	Fields are defined by the user

## Formatting fields

The date and Running Header fields allow you to customize their formatting.


### To format a field:

1. Using the **Frame Text**  tool, right-click the field in the document text and choose **Edit Field...** from the context menu. You can also select the field or position the text cursor before or after it and then click the respective **Edit**  icon beside the field in the **Fields** panel.
2. Format the field. Refer to [Running headers](#) on page 28 for information on formatting a running header. For dates, select a **Language** if the field's language doesn't match the language of the surrounding text. Choose one of the preset date and/or time formats or click **Custom** and enter a custom format into the **Pattern** field. Refer to the table on the following page for more information.



3. Click **Close**.

### To set the default formatting for a field:

1. Position the text cursor away from date or Running Header fields and click the respective **Edit**  icon beside the field in the **Fields** panel.
2. Format the field and click **Close**. The formatting options are the same as for formatting a specific field.

### Date and time formatting options:

Combine the following symbols in the **Pattern** field. Note that many are case sensitive. Plain text such as *Today's date*: must be enclosed in apostrophes and its apostrophe repeated as *'Today' date*:. Non-alphabetic characters such as dashes, commas, periods and colons do not need to be enclosed in apostrophes.

Symbol	Meaning	Pattern	Examples for September 3, 2023	
G	Era	G GGGG GGGGG	AD Anno Domini A	
y	Year	y yy	2023 23	
Q	Quarter	Q, QQ QQQ QQQQ	2 Q2 2nd quarter	Use QQ to prefix single digits with 0
M	Month in year	M, MM MMM MMMM MMMMM	9, 09 Sep September S	Use MM to prefix single digits with 0
L	Standalone month in year	L, LL LLL LLLL LLLLL	9, 09 Sep September S	Use LL to prefix single digits with 0
w	Week of year	w, ww	36, 36	Use ww to prefix single digits with 0
W	Week of month	W, WW	4, 04	Use WW to prefix single digits with 0
d	Day in month	d, dd	3, 03	Use dd to prefix single digits with 0
D	Day of year	D, DD, DDD	246, 246, 246	Use DD to prefix single digits with 0 or DDD to prefix single digits with 00
F	Day of week in month	F, FF	1, 01	Example is first Sunday in September Use FF to prefix single digits with 0
E	Day of week	E EEEE EEEE EEEE	Sun Sunday S Su	Example is Sunday
e	Local day of week	e, ee eee eeee eeeee eeeee	1, 01 Sun Sunday S Su	Varies by language

**Tip:** Use *Standalone month in year* for languages that spell the month differently in a full date versus standalone; for example, September 22 in Polish is 22 września but September 2023 is wrzesień 2023


**Tip:** Sunday is the 1st day of the week for English US and some other languages but the 7<sup>th</sup> day of the week for others such as English UK

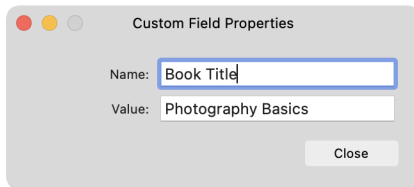
Symbol	Meaning	Pattern	Examples for 6:07:05 p.m. EDT	
a	AM or PM	a aaaaa	<i>varies</i> <i>varies</i>	PM (US), pm (UK, Australia), or p.m. (Canada) p (US, UK), pm (Canada, Australia)
B	Flexible day periods	B	<i>varies</i>	Possible values are “in the morning”, “noon”, “in the afternoon”, “in the evening”, and “at night” (US, UK, Canada) or “morning”, “midday”, “afternoon”, “evening”, and “night” (Australia)
h	Hour in day (1-12)	h, hh	6, 06	Use hh to prefix single digit with 0
H	Hour (0-23)	H, HH	18, 18	Use HH to prefix single digit with 0
k	Hour number in day (1-24)	k, kk	19, 19	Use kk to prefix single digit with 0
K	Hour in AM/PM (0-11)	K, KK	7, 07	Use KK to prefix single digit with 0
m	Minute in hour (0-59)	m, mm	7, 07	Use mm to prefix single digit with 0
s	Second in minute (0-59)	s, ss	5, 05	Use ss to prefix single digit with 0
z	Time Zone	z zzzz	EDT Eastern Daylight Saving Time	
O	Time zone: localized	O 0000	GMT-4 GMT-04:00	“O” is a letter, not a zero
V	Time zone: ID	V VV	usnyc America/New_York	Example is New York city
	Time zone: exemplar city	VVV	New York	
	Time zone: generic location	VVVV	New York Time	
x	Time zone: ISO8601 basic	x	-04	
	Time zone: ISO8601 basic	xx	-0400	
	Time zone: ISO8601 extended	xxx	-04:00	

## Creating custom variables

Custom variables are fields that you create for use in your document. For example, you might use a custom variable as a placeholder for a product or company name that will be finalized or revealed at a later date. Custom variables are also useful for customizing previously-created documents for individual clients.

### To manually create a custom variable:

1. Expand the **Custom** section of the **Fields** panel.
2. Click the **Create Custom Field**  icon.



3. Enter a unique **Name** for the field and its initial **Value**.
4. Click **Close**.

### To create a custom variable based on existing text:


1. If the existing text is longer than a single word, select the text.
2. Right-click the text and choose **Convert Text to Field...** The custom variable will be created immediately using the selected text or the word you right-clicked for both the field name and value. The **Custom Field Properties** window will appear to allow you to rename the field.

**Tip:** The field will be formatted using the attributes of the first character, so if you converted two words to a field and the second word was bold, the bold formatting would be removed



### To change the value of a custom variable:

1. Click the field's value in the **Fields** panel and then click it a second time—do not double-click. Enter a new value and press **Return**. You can also right-click the field in the text frame and choose **Edit Field** from the context menu.

### To rename a custom variable:


1. Click the **Edit**  icon to the right of the field in the **Fields** panel. You can also right-click the field in the text frame and choose **Edit Field** from the context menu.
2. The options are the same as for creating a custom field.

### To delete a custom variable:

1. Click the **Edit**  icon to the right of the field in the **Fields** panel. Click the **Delete**  icon in the popup window.

### To import custom variables into another document:

Custom variables are specific to a document and cannot be synced across chapters of a Book or directly imported into another document. However, you can copy and paste custom variables to another document.

1. Using the **Frame Text**  tool, select a custom variable field and choose Copy from the context menu. You can also copy a range of text containing one or more custom variables or select its text frame.
2. Switch to the target document and choose **Edit > Paste**. The custom variables will be imported into the new document.

# Using anchors

An anchor is a position in a document that you can link to with a hyperlink or cross-reference or which you can use as a bookmark in an exported PDF file.

Anchors can be inserted between two characters of text or added to an object such as a shape or text frame. Text anchors will move with the text as you add and remove text before them in the story while object anchors will remain attached to the object.

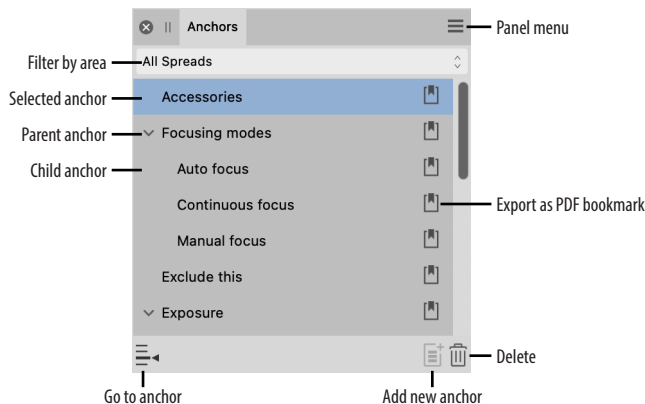
It's very easy to delete text anchors by mistake because they are non-printing characters. It's recommended that you enable **Show Anchors** when working with text anchors. Object anchors are never visible and can be found only with the **Anchors panel**.

You can create text and object anchors manually and Publisher will create text anchors automatically when a table of contents is generated or when a cross-reference is added. The table of contents feature uses anchors to link its page numbers to pages while the cross-references feature uses anchors as the targets for its references.

## Using the Anchors panel

To display the Anchors panel:

1. Choose **Window > References > Anchors** to display the **Anchors panel**.



2. Collapse or expand parent anchors by clicking the caret > icons to the left of their names—they won't stay collapsed but it may help
3. Filter the list of anchors to just those on a specific page by choosing a specific page from the **Area** popup menu that defaults to *All Spreads*. If the document is a chapter of an open Book, *All Spreads* will be renamed to *Current Chapter* and an *All Chapters* option will be added. Choosing *All Chapters* will show anchors in all of the Book's chapters, allowing you to go to any of them even if the chapter is not open. Anchors not in the current chapter are listed with a **Chapter** icon beside them.

**Definition:** An anchor is a marker in your document

**Tip:** While Publisher doesn't allow anchors to be applied to a page like bookmarks in Adobe® InDesign®, they can be applied to an object for more flexibility

**Tip:** Anchors are not displayed in the order they appear in the document or in the order bookmarks will appear in an exported PDF



## Inserting anchors

You can add anchors manually but Publisher will also create them automatically if you insert a table of contents or target paragraphs or index marks with cross-references. If you plan to add a table of contents, it is recommended that you not add anchors for any headings because the table of contents feature will generate them automatically. You might instead consider adding the table of contents to your publication earlier than you need to and updating it as you work so that the anchors are available to you for other purposes.

If you plan to cross-reference your publication by targeting paragraphs or index marks, the cross-references feature will automatically insert anchors for the targets. But you might prefer to add anchors manually and use them as targets when you cross-reference your publication.


### To view text anchors:

1. Choose **Text > Interactive > Show Anchors** to view the non-printing anchor symbols. These are not turned on with **Text > Show Special Characters**.




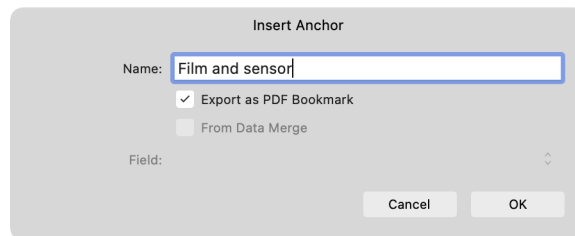
An anchor symbol between two characters

### To insert an anchor:

1. Using the **Frame Text**  tool, select a word or words or position the text cursor before or after a word. Selected text will be used as the anchor's default name.

Or to add an anchor to an object, select an object using the **Move**  tool.

2. Click the **New Anchor**  icon in the **Anchors panel** or choose **Text > Interactive > Insert Anchor...**


The 'Insert Anchor' dialog box has a title bar. It contains a 'Name:' label followed by a text field containing 'Film and sensor'. Below this are two checkboxes: 'Export as PDF Bookmark' (checked) and 'From Data Merge' (unchecked). At the bottom left is a 'Field:' label with a dropdown arrow. At the bottom right are 'Cancel' and 'OK' buttons.

Insert Anchor

Name:

☒ Export as PDF Bookmark

☐ From Data Merge

Field: 

3. The **Name** field will be pre-filled if you selected text. If you placed the text cursor or selected an object, the anchor name will default to *Anchor #* where # is the next unused default anchor number. It is recommended that you enter a useful name if you intend to export this anchor as a PDF bookmark. A unique name will also avoid later confusion over the purpose of an anchor.
4. Select **Export as PDF Bookmark** (default) to include this anchor as a bookmark in an exported PDF file.

5. **From Data Merge** and **Field** are used only for data merging which is beyond the scope of this manual.

### To delete an anchor:

1. Select an anchor in the **Anchors** panel and then click the **Remove Anchor**  icon.

Or position the text cursor before or after a text anchor or select an object with an anchor and choose **Text > Interactive > Delete Anchor**.

You can also delete a text anchor reference as you would any other character with **Backspace** or **Delete**.


### To rename an anchor:

1. Select an anchor in the **Anchors** panel and then click it a second time—do not double-click. Enter a new name and press **Return**.

Or position the text cursor before or after a text anchor or select an object with an anchor and choose **Text > Interactive > Anchor Properties...** The options are the same as for inserting an anchor.

**Tip:** Don't rename anchors generated by the Table of Contents feature because duplicate anchors will be created when you update the table of contents




### To convert an anchor to a PDF bookmark:



1. Click the **Bookmark**  icon to the right of the anchor name in the **Anchors** panel.

Or position the text cursor before or after a text anchor or select an object with an anchor, choose **Text > Interactive > Anchor Properties...**, and select **Export as PDF bookmark**.

### To move a text anchor:

You can cut and paste anchors just like any other character except that they have no width and can be difficult to select.

1. If text anchors are not already visible, choose **Text > Interactive > Show Anchors** to view the non-printing anchor symbols.
2. Using the **Frame Text**  tool, position the text cursor before or after the anchor. Press **Shift** +  or , depending on where you placed the text cursor.

If you're unsure if the text cursor is to the left or right of the anchor, press  or  (Left Arrow or Right Arrow) and if the text cursor doesn't move, you just moved past it in that direction.

3. If the anchor was the target of a cross-reference you will need to reselect the cross-reference target with the **Cross-References** panel.

**Tip:** Don't cut and paste anchors generated by the Table of Contents feature because duplicate anchors will be created when you update the table of contents

### To make an anchor a child of another anchor:

1. Drag an anchor's name in the panel over the desired parent anchor and then release the mouse button when the parent anchor becomes blue. You can also drag the anchor between two other anchors to make it a child of those anchors' parent but you can't specify the exact position.

**Tip:** Don't change the hierarchy of anchors generated by the Table of Contents feature because they will return to their original position when you update the table of contents

### To export a document to PDF and include PDF bookmarks:

1. Choose **File > Export...**
2. Select *PDF* from the popup menu of file types.
3. Select a preset such as *PDF (for digital - high quality)*.
4. If **Advanced > Include bookmarks** is not selected for the preset you chose, select it now

You may need to enable bookmarks if they are not visible in your PDF viewer software. Adobe® Acrobat® Reader displays PDF bookmarks by default but if they're not visible choose **View > Show/Hide > Navigation Panes > Bookmarks**. Apple Preview does not display PDF bookmarks by default so choose **View > Table of Contents**.

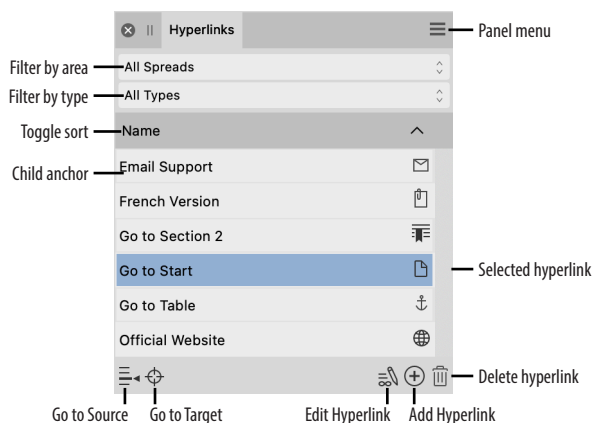
# Using hyperlinks

A hyperlink allows the reader of a PDF or eBook to jump to another location in the same publication, another file, a website, or to start an email with their device's default mail application. A hyperlink can be applied to a range of text or to an object.

## Using the Hyperlinks panel

**To display the Hyperlinks panel:**

1. Choose **Window > References > Hyperlinks** to display the **Hyperlinks panel**.






2. Filter the list of hyperlinks to just those on a specific page by choosing a specific page from the **Area** popup menu that defaults to *All Spreads*.
3. Filter the list of hyperlinks by choosing a single type of hyperlink from the **Type** popup menu that defaults to *All Types*.

## Inserting hyperlinks

Page and Section are most useful for objects since you can't CR an object

File is just for relative links, the file isn't incorporated

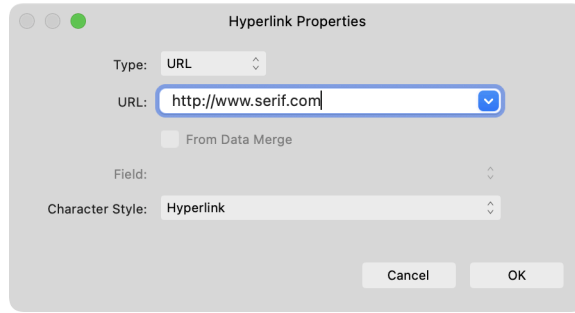
**To insert a hyperlink:**

1. Using the **Frame Text**  tool, select a range of text. The selected text will be used as the default URL if you choose the URL type.  
Or to add a hyperlink to an object, select an object using the **Move**  tool.
2. Click the **Add Hyperlink**  icon in the **Hyperlinks panel** or choose **Text > Interactive > Insert Hyperlink...**

**Tip:** While you could use a hyperlink and an anchor to create a cross-reference, it's easier to do this with the cross-references feature which can also automatically update a page number or the link text

**Tip:** The table of contents, index, and cross-references can be hyperlinked automatically but their links are not listed in this panel

**Tip:** Unlike the Anchors panel, the **Hyperlinks panel** cannot list hyperlinks in other chapters for a Book



3. Choose the **Type** of the hyperlink:

- **Anchor:** Select a text or object anchor from the **Anchor** list. If the document is a chapter in an open Book, the **Chapter** popup menu will allow you to select an anchor in a different chapter. Refer to [Using anchors](#) on page 205 for information on creating anchors.
- **Email:** Enter an email address so that when the reader clicks the hyperlink, a new email will be started using the reader's default mail application. Do not include `mailto:` in the field but you can use the standard `?subject=` syntax, as long as you escape the spaces in the subject with `%20`.
- **File:** Click the **More** icon to browse to a PDF file on your computer, which if you select the additional option to **Include file on export** will be linked with a relative URL in the exported PDF file so they can be uploaded together. If you don't select **Include file on export** then an absolute URL to the file on your computer will be used.
- **Page:** Select a page number in the current document—the target is to a page number so if you add or remove pages the content of the target page number might be different. Use *Anchor* if you want the target to move as pages are added and removed.
- **Section:** Select a section in the current document.
- **URL:** Enter an absolute URL for a website page or file. Use *File* if you need a relative URL; inclusion of `http/https` is optional.

4. **From Data Merge** and **Field** are available for all but *Page* and *Section* and are used only for data merging which is beyond the scope of this manual.
5. **Character Style:** Select a character style to apply to the hyperlink. Publisher will create a default style named *Hyperlink* if you select *Hyperlink* from the list for a document that lacks this style.
6. Click **OK**.

**Tip:** Although you can select any type of file, the File feature works reliably only with PDF files; you may get an error when attempting to export a document that includes a link to a different type of file

### To delete a hyperlink:

1. Select a hyperlink in the **Hyperlinks panel** and then click the **Delete Hyperlink**  icon.

Or position the text cursor before or after a hyperlink or select an object to which a hyperlink is applied and choose **Text > Interactive > Delete Hyperlink**. Or select a range of text that includes the hyperlink or the object to which a hyperlink is applied and delete it.

### To edit a hyperlink:

1. Position the text cursor in, before, or after a hyperlink or select an object with a hyperlink and choose **Text > Interactive > Edit Hyperlink...**, or double-click the hyperlink in the **Hyperlinks panel**. The options are the same as for inserting a hyperlink.

### To rename a hyperlink:

1. Select a hyperlink in the **Hyperlinks panel** and then click it a second time—do not double-click. Enter a new name and press **Return**. The name has no impact on the hyperlink but is helpful for keeping track of the hyperlinks in a document

### To find a hyperlink in the document:

1. Select a hyperlink in the **Hyperlinks panel** and click the **Go to Source**  icon.

### To view the target of a hyperlink:

1. Select a hyperlink in the **Hyperlinks panel** and click the **Go to Target**  icon.

Or position the text cursor before or after a hyperlink or select an object to which a hyperlink is applied and choose **Text > Interactive > Go to Hyperlink Target**.

### To fix a broken hyperlink:

1. If you delete the target of an Anchor, Page, or Section hyperlink, Publisher will display a **Broken Hyperlink**  icon in the **Hyperlinks panel**. Delete the hyperlink or edit it to select a new target.



Although you can use Publisher for almost any visual project, most users of Publisher use it to print directly to a local printer, to prepare a PDF file to be printed at a large-format or high-volume digital printing press, or to prepare a PDF file to be converted to film for printing on a commercial press.

Printing a document on a commercial press used to mean printing colour separations to a PostScript file for delivery to a print partner, also referred to as a service bureau or service provider. The commercial operator would send the PostScript file to an Imagesetter for conversion to film. All of the work was done up front on your computer so you had complete control of the final product, but also the responsibility to get it right. This sometimes led to poor colour because the publishing application wasn't optimized for the specific printing press and type of paper.

With newer applications such as Publisher, documents are exported to a PDF file and the print partner handles the colour separations to ensure colour fidelity with the printing press and paper.

Not every document will be printed and Publisher allows you to export to a PDF file suitable for digital distribution. It doesn't include optimized workflows for generating ebooks but a standard PDF can be converted to an ebook with specialized software.

## In this chapter

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## Preflighting documents

**Definition:** *Preflight* refers to the automatic comparison of a document to a checklist and is named after the preflight checks that pilots do before take off

**Tip:** The profile preset selection is saved with the document but the profile is not embedded in the document so if you send the document to somebody else for review or open it on another device and you want the same Preflight settings, export your presets to a file that can be imported

Preflight helps you avoid mistakes before printing or exporting a document. It can alert you to errors including spelling, overset text, broken cross-references, out-of-date indices and tables of contents, missing fonts and images, and much more.

Publisher can preflight a document *live* as you work and on demand before you print or export. Publisher defaults to *live* checking for all documents, except for those opened from PDF, Designer's .afdesign, and Photo's .afphoto files.





The Preflight settings can be individually disabled or configured as a warning or error to indicate its severity to you and saved as a profile preset to use for different types of documents. The profile preset includes when the Preflight check should be completed and is saved with a document for consistent preflight checking. You can also add a Preflight comment to any object to remind you to review it before printing or exporting.

You can Preflight an entire Book at once but only if the Book and its chapters are all open. Refer to [Preflight a Book](#) on page 147 for more information.

## Using the Preflight panel

**To display the Preflight panel:**

1. Choose **Window > Preflight** or click the **Preflight** icon at the bottom of the document window to the right of the page navigation controls. The icon's appearance will depend on whether there are errors, warnings, or no issues.

Status	Description
	Preflight not completed because <b>Check</b> is set to <i>Never</i>
	All Preflight tests passed
	One or more Preflight warnings
	One or more Preflight errors and possibly one or more warnings


The screenshot shows the Preflight panel in Adobe InDesign. At the top, there's a 'Profile' dropdown set to 'Book default' and a 'Check when' section with buttons for 'Never', 'Export', and 'Live'. Below these are 'Check Now' and 'Check later' buttons. The main area lists several errors and warnings, each with an icon (red X for error, yellow triangle for warning) and a 'Fix' button. The errors are: 'One or more tables of contents entries need updating.' and 'The document index needs updating.' The warnings are: 'Straight quotes' (60 instances), 'Consecutive breaks' (138 instances), 'Overflowing text frame' (159 instances), 'Straight quotes' (159 instances), and 'Bleed Hazard' (173 instances). The page number of the issue (159) is highlighted in the original image.

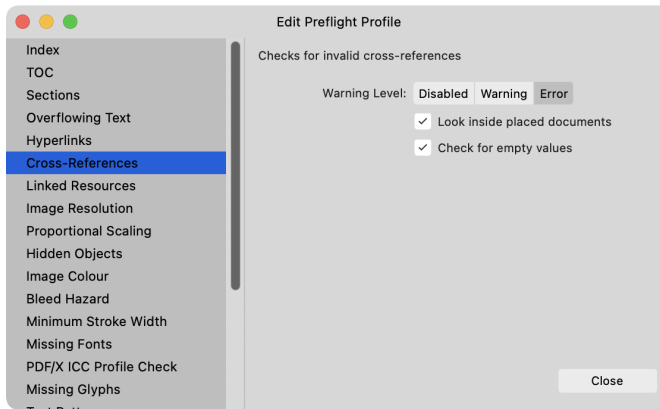
Icon	Message	Fix	Count
Error icon (Red X)	One or more tables of contents entries need updating.	Fix	
Error icon (Red X)	The document index needs updating.	Fix	
Warning icon (Yellow Triangle)	Straight quotes		60
Warning icon (Yellow Triangle)	Consecutive breaks	Fix	138
Error icon (Red X)	Overflowing text frame		159
Warning icon (Yellow Triangle)	Straight quotes		159
Warning icon (Yellow Triangle)	Bleed Hazard		173

2. The issues are sorted by page number by default but you can change that by choosing **Sort by error type** from the panel menu.
3. Select the profile preset to use from the **Profile** popup menu and choose when to **Check** from the three options. Click **Check Now** to perform a check if *Live* is not selected.

## Changing Preflight settings

### To change Preflight settings:

1. Create or open a document—you cannot change Preflight settings without an open document.
2. Click the menu  icon to the right of the **Profile** popup menu and choose **Edit profile...** from the popup menu.

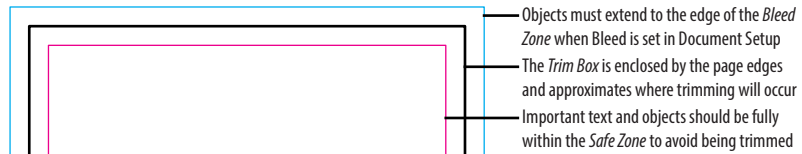


**Tip:** Preflight cannot be restricted to a page range and you cannot limit how many of each issue are reported

**Tip:** Preflight does not check for issues on hidden layers because they don't affect printing or exporting

3. Choose an issue type from the left pane and configure its options.
4. You can select a **Warning Level** for each issue type. Select *Disabled* to ignore this issue type, *Warning* for it to be flagged with the yellow icon, and *Error* for it to be flagged with the Red icon. With the default settings, *Error* is reserved for issues that will impact the successful printing or exporting of the document but you can change them as you see fit.
5. You can select **Look inside placed documents** for some issue types to check for that type of Preflight issue in a linked or embedded document
6. The specific options for each issue type vary:
  - **Index:** No specific options, alerts you if outdated.
  - **TOC:** No specific options, alerts you if outdated.
  - **Sections:** No specific options, alerts you if all sections have **Include on export** disabled.
  - **Overflowing Text:** No specific options, alerts you if text is overflowing.
  - **Hyperlinks:** No specific options, alerts you if a link is invalid.

- **Cross-References:** Alerts you for invalid cross-references. Select **Check for empty values** to report if a cross-reference targets a blank paragraph.
- **Linked Resources:** No specific options, alerts you if a linked resource is missing or the version in the document needs to be updated.
- **Image Resolution:** Set the minimum and maximum thresholds below and above which you want to be alerted to avoid low-resolution images that won't print well or images that have such high resolution that it might affect performance.
- **Proportional Scaling:** Set the threshold value above which you want to be alerted for a distorted image.
- **Hidden Objects:** Set to be alerted to a hidden layer. This option is useful in case you hide layers while working and forgot to un-hide them.
- **Image Colour:** Set to be alerted if the colour space (format) or colour profile of a placed image or document doesn't match this document.
- **Bleed Hazard:** If **Bleed** is set in **Document Setup**, select the **Safe Zone Edge** for which you want to be alerted. *Mirror Bleed* (default) will set the safe zone to the inverse of the bleed which is a useful amount, *Trim Box* will set the safe zone to the edges of the page, and *Custom* allows you to define your own safe zone boundaries.




- **Minimum Stroke Width:** Because thin lines don't print well—white lines disappear when neighbouring ink bleeds into them and colour lines can have multiple component strokes if the CMYK plates are misaligned—you can set the minimum widths for white, single ink, and multiple ink lines.
- **Missing Fonts:** No specific options, alerts you if a font is missing.
- **PDF/X ICC Profile Check:** No specific options, alerts you if the document cannot be exported as a valid PDF/X file.
- **Missing Glyphs:** No specific options, alerts you if a font lacks a character you used set in that font.
- **Text Patterns:** Set to be alerted for common issues such as multiple spaces, consecutive breaks, straight quotes, and more; you can set each option independently.
- **Spelling:** No specific options, alerts you of spelling mistakes and if a dictionary is missing for the language used.
- **User Comment:** No specific options, alerts you if you entered a user comment for any object.

- **PDF Passthrough:** Set the PDF compatibility level for PDF files placed in the document below which you will be alerted. For example, placing a PDF 1.4 file with a signature into a document with this option set to PDF/X-1a:2003 would alert you of the incompatibility.
- **Alt Text:** Alerts you if alt text is missing for placed images and documents, and for vector (path) objects.
- **Data Merge Update:** No specific options, alerts you if a data merge source has been updated.
- **Data Merge Fields:** No specific options, alerts you if there are mismatched text field and picture frame links.
- **Colours and Inks:** Set to be alerted if any part of the document would exceed the specified **Maximum Ink** or **Maximum Rich Black** thresholds. Your print partner will tell you the values you should use for their printing press.


**Tip:** It is recommended that the option for **Vector Objects** be disabled because it will generate a Preflight warning or error for every line drawn with the Pen tool

Refer to the [Preflight help page](#) for a complete list of the warning and error messages that are associated with the above settings.


#### To save a Preflight profile preset:

1. Click the menu  icon to the right of the **Profile** list and choose **Create preset...** from the popup menu.
2. Enter a preset name and click OK.

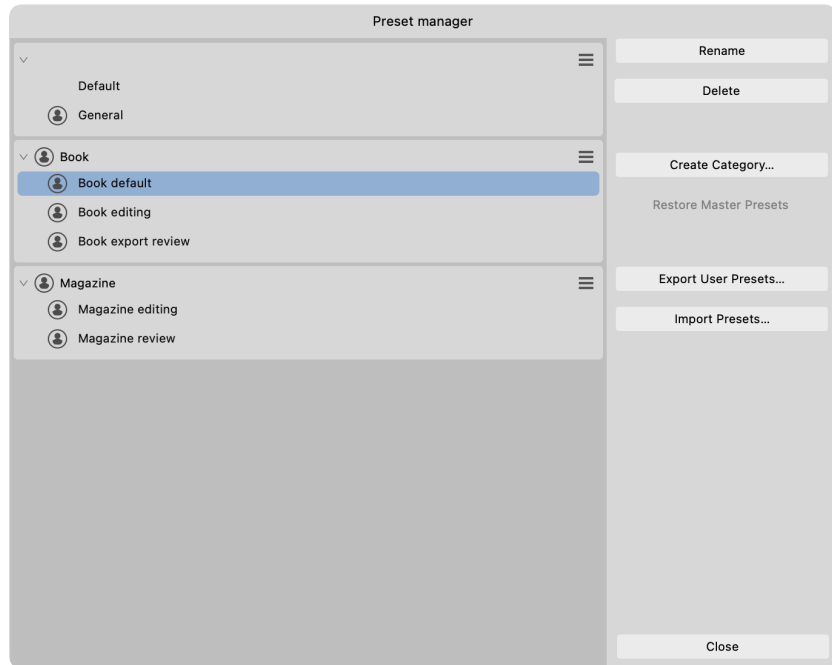
#### To update a Preflight profile preset:

1. Click the menu  icon to the right of the **Profile** list and choose **Create preset...** from the popup menu.
2. Enter the preset's exact name and click OK. Publisher will prompt you to confirm that the existing preset should be replaced.

#### To organize, import/export, or rename or delete a Preflight profile preset:

1. Click the menu  icon to the right of the **Profile** list and choose **Manage presets...** from the popup menu.

**Tip:** The Preset Manager is shared with other parts of Affinity and includes linked categories, linking to the other applications in the suite, which don't apply to Preflight because it is specific to Publisher



2. To rename or delete a preset, select a preset and click **Rename** or **Delete**.
3. To organize presets into categories, click **Create Category...**, enter a category name, and then click **OK**. Then drag presets into the category—a blue line will appear to indicate where the preset will be moved. If you have many presets, you can collapse and expand the categories by clicking their caret icon.
4. To rename a category, click the menu icon to the right of the category list and choose **Rename Category...** from the popup menu. To delete a category, delete all of its presets or move them to another category and then click the menu icon to the right of the category name and choose **Delete Category...** from the popup menu.
5. To export profile presets to share them with another user or device, click **Export User Presets...** to export all presets, or to export just those in one category, click the menu icon to the right of the category name and choose **Export User Presets...** from the popup menu. Both options will create an .afpreflightpresets file.
6. To import profile presets from an .afpreflightpresets file, click **Import Presets...** to import them exactly as they were exported. To import profile presets directly into a category, click the menu icon to the right of the category name and choose **Import Presets to Category...** from the popup menu.

## Viewing and resolving Preflight issues

### To enable or disable live Preflighting:

1. Click **Live** to enable live Preflighting, **Never** to disable Preflight entirely, or **Export** to Preflight only before printing or exporting a document. Although the button is labeled Export it works for printing, too.

This feature is saved with a profile preset and with the document.

2. Click **Check Now** to perform a check if *Live* is not selected.

### To change profile presets:

1. Select the profile preset to use from the **Profile** list.

### To review Preflight issues:

1. Hover the mouse pointer over an issue to see more information in a popup tip.
2. Double-click an issue to view the page with the issue; the object or text will be selected as appropriate.
3. If the issue has a **Fix** button, such as an outdated index, click it to resolve the issue. For certain types of issues such as missing fonts, the Fix button will open another window for you to resolve the issue.

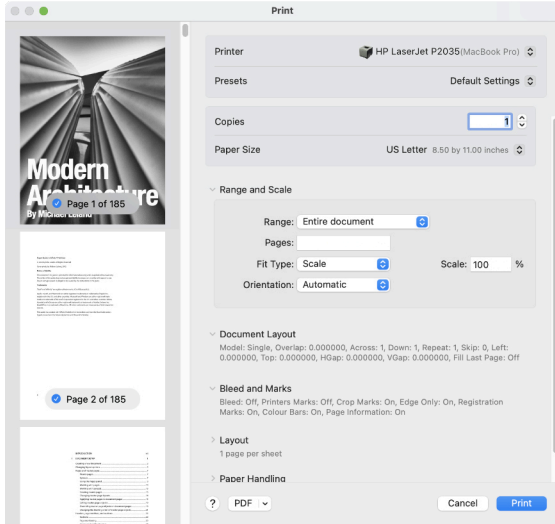
**Tip:** Preflight reports can be viewed only within the panel and cannot be exported

# Printing directly to a printer

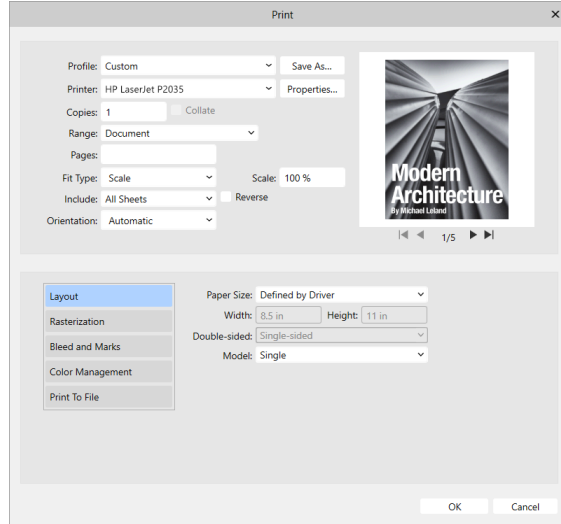
You can print directly from Publisher to any printer connected to your printer or network.

## To print directly to a printer:

1. Choose **File > Print**. The options are laid out slightly differently for macOS and Windows due to the differences between the operating systems.



macOS



Windows

2. Adjust the printing options:

- **Printer:** Select a printer if you have more than one available.
- **Preset:** If you've created a preset, you can select it from the list below.
- **Copies:** Enter the number of copies.
- **Paper size:** Select a paper size.
- **Range and Scale:**
  - **Range:** Choose from *Entire document*, *Odd pages*, *Even pages*, *Current page*, or *Selection* (selected object).
  - **Pages:** Enter a custom page range to print; for example, 10-25.
  - **Fit type and Scale:** Select *Scale* and enter a scale percentage, the default is 100% (actual size), or select *Fit to Printable* or *Shrink to Printable* to enlarge or shrink the document page to match the printable area of the paper.
  - **Orientation:** Select *Portrait* or *Landscape* to change the *Automatic* orientation of the page on the paper.

- **Document Layout:**

- **Model:** Choose from:

Model	Description
Single	prints one page per sheet
Tiled	prints each page over multiple sheets when the page is larger than the paper; you can specify the amount of overlap to make it easier to join sheets together
N-Up	prints multiple pages or copies in rows and/or columns; for example, a sheet of address labels
Book	facing-pages are printed side-by-side on each sheet as they are shown on screen
Booklet	facing-pages are imposed (flipped and reordered) so they can be folded into a booklet

**Tip:** Refer to [N-Up printing](#) on page 222

**Tip:** Refer to [Book and booklet printing](#) on page 223

- **Bleed and Marks:**

- **Include bleed:** Select if your document has images or text that bleed off the page and you defined a bleed when creating the document or changing its layout. Always select **Include printers marks** when including bleed.
  - **Include printers marks:** Select if you want to crop a printed document with a paper cutter.

Printers marks	Description
Include crop marks	Places trim lines to indicate the trim box borders
Include registration marks	Places target symbols at the corners and mid-points outside of the crop area
Include colour bars	Places greyscale and colour bars below crop area to help adjust ink density during printing
Include page information	Places the document name, page number, date, and time above the crop area

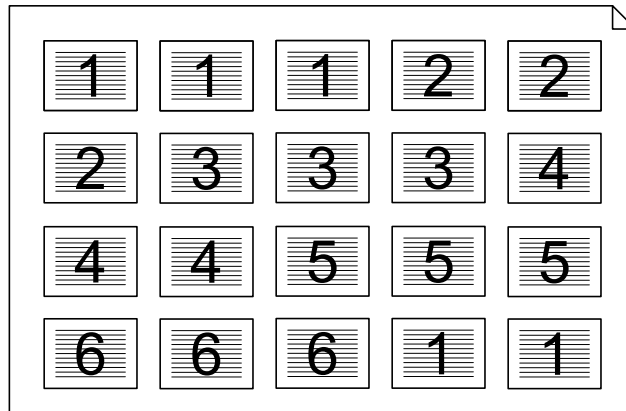
- The remainder of the options will vary depending on your version of macOS and the selected printer.

### 3. Click **Print**.



## N-Up printing

The *N-Up* option in the **Print** window allows you to print multiple pages or copies of the same page in rows and columns on a single sheet to save paper. This is useful for printing address labels, business cards, and archival records. You would print labels and cards at actual size but archival records might be printed pages at a reduced size.



A 6-page document printed *N-Up* with landscape orientation and *Across* set to 5, *Down* set to 4, *Repeat* set to 3, *Skip* set to 0, and *Fill last page* selected

When you choose the *N-Up* model, additional options are shown:

A screenshot of the N-Up printing options dialog box. The 'Model' dropdown is set to 'N-Up'. Below it, there are several settings: 'Across' is set to 1, 'Down' is set to 1, 'Repeat' is set to 1, 'Skip' is set to 0, 'Left' is set to 0 mm, 'Top' is set to 0 mm, 'HGap' is set to 0 mm, and 'VGap' is set to 0 mm. At the bottom, there is a checkbox labeled 'Fill last page' which is currently unchecked.

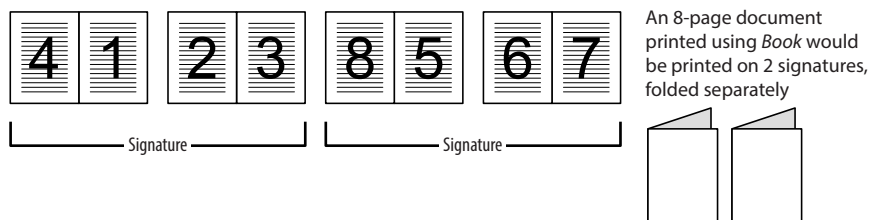
- **Across/Down:** Enter how many pages should be printed across a sheet (columns) and down a sheet (rows).
- **Repeat:** Enter how many copies should be made. While you can make additional copies with the normal **Copies** setting, this option makes copies of a page on a sheet before the next page.
- **Skip:** Enter how many pages to leave blank at the start of the N-Up imposition. If **Across** and **Down** were both set to 3 for a 3x3 grid, setting **Skip** to 3 would leave the first row on the first sheet blank.
- **Left/Top:** Enter the offset from the left and top edges of the sheet. N-Up printing aligns the pages to the left and top of sheets.
- **HGap/VGap:** Enter the horizontal and vertical gaps between the pages on a sheet. Use these options with **Left/Top** to align pages or copies to a grid, such as on a sheet of labels.

- **Fill last page:** Select this option to avoid wasting paper at the end of the document. If the number of pages and copies would result in blank columns or rows, this option will repeat the start of the document until the last page is filled.

## Book and booklet printing

The *Book* and *Booklet* options in the **Print** window don't refer to printing a Publisher Book but to the printing layout. These options are generally used to print pages onto sheets twice as large, such as two US Letter pages on a Ledger sheet or two A4 pages on an A3 sheet. It is recommended that you use multiples of four pages for best results.

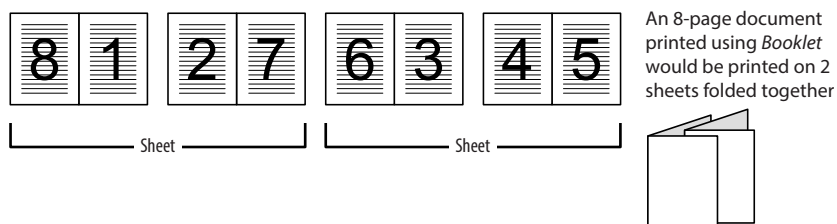
Pages are normally printed individually in sequence, one page per sheet, but the *Book* option prints single-sheet signatures. When printed double-sided, a single-sheet signature would have four pages that could be folded for binding into a book or for side stapling, screw binding, or bound in another manner on the side.



**Definition:** A *signature* is a group of sheets folded in half that are bound into a book

**Tip:** Books are typically made up of signatures of more than one sheet but the *Book* printing layout is limited to single sheets

The *Booklet* option imposes pages so the sheets of paper can be folded together into a booklet that could be stapled at the centre. Thick booklets will have uneven outer edges unless they are trimmed.



**Definition:** *Imposition* refers to the flipping and reordering of pages on a sheet to simplify binding

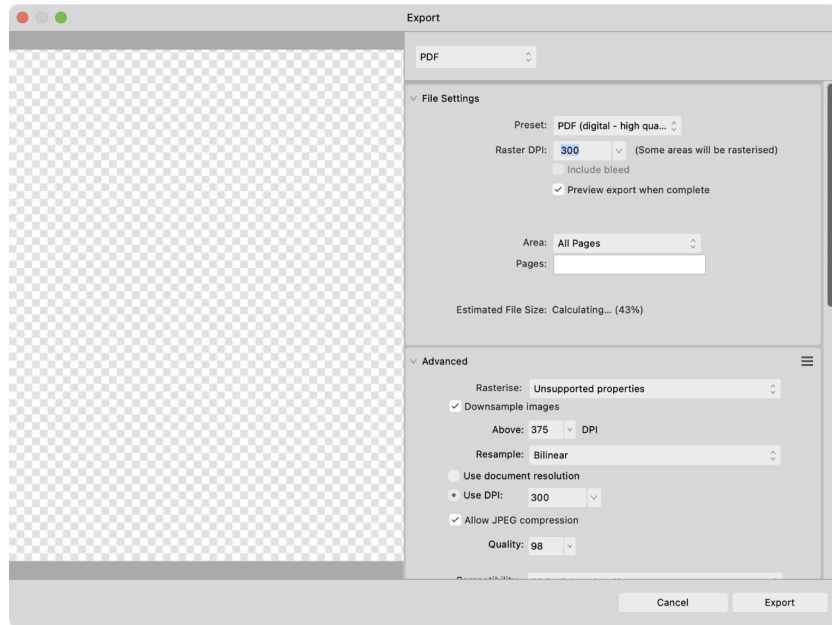
# Exporting to PDF for digital distribution

To share a Publisher document with others online, an Adobe® PDF file is often the best format. While your computer may allow you to print to a PDF file, it is better to export to PDF to take advantage of the options Publisher offers.

Creating a PDF for digital distribution is similar to exporting to PDF for printing on a commercial press but the settings are somewhat different.

## To export a publication for digital distribution:

1. Preflight your document and resolve any issues. Refer to [Preflighting documents](#) on page 214. Exporting your document will run preflight automatically unless you've disabled it, but it's a best practice to resolve any issues and resave the document before exporting.
2. Choose **File > Export**.



The preview of the first page and the estimated size of the exported PDF file may take some time to appear, especially for long documents, and it's not necessary to wait. The preview and file size will also be recalculated as you change options in the window.

3. Select the export options, click **Export**, and then enter a filename. The number of options can be intimidating but the most important are **File format**, **Preset**, and **Area**. You can leave the other options unchanged until you're more familiar with the range of options.

- **File format:** Select *PDF* from the list of formats at the top of the window.
- **Preset:** Select *PDF (digital - high quality)* unless you need to reduce the file size in which case select *PDF (digital - small size)* to reduce the quality of the document's images.

**Tip:** You cannot zoom in and out of the preview when exporting to PDF, SVG, EPS, or PSD

Preset	Downsample	Resamples	JPEG quality
PDF (high quality)	375 dpi	300 dpi	98
PDF (small size)	90 dpi	72 dpi	85

- **Raster DPI:** Select the resolution at which effects should be rasterized. Leave this unchanged if you're unsure which value to use.
- **Preview export when complete:** Select to open the PDF in your computer's default PDF viewing application.
- **Area:** Select *All Pages* unless your document is a single page in which case you would select *Whole Document*. Optional: enter a page range below to limit the pages that will be exported.
- **Rasterize:** Select *Unsupported properties* (default, recommended) to rasterize only the objects that aren't compatible with the selected PDF format. Select *Everything* to rasterize all objects or *Nothing* to omit objects that aren't compatible with the PDF format.
- **Downsample images:** Select and enter a resolution above which raster (bitmapped) images will be downsampled to that resolution.
- **Resample:** Select the resampling method to use if an image is up- or downsampled on export.

**Tip:** Don't select *All Spreads* for a facing-pages document because this will make on-screen viewing of the PDF more difficult

**Tip:** The *All Pages* setting is not *sticky* so you must ensure that you select it each type you export

Resample options	Description
Nearest Neighbour	Fast but lower quality; use for hard-edge images
Bilinear	Use when scaling images smaller (default)
Bicubic	Use when scaling images larger
Lanczos 3 (separable)	Very high quality but slower than the above options
Lanczos 3 (non-separable)	Marginally-higher quality than <i>Lanczos 3 (separable)</i> but slightly slower

- **Use document resolution/Use DPI:** Select **Use document resolution** to export the document at its native resolution, or select **Use DPI** to enter a custom resolution. Leave this unchanged if you're unsure which to use.
- **Allow JPEG compression:** Select to compress raster (bitmapped) elements to reduce file size but some quality may be lost (default, recommended). Deselect to export uncompressed. Enter a JPEG quality level to specify the level of compression (default is 98 for high quality, 85 for small size).

**Tip:** Refer to [Colour](#) on page 241 for a description of colour formats (spaces) and profiles

- **Compatibility:** Select the version of PDF to export. This will default to *PDF 1.6 (Acrobat 7)* and in general there is no need to change this unless you are creating a custom preset.
- **Colour space:** Select *RGB* (default, recommended) because the PDF will be viewed on a monitor. You can also select *As document* to use the document's defined colour space (format) or select a different colour space.
- **Profile:** Select *sRGB IEC61966-2.1* (default, recommended) because the PDF will be viewed on a monitor.
- **Embed profiles:** Select to embed the colour profiles in the PDF file.
- **Convert image colour spaces:** Select to convert all images to the colour space of the exported file or deselect to allow images to use a different colour space. For example, a CMYK image should be converted to RGB for on-screen viewing.
- **Honour spot colours:** Select to export spot colours as spot colours instead of converting them to an equivalent colour in the colour space. This is not important for digital distribution.
- **Include hyperlinks:** Select to include clickable links in the PDF if you have added hyperlinks to the document.
- **Include bookmarks:** Select to include bookmarks in the PDF to make it easier for readers to navigate the document.
- **Include layers:** Select to not flatten the document. Select **Include invisible layers** to also include hidden layers that have non-hidden child layers.
- **Include printers marks:** Do not select this option for digital distribution.
- **Embed fonts:** Select *All Fonts* to ensure the document can be viewed without installing the fonts used in the document. You can also select *Uncommon Fonts* to reduce the file size by not embedding the basic PostScript fonts or *No Fonts*. Do not select *Text as Curves* for a long publication because it will convert all text to paths and increase the file size.
- **Subset fonts:** Select to include only the glyphs (characters) used in the document rather than the entire font.
- **Allow advanced features:** Deselect this to ensure that the PDF can be viewed by PDF viewers that don't support advanced features, including stretched art text, stroked text, linear and radial gradients, and non-solid transparencies.
- **Tagged PDF:** Select to include Alt Text that you've added to images to improve the accessibility of the exported PDF.

**Tip:** This option does not change the appearance of hyperlinks; it is up to you to format them to appear clickable

- **Password Protection:** Select options to protect your document from being opened and/or modified and printed by others. The encryption method will be selected automatically based on the **Compatibility** option you selected above. **Password Protection** requires *PDF 1.6 (Acrobat 7)* or higher.

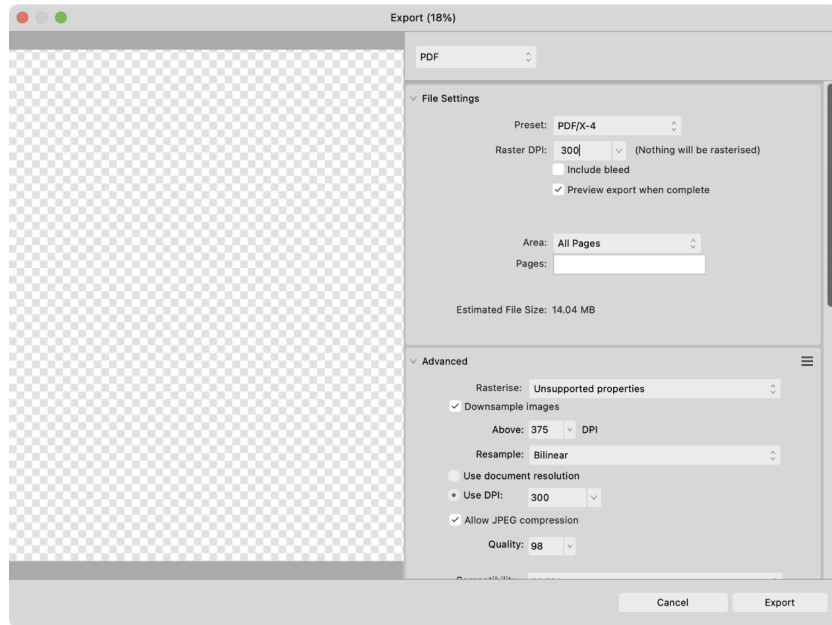
Option	Description
<b>Require password to open</b>	Select and enter a password below to prevent others from opening the exported PDF without the password
<b>Require password for modification and printing</b>	Select and enter a password below to:
<b>No document printing</b>	prevent others from printing
<b>No content modification</b>	prevent others from modifying the PDF in an application such as Publisher or Adobe® Acrobat®
<b>No content copying</b>	prevent others from copying text and images in an application such as Publisher or Adobe® Acrobat®

# Printing on a commercial press

To send a publication to a printer for printing on a commercial press, you need to convert your Publisher document and all of its resources and fonts to a PDF file.

## To export a publication for commercial printing:

1. Preflight your document and resolve any issues. Refer to [Preflighting documents](#) on page 214. Exporting your document will run preflight automatically unless you've disabled it, but it's a best practice to resolve any issues and resave the document before exporting.
2. Choose **File > Export**.



The preview of the first page and the estimated size of the exported PDF file may take some time to appear, especially for long documents, and it's not necessary to wait. The preview and file size will also be recalculated as you change options in the window.

3. Select the export options, click **Export**, and then enter a filename.
  - **File format:** Select *PDF* from the list of formats at the top of the window.
  - **Preset:** Select a PDF preset based on your print partner's requirements.

**Tip:** You cannot zoom in and out of the preview when exporting to PDF, SVG, EPS, or PSD

Preset	Description
PDF/X-4	can be used by a wide range of presses; includes device-independent colour spaces (formats) and live transparency
PDF/X-3	similar to PDF/X-4 but does not support live transparency
PDF/X-1a	colours are separated into CMYK and spot colours in the file
PDF (press ready)	exports to PDF 1.7 (Acrobat 8) unlike PDF/X which is based on PDF 1.6; use if the document has passthrough PDF files based on PDF 1.7

- **Raster DPI:** Select the resolution at which effects should be rasterized. Leave this unchanged if you're unsure which value to use.
- **Include bleed:** Select if your document has images or text that bleed off the page and you defined a bleed when creating the document or changing its layout. Always select **Include printers marks** when including bleed.
- **Preview export when complete:** Select to open the PDF in your computer's default PDF viewing application.
- **Area:** Select *All Pages* unless your document is a single page in which case you would select *Whole Document*. Optional: enter a page range below to limit the pages that will be exported. For example, 10-25.
- **Rasterize:** Select *Unsupported properties* (default, recommended) to rasterize only the objects that aren't compatible with the selected PDF format. Select *Everything* to rasterize all objects or *Nothing* to omit objects that aren't compatible with the PDF format.
- **Downsample images:** Select and enter a resolution above which raster (bitmapped) images will be downsampled to that resolution.
- **Resample:** Select the resampling method to use if an image is up- or downsampled on export.

**Tip:** Don't select *All Spreads* for a facing-pages document because your commercial printer will need the pages exported as individual pages and not as readers spreads (layout spreads)

**Tip:** The *All Pages* setting is not *sticky* so you must ensure that you select it each type you export

Resample options	Description
Nearest Neighbour	Fast but lower quality; use for hard-edge images
Bilinear	Use when scaling images smaller (default)
Bicubic	Use when scaling images larger
Lanczos 3 (separable)	Very high quality but slower than the above options
Lanczos 3 (non-separable)	Marginally-higher quality than <i>Lanczos 3 (separable)</i> but slightly slower



- **Use document resolution/Use DPI:** Select **Use document resolution** to export the document at its native resolution, or select **Use DPI** to enter a custom resolution. Leave this unchanged if you're unsure which to use.
- **Allow JPEG compression:** Select to compress raster (bitmapped) elements to reduce file size but some quality may be lost (default, recommended). Deselect to export uncompressed. Enter a JPEG quality level to specify the level of compression (default is 98).
- **Compatibility:** Select the version of PDF to export. This will be set appropriately by the preset and there is no need to change this unless you are creating a custom preset.
- **Colour space:** Select *As document* to use the document's defined colour space (format) or select a different colour space. For PDF/X the only other option will be CMYK.
- **Profile:** Select *Use document profile* to use the document's defined colour profile, or select a different colour profile.
- **Embed profiles:** Select to embed the colour profiles in the PDF file; this cannot be disabled for PDF/X.
- **Convert image colour spaces:** Select to convert all images to the colour space of the exported file or deselect to allow images to use a different colour space. For example, an RGB image in a CMYK document would be converted to CMYK when this option is selected. This cannot be disabled for PDF/X-1a.
- **Honour spot colours:** Select to export spot colours as spot colours instead of converting them to an equivalent colour in the colour space. Select only if your printer will print a separate plate for each spot colour.
- **Overprint black:** Select to print black over CMYK elements instead of knocking out the CMYK colour below to avoid registration issues.
- **Include hyperlinks:** Hyperlinks serve no purpose when printing on a press and this option cannot be selected for PDF/X although it's available for PDF (Press Ready).
- **Include bookmarks:** PDF bookmarks serve no purpose when printing on a press but you can select this option so the file can also be used for other purposes.
- **Include layers:** Select to not flatten the document. Select **Include invisible layers** to also include hidden layers that have non-hidden child layers.
- **Include bleed:** Select if your document has images or text that bleed off the page and you defined a bleed when creating the document or changing its layout. Always select **Include printers marks** when including bleed.

**Tip:** Refer to [Colour](#) on page 241 for a description of colour formats (spaces) and profiles

**Tip:** This option does not change the appearance of hyperlinks; it is up to you to remove hyperlink formatting that you may have applied for an online version of the document

**Tip:** There are two Include bleed options they are selected and deselected together

- **Include printers marks:** Select to include printers marks around the page edges to aid in trimming the pages. You can select each type of printers marks independently.

Printers marks	Description
Crop marks	Places trim lines to indicate the trim box borders
Registration marks	Places target symbols at the corners and mid-points outside of the crop area to help align the colour plates
Colour bars	Places greyscale and colour bars below crop area to help adjust ink density during printing
Page information	Places the document name, page number, date, and time above the crop area

- **Embed fonts:** Select *All Fonts* to ensure the document will print correctly. For *PDF (press ready)*, you can also select *Uncommon Fonts* to reduce the file size by not embedding the basic PostScript fonts or *No Fonts*. Do not select *Text as Curves* for a long publication because it will convert all text to paths and increase the file size.
- **Subset fonts:** Select to include only the glyphs (characters) used in the document rather than the entire font.
- **Allow advanced features:** Select to use advanced PDF features supported by the selected PDF format but which might not be supported by all PDF viewers, including stretched art text, stroked text, linear and radial gradients, and non-solid transparencies. Select this option for printing to a commercial press or deselect it if the PDF will also be distributed digitally and you aren't sure of the viewers that will be used.

**Tip:** Don't use Subset fonts if you think you might ever need to directly edit the PDF in Publisher, instead of editing the .afpub file



# Customizing

# 7

We all have different ways of working and it's important to customize our tools to the way we work to increase efficiency. Publisher provides many ways to customize the application but the best approach for you will depend on your computer and monitor setup, your keyboard and pointing device, and your personal preferences.

Publisher allows you to customize the interface by moving, scaling, and hiding the toolbars and panels and you can save your preferred configurations as *Studio presets*. You can also change many options and keyboard shortcuts and install additional spelling and hyphenation dictionaries.

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Installing additional dictionaries .....	255

# Customizing the interface

Publisher's features are accessed through a combination of menu commands, tools, and panels. Tools and panels are windows that remain open while you work and you can choose which ones to open and where they are displayed.

You can customize the Toolbar, Context Toolbar, Tools, various panels, and Studios independently and then save the interface at any time as a studio preset that you can load in the future to restore the interface to your preferred setup.

## Customizing the Toolbar

The **Toolbar** contains many commonly-used controls. You can choose which controls are shown in it and you can hide it entirely but note the Toolbar's **Status** control provides the main indication of the current magnification level so it's recommended that you keep it open.

On macOS, the **Close**, **Minimize**, and **Maximize** buttons (red, yellow, and green controls) are located in the Toolbar so closing it will also leave you without access to these standard controls. The background of the **Toolbar** also provides the main way to drag the document window but if you close it you can drag an empty part of the **Tools panel** or the **Status Bar** at the bottom of the screen to move the window.



### To open or close the Toolbar:

1. Choose **View > Show Toolbar**.

### To customize the Toolbar:

1. Choose **View > Customize Toolbar** to view all the icons that can be added to the toolbar.



2. Drag icons you don't use frequently out of the **Toolbar** and release them anywhere to remove them. Drag icons you want to add from the **Customize** window onto the Toolbar between other icons—use the space icons to arrange the icons in the Toolbar.
3. To restore the Toolbar icons to their default state, drag the default set to the Toolbar.
4. Choose **Icon and Text** from **Show** to display labels below the icon groups.
5. You can save the Toolbar state as part of a Studio preset. Refer to [Using Studio presets](#) on page 240.
6. Click **Done** (macOS) or **Close** (Windows)

## Showing the Context Toolbar

Below the main toolbar is a second toolbar named the **Context Toolbar**, commonly referred to as the **Context Bar**. You can only show and hide the Context Toolbar, you cannot choose which controls are shown in it because the controls change dynamically based on the tool you select and what you select in the document.

It is recommended that you keep the **Context Toolbar** open because it provides quick access to the most frequently-used features.



### To open or close the Context Toolbar:

1. Choose **View > Show Context Toolbar**.
2. You can save the Context Toolbar state as part of a Studio preset. Refer to [Using Studio presets](#) on page 240.

## Customizing Tools

The **Tools panel** is different from the panels shown in the **Left** and **Right Studios** because it is shown on its own outside of the Studios. It can be shown docked on the left side of the document window or undocked as a floating panel that you can position on the screen.

Like the main toolbar, you can customize the Tools panel by adding and removing tool icons.

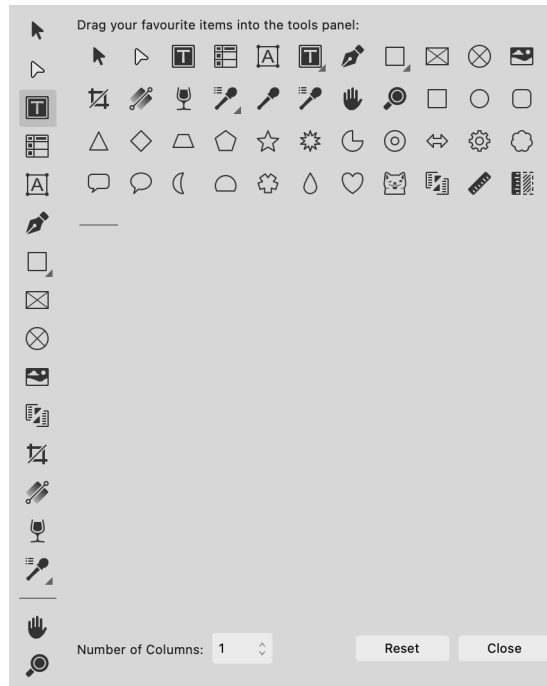
### To open or close the Tools panel:

1. Choose **View > Show Tools** to open or close the panel.
2. Choose **View > Dock Tools** to dock or undock the panel from the document window.

## To customize the Tools panel:

**Tip:** The **Colour Selector** control cannot be removed from the Tools panel and is not shown when customizing the panel

1. Choose **View > Customize Tools** to view all the tools that can be added to the Tools panel.



2. To remove tools you don't use frequently, drag the tool icons out of the Tools panel on the left and release them anywhere else.
3. To add a new tool, drag the icon you want from the **Customize** window onto the Tools panel between other icons. Some tools are available *stacked* and *unstacked*—stacks group similar tools that can display a popup menu from which you can choose a different tool. The currently-selected tool will be shown in the Tools panel. Stacks are indicated with triangle cues in the bottom-right corner which you can click to display the popup menu. For example, you can add the individual shape tools or the stack of shape tools.
4. Optional: Add separator lines to divide groups of tools.
5. Click **Reset** to restore the Tools panel icons to their default state.
6. Choose the **Number of Columns** if you'd prefer to view the tool icons in multiple columns. This is useful if you use a large set of tools on a smaller screen.
7. You can save the Tool panel's tools as part of a Studio preset, but not the panel's docked or undocked state or the number of columns. Refer to [Using Studio presets](#) on page 240.
8. Click **Done** (macOS) or **Close** (Windows)

**Tip:** You can also click and hold on the tool to display the popup menu

**Tip:** The **None** swatch won't be displayed for the **Colour Selector** when tools are arranged in a single column

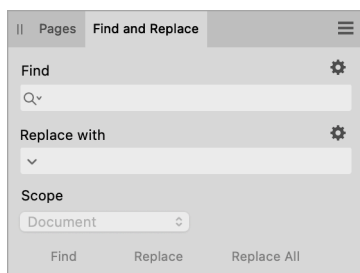
## Customizing the panels

Panels are windows that remain open while you work and you can choose which ones to open and where they are displayed. Panels can be docked in a *Studio*, a container for panels, on the left or right side of the document window. Panels can also be undocked as floating windows that you can position on the screen. Undocked panels can be snapped to each other's edges so that they can be moved as a single unit.

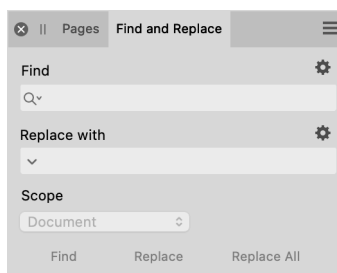
Publisher has many panels so the default interface displays some in the left Studio and some in the right Studio. You can show and hide the left and right Studios independently, group panels within a Studio, and collapse panel groups.

A panel group is a row of panels, and even a single panel is considered a group. If there are more panel tabs for a group than will fit within the Studio, Publisher will automatically shorten their names to save space.

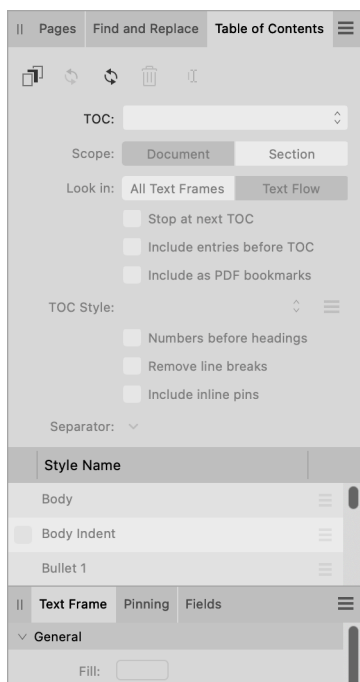
**Tip:** Publisher for Windows can display two columns of panels in the left and right Studios while Publisher for macOS can display a single column in each



A docked panel group with two panels



An undocked panel group with two panels



A docked panel group (top) with three panels and a second panel group (below) with three more panels



**Tip:** The **Tools** panel is not hidden by **Hide Studio**



**Tip:** Some panels are in the **Windows > References, Table, and Text** sub-menus

**Tip:** When adding a panel to a group, do not release the mouse until the blue highlight disappears or you will create a new panel group

## To open or close a Studio:

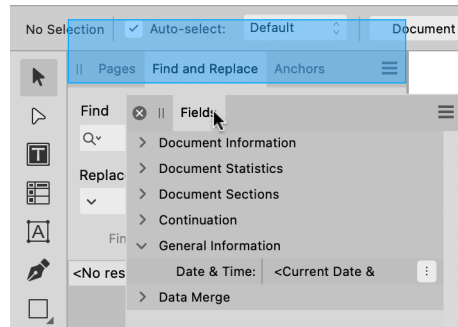
1. Choose **Window > Studio > Show Left/Right Studio** to open or close a studio.
2. Or choose **Window > Studio > Hide Studio** to close or open both studios at once.

## To open or close a single panel:


1. Choose the panel name from the **Window** menu to open or close it. When you open a panel, it will be docked in the left or right Studio or undocked and positioned on screen depending on how it was displayed before it was last closed.
2. Or close it by choosing **Close** from the panel menu . If the panel is undocked and not part of a panel group, you can also click its **Close**  icon.

## To group panels:

1. To add a panel to an existing group—a row of panel tabs—drag the panel's tab into the group's row of tabs and position it between the desired tabs.
2. To create a new group—a new row of panel tabs—drag the panel's tab above or below an existing panel until you see the blue highlight appear and then release the mouse button.



The blue highlight indicates that releasing the mouse now will create a new panel group for the Fields tab that is being dragged into the left Studio



3. To merge two panel groups, drag one group's dragger  icon into the other group's row of tabs and position it between the desired tabs. If the group has only a few tabs you can also drag the blank area to the right of the last tab.

## To expand/collapse a panel group:

You can collapse a group of panels to the height of their tabs to provide more space to view the panels in another group.

1. To collapse a panel group, double-click any of the group's panel tabs.
2. To expand a panel group, click the tab you wish to make active.



**To close a panel group:**

1. Choose **Close Panel Group** from the panel menu . If the group is undocked you can also click its **Close**  icon.

**To dock and undock panels:**

1. To add a floating panel to a Studio, drag the panel's tab into a Studio and add it to an existing panel group or above or below a panel create a new group.
2. To float a panel as a standalone window, drag the panel's tab out of the Studio. To add it to an existing floating panel's group, drag it onto that panel's tab row.
3. To snap undocked panels to each other:

**To resize panels, panel groups, and Studios:**

1. To change the width of the Studios and the panels in them, position the mouse pointer anywhere over the panel's interior borders. When the mouse pointer changes to the horizontal resize  pointer, drag the border to the desired width.
2. To change the height of a panel group in a Studio, position the mouse pointer anywhere over the group's horizontal border. When the mouse pointer changes to the vertical resize  pointer, drag the border to the desired width.
3. To resize a floating panel, drag from any of its sides or corners. When the mouse pointer changes to the appropriate resize pointer, drag the border or corner to the desired width or height.

**To reset the Studios and panels to the default configuration:**

1. Choose **Window > Studio > Reset Studio**.

## Using Studio presets

Once you have the panels, Toolbar, Context Toolbar, and Tools set up the way you want them you should save the setup as a Studio preset so that you can easily restore the interface to this configuration. If you normally work on a large monitor or monitors you might want to create a second preset for use on a laptop screen. Or you may wish to create presets for different styles of working, such as document layout, cross-referencing, and digital publishing.

Studio presets save the position, size, and dock status, as applicable, for the Toolbar, Context Toolbar, Tools, panels, and panel groups, including the active panel in a panel group and the vertical height of a panel group. A preset does not save whether a section in a panel is expanded or collapsed.

### To save a Studio preset:

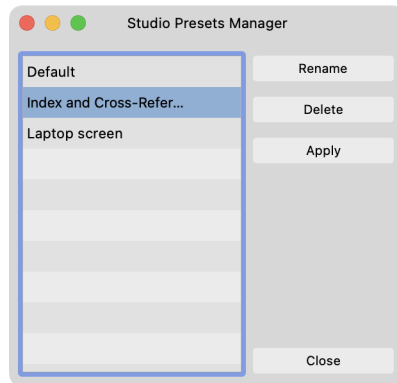
1. Choose **Window > Studio > Add Preset...**
2. Enter a name for the preset and click **OK**.

### To load a Studio preset:

1. Choose **Window > Studio > *preset name***.

### To rename or delete a Studio preset

1. Choose **Window > Studio > Manage Studio Presets**.



2. Select a preset and then click **Rename** or **Delete**, and then enter a new name or confirm the deletion.

# Changing settings or preferences

## Colour

Publisher allows you to set the default colour profile for each colour format (space). The default profile is used when creating a new document.

Publisher uses the ICC colour profiles installed on your computer and you can install additional profiles recommended by your printer.

If you're new to working with colour printing, you should understand that colours are displayed on screen in RGB (Red, Green, Blue) and printed in CMYK (Cyan, Magenta, Yellow, Black). LAB (Luminance, A for Green to Red, B for Yellow to Blue) is a three-dimensional colour model that can represent any colour in the range of human vision and is popular for enhancing and converting photographs. CMYK is the best colour format (space) for colour printing.

### To install a colour profile on macOS:

Quit Publisher before installing a colour profile because it checks for profiles when it is started.

1. Copy the .icc file(s) to `/users/<username>/Library/ColorSync/Profiles`. The default colour profiles are stored in a similar folder for all users of your computer so this folder will be empty if you haven't previously installed a colour profile.
2. Restart Publisher.

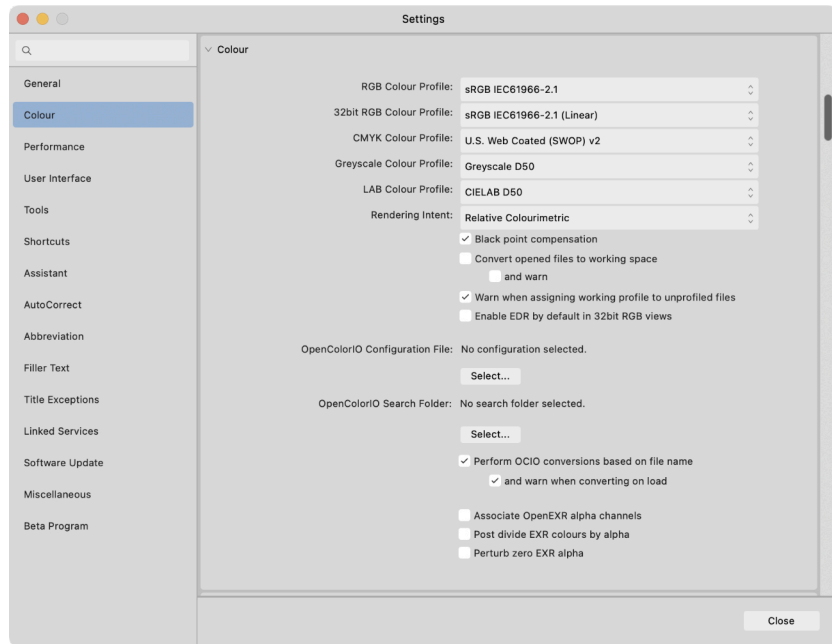
### To install a colour profile on Windows:

1. Open **Colour Management** via the **Control Panel** or by searching for it in the **Settings** app.
2. Select the **All Profiles** tab.
3. Click **Add**, select the .icc file, and click **Add**.
4. Restart Publisher.

**Tip:** You can also install a colour profile by switching to the Photo persona and choosing **File > Import ICC Profile...**, but the profile will not be available to other applications on your computer

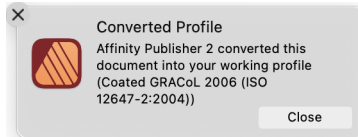
## To change colour settings:

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Colour** in the left pane.



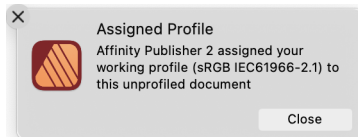
2. Select the default colour profile for each colour format (space).
  - **RGB Colour Profile:** Select the default for RGB/8 and RGB/16 documents; not recommended for publishing
  - **32bit RGB Colour Profile:** Select the default for RGB/32 (HDR) documents; not recommended for publishing
  - **CMYK Colour Profile:** Select the default for CMYK/8 and CMYK/16 documents; refer to the list of [Popular CMYK colour profiles](#) on page 244 for more information.
  - **Greyscale Colour Profile:** Select the default for Grey/8 and Grey/16 documents
  - **LAB Colour Profile:** Select the default for LAB/16 documents; not recommended for publishing
3. **Rendering Intent:** Select an option for converting colours from the document or image's colour gamut that are not reproducible in the output colour gamut. The *Perceptual* and *Saturation* rendering intents are used for re-purposing, such as the display or printing of photographs, while *Absolute* and *Relative Colourimetric* are used for proofing, such as proofing a CMYK print job on a 6-colour inkjet printer.

- **Perceptual:** Typically used to process digital and scanned photographs with highly saturated colours. All colours are shifted to allow out-of-gamut colours to be shown but the relationships between colours are retained to preserve the overall perception.
  - **Saturation:** Typically used for business graphics because colours are shifted to maximize saturation and make the image more vibrant at the expense of colour accuracy.
  - **Absolute Colourimetric:** Used for side-by-side comparisons of outputs from different printers and when complete accuracy is required, such as for a logo. All colours of the original colour gamut are shifted so that the white points are aligned.
  - **Relative Colourimetric:** With identical papers, *Absolute* and *Relative* will produce identical results but *Relative* accounts for differing white points, such as one printer using a yellowish paper.
4. **Black point compensation:** Select to adjust the document's black point for the current colour profile while maintaining the current contrast. Deselecting this may impact contrast.
  5. **Convert opened files to working space:** Select to automatically convert all opened documents with their own colour profile to the default colour profile set for their colour format (space). Select the **And warn** option so that Publisher displays a temporary alert to notify you of the conversion:



Example: When opening a CMYK document set to *U.S. Web Coated (SWOP) v2* and Publisher's CMYK default is set to *Coated GRACoL 2006 (ISO 12647-2:2004)*, the document would be converted to the default and this alert shown

6. **Warn when assigning working profile to unprofiled photos:** Documents without a colour profile are always converted to the default colour profile set for their colour format (space). Select this option so that Publisher displays a temporary alert to notify you of the conversion.



Example: When opening an RGB document without a colour profile and Publisher's RGB default is set to *sRGB IEC61966-2.1*, the document would be converted to the default and this alert shown

7. **Enable HDR/EDR by default in 32-bit RGB views:** Select if you have a compatible HDR/EDR display and want to use the full dynamic range. You may not want to use this if creating images for other uses. This option is named HDR on Windows and EDR on macOS.
8. **OpenColorIO and OpenEXR:** These options aren't relevant to publishing as they are intended for motion picture production. Publisher includes them because all three Affinity apps can open each other's files.

**Tip:** *Included* means the profile is included with Publisher but it is not in a user-accessible location

## Popular CMYK colour profiles

North America	Description	Included
U.S. Web Coated (SWOP) v2	for printing on rolls of coated paper on a web offset press; default for most publishing applications	✓
U.S. Web Uncoated v2	for printing on rolls of uncoated paper on a web offset press	✓
Coated GRACoL 2006 (ISO 12647-2:2004)	for printing on grade 1 paper such as for a brochure on a sheetfed press	
Web Coated SWOP 2006 Grade 3 Paper	for printing on bright, glossy lightweight paper such as for a magazine on a web offset press	
Web Coated SWOP 2006 Grade 5 Paper	for printing on lower quality lightweight paper on a web offset press	
U.S. Sheetfed Coated v2	for printing packaging and brochures	✓
U.S. Sheetfed Uncoated v2	for printing packaging and brochures	✓
US Newsprint (SNAP 2007)	for printing on rolls of newsprint on a web offset press	
Europe and Australia	Description	
Coated FOGRA27 (ISO 12647-2:2004)	for printing on paper type 1 on a web offset press, superseded by FOGRA39; 350% total ink coverage	✓
Coated FOGRA39 (ISO 12647-2:2004)	for printing on paper type 1 on a web offset press; 350% total ink coverage	✓
Web Coated FOGRA28 (ISO 12647-2:2004)	for printing on paper type 3 on a web offset press; 350% total ink coverage	✓
Uncoated FOGRA29 (ISO 12647-2:2004)	for printing on paper type 4 on a web offset press; 350% total ink coverage	✓
Euroscale Coated v2	for printing on paper type 1 or 2 (bright white) using Euroscale inks on a web offset press; 350% total ink coverage	
Euroscale Uncoated v2	for printing on uncoated white paper using Euroscale inks on a web offset press; 260% total ink coverage	

Japan	Description	
Japan Color 2001 Coated	for printing on paper type 3 on a sheetfed press; 350% total ink coverage	✓
Japan Color 2001 Uncoated	for printing paper type 4; 310% total ink coverage	✓
Japan Color 2002 Newspaper	for printing on rolls of newsprint on a web offset press; 240% total ink coverage	✓
Japan Color 2003 Web Coated	for printing on paper type 3 on a web offset press; 350% total ink coverage	✓
Japan Color 2011 Coated	for printing on paper type 1 on a sheetfed press	
Japan Web Coated (Ad)	for printing magazine advertisements	
Generic	Description	
Generic CMYK Profile	don't use for commercial printing	
Photoshop 4 Default CMYK	don't use for commercial printing	
Photoshop 5 Default CMYK	don't use for commercial printing	



# Keyboard shortcuts

Most users press keyboard shortcuts to invoke frequently-used menu commands and while Publisher has a standard set of shortcuts, some users are more familiar with other software and prefer to use the same shortcuts they’ve used for many years. Publisher allows you to change the keyboard shortcut for any menu command as well as for the tools, panels, and text input.

Some of the default shortcuts might not work with your keyboard. For example, the default shortcut to move the text cursor to the end of the story is ⌘ + End (macOS) or Ctrl + End (Windows) but if you use a laptop you may not have an End key on your keyboard.

Once you have the keyboard shortcuts set the way you prefer you can save the shortcuts to a file that you can load again at any time in case you make changes you regret.

Shortcut files can generally only be opened in the same major version of Publisher for the same operating system that they were saved from. For example, a shortcuts file saved from Publisher 2.2.0 will work in 2.2.1 but not necessarily in 2.1.0. If you save and load your shortcuts, it’s a good idea to save a new copy after upgrading Publisher to a new major version.

Publisher includes shortcuts for some of the most frequently-used menu commands doesn’t have default shortcuts for some of the features used in creating long publications, including cross-references, indexing, and notes. If you use these features you should consider adding shortcuts to save time.

The symbols shown for the modifier and special keys in the shortcuts editor are:

Symbol	Key	Symbol	Key
⌘	Command (macOS)	^	Ctrl
⇧	Shift	⌥	Option (macOS) or Alt (Windows)
←	Arrow Left	↑	Arrow Up
→	Arrow Right	↓	Arrow Down
⌂	Home	⏮	Page Up
↵	End	⏭	Page Down
⇥	Tab	⏏	Esc
⌫	Delete	↵	Return (macOS) or Enter (Windows)
F1	Function (Fn)		

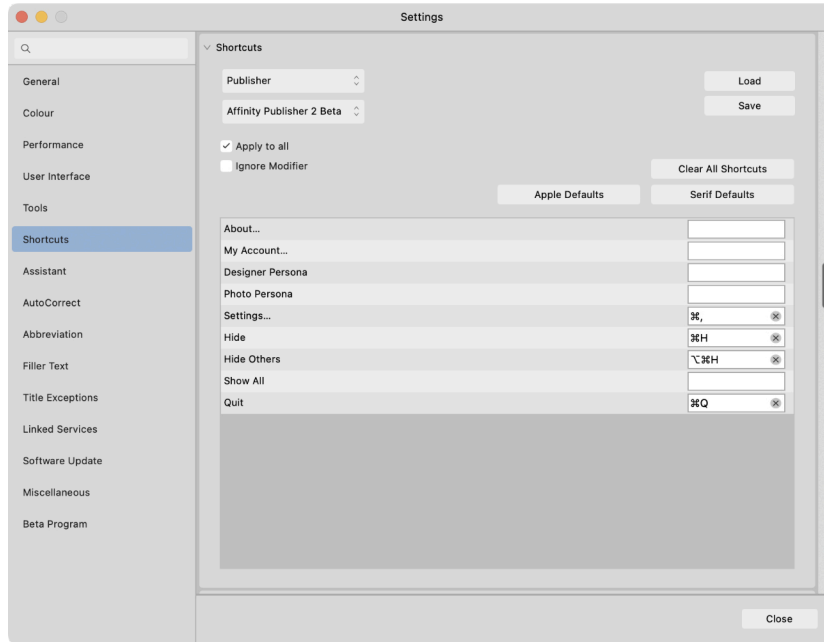
**Tip:** Be careful when editing shortcuts, there is no undo feature but you can restore the shortcuts to Serif’s defaults or load your own saved shortcuts file



## To change a keyboard shortcut:

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Shortcuts** in the left pane.

There are two unlabeled lists at the top of this window. The first is **Personas**

and the second is **Elements** which lists groups of shortcuts corresponding to the menus, the tools, studio panels, text input, blend modes, and some miscellaneous shortcuts.



2. Choose the **Persona** for which you want to set shortcuts. Don't change this if you want to change shortcuts for the default *Publisher* persona.
3. Choose the user interface **Element**. On macOS, the first option is *Affinity Publisher 2* which corresponds to the application name menu while on Windows the first option is the *File* menu.
4. Select **Apply to All** if you want the changes you make to apply to the same command in all personas, if applicable. This is on by default because it's confusing to use different shortcuts for the same feature in different personas.
5. Select **Ignore Modifier** to create single-key shortcuts. This is off by default because using a single key such as *N* for *New* would make it impossible to type an *N*. Modifiers cannot be used for **Tools** so this option is hidden when editing those shortcuts.
6. To add or change a keyboard shortcut, click in the box to the right of the command, tool, or operation you want to change and then press the shortcut combination you want to use. If that shortcut is already in use a warning  icon will appear. Mouse over that triangle to find out which shortcut is in conflict.
7. To delete a keyboard shortcut, click the delete  icon to the right of the shortcut. Do not press the **Delete** key to delete the shortcut or **Esc** to cancel

because that will assign the **Delete** or **Esc** keys as a shortcut for that command or operation.

8. On Windows, click **Reset** to restore all of the keyboard shortcuts for all personas and user interface elements to the default settings. On macOS, click **Serif Defaults** to do the same thing or **Apple Defaults** to use a more Mac-like combination. The only difference in the Apple Defaults is the Text Input shortcuts, but the Apple Defaults button changes all shortcuts.
9. Click **Clear All Shortcuts** to remove all shortcuts. This option is not recommended because you will lose all the basic and most common shortcuts.

#### To save the current shortcuts:

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Shortcuts** in the left pane.
2. Click **Save** and enter a filename and select a location for the file. Publisher will save the shortcuts as an .affshortcuts (macOS) or .afshort (Windows) file that you can load at any time.

#### To load shortcuts from a file:

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Shortcuts** in the left pane.
2. Click **Load** and select an .affshortcuts (macOS) or .afshort (Windows) file from your computer.

#### Recommended shortcuts for references

Publisher doesn't have default keyboard shortcuts for notes, cross-references, anchors, and hyperlinks. If you're using the references features for a book you might find these shortcuts helpful but some will require changing the defaults for the listed commands. Windows users, substitute **Ctrl** for **⌘**.

Command	Shortcut	Availability
Insert Cross-Reference	<b>⌘ + R</b>	Used for Show Rulers
Edit Cross-Reference	<b>Shift + ⌘ + R</b>	Used for Rename Layer
Insert Anchor	<b>⌘ + Y</b>	Used for Last Used (View Mode > Wireframe)
Anchor Properties	<b>Shift + ⌘ + Y</b>	Available
Insert Hyperlink	<b>⌘ + K</b>	Used for Find in Layers
Hyperlink Properties	<b>Shift + ⌘ + K</b>	Available
Insert Footnote	<b>Shift + ⌘ + N</b>	Available: use this shortcut for whichever type of note you're using

## AutoCorrect, Abbreviations, and Title exceptions

**AutoCorrect** allows you to automatically replace specified text with other text as you type. For example, you can convert straight quotation marks to typographic ones and replace *teh* with *the*. AutoCorrect can also automatically capitalize the first word of a sentence.

**Abbreviations** allows you to define exceptions to the automatic capitalization of text. For example, you wouldn't want to capitalize the first word after *vs.* which is typically used within a sentence.

**Title exceptions** allows you to define exceptions to the capitalization of phrases that are formatted with the **Title Case** formatting option. For example, "*and*" should not be capitalized with Title Case so it should be included in this exception list.

Publisher uses its own lists for each type of text replacement for every language it supports and doesn't rely on the similar text replacement features built into macOS and Windows. This is important because while you might want the same corrections for basic text some of the corrections you use in Publisher may be more typographic and not suitable for your other applications. macOS also lacks separate text replacement lists for each language so Affinity's custom feature is important for those who work in multiple languages.

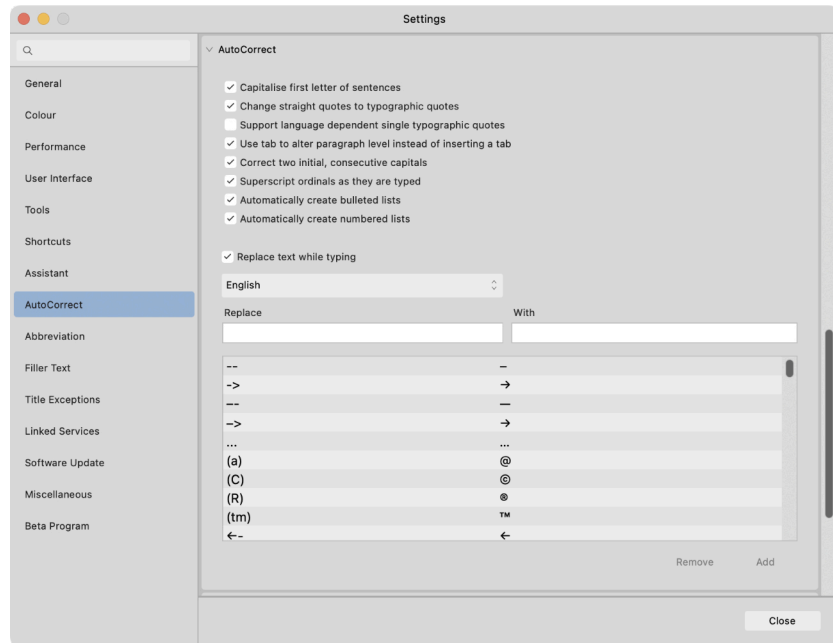
Publisher includes default lists of AutoCorrect, Abbreviations, and Title Exceptions for the languages for which it provides a user interface. You must create your own lists for other languages. Although Publisher includes useful default lists for British and American English, it does not include them for Australian, Canadian, or other variations of English, and you cannot easily copy the British or American lists to use as a starting point.

On macOS, the user interface language and the language used for formatting text are not consistently spelled out for British and American English. On Windows, they are written as English (United Kingdom) and English (United States) but on macOS they are written as shown below:

Text language	Interface language	Defaults included for
English (United Kingdom)	English	AutoCorrect, Abbreviations, Title Exceptions
English	English (United States)	AutoCorrect, Abbreviations
English (Australia)	n/a	none
English (Canada)	n/a	none
German	Deutsch	AutoCorrect, Abbreviations
Français	français	AutoCorrect, Abbreviations
Español	español	AutoCorrect
Italiano	italiano	AutoCorrect
Português (Brasil)	português (Brasil)	none

## To add or remove AutoCorrect text:

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **AutoCorrect** in the left pane.



2. Customize the AutoCorrect rules:

- **Capitalize first letter of sentence:** Select to use automatic sentence capitalization. You can define exceptions to this rule with Abbreviations.
- **Change straight quotes to typographic quotes:** Select to automatically change single and double quotation marks as you type, for example, "x" to “x” and 'x' to ‘x’. For languages other than English, this option will convert only double quotation marks.
- **Support language-dependent single typographic quotes:** Select to automatically change single quotation marks as you type in languages other than English, for example, 'x' to ,x‘.
- **Use tab to alter paragraph level instead of inserting a tab:** If the text style has **Next Level** set to another text style, pressing **Tab** at the start of the paragraph will change the text style to that defined in Next Level instead of inserting a tab. For example, it would change *Heading 1* to *Heading 2*. Pressing **Shift + Tab** will change to the previous level's text style.
- **Correct two initial, consecutive capitals:** Select to change this common typo situation, for example, *ThE* to *The*.
- **Superscript ordinals as they are typed:** Select to automatically change ordinals as you type, for example, *1st* to *1<sup>st</sup>*.

**Tip:** If the font supports true ordinals, use those instead of the **AutoCorrect** feature to typeset ordinals as the font designer intended; refer to [Ordinals](#) on page 78

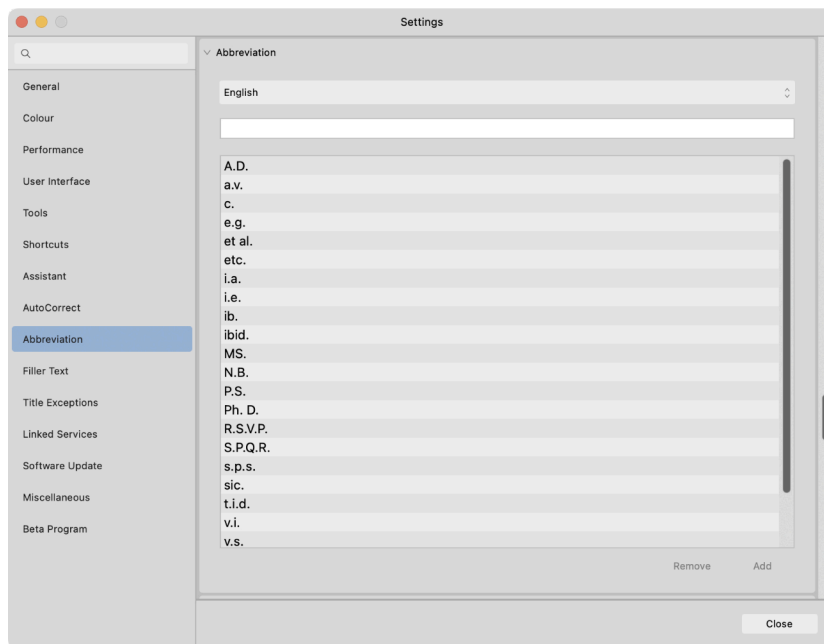
- **Automatically create bulleted lists:** Select to automatically change paragraphs starting with “\* ” (an asterisk and space) to a bulleted list. Note that this will not apply the default *Bullet 1* text style.
  - **Automatically create numbered lists:** Select to automatically change paragraphs starting with “1. ” (a 1 followed by a period and space) to a numbered list. Note that this will not apply the default *Numbered 1* text style.
3. Select **Replace Text While Typing** to replace certain text with other text as you type.
  4. Select which **Language** you wish to customize.
  5. Enter the word to replace in **Replace**, for example, *teh.*, and the replacement text in **With**, for example, *the*. You are not limited to single words and can enter phrases in either field. Click **Add** to add the text replacement to the list below.
  6. To delete an existing text replacement pair, select it from the list and click **Remove**.

**Tip:** When editing a variation of English other than British and American English, ensure you are editing the right text because this window defaults to your user interface language, not the language of your text

### To add or remove Abbreviations:

You can define exceptions to the automatic capitalization of text following commonly-used abbreviations.

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Abbreviations** in the left pane.



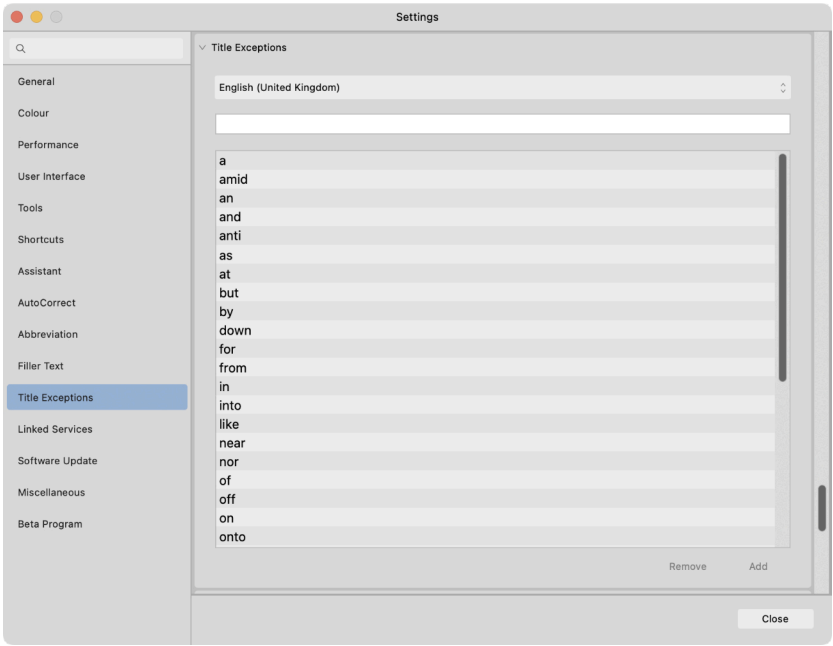
**Tip:** When editing a variation of English other than British and American English, ensure you are editing the right text because the window defaults to your user interface language, not the language of your text

2. Select which **Language** you wish to customize.
3. Enter the abbreviation into the text field. You can enter any text string but only text that ends with a period will have any effect because text will not be automatically capitalized following abbreviations without periods. Click **Add** to add the abbreviation to the list below.
4. To delete an existing abbreviation, select it from the list and click **Remove**.

**To add or remove Title Exceptions:**

You can define exceptions to the capitalization of phrases that are formatted with the **Title Case** formatting option.

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Title Exceptions** in the left pane.



**Tip:** When editing a variation of English other than British and American English, ensure you are editing the right text because the window defaults to your user interface language, not the language of your text

2. Select which **Language** you wish to customize.
3. Enter the title exception into the text field. You can enter any text string but only text that ends with a period will have any effect because text will not be automatically capitalized following abbreviations without periods. Click **Add** to add the abbreviation to the list below.
4. To delete an existing abbreviation, select it from the list and click **Remove**.

## Filler text

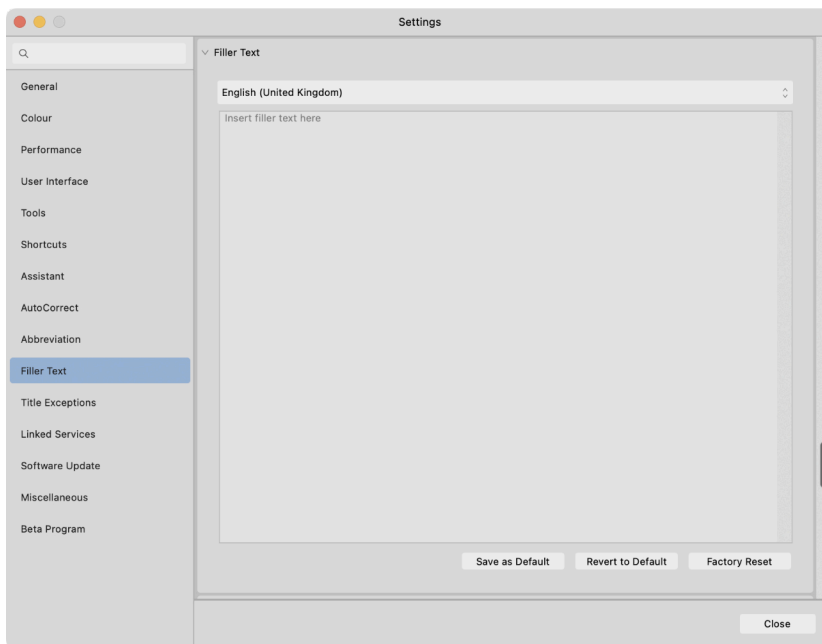
Filler text, also referred to as placeholder text, is used to demonstrate a layout's design without using actual words that may not be ready yet and which could be distracting.

Designers have long used *Lorem Ipsum* as filler text, adapted from a Latin dialogue by the Roman statesman Cicero. Publisher allows you to insert filler text automatically by choosing **Text > Insert Filler Text**. The filler text will fill all the space in the text frame or series of linked frames without overflowing the frames. Publisher will select a random sentence from the filler text to avoid identical blocks if you inserted it into multiple frames on the same spread.

You can replace Publisher's default filler text with your own, and use different filler text for various languages if the Latin text is not suitable for your purposes.

### To replace Publisher's filler text:

1. Create or open a document—you cannot set Filler Text defaults without an open document.
2. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **Filler Text** in the left pane.



3. Select which **Language** you wish to customize. The text field below will be blank if you have not customized the filler text for this language.
4. Enter the new filler text. Use at least a few sentences or paragraphs so that there is sufficient text for Publisher to randomize the starting sentence.

**Tip:** It doesn't matter which variation of English you choose, there is only one Filler Text default for all variations of English



You can test it before saving it as the default by drawing a text frame and choosing **Text > Insert Filler Text**. If you have already done that, doing anything to the document including changing the zoom level or page will update the filler text.

5. Until you save the filler text as the default, it will remain a document-level setting and not a global setting and will not be available to other open documents. To save the current document's filler text as Publisher's default, click **Save as Default**. This command saves only the selected language's filler text.
6. To undo changes you have made to the Filler Text for the current document, click **Revert to Default**. This command reverts only the selected language's filler text.
7. To revert the Filler Text to Publisher's original default, click **Factory Reset**. This command resets only the selected language's filler text.

**Tip:** If you insert filler text as a field (with **Insert filler text as text** disabled), you can convert it to regular text by right-clicking it and choosing **Expand Field**

#### **To insert filler text as text instead of as a field:**

1. Choose **Affinity Publisher 2 > Settings...** (macOS) or **Edit > Settings...** (Windows) and then click **General** in the left pane.
2. Click **Insert filler text as text**. From now on when you choose **Text > Insert Filler Text**, it will insert enough filler text as regular text to fill the frame(s).

# Installing additional dictionaries

Publisher uses the spelling and hyphenation dictionaries included with macOS and an equivalent list of dictionaries is installed with Affinity for Windows.

You can install additional dictionaries if the spelling or hyphenation language you want isn't included listed in the **Spelling** and **Hyphenation** language lists in the **Character panel**. Publisher uses the widely-available Hunspell dictionary format used by many other applications.

You can download Hunspell dictionary files from many websites but Serif has provided a convenient [list of download links](#) on the Affinity forum. All of the files will be named `xx_XX` where `xx` is the language and `XX` is the region, for example, `pl_PL` represents Polish and Poland.

## To install an additional dictionary on macOS:

1. To install a spelling dictionary, copy the downloaded `xx_XX.dic` and `xx_XX.aff` files to `/users/<username>/Library/Spelling/`. Both files are required for a spelling dictionary.
2. To install a hyphenation dictionary, create a folder named `xx_XX` in `/users/<username>/Library/Spelling/` and copy the downloaded `hyph_xx_XX.dic` file into it.
3. Restart Publisher for the changes to take effect.

## To install an additional dictionary on Windows:

1. The default folder for installing additional dictionaries is `C:\ProgramData\Affinity\Common\2.0\Dictionaries\` but you can change this if desired by choosing **Edit > Settings...**, select **Tools** from the left pane, and click **Browse**.
2. To install spelling and hyphenation dictionaries, create a folder named `xx_XX` in `C:\ProgramData\Affinity\Common\2.0\Dictionaries\` or your custom location and copy the downloaded `xx_XX.dic` and `xx_XX.aff` spelling dictionary files and/or the `hyph_xx_XX.dic` hyphenation dictionary file into it.
3. Restart Publisher for the changes to take effect.

**Tip:** macOS does not include a matching hyphenation dictionary for every spelling dictionary, nor are they available for every language

**Tip:** Some dictionary files are named `xx_XX` while others are named `xx-XX` with a hyphen instead of an underscore—this isn't important

**Tip:** When changing the location of dictionaries, select the folder containing the language folder(s) and not the language folder (`xx_XX`) you created

## Included and available dictionaries

This table lists all of the included spelling and hyphenation dictionaries as well as some other common ones but you are not limited to those listed here. Dictionaries marked as ✓ are included with macOS or with Publisher for Windows.

Hyphenation dictionaries marked as *auto* aren't necessary because hyphenation is generally the same for each regional variant of a language (for example, Spanish for Spain and Mexico) so Publisher will automatically use the main hyphenation dictionary for that language when **Language > Hyphenation** is set to *Auto* in the **Character** panel.

For all variants of English other than English (United Kingdom), setting hyphenation to *Auto* will default to the English (United States) hyphenation dictionary.

Locale	Language	macOS	Hyphen.	Windows	Hyphen.
		Spelling		Spelling	
en_US	English [United States]	✓	✓	✓	✓
en_GB	English (United Kingdom)	✓	✓	✓	✓
en_AU	English (Australia)	✓	auto (US)		auto
en_CA	English (Canada)	✓	auto (US)		auto
en_IN	English (India)	✓	auto (US)		auto
en_SG	English (Singapore)	✓	auto (US)		auto
en_ZA	English (South Africa)	✓	auto (US)		auto
en_NZ	English (New Zealand)	✓	auto (US)		auto
en_JP	English (Japan)	✓	auto (US)		auto
de_DE	Deutsch [German]	✓	✓	✓	✓
de_AT	Deutsch (Österreich) [Austria]				
de_CH	Deutsch (Schweiz) [Switzerland]				
es_ES	Español [Spanish]	✓	✓	✓	✓
es_MX	Español (México)		auto		auto
es_AR	Español (Argentina)		auto		auto
es_BO	Español (Bolivia)		auto		auto
es_CL	Español (Chile)		auto		auto
es_CO	Español (Colombia)		auto		auto
es_CR	Español (Costa Rica)		auto		auto
es_EC	Español (Ecuador)		auto		auto
es_PE	Español (Perú)		auto		auto
es_PY	Español (Paraguay)		auto		auto

**Tip:** On macOS, *English (United States)* is written as *English* without *United States* in parentheses

**Tip:** If the **de\_AT** or **de\_CH** files you downloaded include **\_frami** in their file-names and you use macOS, remove **\_frami** from the names so that the language will be listed correctly

Locale	Language	macOS Spelling	Hyphen.	Windows Spelling	Hyphen.
es_US	Español (Estados Unidos)		auto		auto
es_UY	Español (Uruguay)		auto		auto
es_VE	Español (Venezuela)		auto		auto
fr_FR	Français [French]	✓	✓	✓	✓
fr_CA	Français (Canada)		auto		auto
fr_BE	Français (Belgique)		auto		auto
fr_CH	Français (Suisse)		auto		auto
fr_LU	Français (Luxembourg)		auto		auto
it_IT	Italiano [Italian]	✓	✓	✓	✓
pt_BR	Português (Brasil)	✓	✓	✓	✓
pt_PT	Português (Portugal)	✓	auto		auto
cs_CZ	Čeština [Czech]	✓			
da_DK	Dansk [Danish]	✓			
ga_IE	Gaeilge [Irish]	✓			
hu_HU	Magyar [Hungarian]	✓			
nl_NL	Nederlands [Dutch]	✓			
nb_NO	Norsk Bokmål [Norwegian]	✓			
nn_NO	Norsk Nynorsk [Norwegian]	✓			
pl_PL	Polski [Polish]	✓			
ro_RO	Română [Romanian]	✓			
fi_FI	Suomi [Finnish]	✓			
sv_SE	Svenska [Swedish]	✓			
sv_FI	Svenska (Finland)				
vi_VN	Tiếng Việt [Vietnamese]	✓			
tk_TM	Türkçe [Turkmen]	✓			
el_GR	Ελληνικά [Greek]	✓			
bg_BG	Български [Bulgarian]	✓			
uk_UA	українська [Ukrainian]	✓			
ru_RU	Русский [Russian]	✓			
af_ZA	Afrikaans (Suid-Afrika)				
bs_BA	Bosanski (Bosna   Hercegovina)				

**Tip:** The only available dictionary for French is the main **fr\_FR** dictionary; if you import text formatted as Français (Canada) or one of the other three variants, download the fr\_FR dictionary files from the Affinity forum and rename them as required to avoid seeing the missing dictionary error in Preflight

Locale	Language	macOS		Windows
		Spelling	Hyphen.	Spelling Hyphen.
et_EE	Eesti [Estonian]			
gl_ES	Galego (España) [Galician]			
hr_HR	Hrvatski (Hrvatska) [Croatian]			
lv_LV	Latviešu (Latvija) [Latvian]			
lt_LT	Lietuvių [Lithuanian]			
mn_MN	Монгол [Mongolian]			
sk_SK	Slovenčina (Slovensko) [Slovak]			
sq_AL	Shqip (Shqipëri) [Albanian]			
sl_SL	Slovenščina (Slovenija) [Slovenian]			
la_VA	Latin (Vatican City)			
ca	Català [Catalan]			
ca_valencia	Català (Valencian)			
gd_GB	Gàidhlig (An rìoghachd Aonaichte) [Gaelic]			

# Appendices

## Appendix A – Special characters

### To type a special character:

1. Type the character's Unicode value and choose **Text > Toggle Unicode**, or choose **Text > Insert** and select from the list.
2. Choose **Text > View Special Characters** to show the invisible symbols for special characters. This will not display anchors, index marks, or fields which you must enable separately with their respective commands.

Whitespace		<i>* Not in menu</i>
d·b	Space	U+0020
d—b	Em Space, non-breaking	U+2003
d␣b	En Space, non-breaking (½ em)	U+2002
d␣b	Third/Thick Space, non-breaking (⅓ em)	U+2004
d␣b	Quarter/Mid Space, non-breaking (¼ em)	U+2005
d␣b	Thin (Fifth) Space, non-breaking (⅕ em)	U+2009
d␣b	Sixth Space, non-breaking (⅙ em)	U+2006
d␣b	Hair Space, non-breaking (⅛ em)	U+200A
d!b	Punctuation Space, non-breaking (width of period)	U+2008
d°b	Figure Space, non-breaking (often the width of a 0)	U+2007
d␣b	Medium Mathematical Space, non-breaking (¼ em)	U+205F*
d^b	Non-Breaking Space	U+00A0
d^b	Narrow Non-Breaking Space (½ em)	U+202F






d »	Tab	U+0009
d »	Right Indent Tab	
b	Indent to Here	
d b	Em Quad/Mutton – no symbol shown	U+2001*
d b	En Quad/Nut – no symbol shown	U+2000*
d b	Ideographic Space – no symbol shown	U+3000*

### Hyphens








d=	Automatic Hyphen-	
db=	Soft Hyphen, inline/end of line	U+00AD
d-b	Non-Breaking Hyphen – no symbol shown	U+2011

### Breaks and Joiners

d ↵	Line Break	U+2028
d ¶	Paragraph Break	U+2029
d ›	Column Break	
d ↓	Frame Break	
d ⇓	Page Break	U+000C
d ⇓	Odd/Even Page Break	
d §	End of Story	

	Zero-Width Space (breaking, discretionary line break)	U+200B
	Zero-Width Non-Breaking Space	U+FEFF*
	Zero-Width Non-Joiner	U+200C
	Zero-Width Joiner	U+200D*
	Word Joiner	U+2060*

## Markers

	Anchor position	
	Pinned object position	
	Index Mark	
	Note Mark	
	Endnote brackets (type between)	
	Broken endnote brackets and number	
	Field (field value is shown)	



# Appendix B – Clearing user data

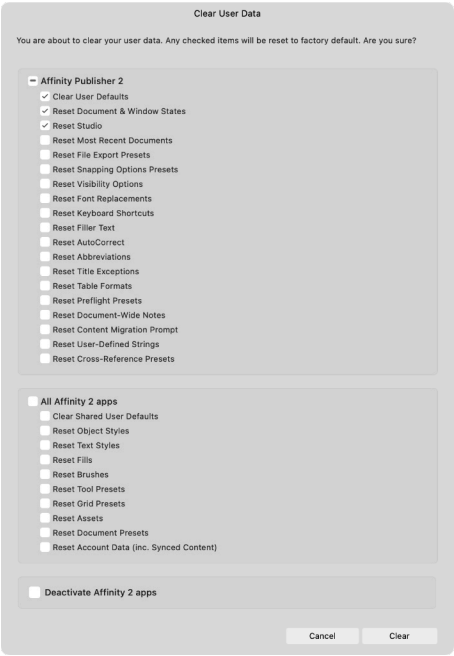
If Publisher starts to act strangely, such as if a panel won't display when you choose its menu command, you might need to clear your user data for a fresh start.

## To clear user data:

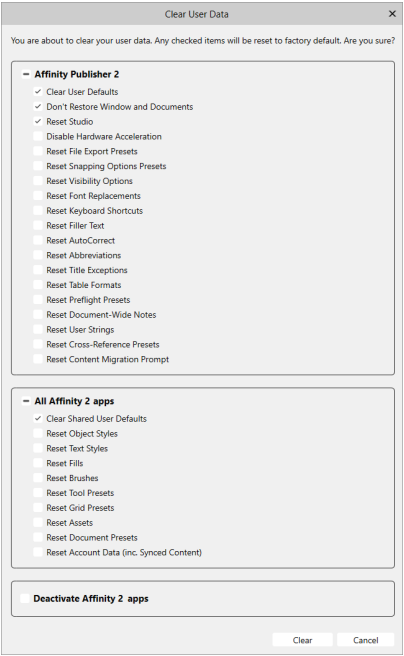
1. Before starting Publisher:
  - **macOS:** Start Publisher and then immediately press and hold **Ctrl**. Don't press **Ctrl** before clicking the app icon or a context menu will appear.
  - **Windows:** Press and hold **Ctrl** and then start Publisher.
2. Release **Ctrl** when the **Clear User Data** window appears.
3. Select which data to clear and click **Clear**. Your preference settings, text formatting defaults, and other options are grouped together as the first item, *User Defaults*, but other settings can be cleared independently.

The options are similar but slightly different for macOS and Windows.

**Tip:** Windows: If you don't have the app icon pinned in the Task bar and the Clear User Data window doesn't appear, wait for the icon to appear and then click it



macOS



Windows

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