Automate This!

From: Anne Smith (ACME Cosmetics Inc.)
To: Designer
Sent: Thursday, March 02, 2006 17:30 PM
Subject: Our upcoming product launch

We need to send 150 personalized invitations for the upcoming product launch to our key customers. I would like you to personalize the invites based on each customer's last purchase with us (fragrance, makeup, or hair care). Marketing tells me it'll make people feel like we care. While you're at it, please provide us with personalized name tags for all 150 of those customers. The printer needs everything by tomorrow. This shouldn't be a problem, right?
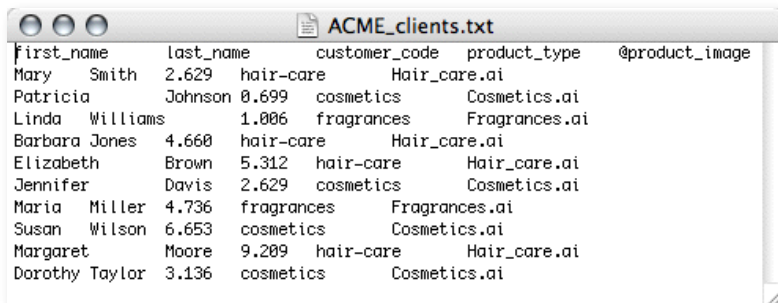
–Anne

DATA MERGE is an InDesign CS2 feature most people ignore until they get a request like the one on the left. When you want to automate repetitive layouts but don't need the sophistication of XML-based workflows or specialized cataloging plug-ins, Data Merge is an excellent solution.

By RUFUS DEUCHLER

Clients! They ask for the impossible, like 300 different InDesign documents overnight. Thanks to InDesign's Data Merge, I can deliver—and so can you.

With Data Merge you can designate areas in your InDesign document that will populate from a comma-delimited file (.csv) or a tab-delimited (.txt) file. These text files can also contain references to images to further personalize your layout. It's like Microsoft Word mail merge but with the ability to use page layout's best text-composition engine and all of InDesign's wonderful graphic features. To download the sample files for these projects and follow along, go to *http://downloads.indesignmag. com/supportfiles/ACME_Cosmetics.zip*.

FIGURE 1: The tab-delimited .txt file. The @ symbol defines links to images.

1. **OPEN ANNE'S DATA**
In a text editor or word processor, let's open ACME_clients.txt, which is the .txt file from the client, Anne (**Figure 1**). A tab-delimited .txt file or a comma-delimited .csv file can be generated by most spreadsheet and database applications, such as Microsoft Excel and FileMaker Pro; also, they can be written in any text editor, such as Apple's TextEdit or Microsoft's NotePad.

The first line of the file must list the names of each field; you'll use those in your InDesign template, so make sure they mean something to you, such as "first_name" and "last_name."

2. SET UP THE DATA FOR VARIABLE IMAGES

In the .txt file, add the @ sign before "product_image" in the first line of text (the field name). The @ sign tells Data Merge that the data contained in the field relates to an image file. In this example, the images files are in the same directory as the InDesign template, so the file name is enough. When images are in a different folder, you must specify the path to graphics; for example, `HD:Users:Username:Desktop:Images:hair_care.ai` on a Mac or `c:\images\hair_care.ai` on Windows.

3. CREATE THE INDESIGN PROTOTYPE

Create the layout as you normally would, inserting both text and image areas. This document will be the template into which the data from the text file automatically flows. You can come up with your own graphics or use the files I've provided: Anne_Signature.pdf, Anne_Smith_logo.pdf, Cosmetics.pdf, Fragrances.pdf, and Hair_care.pdf.
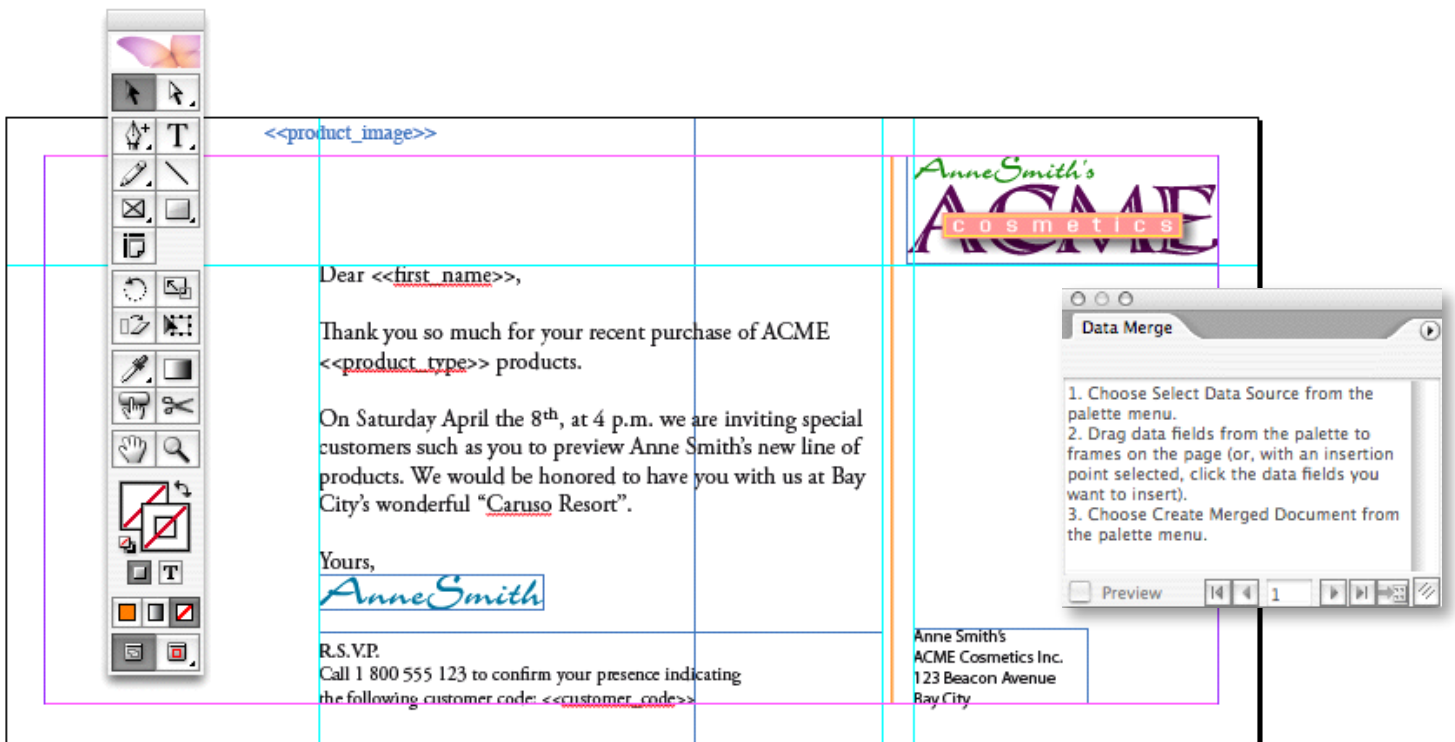

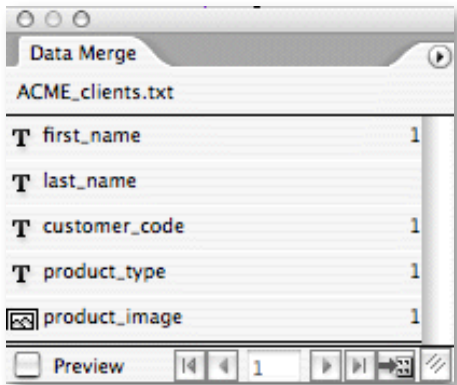**FIGURE 2:** The Data Merge palette when no data source is selected.

FIGURE 3: The Data Merge palette with a data source.

FIGURE 4: One tab in the Create Merged Document options panel.

4. MEET THE DATA MERGE PALETTE

Go to **Window** > **Automation** and choose Data Merge. If no data source has been selected, the palette guides you through what to do next (**Figure 2**).

5. SELECT THE .TXT FILE

Now you need to tell Data Merge where to get the data from; choose Select Data Source… from the palette's flyout menu and select ACME_clients.txt. (If you were using a .csv file instead, you would choose it at this time.) You will then see all the items listed on the first line of your text file in the palette. Textual data and images are indicated by separate icons you can see in the left side of the palette (**Figure 3**).

6. ASSIGN THE TEXT AND IMAGE FIELDS

You can assign the data to areas in your layout in a couple of ways.

A. The first method is useful when the data needs to be in a specific place in an existing text (such as the ACME invite): Put your text cursor where you want to see the data and click the data in the Data Merge palette. A bracketed text snippet will be inserted in your layout.

B. When you need to link an image frame with the data, drag the fields from the Data Merge palette and drop data into any text or image frame in your layout.

It's as easy as that. Now you can format the text data as if it were normal text.

7. PREVIEW

Now that InDesign knows where to find the data and how you want the data to look, you can preview how the data will behave in your layout by choosing Preview in the Data Merge palette or its flyout menu. You can also navigate in preview mode to see how data behaves across multiple pages.

8. LET IT FLOW!

Once everything looks as you want it to, your template is complete. Choose Create Merged Document from the palette's flyout menu (or click on the button in the lower corner of the palette).

In the Records panels (**Figure 4**), you can choose which records to merge into your layout, whether to create single or
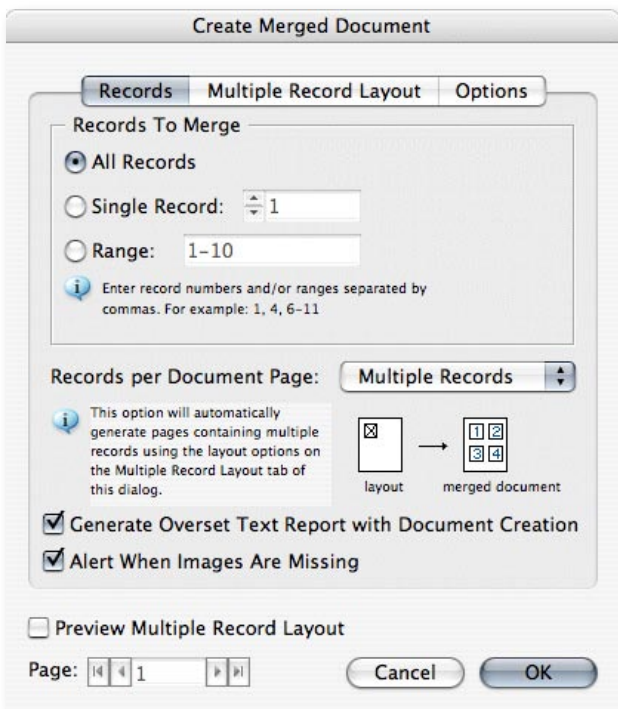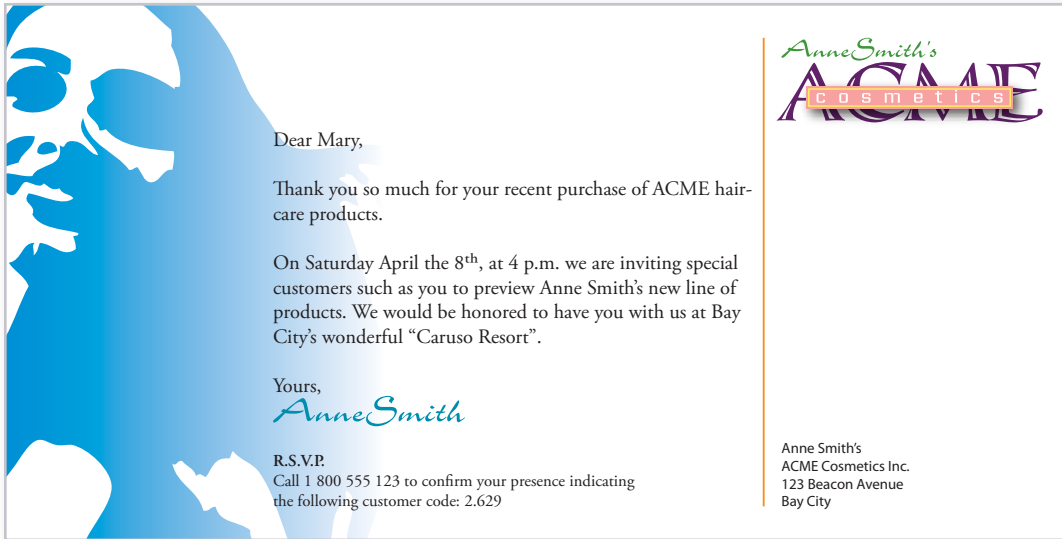
FIGURE 5: One for Mary, one for Patricia, one for Linda, one for...

FIGURE 6: The original layout (top) and the automatically generated layout (right).

multiple records per page (see below), and how images should fit in assigned image frames. You can also instruct InDesign to alert you if there's overset text in the generated file—very useful if you don't want to check all 150 invitations individually!

9. THE FINAL INVITATIONS

InDesign then creates a new file with a new page for each data line of your original .txt (or .csv) file (**Figure 5**). You can either print or export the file as PDF.

10. NAME THE TAGS

Lastly, it's time to make the product launch name tags. You can create templates for single objects (such as the name tag in **Figure 6**) and automatically generate layouts with multiple instances of the object on a page.

Note that if your original layout has several elements (such as the ACME name tag), InDesign considers it a group of objects and repeats it many times on a page. In Multiple Record Layout Options, you can specify margins, layout, and even the spacing between the repeating objects. The number of tag repetitions depends largely on the space available on the document page; you'll probably have to try several options (maybe even change the page orientation) until you manage to fit as many tags as possible on a page.

No problem, Anne. The printer will get it all by tomorrow.

RUFUS DEUCHLER is a graphic designer, trainer, and print production consultant in Florence, Italy (*www.deuchler.net*). He is also Adobe Certified Expert—Print Specialist and the coordinator of the Italian InDesign User Group.