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# Use Data Merge to build personalized documents

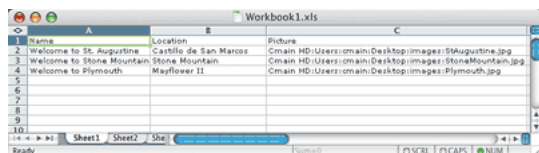
You might be asking, “What’s Data Merge?” That’s a valid question as it’s fairly new to Adobe® InDesign®. Data Merge is the ability to create fields in your document that automatically populate from a comma-delimited file (.csv) or a tab-delimited (.txt) file. These files can also reference the paths to images so that the images change, too. It’s mail merge with a graphics professional flare!

In the second half of this tutorial, we’ll take a look at good document hygiene for your InDesign files. Although the world is moving to PDF workflow, there will be times that your printer will want the original source InDesign files to print from. That’s cool because Adobe InDesign CS2 provides more features to make sure that your files are right before you send them to press.

## Create merged documents

### Step 1: Create your data source.

You can create your data source manually by typing it in a text file, but it’s easier using a program like Microsoft® Excel or FileMaker Pro. Because Excel is common, let’s use it. Open Excel and create a document that has the headings “Name,” “Location,” and “Picture” across the top. Input your records in each column. Do just three records at first to make sure it works. For the Picture column, you have to input the exact path on your computer for each picture, and it’s case sensitive. Example: Mac HD:Photos:SpaceAlien.jpg (PC: c:\Photos\SpaceAlien.jpg). When you’re done, save the file as Comma-Delimited.



	A	B	C
1	Name	Location	Picture
2	Welcome to St. Augustine	Castillo de San Marcos	C:\main HD\Users\cmain\Desktop\images\StAugustine.jpg
3	Welcome to Stone Mountain	Stone Mountain	C:\main HD\Users\cmain\Desktop\images\StoneMountain.jpg
4	Welcome to Plymouth	Mayflower II	C:\main HD\Users\cmain\Desktop\images\Plymouth.jpg
5			
6			
7			
8			
9			
10			

Type text in the Name and Location fields and the path to three images in an Excel document.

### Step 2: Open the file in a text editor.

Now that you have your data file, you need to make one change to it in a text editor. Open it in TextEdit on the Mac or Notepad on the PC. Once you have it open add “@” before the word “picture” (@picture) and save the file. Excel won’t allow this as it thinks you’re trying to create a function.



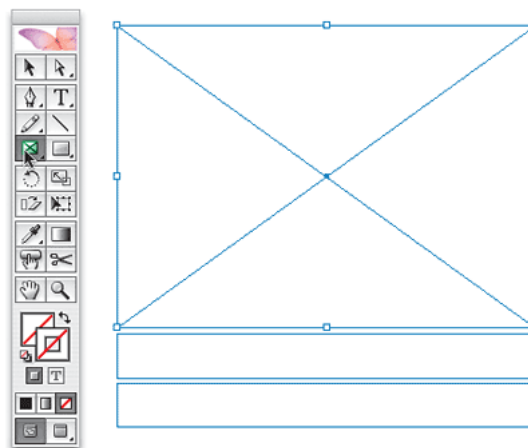
```

Name,Location,@Picture
Welcome to St. Augustine,Castillo de San Marcos,C:\main HD\Users\cmain\Desktop\images\StAugustine.jpg
Welcome to Stone Mountain,Stone Mountain,C:\main HD\Users\cmain\Desktop\images\StoneMountain.jpg
Welcome to Plymouth,Mayflower II,C:\main HD\Users\cmain\Desktop\images\Plymouth.jpg
  
```

Open and edit the Excel document as plain text in a text editing application.

### Step 3: Create text and image frames in InDesign.

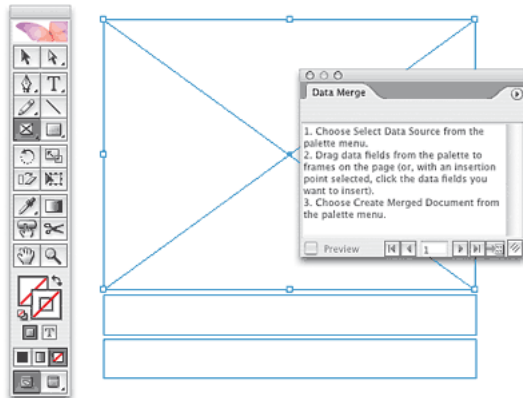
Create a new InDesign document (choose File > New > Document) and drag out two text frames (one for the Name and one for the Location) with the Type tool (T). Then use the Rectangle Frame tool (F) to create an image frame for the photo that you’re about to merge.



Create 2 text frames and an image frame in a new InDesign document.

#### Step 4: Display the Data Merge palette.

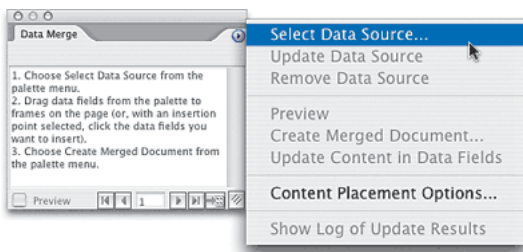
Open the Data Merge palette, which is located under the Window > Automation menu of InDesign CS2. What's nice about this palette is that it contains the next three steps directly on the palette.



Choose Window > Automation > Data Merge to display the Data Merge Palette.

#### Step 5: Choose your CSV file.

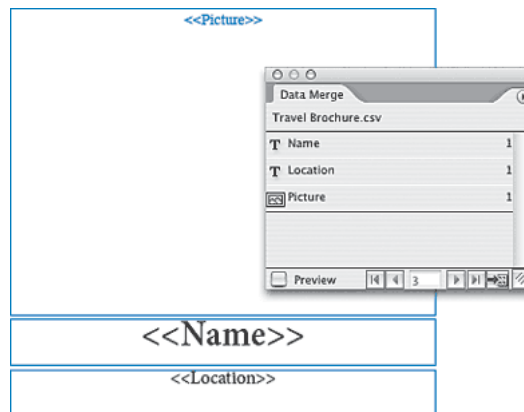
Choose Select Data Source from the Data Merge Palette's flyout menu. This will bring up a dialog asking you to choose the comma-delimited file you created in Steps 1 and 2. The palette should then populate with the three fields: Name, Location, and Picture. The Picture field should have the icon of an image to the left of it which indicates that you successfully put the "@" symbol in front of the word "picture" in the data file.



Choose select Data Source from the Data Merge palette menu to select the Excel document.

#### Step 6: Assign the proper fields and stylize.

Now, with the Selection tool (V) select one of the frames you created in Step 3 and assign the proper field to it by clicking on that field in the Data Merge palette. Repeat for each frame. This will put the field name in the frames. At this point you can also stylize the text using any fonts or style sheets you want. Keep in mind that the size of the frame should be large enough to accommodate the largest piece of field data that will be coming from your data file in the font and size you've chosen.



Assign the data fields in the Excel document to the image and text frames in the InDesign document.

#### Step 7: Preview the data files.

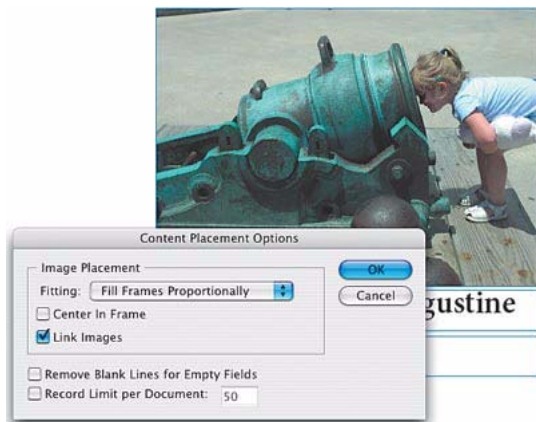
Now you can test it to see if it works by clicking the Preview checkbox at the bottom of the Data Merge palette. This will show you the first record in your data file in the frames that you assigned the fields to. You can page through the records using the right and left arrow buttons at the bottom of the Data Merge palette.



Click Preview in the Data Merge palette to test the results.

**Step 8: Fill the frames proportionally.**

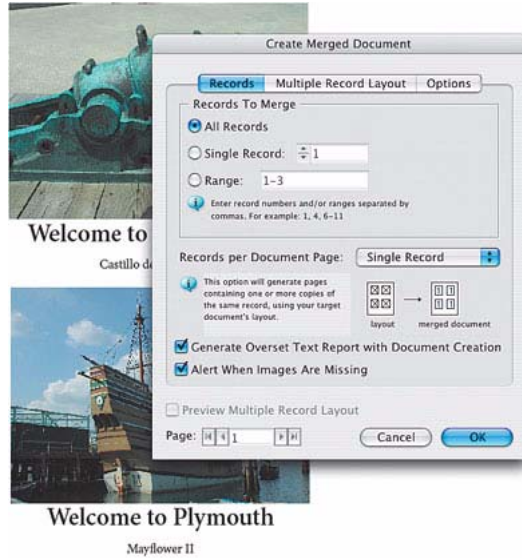
By default the images will come into your frame sized proportionally to fit it. That's a good thing! However, if you want to override this control, choose Content Placement Options from the Data Merge palette menu. From this dialog you can choose InDesign's new Fitting command Fill Frames Proportionally and this will make sure that the image fills the entire frame (with maybe a little cropped off). Feel free to add other graphic or text elements to the page as well as embedding the text fields into existing text to generate graphically rich, personalized documents.



*The Fill Frames Proportionally option places the image so that its height or width fills the frame, leaving the rest of the image cropped.*

**Step 9: Generate the merged document.**

Now you're ready to generate your merged document. You can either click the Create Merged Document icon on the bottom right of the Data Merge palette or choose the Create Merged Document command from the Data Merge palette's flyout menu. This will generate a new document with each one of your records on a different page.



*The Create Merged Document dialog box lets you adjust the merging options.*

## Preparing documents for prepress

### Step 1: Remove unused swatches for good hygiene.

For good document hygiene you should probably remove any unused swatches. Bring up the Swatches palette and choose Select All Unused from the palette menu. This will select all the swatches that you didn't use in your document and now you can simply click the Trash icon at the bottom right of the palette to remove them. (By the way, this step and the following steps don't necessarily have to be done in the order shown here.)



Choose *Select All Unused* and then click the *Delete Swatch* icon to get rid of unused swatches.

### Step 2: Check colors before output.

Next, you'll probably want to make sure that your document doesn't contain too many colors. For example, if your job is supposed to be four-color process then you only want cyan, magenta, yellow, and black in your document. If your document is supposed to only contain black and one spot color, then you probably don't want to see four colors.

To check this, bring up the Separations Preview palette from the Window > Output menu. It will immediately show you how many colors were used.

### Step 3: Verify the stacking order.

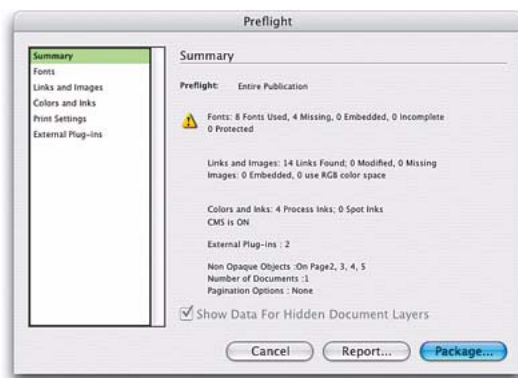
Stacking order is important when using InDesign's transparency features. Whenever possible, place your text on top of your transparent objects. If your text is below your transparent objects, it can become rasterized. To make sure your transparent objects are set up correctly, bring up the Flattener Preview from the Window > Output menu. Choose All Affected Objects in the Highlight pop-up menu. This will highlight in red anything that either has transparency or anything that's under a transparent object. Make sure your text doesn't turn red. If it does, then arrange your text so that it's on top.

### Step 4: Check for overprinting.

By default, overlapping colors are set to knock out. If any of your objects are set to overprint, you may get unexpected color results. Or if you have set some of your objects to overprint, then you may want to verify that you set them properly. Simply choose Overprint Preview from the View menu. This will show you the overprint results. Be sure to turn it off when you're done as it will cause InDesign to run slower.

### Step 5: Package the document.

The Package function (File > Package) will run InDesign's built-in Preflight. Preflight is great because it can warn you about missing links, missing fonts, and images in the wrong color space. Unfortunately, most of these errors have to be fixed in InDesign. If you receive an error that needs fixing, simply cancel and go fix the error and then run Package again. Once it satisfies the Preflight function, you'll be able to choose a location such as your Desktop and package a copy of the document, links, and fonts to this folder, which you can then give to your print service provider.



The Preflight dialog box displays errors in the document.

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#### By Terry White for Layers Magazine

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