

Working with variable data

I. Data merge basics

- A. Enhancement to merge repetitive data to create form letters, envelopes, mailers, junk mail and name tags
- B. Elements of a data merge:
 1. Data source file: contains information that changes with each "product" produced (i.e. each letter)
 - a. Usually a spreadsheet or database file (Word, Excel, plain text .txt file)
 - b. Can be either comma-delimited or tab-delimited
 2. Target document: InDesign document with tags
 3. Merged document: product of repetitively merging each data source record and the target document

	A	B	C
1	Company Name	Address	City
2	Adobe Systems, Inc.	345 Park Avenue	San Jose
3	dot2dot2 document Production Services	6365 Santana Row	San Diego
4	Empowered Writing	17404 NE 25th Street	Vancouver

3 records

2

<<Company Name>> each record has 5 fields
<<Address>>
<<City>>, <<State>> <<Postal Code>>

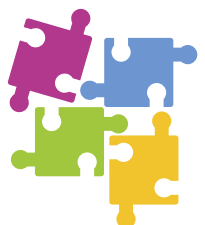


II. Creating a data merge in InDesign

- A. To do a data merge
 1. Determine what data fields you will use (ex: name, address, city, state, zip)
 2. Create the source file (outside of InDesign)
 - a. In the database or spreadsheet program (FileMaker/Access or Excel), save the source file as a comma-delimited (.csv) or tab-delimited (.txt) text file
 - b. You can also create the data source in any word-processor by separating each line (record) with either commas or tabs and saving as a plain text .txt file (include the first line of field names)
 - c. Special care: a list which contains commands must be surrounded by quotes

Cyndi, Reese, creese@santarosa.edu, Both, "Illustrator, Acrobat, Photoshop, Connect, Dreamweaver, Flash, Microsoft Office", reese_cyndi.pdf

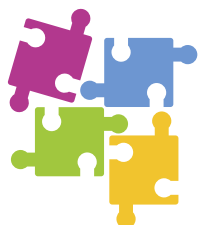
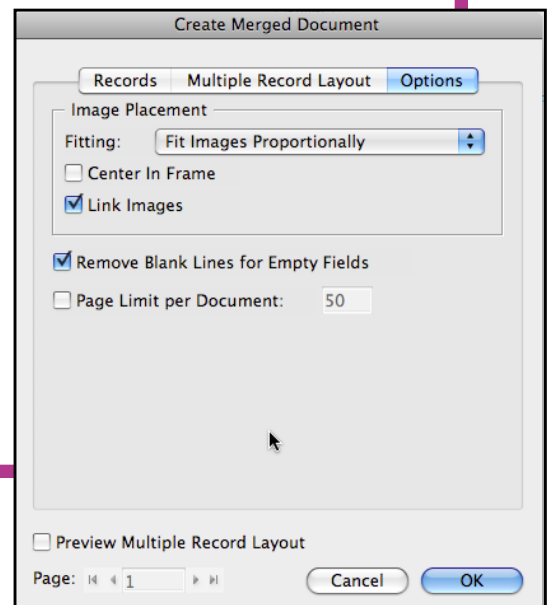
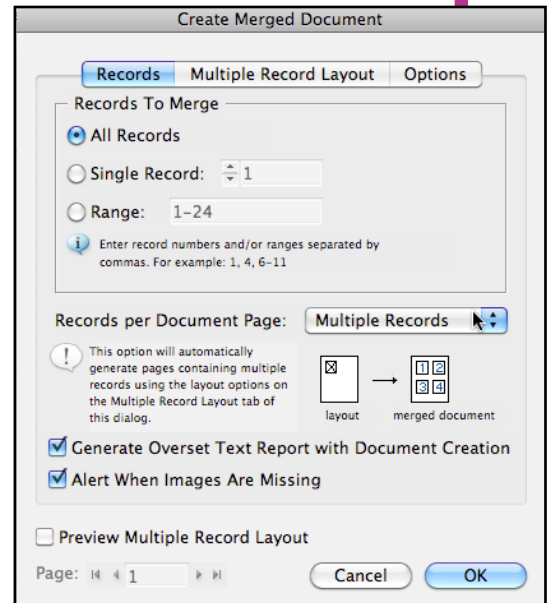
3. Create an InDesign target document
 - a. Include text and graphics that will remain the same in each merge
 - b. Display the Data Merge panel using the **Window..Automation..Data Merge** menu
 - c. Declare the source file using the Data Merge **Select Data Source** menu
 - d. Insert fields from the Data Merge panel into the target document: click on the data field with a text insertion point in a frame at the appropriate place
 - e. Format the fields — the format will be applied to the actual values when the merge occurs
 - f. Preview the records using the Preview checkbox in the Data Merge panel



4. Merge the source file and target file
 - a. Choose the Data Merge panel **Create Merged Document** menu or click on the Create Merged Document button
 - b. For letters: each single record will generate a new page in the new merged document
 - c. For mailing labels: the multiple records feature will generate a series of records in the new merged document
 - d. Choose the **Content Placement Options** menu from the Data Merge panel if merging graphic files or to remove blank lines for empty fields

B. Special merges

1. Special merge: multiple records/page
 - a. Design the page so that each "unit" takes up exactly a given piece of real estate (i.e. each postcard takes up a 3x5 inch area within the margins and column gutters)
 - b. Choose the Multiple Records option
 - c. In the Multiple Record Layout
 - The margins specify the overall area where the data fields will reside (not the design)
 - The spacing specifies the amount of space between the text frames that hold the field(s)
2. Special merge: graphics
 - a. Set up the data source file and create a data field name that starts with an @
 - The @ is for the field name only
 - If using Excel, type an apostrophe (') before the @ so that you don't invoke an Excel function
 - b. Include the name of the graphic or PDF with path information
 - If the data source document is in the same folder as the graphics, path information is not required
 - Windows example: C:\MyDocuments\BillSmith.jpg or C:\Photos\BillSmith.jpg
 - Mac example: Mac HD: Photos:BillSmith.jpg
 - c. When setting up the merge, create an empty frame to hold the graphic
 - d. Drag the field name of the graphic to the empty placeholder frame
 - e. When merging records, check out the Options tab to coordinate the resizing of the graphic to the frame



Adobe Bridge CS4



I. Adobe Bridge

A. CS4 File management program (**asset** management) used in two different formats:

1. Full Mode: run as a separate program (supports Microsoft Office docs and previews PDFs)
2. Compact Mode: integrates as a window for CS4 applications (InDesign, Photoshop, Illustrator) to preview, import (InDesign) and open files

B. Using Bridge in InDesign

1. Drag and drop graphic assets from the Bridge window into InDesign as an alternative to **File..Place** — use the Compact Mode window which contains less information than Full Mode
2. Double click on Bridge assets to open them in their native applications (useful for InDesign, Photoshop and Illustrator files)
3. Click on the InDesign window to resume work (you are in two separate programs)
4. Hint: I use Bridge in either Compact or Full mode, then click on the minimize button so that it doesn't take up any screen space but can be displayed quickly when needed

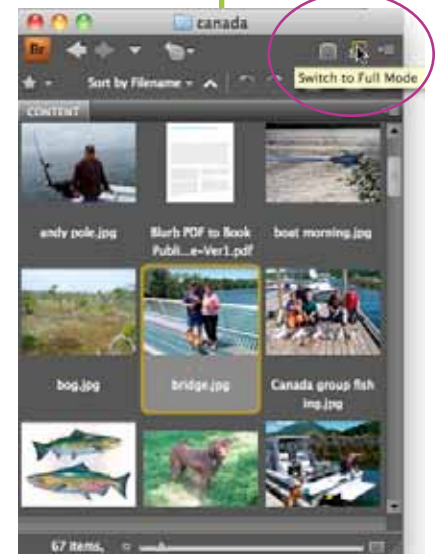
C. Full Mode features

1. Common workspace arrangements (upper right)
 - a. Essentials
 - b. Filmstrip — for previewing images
 - c. Metadata focus — for previewing folders paired with internal info in Content panel
 - d. Keywords: metadata used to categorize assets
2. **Window..Workspace..Reset to Default Workspace** menu helps when Bridge windows don't cooperate or have been customized

D. Navigational panels

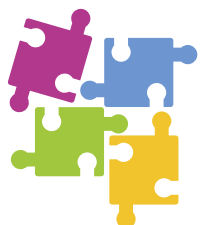
1. Folders panel: navigates the standard folder organization of hard drive
2. Favorites panel
 - a. Displays favorite folders, files and applications (Version Cue can be added)
 - b. Bridge Home (replaced with AdobeTV)

Compact mode

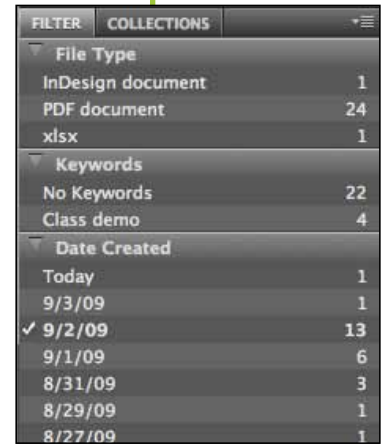


Fullm

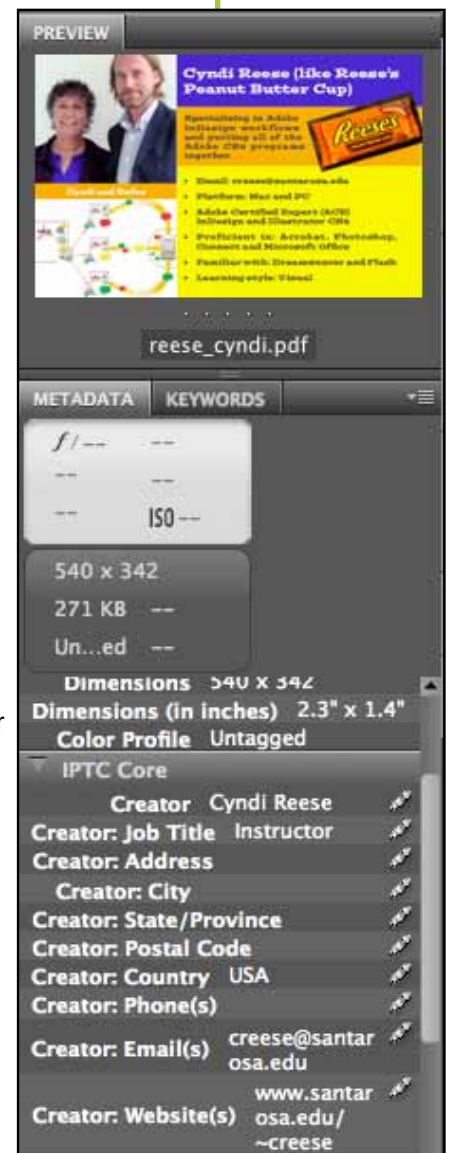
Metadata is "data on data" — internal info stored in a file, such as the date created, author, and filesize



- c. Favorites panel contents is customized in the **Bridge/Edit..Preferences** menu
- d. Drag a folder, file, or application to the Favorites panel to install it in the Favorites panel
Control/right-mouse click to delete from Favorites using the context menu



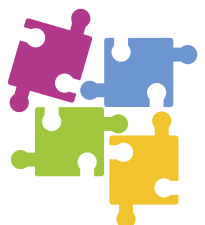
- E. Content panel: a thumbnail preview of assets in the specified folder
- F. Metadata panel:
 - 1. InDesign document: fonts/swatches used
 - 2. Images: filesize, dimensions, color mode and resolution
- G. Filter panel: sorts and filters assets that are currently shown in the Content panel
 - 1. Displays summary of Content area (i.e. number of JPEGs, dates when modifications were made)
 - 2. Click on an option to filter the Content area (i.e. show only Illustrator graphics or files that were modified yesterday) — this is a toggle so clicking again “unfilters”



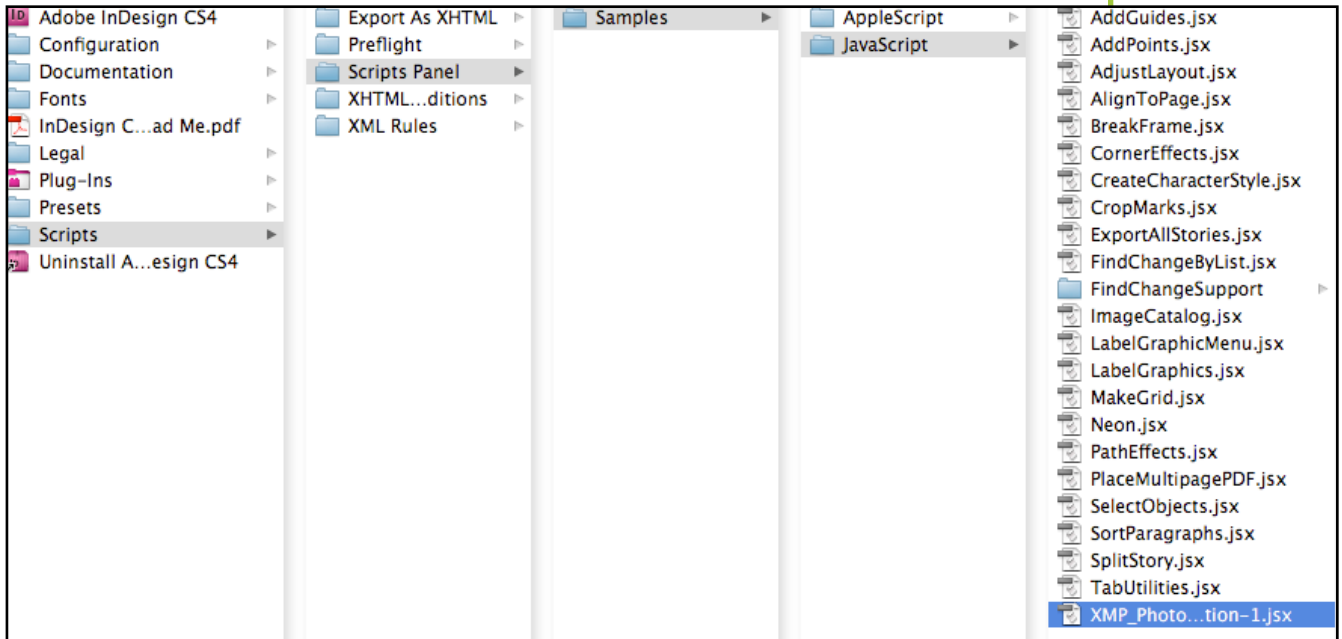
H. Metadata

1. What is metadata?
 - a. Internal descriptive file information that can be searched and processed by other Adobe applications
 - b. Standard metadata: title, author, copyright info, summary, date created, date modified
 - c. User-defined metadata: keywords (people, places, project names) and manual entries
 - d. Similar to how web pages contain metadata that it is used by search engines
2. To add metadata to a document using InDesign, Illustrator and Photoshop
 - a. Choose **File..File Info**
 - b. Fill in the dialog box — this is generic and includes metadata for other Adobe apps
3. To add metadata to any Adobe document using Bridge
 - a. Choose a workspace that includes the Metadata panel
 - b. Select a document (asset)
 - c. Add information in the Metadata and/or Keywords panels
 - d. Click on the checkmark when finished adding data in the Metadata panel
4. Metadata templates
 - a. Saved collections of metadata that can be applied to assets so that the same metadata is applied to a series of different documents
 - b. Bridge: create templates using the **Tools** menu or the Metadata panel flyout menu

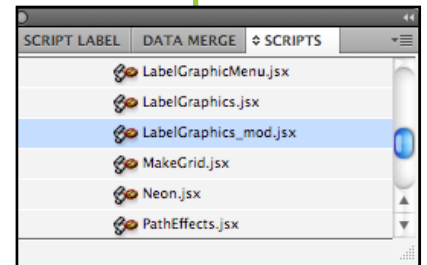
Metadata is stored using XMP standards (extensible metadata platform) which is based on XML



- c. Apply templates using Bridge **Tools** menu or the Metadata panel flyout menu
InDesign's **File..Info** menu has access to metadata templates
5. Metadata is a powerful searching mechanism in Adobe Bridge
6. Additional InDesign feature — extracting creator/description metadata automatically into a text frame
 - a. Apply metadata templates using **File..Info** menu
 - b. Download a script from <http://tinyurl.com/96zbl7> (or just use the LabelGraphics script)



- c. Copy the script into the Scripts folder in the InDesign program folder
- d. In Indesign, select the graphic or asset
- e. Choose the **Window..Automation..Scripts** menu and double click on the script





Cyndi Reese (like Reese's Peanut Butter Cup)

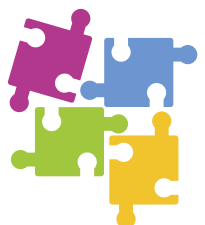
Specializing in Adobe InDesign workflows and putting all of the Adobe CS4 programs together.

- **Email:** creese@santarosa.edu
- **Platform:** Mac and PC
- **Adobe Certified Expert (ACE) InDesign and Illustrator CS4**
- **Proficient in:** Acrobat, Photoshop, Connect and Microsoft Office
- **Familiar with:** Dreamweaver and Flash
- **Learning style:** Visual





Cyndi Reese and Rufus Deucher



II. Snippets

- A. File that holds multiple objects AND retains their location (XML) — useful for a frame that always needs to be imported at the same location (ex: a newsletter masthead of 5 objects that always goes at the top of the page)
- B. About snippets
 1. Similar to an InDesign library (collection of your favorite objects as an alternative to **File..Place**) but a snippet is one file = one favorite (which can be a collection of objects)
 2. .idms extension (used to be .inds)
 3. Snippets are supported by both InDesign and Bridge
- C. To create a snippet from InDesign
 1. Select the object(s)
 2. Choose the **File..Export** menu and choose the InDesign Snippet option
 3. Choose a custom name
 4. You can also drag-and-drop a file into Bridge to create a snippet
- D. To use a snippet in InDesign
 1. Choose the **InDesign/Edit..Preferences..File Handling** menu and check the position where the snippet will import (Position at Original Location is standard)
 2. Drag and drop from Bridge or **File..Place** into the InDesign document
 3. If you hit the Alt/Option key down when you import the snippet, the position state switches (position at original location vs position at cursor click)

Drag and drop 5 different objects at once with a snippet

