



## LAB three

# DATA MERGE

### Part 1: Take a CLASS survey

This is due by midnight Wednesday, February 1st. Please take the Acrobat.com SendNow class survey which is listed at the class website for Week 3. You've also received an email invitation to fill out this form.

### Part 2: Look at the data source files

On Thursday, the results from the survey and your Lab 2 student advertisements will be uploaded to Acrobat.com. Using the link at the Week 3 InDesign 3 class website, download the Acrobat.com compressed zip file InDesign3Lab3.zip to your hard drive. Decompress (unzip) the contents and access the folder containing all of the individual student advertisements created in Lab 2 and the .csv spreadsheet that serves as the data source.

If you have Microsoft Excel, open the file InDesign3students.csv. This original data source simulates "data base" information on each student in the class and includes a location reference to the Lab 2 student ads submitted as a PDF. Notice the Programs column with the list of software applications and the @Ad column header in the first row. The "@" is needed for the InDesign merge to declare a filename and its location. This file can also be opened in a word processor or even a plain text editor.

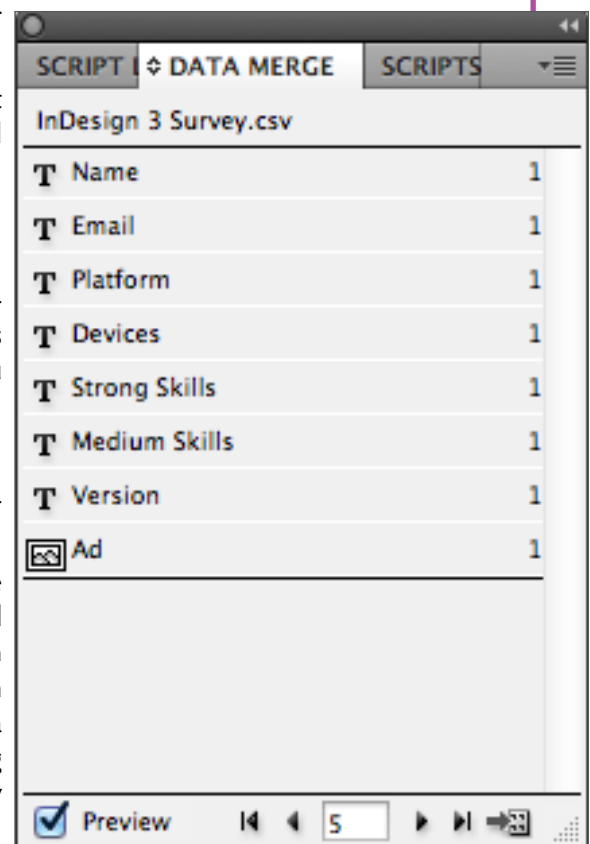
Close this document. If prompted, do *not* save the document as it is in perfect condition for the data merge. This .csv file will supply the data to your data merge workflow.

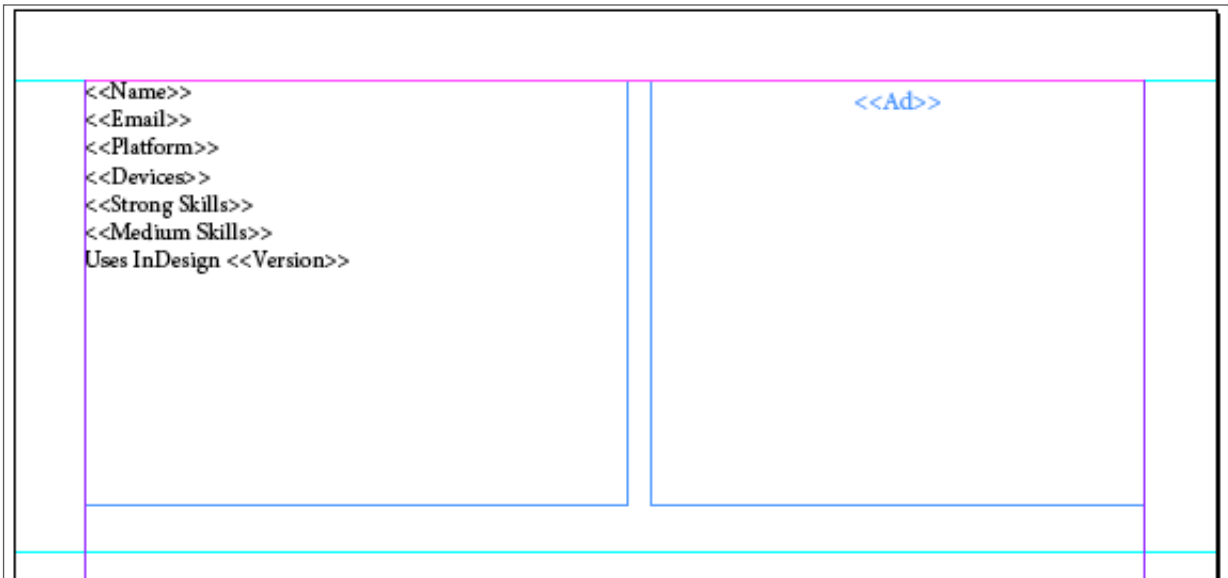
### Part 3: Data merge

Create a new InDesign document to start the data merge process. You will create a multiple record merge with 3 students per page. Choose the **Window..Utilities..Data Merge** menu command to bring up the Data Merge panel.

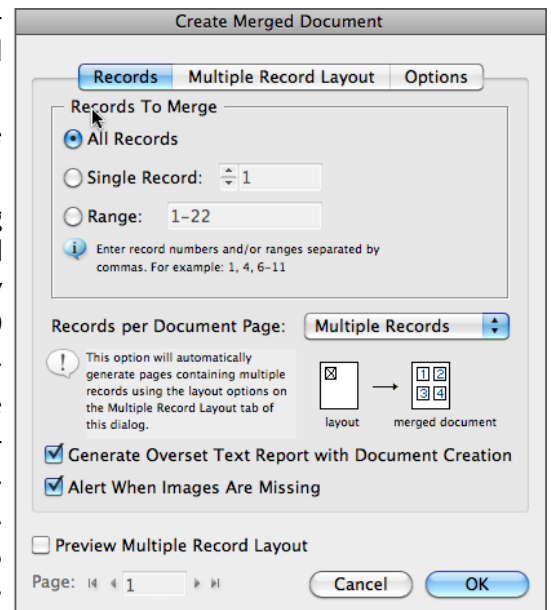
Following the 3 requirements in the panel:

1. Select InDesign3students.csv as the data source. This populates the Data Merge panel.
2. Design the initial layout of your catalog. The **Layout..Create Guides** menu will be useful to your initial layout if you section the 1-page document into 3 rows. In the top area for the first row, drag the text data fields from the data merge panel into an existing text frame. Create a blank 3.5"x3" frame to hold the ad PDF from Lab 2 and drag the Ad field from the Data Merge panel into this empty frame. See the screen shot on the next page.





3. Refine the layout. Experiment with the Preview option at the bottom of the Data Merge panel to see the information presented for each student in this top area. This will help you visualize the amount of text that will be listed for each student when the merge is processed. Resize your text frame accordingly, format the text, and apply paragraph and character styles. The list of strong skills should be displayed in a bold font for emphasis. The list of medium skills should be displayed in either italics, a light font, or some sort of diminutive formatting.
4. When you are satisfied with the layout for one sample student, create a new document that will be populated with all student records on multiple pages:
  - a. Click on the Create Merged Document button at the bottom of the Data Merge panel.
  - b. There are three buttons at the top of the dialog box that you will use: Records, Multiple Record Layout, and Options. In the first Records tab, specify **Multiple Records** per Document Page (very important) and turn on the Preview Multiple Record Layout option.
  - c. Examine the features in the Options button. The Remove Blank Lines for Empty Fields option will be useful for students who do not have strong or medium program skills.
  - d. Using the Multiple Record Layout button, adjust the spacing between rows as desired. If you include too much spacing, you'll only see two records per page instead of three records.



After the merged document is created, do any edits necessary to the text. Add master page and other design elements to create a consistent look and feel. Save the merged document as Lab3 and create a smallest size PDF. Submit this PDF to CATE.

### Checklist:

- Watch the assigned webcasts
- Complete Lab 3 and submit to CATE
- Complete Lab 2 with your team and submit the narrative at CATE