Form Letter Tutorial
Part One — The Basics

This tutorial covers the basic merge and output capabilities of the AccurioPro® VDP software. The sample document consists of a single-page form letter that has several variable elements, including text, articles, and pictures. You will merge data from a tab-delimited text file into this form letter to produce pages containing each version of the variable data. This tutorial also covers using the AccurioPro PDF Driver to produce a PDF file containing the merged pages.

Topics covered in this tutorial:

✔ Setting Up the Data Source Definition (DDF)

✔ Configuring the DDF using Setup

✔ Setting up Variable Links in the DDF

✔ Placing Variable Links (Text and Picture Links) in a document

✔ Checking your work by running reports and tests

✔ Merging data to produce PDF output

✔ Merging data to produce a multipage InDesign document

✔ Reviewing the Basic Steps (A Quick Start Guide)

AccurioPro
Variable Data

Overview

The Sample Document

The name of the sample document for this tutorial is "Form Letter Basics.indd" and it exists in the "1) Form Letter" Tutorial Files folder. The document is a personalized form letter. It requires six Variable Text elements (Name, Address 1, Address 2, City, State, Zip) and one Variable Picture (a credit card logo).

The sample document looks like this:

The Sample Data File

When any AccurioPro window or documentation refers to a "database" or "data file", it's referring to a variable data file that has been saved in a delimited text file format. AccurioPro accepts simple, delimited text files created on either a Macintosh, PC/MS-DOS (Windows), or UNIX system that use ASCII encoding. Additionally, AccurioPro accepts delimited text files that use UTF-8 Unicode encoding.

Delimited text files are easily created using most of the popular database or spreadsheet software programs. For step-by-step examples on creating a delimited text file, see the **Database Files** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

The variable data for this tutorial is contained within a tab-separated text file named "Form Letter.txt" which exists in the "1) Form Letter" Tutorial Files folder. Also, the contents of the data file have been placed on the document's pasteboard for your viewing convenience only. Below is a picture of the data in this file:

Name	Gender	Address #1	Address #2	City	ST	Zip	Logo	Contact
Roland Reed	M	1267 Vernon Ct	Suite #244	Hollywood	CA	90036	VISA.eps	contact1.txt
Cindy Olsen	F	4577 Roanoke St		Glendale	CA	90148	MSTR.eps	contact2.txt
Thomas Corbo	M	4522 Troy Ave	Unit 3-B	Burbank	CA	91504	AMEX.eps	contact3.txt
Beth Stein	F	294 Eagle St		Glendale	CA	90148	MSTR.eps	contact2.txt
James Blish	M	1433 Van Dyke	#22	Hollywood	CA	90036	VISA.eps	contact1.txt

This data file holds six records (lines), each containing nine fields (columns) of data. The first record contains names for the fields. The remaining five records contain data for the variable job. Please note that although this data file is small for training purposes, your data files may contain any number of records and the records may contain up to 1500 fields.

The first seven fields in this tutorial's variable data records provide data for Variable Text Links. Note that the "Address #2" field does not contain data in two of the records.

The last two fields ("Logo" and "Contact") contain names of files that are located in the same folder as the sample document. AccurioPro is able to merge (place) external graphic files and text files when they are referenced by either a file name or the full path to the file.

➤ The "Logo" field provides data for a Variable Picture Link, the file name of a digital image (the logo of the type of credit card requested by the customer).

➤ The "Contact" field provides data for a Variable Article Link, the file name of a text file (each text file provides contact information of a person at one of the banks issuing credit cards to these individuals). Article Links are described in **Tutorial #1c**.

*Besides being able to import files that are named in a data field, AccurioPro can also import files that are named by a Link Rule. An example of this type of rule is provided in **Tutorial #1b**.*

Getting Started

There are four basic steps in using AccurioPro to produce a Variable Data Job:

     1) Set up a Data Source Definition (DDF)

     2) Assign Variable Links to content in the document

     3) Check your work

     4) Produce merged output

This tutorial provides detailed step-by-step instructions for each of these four basic steps. For a quick introduction, simply follow the instruction provided by each numbered step. For details, review the descriptions that are provided under each numbered step.

Run Adobe® InDesign®

If you are not currently running the InDesign application where you installed AccurioPro, launch it now. If AccurioPro has loaded successfully, you will see the **AccurioPro** menu appear on the menu bar. If you do not see the **AccurioPro** menu, repeat the instructions in the **AccurioPro Installation** manual, which is available in PDF format with the installer.
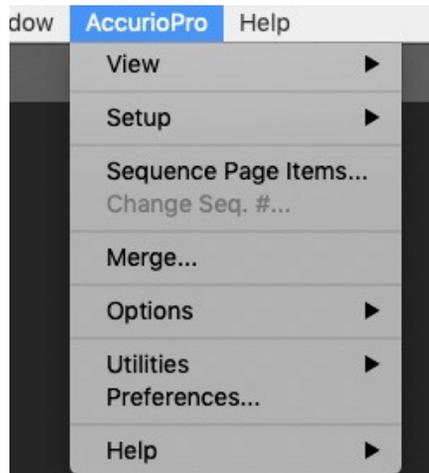
Open the Sample Document

To open the document that has been prepared for this tutorial, follow the steps below:

1) Select <u>Open</u> from the <u>File</u> menu.

2) Select the file "Form Letter Basics.indd".
This document exists in the "1) Form Letter" folder which is inside the "AccurioPro Tutorial Files" folder in the AccurioPro product folder. The files for this tutorial are shown in the picture below:

3) Click <u>Open</u> to complete your selection.
Replace any missing fonts and update any modified pictures (the pictures are included in the same Tutorial Files folder as the sample document).

AccurioPro Variables have not yet been placed in this document. In this tutorial, you will use AccurioPro to set up and merge this document to produce variable data output. The sample document looks like this:

The contents of the data file have been placed on the document's pasteboard for viewing purposes only. The data file which contains the variable data for this job is a text file named "Form Letter.txt." This text file exists in "1) Form Letter" Tutorial Files folder.

Setting up the Data Source Definition (DDF)

When you have a document that does not yet contain any Variable Links, then the first step in setting up this variable data printing job is to let AccurioPro know some things about the data file you will be using. This is accomplished by setting up the document's "Data Source Definition" or "DDF" for short.

A DDF is simply a view or description of a data file. For example, a DDF describes the following characteristics of a data file (all of these characteristics will be covered again in more detail later in this tutorial):

Field Delimiter: The character that separates each field of the data file.
(e.g. Comma-Separated or Tab-Separated)

File Origin: The computer system that created the data file
(e.g. Macintosh, Windows, etc.).

Field Names: The number of fields (columns) and their order.

It is easy to set up the document's DDF because AccurioPro provides a "Setup" feature to determine the items listed above automatically.

When Not To Run Setup

Generally, you will prefer to use Setup only once, when a document has not yet been set up. Using Setup on a previously set-up DDF will reset all of the DDF's settings, including its list of Fields and Variable Links. If the document already contains Variable Links, resetting the document's DDF could cause the document to encounter errors when merging.

A common mistake that new users make is that they feel that they need to run Setup every time they receive a new data file. The fact is that as long as the structure of the data file has not changed (i.e., as long as it still has the same number of fields as before and the fields are in the same order), then there is no reason to re-run Setup. When you receive an updated data file, just select the new data file when prompted to do so. Your settings will continue to work just fine!

If you wish to change one or more of the existing Document DDF's settings without affecting its other settings, instead of re-running Setup, you can simply click the **Edit** button on the **Data Source Definitions** window, and then change the settings individually.

Configure the Document DDF

Follow the steps below to set up the DDF for this tutorial:

1) **From the __AccurioPro__ menu, select __Setup__ ⇨ __Data Source Definitions__.**
This opens the **Data Source Definitions** window, as shown below:
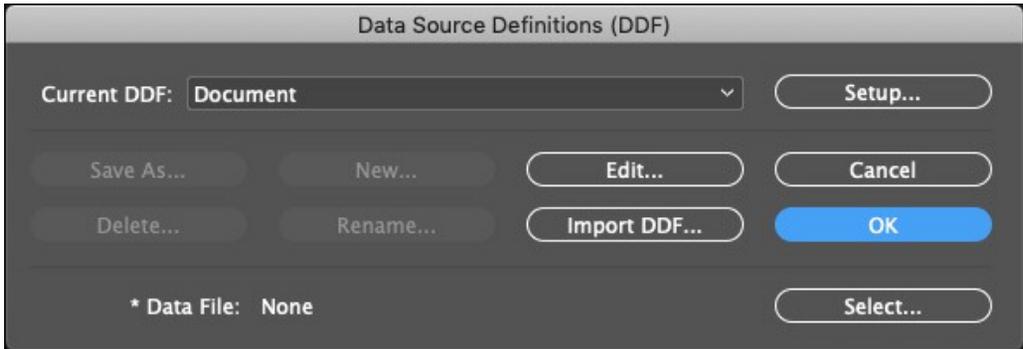
2) **Click the __Setup__ button.**
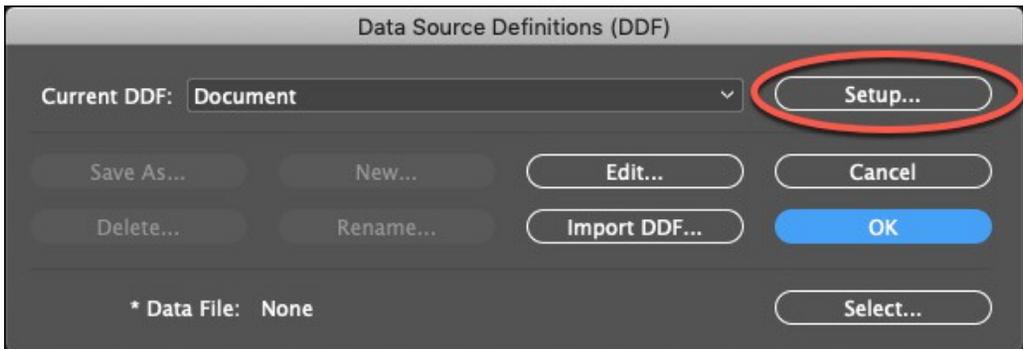
3) **Select the data file ("Form Letter.txt").**
AccurioPro prompts you to select the data file that the DDF is going to describe. For this tutorial, select the "Form Letter.txt" file in the "1) Form Letter" Tutorial Files folder, and then click the **Open** button to complete the selection.

4) **Verify the Setup entries.**
AccurioPro reads the selected data file and attempts to determine how it is set up. Also, Setup assumes the first record contains names for the fields in the data file.

For this tutorial, your **Setup** window should look like this:

5) Make changes to the setup if necessary.

For this tutorial, the settings are correct as displayed above. All of these settings will be covered in more detail later in this tutorial. However, for future reference, note that you may change any of these settings before continuing.

For instance, note the **A** check box on the top of the **Setup** window. You may check this box to see the fields labeled by Letter instead of Number. This will not change the names of the fields; this only changes which type of label is presented on this window.

Also, note the **Number Fields** button at the bottom of the **Field Names** list. All of the other AccurioPro menus and windows list names in alphanumeric order ("Address #1", "Address #2", "City", etc.). If you prefer to have these Fields and their corresponding Variable Links always listed in their data file order, click **Number Fields** to add a number prefix to their names ("1-Name", "2-Address #1", "3-Address #2", etc.). To return to the original Field Names, click the **Refresh List** button.

To edit a Field Name, click on the Field Name and then click the **Edit** button at the bottom of the window. Enter the name you prefer in the corresponding box, and then click **OK**. This does not change the data or the field name that is in the data file; this

simply changes the name that AccurioPro will use to refer to this field. Please note that every field must have a name. Even if you do not intend to import data from a field, you must still provide a name for that field.

To specify a custom field delimiter, select **Custom** from the **Field Delimiter** popup menu, enter the character in the corresponding box, and then click **Refresh List** to refresh the list of fields.

Use the **Empty Link** settings on the bottom right corner of the **Setup** window to indicate how you would prefer the Variable Links to these Fields behave when a record does not have any data for them to display. Each of the available **Empty Link** settings is described in more detail later in this tutorial where you will also learn how to adjust this setting on any one of these Variable Links whenever you wish.

6) Click <u>OK</u> to complete the Setup.

This applies the Setup settings to the document's DDF, assigns the data file you selected, and returns you to the **Data Source Definitions** window, which you can leave open at this point to continue with this tutorial.
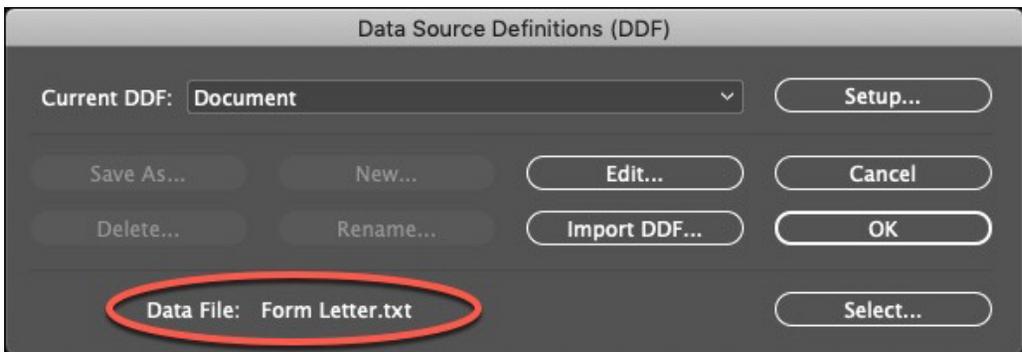
*You do not need to rerun Setup each time you receive a new or updated data file. As long as the structure and data file settings of the new/updated data file have not changed from the previous data file, you do not need to rerun Setup. Rather, the existing DDF can continue to be used "as is" without resetting it. If any changes are required, you can change one or more of an existing DDF's settings individually without affecting its other settings by clicking the **Edit** button on the **Data Source Definitions** window.*

Running Setup on a DDF will reset all of the DDF's current settings and will remove or modify the DDF's existing Field Names and Variable Links and Rules. As a result, if the reset DDF does not include a Variable Link and/or a Rule that was placed in a document by the earlier version of the DDF, you will encounter a "Bad Tag!" error when you merge that document. Please keep this in mind when using the Setup feature.

About "Variable Links"

In addition to determining the key characteristics of the data file, Setup also creates a Variable Link for each named field. The next step in setting up a DDF is to review these new Variable Links, as discussed below.

What Is a Variable Link

A Variable Link associates content in a document to a field in the data file. For example, the Setup routine that you completed in the previous steps automatically created a Variable Link for each field in the data file. You may now assign these Variable Links to text, picture frames, or text frames in a document. When you merge your document with the data file, the linked content will be replaced or filled with data from the data file.

Types of Variable Links

AccurioPro allows you to place five types of Variable Links in a document: Text, Picture, Frame, Article, and GroupPicture. Text and Picture Links are the ones you will probably use most often. Each type of Variable Link is introduced below:

Text Link

A Text Link is a range of text, such as a name or zip code, that will be replaced by text from a field in the data file.

Picture Link

A Picture Link is a picture frame that will be filled with a graphic that is referenced by its file name (or full path to the file) in a field in the data file or in a Link Rule (AccurioPro Rules are covered later in **Tutorial #1b**). For the graphic files, you may use any graphic file format that your page layout application supports, for example, EPS, TIFF, and JPEG files.

Frame Link

A Frame Link is a text frame whose entire content will be replaced. If a Text Link is assigned to the frame, all of the content in the frame will be replaced by text from a field in the data file. If an Article Link (a Premium feature) is assigned to the frame, all of the content will be replaced by the contents of a text file (such as an InDesign Tagged Text file).

In contrast, placing a Text Link inside a frame will not replace the entire content of the frame. Instead, the incoming data will replace only the linked text in the frame (any other text in the frame that is not linked will not be replaced).

When your job requires replacing all of the content in a frame with the incoming data, use a Frame Link.

Article Link (Premium-Only Feature)

An Article Link is text that will be replaced by the <u>contents</u> of a text file that is referenced by its file name (or full path to the file) in a field in the data file or in a Link Rule (AccurioPro Rules are covered later in **Tutorial #1b**).

For the text files, you may use any text file format that your page layout application supports, for example, ASCII files, HTML files, Microsoft Word documents, InDesign Tagged Text files, etc. Additionally, you may include Variable Links in InDesign Tagged Text files that will be imported by an Article Link.

An Article Link may be assigned to a range of text or to a text frame. When assigned to a range of text, the contents of the linked text file will replace only that range of text. When assigned to a text frame, the contents of the linked text file will replace all of the content that was in the text frame. See **Tutorial #1c** for more information about Article Links.

GroupPicture Link (Optional Feature)

A GroupPicture Link is a picture frame that will indicate the position for a GroupPicture that is referenced by its full file path or file name, either in a field in the data file or in a Link Rule (AccurioPro Rules are covered later in **Tutorial #1b**). For information about GroupPictures, see the **GroupPicture Tutorial**, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

> ❗ *A "Keyword Link" is a special type of Text Link. You can use Keyword Links to insert meta-data (document name, current date, record number, etc.) and to convert field data into bar code data. Keyword Links are discussed in **Tutorial #2** and also in the **AccurioPro VDP Keyword Links** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

Verify/Modify Variable Links

By using the Setup feature as described in the previous steps, you have automatically created nine Variable Links for the document's DDF, one for each named field. By default, each Variable Link was created to "point to" (and have the same name as) its corresponding field in the data file. Also, each Variable Link has been given default settings (for example, in this tutorial, they are set up to be Flagged as Error If Empty and their Type is set to "Text").

In the following set of steps, you will review these settings and will modify some of the defaults to suit the intended use of these Variable Links in the document. For example, we will set the "Address #2" Link to be deleted if empty and we will change the Type that has been assigned by default to the "Logo" Link.

In this tutorial you will modify some of the Variable Links that were created by the Setup procedure. However, this task may not be required for your actual jobs. Assuming all of the Variable Links to the fields in your data file will be used as Text or Picture Links and will never be empty, then once you have completed the Setup routine, you could immediately start assigning the Variable Links to text in the document.

Also, in this tutorial you will modify some of the Variable Link settings before you assign them to content in a document. However, it is not necessary to modify a Variable Link before you use it in a document. You can change a Variable Link's settings at any time, and then the next time you merge, the Variable Link will merge according to its new settings.

Follow the steps below to edit the Variable Links in the document's DDF:

1) **Open the <u>Data Source Definitions</u> window if it is not already open.**
   To open the **Data Source Definitions** window, select **Setup ⇨ Data Source Definitions** from the **AccurioPro** menu.

2) **Click the <u>Edit</u> button.**
   Click the **Edit** button on the **Data Source Definitions** window, as shown circled in the picture below:
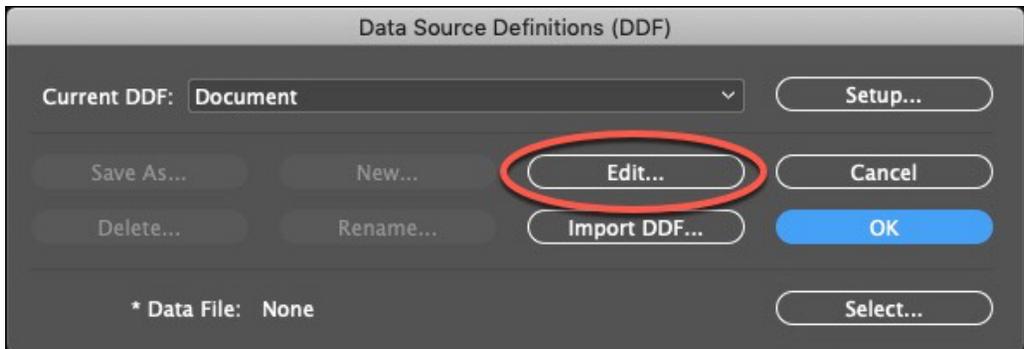
3) On the <u>Edit Data Source Definition</u> window, click the <u>Variable Links</u> button.

The **Edit Data Source Definition** window presents the DDF's File settings, which are described later in this tutorial. First, we will review the DDF's Variable Links. To access the DDF's Variable Links, click the **Variable Links** button on the **Edit Data Source Definition** window, as shown below:
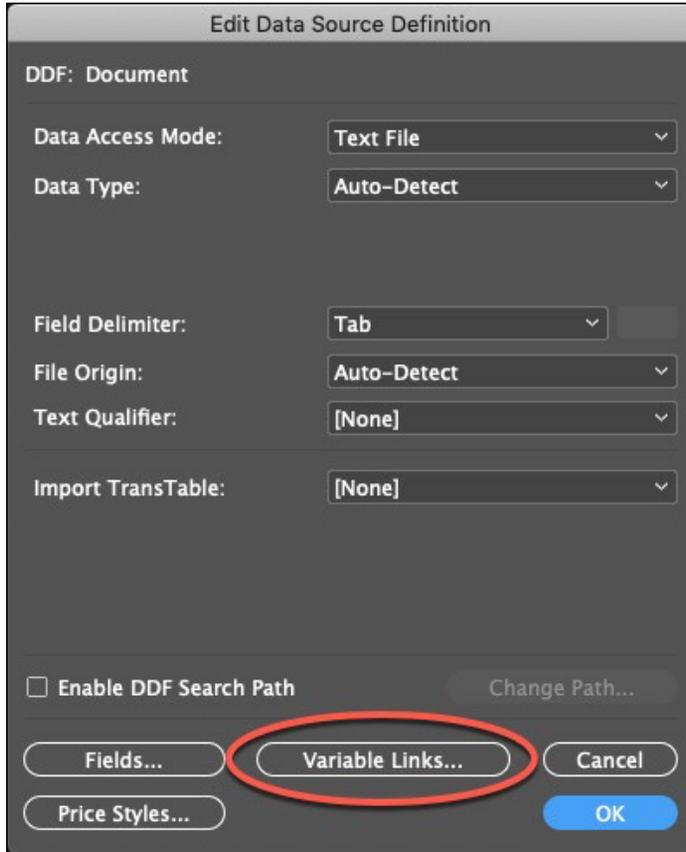
4) Confirm that your list of Variable Links looks like the list in the picture shown below:
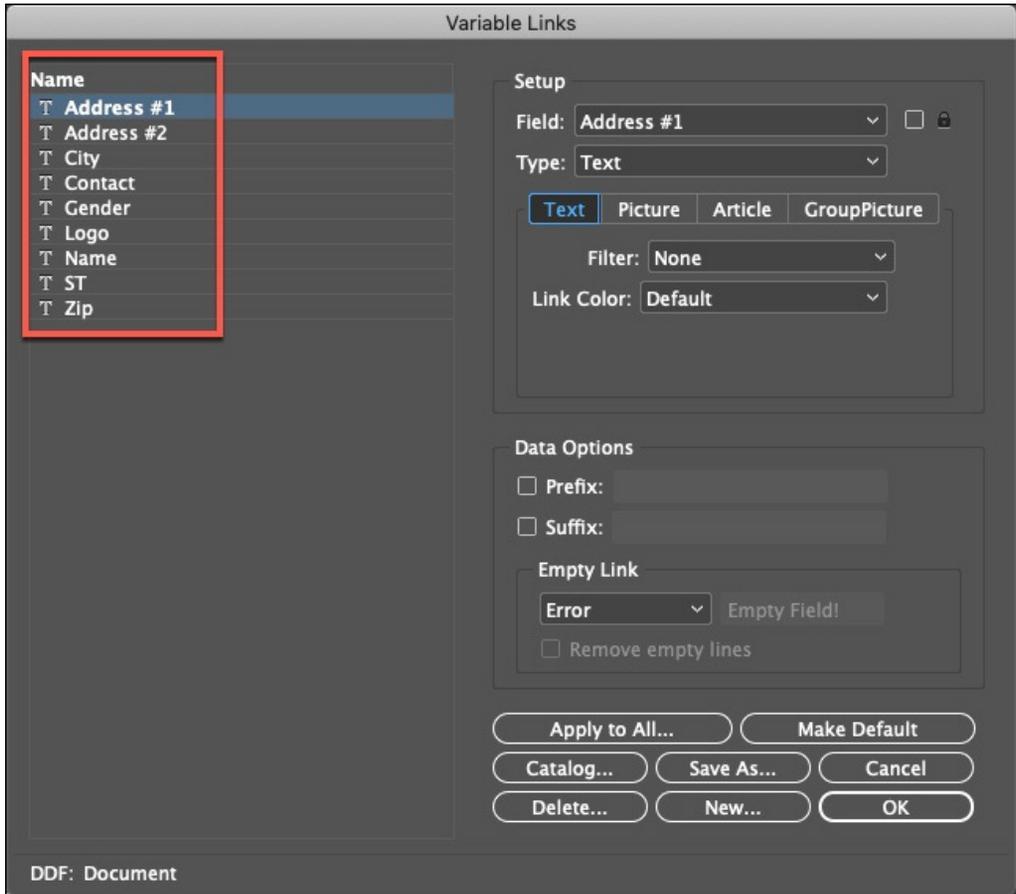
Although in this example each Variable Link has the same name as its corresponding field, this is not a requirement. You can assign any name to a Variable Link and "point it" to any field. You can also have two or more Variable Links which all point to the same field!

You may apply the settings for the currently-selected Link to all the other Links by clicking the **Apply to All...** button. <u>Be forewarned</u>: This action will affect the current settings of <u>all</u> existing Variable Links in the current DDF.

The **Make Default** button causes the settings of the currently-selected Variable Link to become the default settings for any <u>new</u> Variable Links that you create from that point on, including those created by Setup.

About Variable Link Parameters

When you click on the name of a Link in the list on the left side of the **Variable Links** window, the settings for that Link are displayed on the right side of the window. Each Variable Link has a number of parameters associated with it. Some parameters are common to all Variable Links, while other parameters are specific to their Type (for example, Text or Picture).

Setup Parameters

These parameters control how a Variable Link imports data. Each of these parameters is described below:

Field

Each Variable Link "points to" a field in a data file. By default, Setup automatically points each Variable Link to its correspondingly named field. However, you may point a Variable Link to any one of the fields. To do so, select the field by name in the **Field** menu.

Lock/Unlock

This setting lets you control which Variable Links will be processed when AccurioPro processes a document. When unlocked (the default setting), this Variable Link will be merged. When locked, this Variable Link will not be merged; any content in a document that is assigned to a locked Variable Link will display the same information that was present before the merge session.

Type

In addition, each Variable Link must be set to a Type. The Type indicates the type of data that the Variable Link will import. To change the Type, select a type from the **Link** popup menu, as described below:

Text
This imports the data as text (Setup initially sets all Variable Links as Text Links).

Picture
This setting treats the data as the name of a graphic file.

Article
This setting treats the data as the name of a text file. See **Tutorial #1c** for more information about Article Links.

GroupPicture
This setting treats the data as the name of a GroupPicture file (an InDesign document file that is to be imported as a GroupPicture). For more information about this Type, see the **GroupPicture Tutorial**, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

Type Parameters

Depending upon the Type you select, additional parameters appear inside the **Type** box on the **Variable Links** window. The parameters for Text and Picture Types are described next.

Text Parameters

When **Text** is selected for the **Type**, then the **Type** box displays parameters specific to Text, as described below:

Filter (Premium-Only Feature)

If the text in the data field contains embedded Tags, select the appropriate **Filter**. Then, the Text Link will translate the Tags that are in the imported data. This allows you to embed styling information in the data to override the styling that has been applied to a Text Link in the document. Tags can describe almost anything, including paragraph-level attributes, character-level attributes, and special characters.

When this option is enabled for a Variable Link, its data (including any prefix and suffix specified on the **Variable Links** window) will be run through the specified Tags Filter before it is placed in the document. Including Tags in data provides the ability to specify, for example, special formats and special characters such as line ending characters. Below is information on the various Filters that may be available:

InDesign Tags

The data is expected to contain Adobe InDesign Tags data. This setting will use the InDesign Tags Filter to import the data. For more information about this Filter, see Adobe InDesign documentation.

RTF Tags

The data is in Rich Text Format or RTF for short. For more information about this Filter, see Adobe InDesign documentation.

MPS Tags

MPS Tags is a tagging language developed and supported by Meadows Publishing Solutions. The language supports embedding InDesign typographical information in an MPS Tags format. For details about MPS Tags, see the MPS Tags Specification at **www.meadowsps.com/mpstags**.

InDesign Place

This Filter will import the data in the same manner as the InDesign "Place" command. The data must be a format supported by the InDesign Place command. For more information about the InDesign Place feature, see Adobe InDesign documentation.

Link Color

When you assign a Variable Link to a range of text in a document, a non-printing green underscore marks this Text Link in the document. This green color is the default color for marking a text link. If you would prefer a different color for the underscores that are used to mark text assigned to a specific Variable Link, select that color from this menu.

Picture Parameters

When **Picture** is selected for the **Type**, then the **Type** box displays parameters specific to Pictures, as described below. As you select the various options, a sample picture provides a basic preview of the chosen option.

Fitting

There are several options for determining how a Picture Link will position a picture that it is importing. The picture will first be placed in the same fashion as it would be if you used the Adobe InDesign "Place" feature. Then AccurioPro will apply the option you have selected for this Picture Link. Each option is described below:

Top Left

Will position the picture at the top left corner of the picture frame.

Center

Will center the picture in the picture frame.

Size to Fit

(Default option) Will enlarge or reduce the picture so that it will fit within the picture frame without distorting either the height or the width of the picture (the picture frame may not be completely filled).

Distort to Fit

Will enlarge or reduce the picture to fit exactly within the picture frame, distorting one or both of the picture dimensions if necessary.

Keep Frame Settings

Will not apply any changes to the parameters (such as horizontal and vertical scale) that are applied by the Adobe InDesign "Place" feature.

Size to Fill

Will scale and center the picture in the frame such that both sides of the picture fully fill the frame. This differs from **Size to Fit** because both sides of the picture will completely fill the entire frame while retaining the same scale factor for both height and width. This option will not distort the picture.

Size Height to Fill

Will scale and center the picture until the height of the picture fully fills the frame. This option will not distort the picture.

Size Width to Fill

Will scale and center the picture until the width of the picture fully fills the frame. This option will not distort the picture.

Fit Frame to Picture

The picture is first placed in the same fashion as using the Adobe InDesign "Place" feature (which is generally top/left). After the import, the frame is then re-sized to match the size of the placed image.

Data Options Parameters

These parameters control how a variable link handles the data that it imports. Each of these parameters is described below. :

Prefix and Suffix

For each Variable Link, you can add prefix or suffix character strings, which will be added to the beginning or end of the data that the Variable Link imports. For example, if the "Name" field of a data file contains "`John Smith`" and you add a prefix of "`Hello, `" to the Variable Link for that field, the resulting merged text would be "`Hello, John Smith`".

> *For Text Links, you can use this feature to indicate spaces or text that you would like to have added to a variable link's data when that variable link is not empty. For example, perhaps you would like a comma and space to appear between an Address #1 Text Link and an Address #2 Text Link that are laid out in a single line in a document but only when Address #2 is not empty. To achieve this, set the Address #2 Variable Link to be deleted if empty, and also set the Address #2 Variable Link to add a comma and space as a prefix. Note this prefix will not be added or displayed in the document if the Address #2 Link is deleted because it is empty. When you assign the Address #2 Variable Link to a range of text in the document, include the comma and space in that range of text. Now, when a record has Address #2 data, the document will display a comma and space before the Address #2 data, and when a record does not have Address #2 data, the document will not display the comma, space, and Address #2 data.*

> *For Picture Links, you can use this feature to attach file name extensions (such as ".TIF" or ".EPS") to the file names imported from the data file when the data file contains only the base names of the graphic files.*

Empty Link

An Empty Link occurs when a record does not contain any data for a Variable Link. There are several options to specify how a Variable Link will handle the "Empty Link" condition, as described below:

Error

This is the default setting. If a link is empty, the link will be filled with the global **No Data Error Message**, which is specified in the AccurioPro **Preferences** (you may access the **Preferences** window by selecting **Preferences** from the **AccurioPro** menu). By default, the **No Data Error Message** is set to the string "Empty Field!". For a text link, the text string that has been specified for the **No Data Error Message** will be merged into the Link. For Picture Links, a PICT representation of this text string will be merged instead.

Ignore

This setting will skip merging the Link; the original content in the Link on the page will not be changed.

Delete

This setting will completely remove the Link from the merged page. In the case of a Picture Link or Frame Link, the entire frame will be deleted.

Substitute

This setting will substitute the text string entered here. For Text Links, the text that is entered here will be merged into the Link. For Picture Links or Article Links, AccurioPro will assume the text entered here is the file name or full path name of an external file that AccurioPro will attempt to locate and import.

Remove empty lines

This setting should be used in combination with the **Delete** setting. When **Remove empty lines** is enabled, then after an empty link is deleted, the line that the link appeared on is examined. If the line contains no printable characters, then the entire line is removed as well. This is valuable for an "Address 2" line, for example, which often contains no data. If Address 2 is the only data on the line, then when an empty field condition is encountered, the entire Address 2 line is deleted. This allows any other text lines below it (such as City, State, Zip) to be "pulled up" or "pulled down" to fill in the line previously occupied by the Address 2 line. If you do not enable the **Remove Empty Lines** option, then an empty, blank line will be left in the layout after the merge.

Back to the Form Letter: Set Up Variable Links

Set up a Variable Link to Handle Empty Fields

When you examined the data file earlier in this tutorial, you may recall the "Address #2" field does not contain data for all of the records. During Setup, we chose to set all Variable Links to display an error message when the Link is empty. In the following steps, you will change the "Address #2" Variable Link to delete this Link when it is empty and also to remove the empty line this would create in the document to "pull up" the other lines below it so that there will be no gap between the "Address 1" and "City, State Zip" lines.

Follow the steps below to set up the "Address #2" Variable Link:

1) **Click on Address #2 in the list of Variable Links to select that Link.**

2) **In the Empty Link box, select Delete from the popup menu.**
   This instructs AccurioPro to delete the Link if it is empty after being merged.

3) **Check the Remove empty lines option in the Empty Link box.**
   This instructs AccurioPro to remove the entire line this Link is on (up to and including the paragraph return character) if, after being merged, there are no printable characters on the line (i.e., the line is blank).

4) The "Address #2" Link on the <u>Variable Links</u> window should look like this.
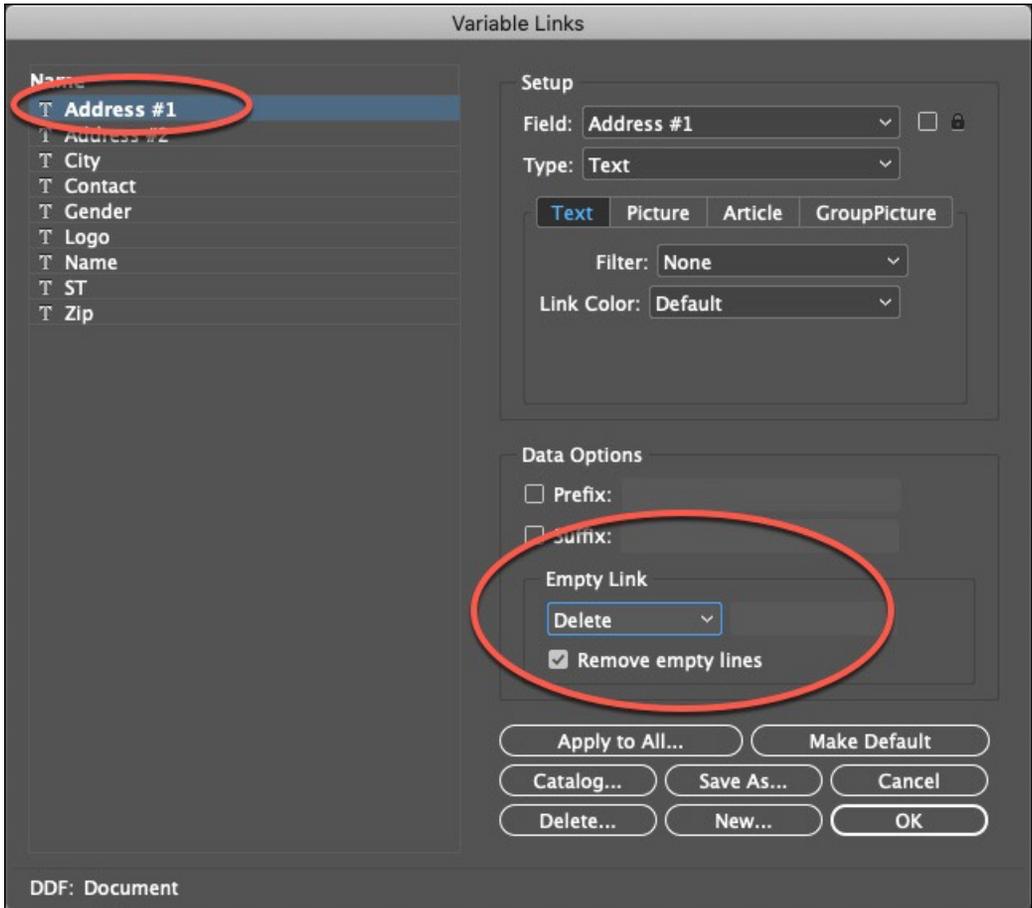
Set up a Variable Link for a Picture

For this tutorial, the "Logo" field of the data file contains the file name of an EPS image of a credit card logo. A Variable Link for this field has already been created by Setup. Remember, though, that Setup sets all Variable Links to be used as Text Links. In the following steps, you will change the "Logo" Variable Link to a Picture Type and then select a picture positioning option for it.

Follow the steps below to set up the "Logo" Variable Link for Picture data:

1) Click on <u>Logo</u> in the list of Variable Links to select that Link.

2) Select <u>Picture</u> from the <u>Type</u> popup menu.

When a Link's Type is Picture, then you can choose a **Position** setting for the graphic files that this Link will merge into the document.

3) Select <u>Size to Fit</u> from the <u>Fitting</u> popup menu.

4) The "Logo" Link on the <u>Variable Links</u> window should now look like this.
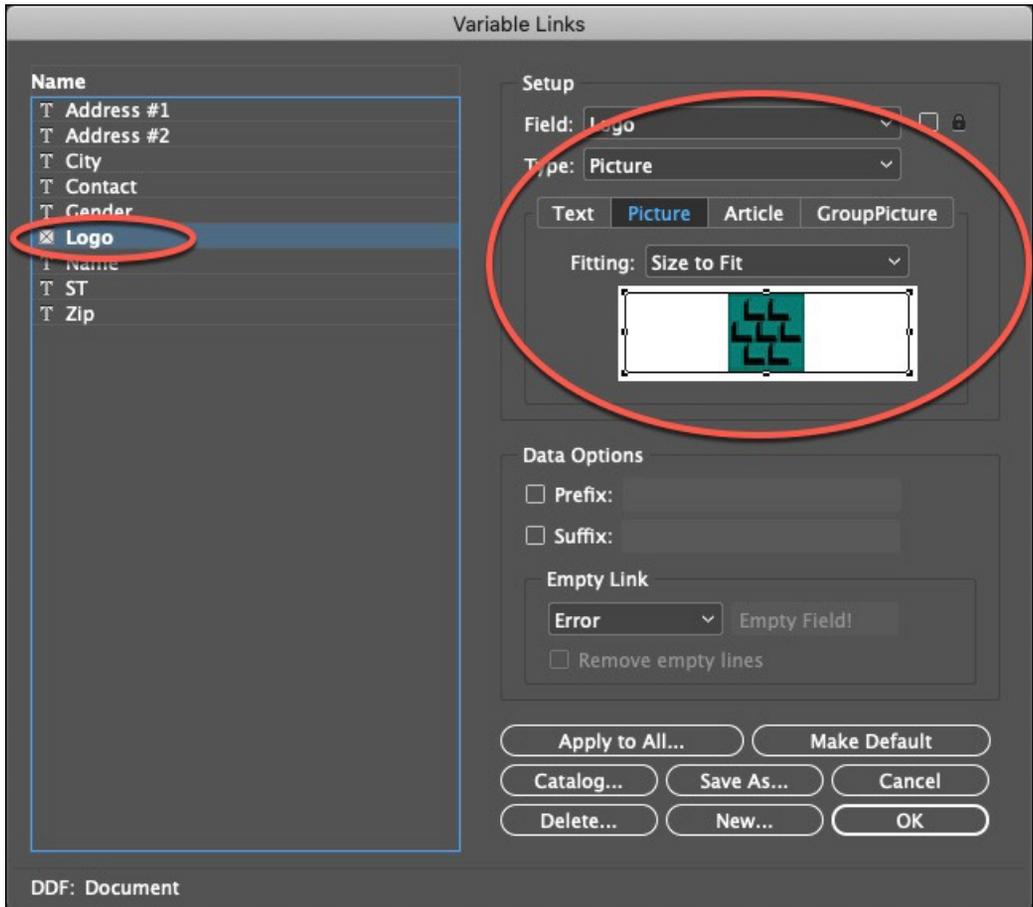
5) Click the <u>OK</u> button.

You have finished setting up the Variable Links for this tutorial. Clicking **OK** returns you to the **Edit Data Source Definition** window, which you will use in the next set of steps.

Verify Data File Settings

The last thing remaining to be done in setting up the Data Source Definition (DDF) for this tutorial is to verify the data file settings that are presented on the **Edit Data Source Definition** window.

What are Data File Settings

Data file settings tell AccurioPro how to interpret a particular data file (text file) when merging it with a document. Each of the settings on the **Edit Data Source Definition** window is described below:
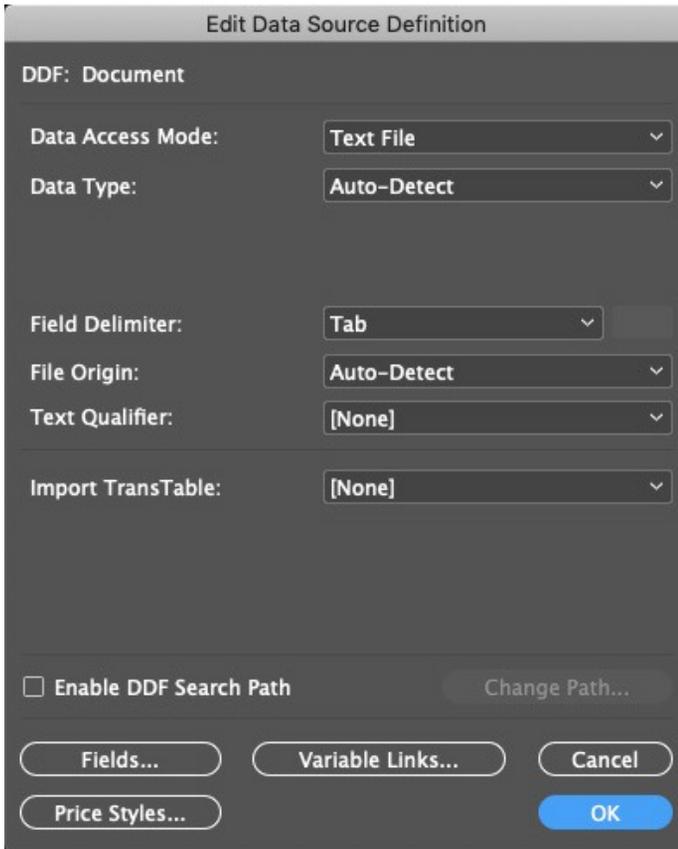
Data Access Mode

Indicates the type of data source. **Text File** is the default selection for this setting. Other Data Access Modes are available only when their corresponding optional modules have been installed. Please contact your saless representative if you are interested in these.

Data Type

Indicates whether the data file uses **ASCII** or **UTF-8** (Unicode) encoding. Setup recommends the **Auto-Detect** setting, which allows AccurioPro to determine the Data Type automatically each time it reads the data file. If you choose to change this setting, note this setting must be accurate for your software to read the data correctly.

Field Delimiter

The Field Delimiter is the character that separates each field of the data file. Typically, this will be a Tab or a Comma.

File Origin

This setting identifies the file system **— Macintosh**, **PC/MS-DOS** (Windows), or **Unix —** that created the data file. This information is important because it identifies which characters represent line endings in the file. **Auto-Detect** (the default setting) allows AccurioPro to determine the File Origin automatically. If you choose to change this setting, note this setting must be accurate for your software to read the data correctly.

Text Qualifier

The Text Qualifier character is what some database or spreadsheet programs use to bracket one or more fields of exported data. Typically, this is a double quote (") character. When you specify a Text Qualifier character, AccurioPro will treat this character as a field data indicator instead of treating it as data.

Import TransTable

A TransTable (Translation Table) is a plain text file that AccurioPro uses to translate characters that are imported from the data file into different characters before the data is merged into a Link. The name of each TransTable file that has been installed appears in the **Import TransTable** popup menu on the **Edit Data Source Definition** window. It is here that you may specify the Translation Table to use. By default, no translation will occur and the popup menu reads **None**. For more information about using Translation Tables, see the **Database Files** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

Verify the Current Data File Settings

The settings on the **Edit Data Source Definition** window were automatically determined in the Setup process, but you have the option of changing them after a DDF has been created. To verify these settings, do the following:

1) **Select <u>Text File</u> from the <u>Data Access Mode</u> popup menu.**
    Text File is the default selection for this setting. Other Data Access Modes are available only when their corresponding optional modules have been installed.

2) For this tutorial, select <u>Auto-Detect</u> from the <u>Data Type</u> popup menu, if available.
When **Auto-Detect** is selected, AccurioPro will determine the **Data Type** automatically.

3) For this tutorial, select <u>Tab</u> from the <u>Field Delimiter</u> popup menu.
When the sample data for this tutorial was exported from its database program, "Tab-delimited" was specified as the file format, meaning that each field in each record was separated by a single tab character.

4) Select <u>Auto-Detect</u> from the <u>File Origin</u> popup menu.
When **Auto-Detect** is selected, AccurioPro will determine the **File Origin** automatically.

5) Select <u>None</u> from the <u>Text Qualifier</u> popup menu.
A Text Qualifier is not used in the data file for this tutorial.

6) Select <u>None</u> from the <u>Import TransTable</u> popup menu.
An Import TransTable is not required for this tutorial. For more information about the AccurioPro TransTable feature, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

*The **Enable DDF Search Path** option, which is not required for this tutorial, adds a path to the list of paths where AccurioPro will search for external files for Links. For more information, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

7) The <u>Edit Data Source Definition</u> window should now look like this.
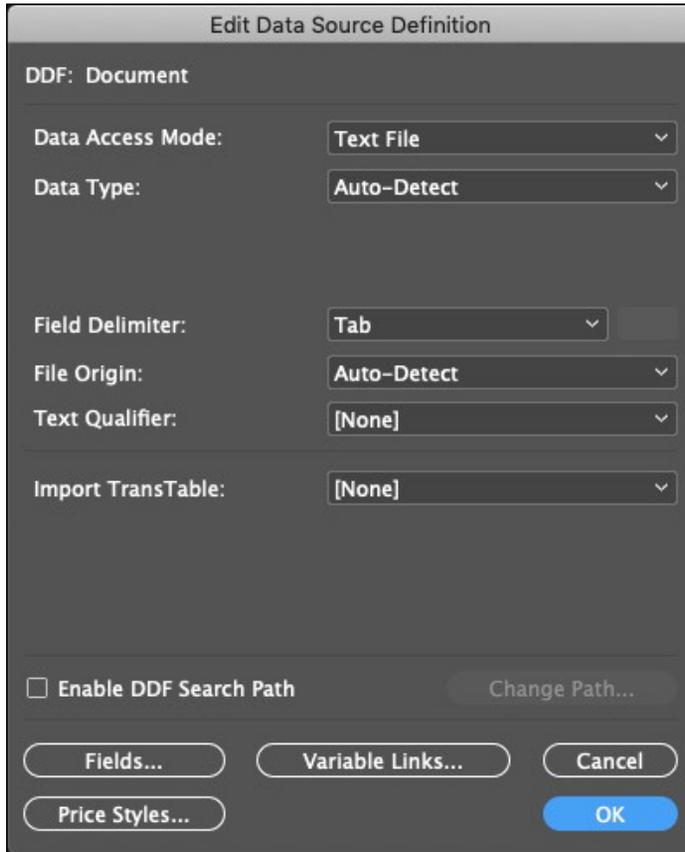
8) Click the <u>OK</u> button to save changes to the data file settings.

This closes the **Edit Data Source Definition** window and returns you to the **Data Source Definitions** window. Please leave the **Data Source Definitions** window open for the next set of steps which covers assigning a DDF to a document.

Store the DDF's Settings with the Document

You have completed setting up the document's DDF and you are now ready to start "tagging" the document. Before continuing, let's save the DDF's current settings in the document so whenever the document is opened, these are the settings that will be applied to this document. To do this, follow the steps below:

1) Confirm the Form Letter document is open in the active window.

If this tutorial's document is not open, you must first close the **Data Source Definitions** window (click the **Cancel** button) and then open the document before continuing.

**2) Open the <u>Data Source Definitions</u> window if it is not open.**

To open the **Data Source Definitions** window, select **Setup** ⇨ **Data Source Definitions** from the **AccurioPro** menu.

3) Confirm <u>Document</u> is displayed by the <u>Current DDF</u> popup menu.

This determines which DDF will be assigned to the document.

4) Click the <u>OK</u> button.

To store your current settings for the "Document" DDF inside the currently active document, and close the **Data Source Definitions** window, click the **OK** button, as shown in the picture below:
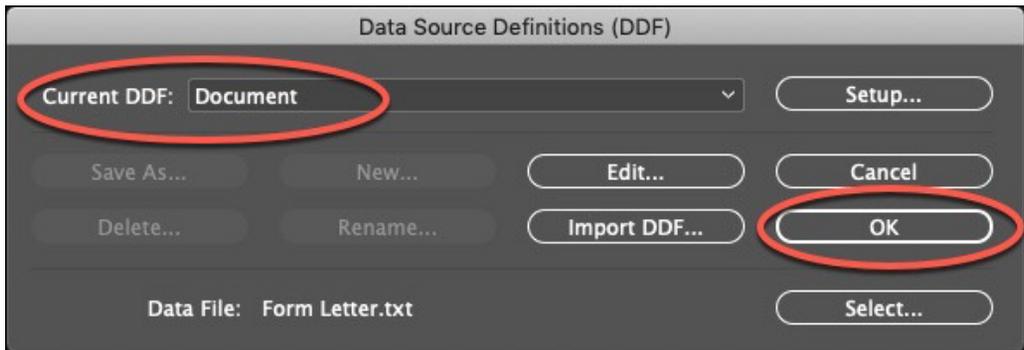
5) Save the document.

The DDF and its settings are now saved with the document. This feature allows you to re-use the document's DDF at any time. Just open a document, and the DDF settings will automatically be loaded and available.

6) You are now ready to assign Variable Links to content in the document.

This process is also referred to as "Tagging" the document.

> *For more information about AccurioPro Data Source Definitions, see the **Database Definitions** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

Preparing the Document

You are now ready to assign the Variable Links that have been set up in your DDF to content in the document. When you're done and you merge the data file with the document, the Links in the merged pages will display data from the data file.

Open the AccurioPro Panel

You will need to use the **AccurioPro** panel for this part of the process. If the panel is not currently visible, do the following:

1) **From the AccurioPro menu, select View ⇨ AccurioPro Panel.**
This opens the **AccurioPro** panel, which looks like this:
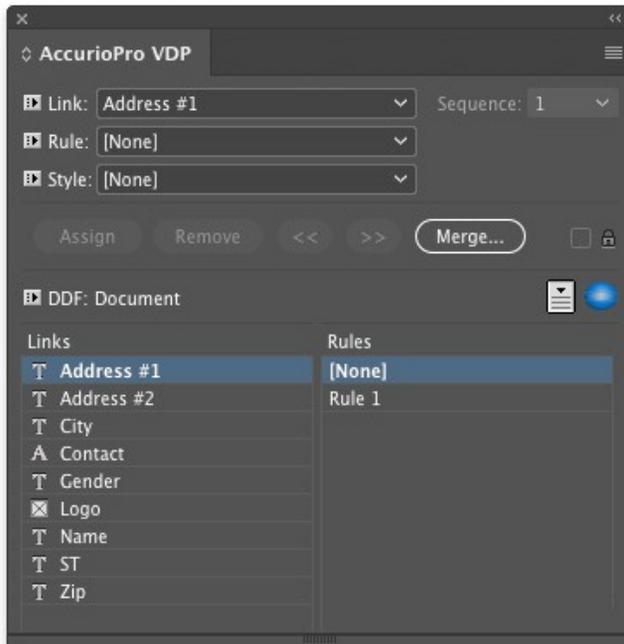
As shown above, several options on the panel may be dimmed. These options will be dimmed when no content is selected in the document.

If you wish to close the **AccurioPro** panel, select **View ⇨ AccurioPro Panel** from the **AccurioPro** menu, or click the **Close** box on the panel.

Place Text Links in the Document

The Form Letter document requires variable text for the Address Block. To place Text Links in the document for this data, follow the steps below:

1) **On the InDesign Tools panel, select the Type** **tool.**

2) **Drag-select (highlight) the word "Name".**
    The word "Name" appears in the text frame near the top of the page. Do not include the New Paragraph (Carriage Return) character in your highlighted selection because the text that is highlighted will be replaced when AccurioPro merges data into the document.
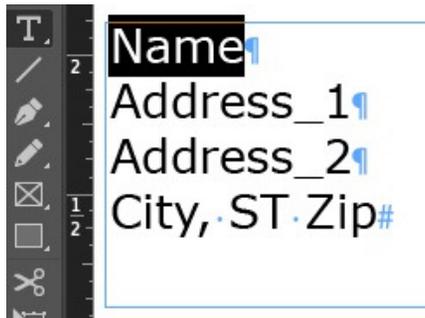
3) Select <u>Name</u> from the <u>Link</u> popup menu on the <u>AccurioPro</u> panel.

Use the **Link** popup menu to specify a Variable Link for the selected range of text. For this tutorial, select **Name**.
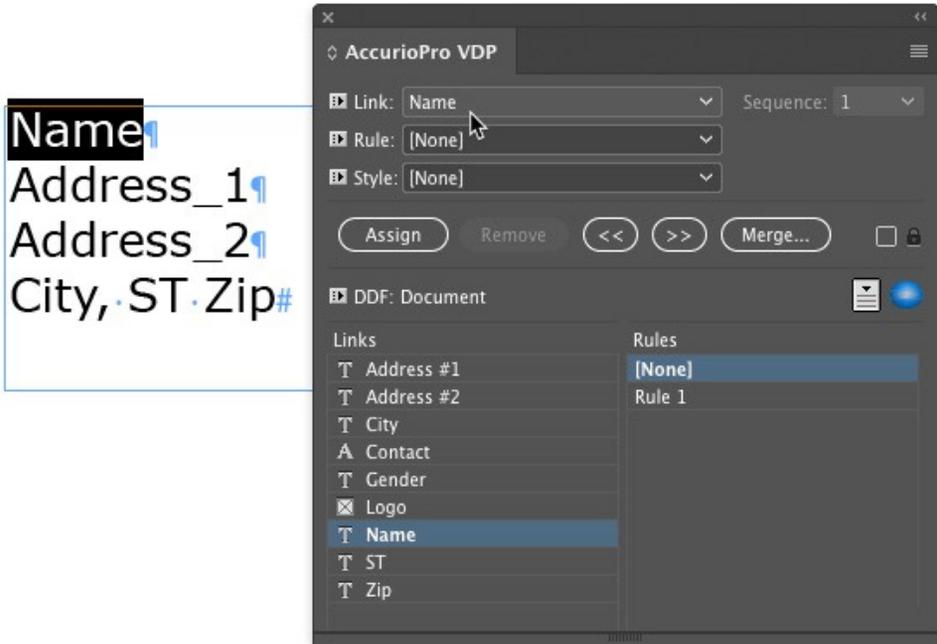

4) Click the <u>Assign</u> button on the panel.
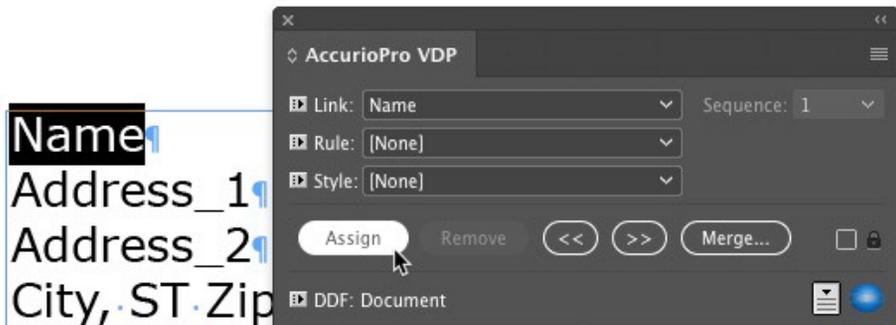
5) The <u>AccurioPro</u> panel now displays green bars.

If the Link was successfully assigned, then the panel should now display a set of green bars above and below its row of buttons. Additionally, a green underscore marks the Text Link in the document, as shown below:
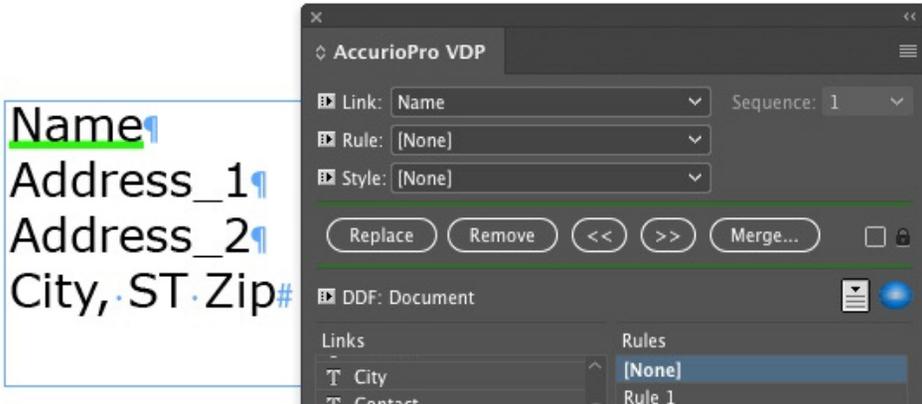
6) Repeat the process for each remaining Text Link.

Next, place five more Text Links in the same fashion ("Address 1", "Address 2", "City", "State" and "Zip"). When you have finished, your document's first six instances of variable text should look like this:


*You can also assign a Variable Link to a selection of text by dragging the name of the Variable Link from the **Links** list on the **AccurioPro** panel and dropping it anywhere on top of the text frame that contains your selection.*

*You may hide the green underscores that mark variable text (Text Links) when viewing the document on screen (the green underscores are always suppressed from printing). To hide the underscores, select **View** ➪ **Screen Mode** ➪ **Preview** from the **InDesign** menu. Note that this does not remove or hide the Links; it's solely a viewing option for the document.*

*You can eliminate the need to click the **Assign** button for each Variable Link assignment by turning On one of the AccurioPro preferences (to access your AccurioPro preferences, select **Preferences** from the **AccurioPro** menu). When **One-Click Link Assignment** is On (checked), the Variable Link assignment will occur as soon as you finish making a selection in the **Link** popup menu on the panel. For more information about this preference, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation. The **One-Click Link Assignment** preference is shown below:*
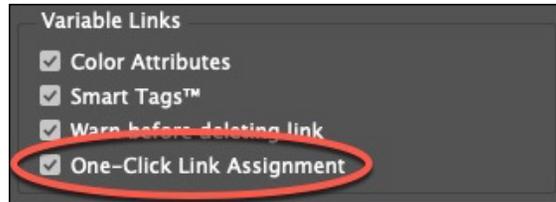
*If you prefer, you can set up AccurioPro to exclude from a Link any preceding or trailing New Paragraph, New Line, and Tab characters by enabling (checking) the **Smart Tags** preference. To access your AccurioPro preferences, select **Preferences** from the **AccurioPro** menu. For more information about this preference, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation. The **Smart Tags** preference is shown below:*
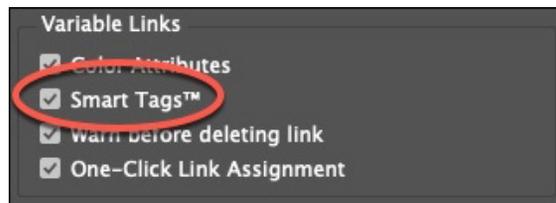
You may also include Links in frames that exist on the pasteboard. However, please note that AccurioPro will not include any pasteboard content (fixed or variable) in merged output unless the content is in a frame that touches the page.

Place Picture Links in the Document

The Form Letter document also requires a variable picture for the Logo of a credit card and you have set up the "Logo" Variable Link to import these pictures whose file names are in the "Logo" field in the data file.

To place this Picture Link in the document, follow the steps below:

1) **On the InDesign Tools panel, select the Selection ▶ tool.**

2) **Click on the "Logo" picture frame near the top right of the page.**


3) **Select <u>Logo</u> from the <u>Link</u> popup menu on the <u>AccurioPro</u> panel.**
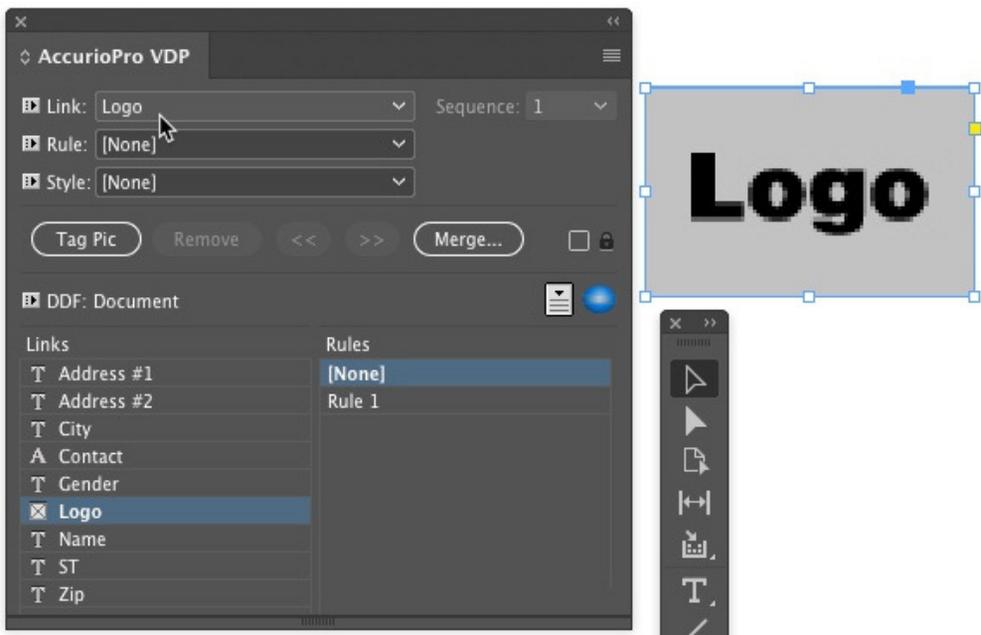
4) Click the <u>Tag Pic</u> button.

Note that the **Assign** button on the panel reads **Tag Pic**. This indicates that you are about to establish a Picture Link, as shown below:
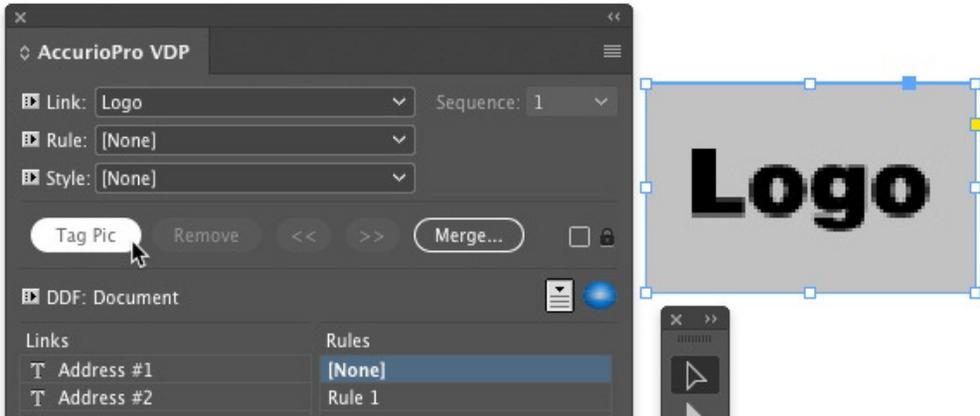
5) The <u>AccurioPro</u> panel now displays green bars.

If the Link was successfully assigned, then the panel should now display a set of green bars above and below its row of buttons. Additionally, when InDesign is showing Frame Edges, a small non-printing green icon will be displayed to mark the Picture Link, as shown below:
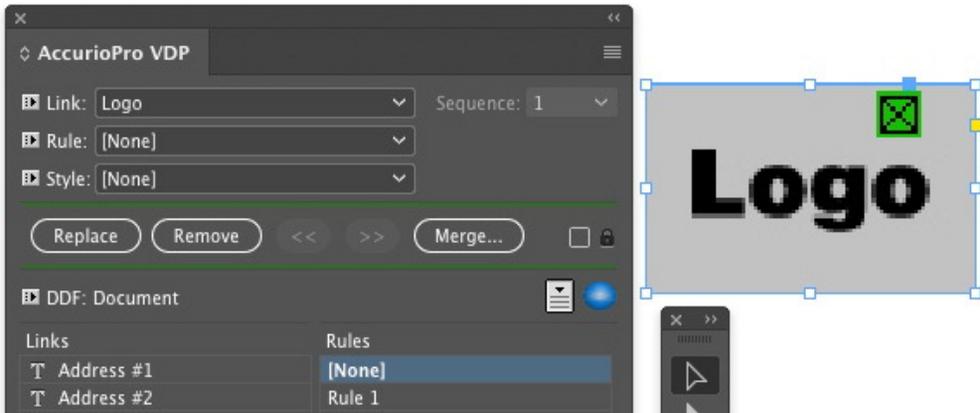
About the AccurioPro Panel

Before we continue with the tutorial, let's learn a little more about how to use the AccurioPro panel. Besides using the **AccurioPro** panel to assign Links to content in a document, you may also use the panel for other helpful operations, as described below:

View Information about a Link

To view information on the panel about a Link in a document, simply click anywhere in the Link with the appropriate tool in your page layout application. Note that for text links, in order to view or modify an existing link, you don't need to select the entire text range. Just click anywhere "in the middle" of a link, and the panel will automatically change to display the information about the currently selected Link.

When the panel detects that your current selection is inside of a Variable Link, you see a set of green bars above and below the row of buttons on the panel. Below is a list of the appropriate tool to use for each type of Link:

To select a Text Link, use the InDesign Type ▣ tool.

To select a Picture Link, use the InDesign Selection ▶ tool.

To select a Frame Link, use the InDesign Selection ▶ tool.

Select the Previous/Next Text Link

To select the previous or next Text Link in a text frame automatically, click once on the text frame with the InDesign Type ▣ tool, and then click the ◁ ("Previous") or the ▷ ("Next") buttons on the panel. AccurioPro will automatically select the previous or next Text Link within the current text frame.

Remove a Link

When a link assignment is removed, the content that was in that link assignment remains on the page but this content will no longer be variable. To remove a Variable Link assignment from a range of text or a frame in a document, click on the Link in the document and then click the **Remove** button on the panel. For example, if you click on a picture frame, the Picture Link assignment will be removed from that picture frame. If you click just once on a Text Link to place your text cursor in the middle of the Text Link, the entire Text Link assignment will be removed. If you select a portion of the text that is inside a text link, the assignment will be removed from your selection while the portion that was not selected will remain linked.

Insert a Link

To insert a link at a specific point in a text frame, simply insert the text cursor in the location where you wish to insert the Link. When you have set an insertion point in a text frame, the **Assign** button on the panel changes to an **Insert** button instead. Make your selection from

the **Link** popup menu on the panel and click this **Insert** button to insert the Link at the current location in the text frame. Or, drag the name of the Variable Link from the **Links** list on the panel and drop it anywhere on top of the text frame that contains your text insertion cursor. The content in the new Link will be the Link's name enclosed by double carets, for example, **<<Name>>**.

Proof a Link

A "proofed" Link is a Link whose content indicates the Link's name. This makes it easy to confirm which Links are assigned in the document. The **Proof** option in the panel menu lets you proof Links automatically when you assign them to content in the document.

If the **Proof** option is On (checked) when you click the **Assign/Tag Frame** button, the selected content will be replaced by the Link's name. This information will be enclosed by double carets, for example, **<<Name>>**. For Picture Links, a PICT representation of this information will replace the previous content in the picture frame. For Frame Links, the proofed Link will include the words "(Frame Tag)", for example, **<<Name>> (Frame Tag)**.

Expand the AccurioPro Panel

The AccurioPro floating panel provides a convenient way to select Variable Links and Link Rules on the panel. To use the feature, click the icon button that is visible on the AccurioPro panel, as shown below:
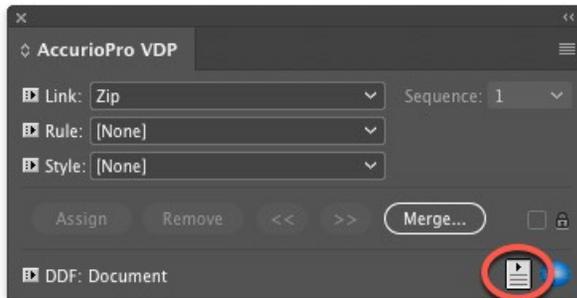
The AccurioPro panel will expand to show two separate lists, one for Variable Links and the other for Rules, as show below:
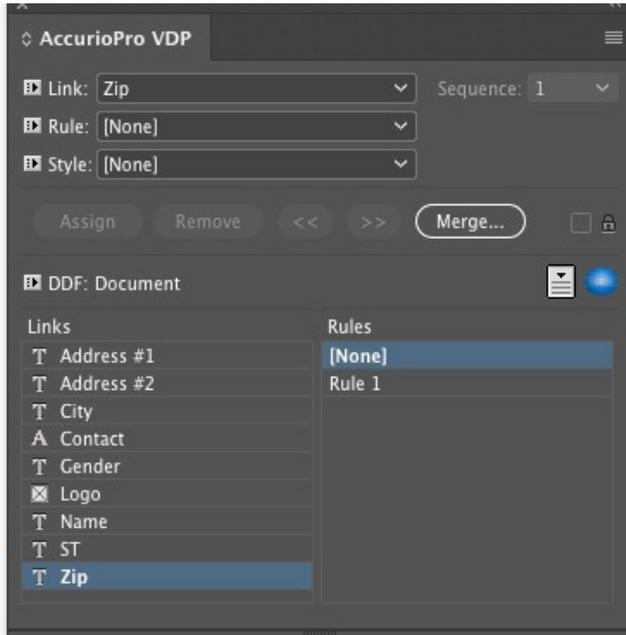
The lists are synchronized with the popup menus for the Links and Rules—if you change one, the other will change as well. You may re-size the panel to reveal more of the Link and Rule names. To hide these lists, just click the icon again.

AccurioPro Panel Shortcuts

Edit buttons

Note the small arrow buttons available to the left of the **Link**, **Rule**, and **DDF** information on the panel, as shown circled below:
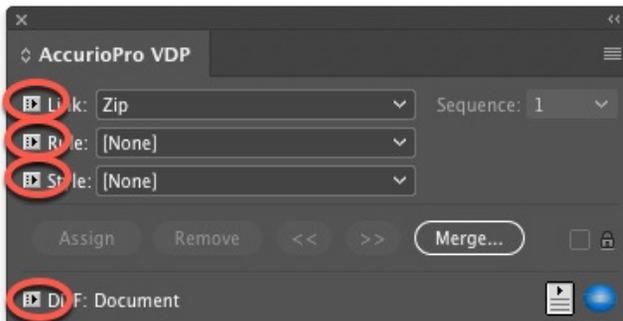
Clicking on one of these small arrows takes you to the corresponding **Variable Link**, **Rules**, or **Data Source Definitions** window. This allows you easy access to make changes to your Variable Links, Rules (discussed in **Tutorial #1b**), and DDF settings at any time.

AccurioPro Panel Menu

As an added ease-of-use feature, frequently used options and actions are presented in the AccurioPro panel menu:
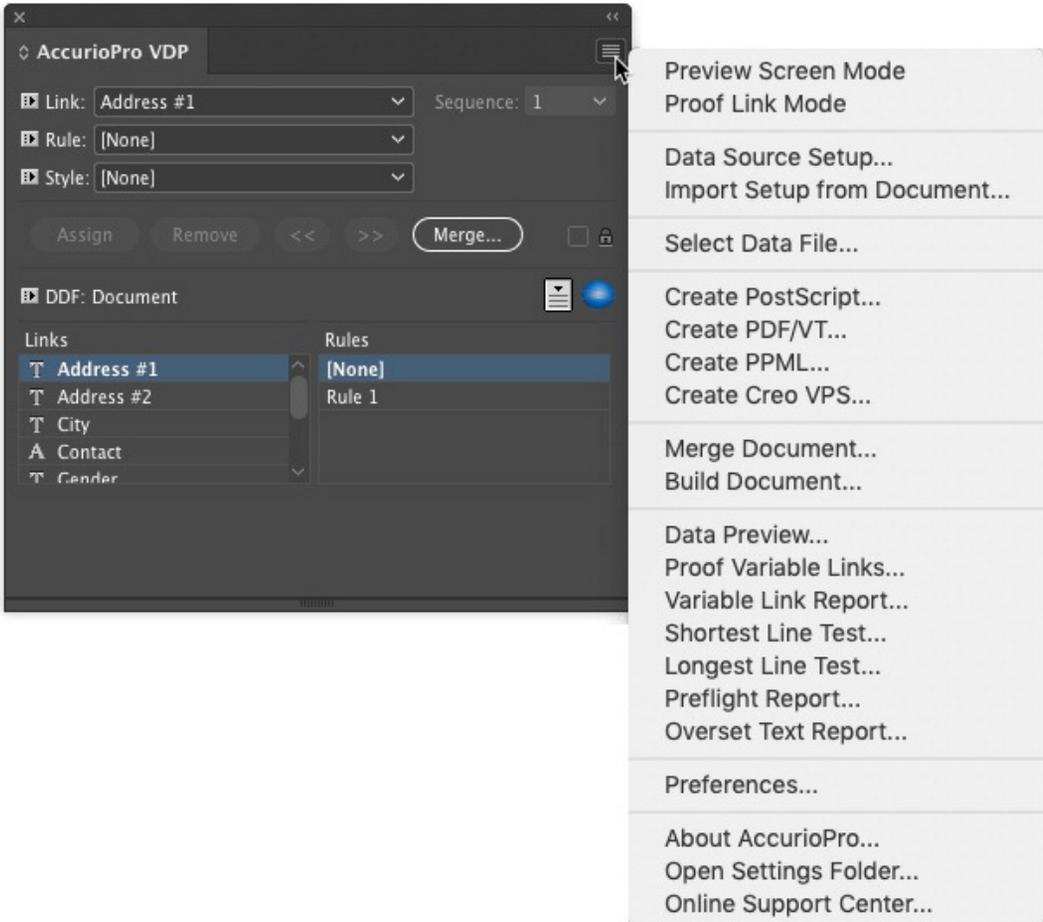
Checking Your Work with Reports and Tests

Back to the tutorial now. You have completed placing Links in your document and are ready to test them. AccurioPro provides a number of reports and tests to ensure that your merged document will produce exactly what you want.

You will run two reports and two tests in this tutorial. We strongly encourage you to run these reports and tests before committing to a full merge session for any of your jobs. (The other optional reports and tests are covered in later tutorials.)

Run Data Preview

Data Preview displays a window where you can step through the records of the data file to view the data while allowing you to merge any of these records into the document to preview the merged results. To run **Data Preview**, do the following:

1) Select Merge from the AccurioPro menu.

This opens the **AccurioPro** window, as shown below:
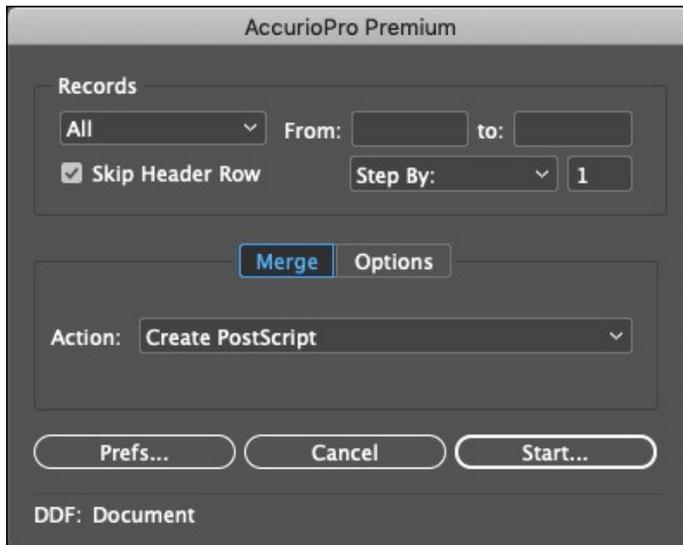
2) For the <u>Records</u>, select <u>All</u>, check <u>Skip Header Row</u>, and select <u>Step by: 1</u>.

You first need to indicate how many data records you would like to process. For this tutorial, select **All** for the record range since you will be processing the entire data file. Additionally, check the **Skip Header Row** option to ignore the first row of the data file (since in this tutorial it contains field names and not actual data). The **Step by** option should be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

*To recall a previous selection of records, open the **Records** popup menu to see the list of all previous record selections. Clicking on one of the listed selections will automatically set the **AccurioPro** window to that record selection.*

3) For the <u>Merge Action</u>, select <u>Data Preview</u>.
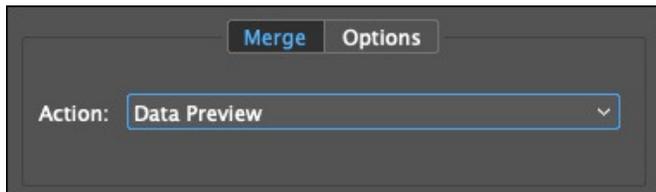
4) Show the merge options on the window.

To see options for this merge session, click the **Options** button, shown circled below:
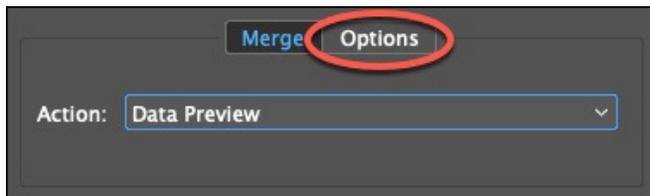
5) For the <u>Options</u>, select <u>Off</u> for <u>CopyFit</u>, and select <u>Standard Mode</u> for <u>Rules</u>.

Since this VDP job does not need to apply **CopyFit**, you can select **Off**, the default setting which allows for fastest performance.

Although this VDP job also does not need to process Rules, you can leave **Rules** set to **Standard Mode** (its default setting). This mode will not affect performance when a VDP job is not using any Rules while allowing for fastest performance when Rules are being processed.

Your settings for **Options** should look like those in the picture below:
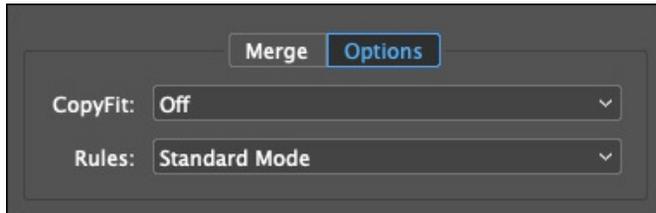
6) **Click the <u>Start</u> button to begin the <u>Data Preview.</u>**
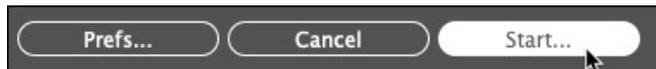
7) **Select the Data File "Form Letter.txt"**
   If you have not yet selected a data file for this document, then AccurioPro will prompt you to select it. If you have already selected a data file, AccurioPro will prompt you to verify which data file you wish to use for this merge session, as shown below:
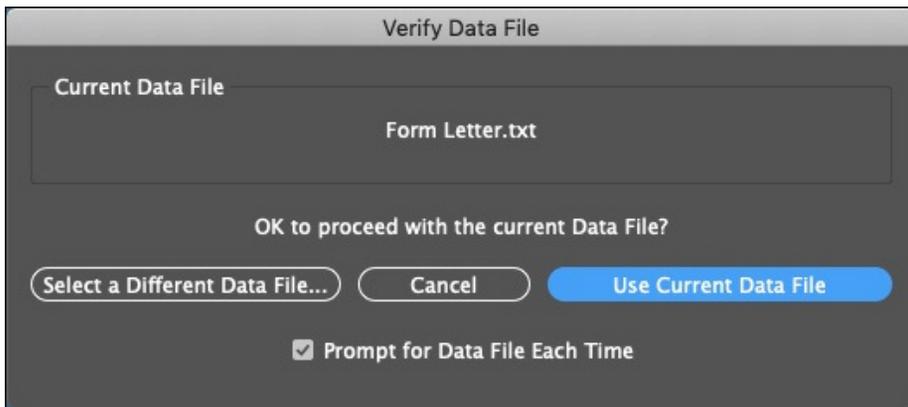
*Each time you start a new merge session, you will be prompted to verify which data file you wish to process. This continual prompting for the data file can be controlled via one of the AccurioPro preferences. The preference called **Prompt for Data File Each Time** instructs AccurioPro to prompt you for a data file each time you start a merge session. If you turn Off (uncheck) this preference, AccurioPro will automatically use the data file that was last selected for this document without prompting you, and this will also allow AccurioPro to start a merge session more quickly. For more information about this preference, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

8) Review the <u>Data Preview</u> results.

At the start of the test, a **Data Preview** window like the one in the picture below will be displayed. For each record, the **Data Preview** window displays the data as it appears in the data fields that are assigned to Variable Links in the DDF, as shown below:
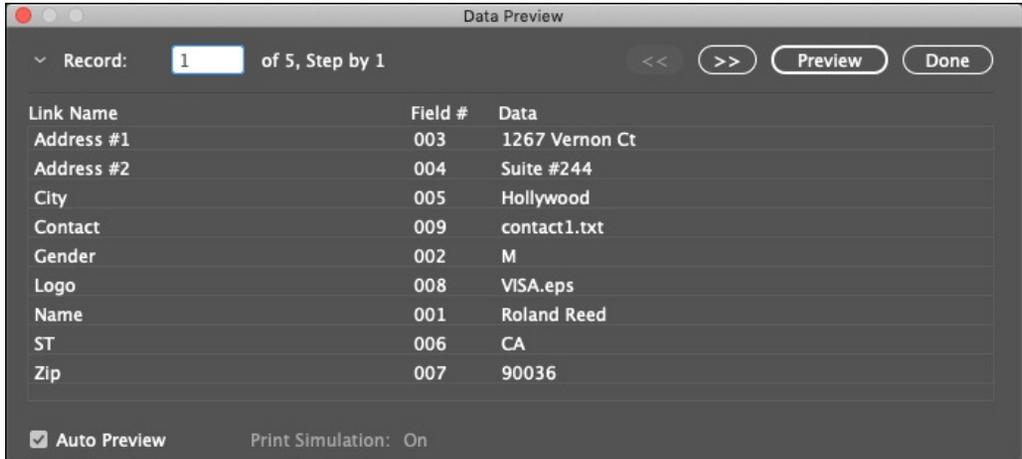
The **Data Preview** window provides you with Arrow buttons to move between records. The 🔲 ("Step Backward") and 🔲 ("Step Forward") buttons step through the data file at the selected "Step Value". For this tutorial, the Step Value, which was specified in the **Step by** option on the **AccurioPro** window, is the number 1. Step Values are discussed at greater length in **Tutorial #3**.

9) Click the "Step Forward" 🔲 button to preview the next record's data.

The next record's data will be displayed in the **Data Preview** window and, if **Auto Preview** is On (checked; its default setting), this record's data will also be merged into the document.

The **Auto Preview** option on the **Data Preview** window determines whether a preview automatically merges a record's data into the document. Checking this option allows you to preview the data in the document as you step through the records on the **Data Preview** window. If you prefer to step through the records without automatically previewing changes in the document, uncheck this option. Then, to preview the current record, click the **Preview** button located on the top right corner of the **Data Preview** window.

10) Continue previewing until you are ready to proceed.

You can continue to scroll through the other records in the data file. Additionally, to preview a specific record, enter the record's number in the Record Number edit box and then either click the **Preview** button or press the Return key on your keyboard.

When ready, click the **OK** button to close the **Data Preview** window.

*You may notice, at the bottom of the **Data Preview** window, the text **Print Simulation: On**. Print Simulation shows you exactly how the data will be printed because as you step through each record of data, the original state of the document is restored before any new data is merged, which is exactly what happens during a merge/print session. This simulation is controlled via a preference named **Use Print Simulation for Preview**, which is On (checked) by default. If this preference is Off, **Data Preview** will not refresh the document after each record, and instead retains changes to the layout. We suggest keeping the **Use Print Simulation for Preview** preference On, but if you want to experiment with changes to your document as you step through each record, you do have the option of turning Print Simulation Off.*

*NOTE: If the **Use Print Simulation for Preview** preference is Off, then you may experience a "Deleted Link" alert when previewing data. These alerts occur when a Test merge session is about to permanently remove a Link from a document. You will not see these messages during **Data Preview** if Print Simulation is On. If you do receive a warning, several options are presented.*

*For more information about the **Use Print Simulation for Preview** preference and about the Deleted Link alert, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

Run a Variable Link Report

The **Variable Link Report** lists all the Links in a document. You may wish to use this feature to discover Link problems (for example, a "Bad Tag") or to determine if there is a sequence number problem (sequencing is covered in **Tutorial #3**).

To run a **Variable Link Report**, do the following:

1) Click the <u>Merge</u> button on the <u>AccurioPro</u> panel.

Clicking the **Merge** button on the panel, as shown below, is a shortcut to open the **AccurioPro** window:
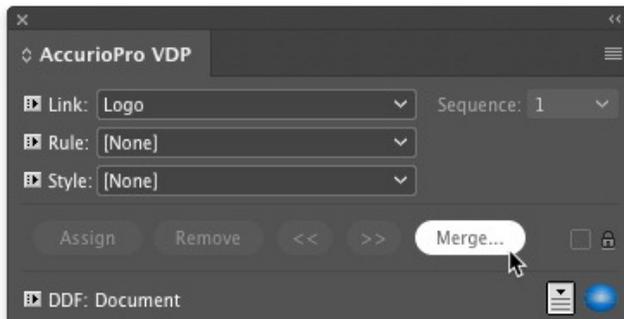
2) For the <u>Records</u>, select <u>All</u>, check <u>Skip Header Row</u>, and select <u>Step by: 1</u>.

The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

3) For the <u>Merge Action</u>, select <u>Variable Link Report</u>.
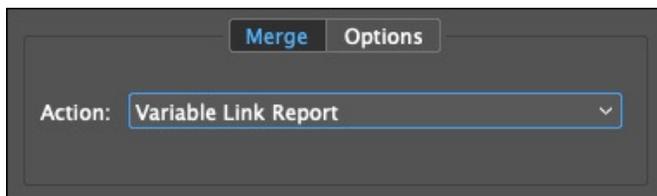
4) For the <u>Options</u>, use the same settings as before.

To see options for this merge session, click the **Options** button. For this merge session, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

5) Click the <u>Start</u> button to run the <u>Variable Link Report</u>.

6) Review the <u>Variable Link Report</u>; status of all Links should be OK.

In this example, you should see the following information, as described below:
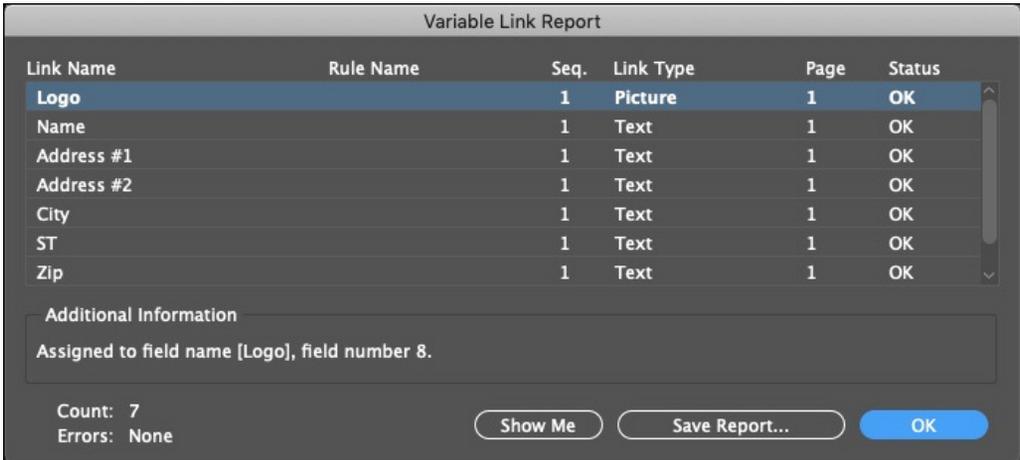
Link Name refers to the name of the Variable Link.

Rule Name refers to the name of the Rule assigned to the Variable Link. (Rules are covered in **Tutorial #1b**.

Seq. is the sequence number assigned to each Link. The concept of a sequence number is explained in **Tutorial #3**. For this tutorial, all of the sequence numbers should be the number 1.

Link Type is either "Text", "Picture", or "Article". If the Link is a Frame Link, you will also see the word "Frame" in parentheses next to the Type.

Page notes the page number on which the Link appears.

Status conditions may include "OK" or "Bad Tag". The "Bad Tag" status indicates the DDF is missing information for this Link (for example, the assigned Variable Link does not exist in the DDF).

Additional Information provides details about the currently selected Link. To display information for another Link, click on that Link in the list.

Clicking the **Show Me** button scrolls the document to show the Link that is currently selected in the list.

Clicking the **Save Report** button saves the report information as a text file. After the report has been saved, the **Variable Link Report** window returns.

7) Click the <u>OK</u> button.

All links should have a status of OK. If there are no issues, click the **OK** button to close the window.

Run a Preflight Report

If your variable data job includes Variable Pictures, as this tutorial does, or any other type of Variable Link that will import files such as Article Links which are discussed in **Tutorial #1c**, we recommend that you run a **Preflight Report**. This report is used to determine the status of the external files for these Variable Links.

When you run a **Preflight Report**, AccurioPro ascertains which external files will be needed when merging the current data file into the document. Then, AccurioPro searches for these files to make sure that they are available. If AccurioPro is not able to locate a required file, that file will appear with a status of "Error" in the **Preflight Report**.

To run a **Preflight Report**, follow these steps:

1) **Select <u>Merge</u> from the <u>AccurioPro</u> menu (or click <u>Merge</u> on the panel).**

2) **For the <u>Records</u>, select <u>All</u>, check <u>Skip Header Row</u>, and select <u>Step by: 1</u>.**
   The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

3) **For the <u>Merge Action</u>, select <u>Preflight Report</u>.**
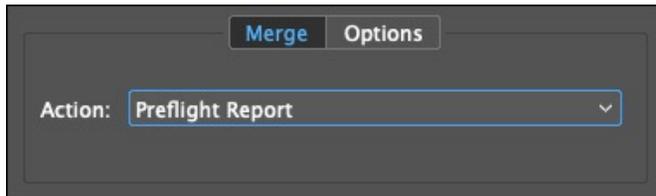
4) **For the <u>Options</u>, use the same settings as before.**
   To see options for this merge session, click the **Options** button. For this merge session, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

5) If prompted, choose which data file to use.
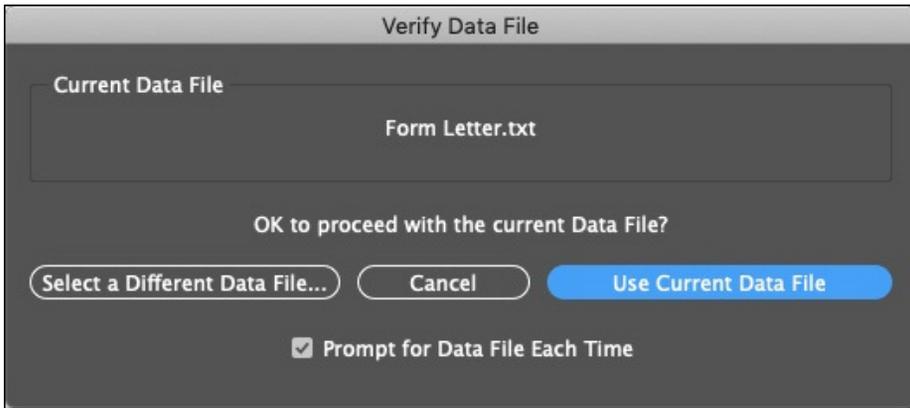
6) Review the Preflight Report.
Once you have selected the data file, AccurioPro analyzes the data to determine which external files are required for the session. AccurioPro then searches for the files and displays a report listing all of the required files with their status. The **Preflight Report** for this tutorial is shown below:
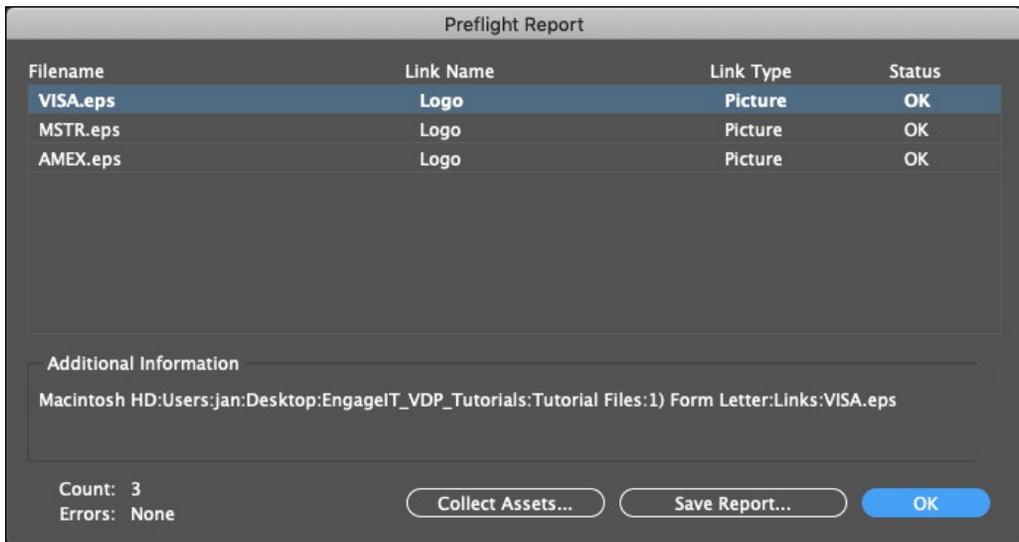
A **Preflight Report** process searches for all files that will be used when merging the selected data file into this document. Note that, for this tutorial, three external files are required (three graphic image files for the Logo Variable Link).

The **Filename** of each file along with the **Link Name** and **Link Type** of the Variable Link that will import the file is shown in the report. In addition, the report provides the following information for each file:

Status: Generally, there will be one of two results in the Status column: "OK" indicates that the file is fine and ready to be used; "Error" indicates a file could not be found or your page layout application lacks the necessary filters to process the file.

Additional Information provides details about the currently selected file. If the selected file has a status of "OK", then the full path to the file will be presented in the box. If the file has a status of "Error", an explanation of the error condition will be presented instead. To display information for another file, click on that file in the list.

If you want to gather up all of the required assets, you can click the **Collect Assets** button. This will collect a copy of the files that the **Preflight Report** is currently listing. AccurioPro will prompt you to select a location and name for a Collect Assets log file, which will be in an XML format. The copies of the listed files will be saved in the same location as the log file.

Clicking the **Save Report** button saves the report information as a text file. You will be prompted to select a file name and folder for the file. After the report has been saved, the **Preflight Report** window returns.

7) Click the <u>OK</u> button to close the <u>Preflight Report.</u>
When ready, click the **OK** button to close the **Preflight Report** window.

❗ *External files for a merge session may be specified by either the name of the file or the full path to the file (for example, VOLUME:FOLDER:FILE NAME). If only the file name is specified, your default AccurioPro Search Preferences are set to search for it in four different paths: 1) The same folder as the document; 2) The same folder as the data file; 3) The DDF Search Path, if one was set for the DDF; and 4) The Global Search Paths, if any were set for your AccurioPro installation. The search is not case-sensitive and is set by default to also search sub-folders within these paths. For more information about setting AccurioPro VDP Search Paths, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

❗ *If you would prefer to collect all of elements of a VDP job (collect a copy of the external files for the document's Variable Links as well as copies of the data file, document, fonts, and any other files the VDP job will be using), use the AccurioPro VDP Packager feature (**AccurioPro** ⇨ **Options** ⇨ **VDP Packager**).*

Producing Print Output

Now that you have finished reviewing reports and tests to verify that everything is set up correctly, you can feel confident to proceed to producing final merged output. AccurioPro provides Print Output options that offer optimization and efficiencies when printing merged output for a large number of records. Please note AccurioPro VDP Essential users are limited to PDF and PDF/VT output only. For AccurioPro Premium users, several additional Printer Drivers, such as PPML and PostScript, are also available. This tutorial provides instructions for PDF and PDF/VT output.

> *For information on any of the AccurioPro Printer Drivers (PostScript, PDF, or PPML), see the Printer Driver's manual. A manual for each one is provided in PDF format within the "Supplemental Documentation" folder in the AccurioPro VDP Documentation package.*

Produce Variable PDF Output

The AccurioPro PDF Driver allows you to produce merged output in a PDF format that is compatible with PDF-enabled digital print controllers as well as with applications that allow you to view and edit PDFs.

Additionally, the PDF Driver allows you to produce output in a PDF/VT caching format that is compatible with PDF/VT-enabled digital print controllers and applications, such as the Adobe PDF Print Engine (APPE). The AccurioPro PDF/VT caching format is optimized for Variable Data Printing.

For a more detailed discussion about the PDF Driver, see the **PDF Driver** manual, which is available in PDF format within the "Supplemental Documentation" folder in the AccurioPro VDP Documentation package.

Follow the steps below to print merged output in PDF format:

1) **Select <u>Merge</u> from the <u>AccurioPro</u> menu (or click <u>Merge</u> on the panel).**

2) **For the <u>Records</u>, select <u>All</u>, check <u>Skip Header Row</u>, and select <u>Step by: 1</u>.**
    The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

3) **For the <u>Merge Action</u>, select <u>Create PDF/VT</u>.**
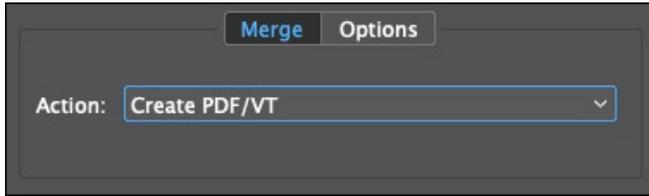
4) **For the <u>Options</u>, use the same settings as before.**
   To see options for this merge session, click the **Options** button. For this merge session, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

5) **Click <u>Start</u> and, if prompted for the data file, select "Form Letter. txt".**
   This opens the **PDF Driver** window, as shown below:
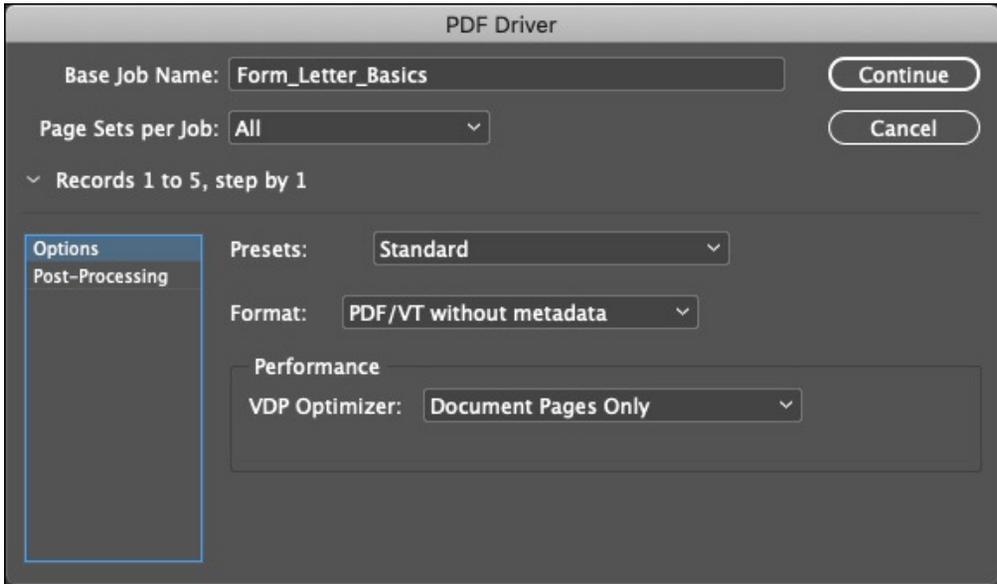
6) **Enter a <u>Base job name</u>.**
   This is the base for the file name(s) of the PDF output. By default, the **Base Job Name** is the name of the document. The PDF Driver will automatically append a separator (the default separator is an underscore), followed by the record range that is in this output file. For example, keeping the default "Form_Letter_Basics" and merging Records 1 to 5, the file name will be "Form_Letter_Basics_1-5.pdf". For information about output file naming preferences, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

7) Specify "All" for the <u>Pages per job</u> / <u>Page Sets per Job</u>.

This feature allows you to control the number of jobs for the printer (in this case, PDF files) that will be created by this merge session. Selecting **All** will create one file that contains all of the merged pages.

If you are running a Premium edition of the software, you may prefer to "chunk" your output into multiple files to create jobs of a more manageable size. For example, if you had 427 records in the data file for the single-page Form Letter document and you entered a value of "100" for this option, then the merge session would create five PDF files, where the first four would contain 100 pages of merged output each and the last one would contain 27 pages of merged output.

8) Select <u>Standard</u> from the <u>Presets</u> popup menu.

The **Standard** Preset is provided for generic PDF/VT output and works for most digital printers and PDF applications. This selects settings on all of the panels on the **PDF Driver** window, whether a panel is visible or hidden at the time the Preset was selected.

9) Click the <u>Continue</u> button and select <u>Export Adobe PDF</u> options.

After clicking **Continue**, the standard **Export Adobe PDF** window prompts you to select additional options for the PDF output. After you select an available **Preset**, choose the **PDF/X-4:2010 Standard** (this is required to ensure conforming PDF/VT output) and then choose any other options as you normally would to produce a PDF of this document. When ready, click the **Export** button.

10) Select a destination folder for the output and then click <u>Save</u>.

This launches the merge session.

Track the Merge Progress for PDF Output

At the start of a merge session, AccurioPro builds a workfile (a temporary document) based on the original document and then merges data with that workfile. Once the workfile has been merged, it is then printed. This process is repeated as many times as necessary to complete the job.

During this merge process, you see a progress bar. You may click the **Cancel** button at any time to stop the merge session (or press **Command-Period** as you would to cancel a normal printing routine). Please note that it may take some time for AccurioPro to respond to a Cancel request as some of the printing processes cannot be interrupted.

Review the Summary Report for PDF Output

When the merge session is finished, the original document returns and AccurioPro opens a window to display a summary report, which details all of the documents that were printed. The summary report will be similar to the one shown below:
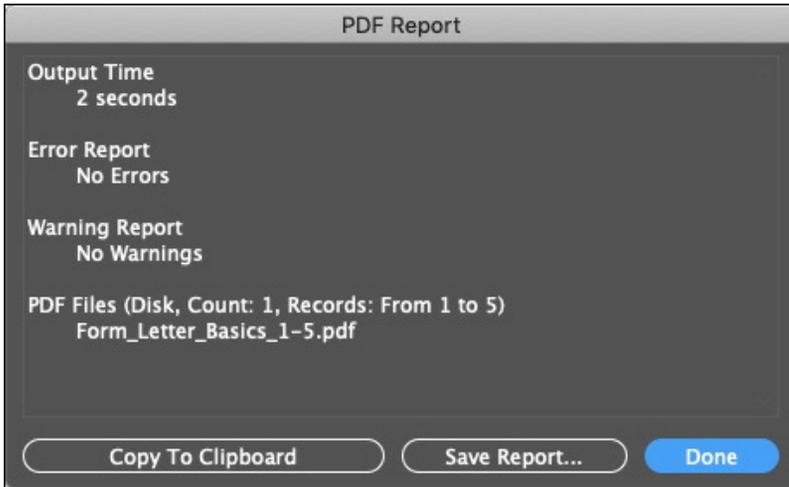
> For detailed information on all of the features of the PDF Driver, see the "PDF Driver" manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

Producing InDesign Document Output

Sometimes, you may prefer to just merge your data into your InDesign document layout, and then print it by hand or export it to a standard PDF file. This way you can scroll through the document and actually make changes to the document pages that have been merged. This can be useful for very short run variable data jobs. This can also be useful for testing and proofing purposes. Note that producing InDesign Document output is <u>not recommended</u> for larger variable data record counts.

The information below describes how to produce a multiple page Adobe InDesign document, where each page of the document contains output merged from a different data record.

Run Build Document

In this section of the tutorial, you will start up a merge session, but instead of producing a PDF file, you will merge all five records into the InDesign document. This type of a merge will produce a document that has five pages, one page for each record of data.

To merge records into a document, do the following:

1) **Select <u>Merge</u> from the <u>AccurioPro</u> menu (or click <u>Merge</u> on the panel).**

2) **For the <u>Records</u>, select <u>All</u>, check <u>Skip Header Row</u>, and select <u>Step by: 1</u>.**
    The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

3) **For the <u>Merge Action</u>, select <u>Build Document</u>.**
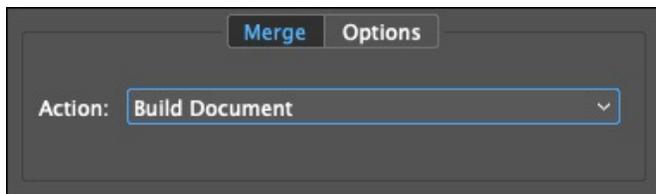
4) **For the <u>Options</u>, use the same settings as before.**
    To see options for this merge session, click the **Options** button. For this merge session, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

5) **Click <u>Start</u> and, if prompted for the data file, select "Form Letter. txt".**
    This starts the merge session. AccurioPro inserts the new pages in the document and then merges the appropriate data into each page.

6) Print or Export the Document

Once the merge process has finished, the sample document will have five pages, one for each of the five records in the data file, as shown below. You can make edits to this document, you can print it (using File/Print), or you can export it as a PDF file. The choice is up to you! Again, the **Build Document** feature is a convenient way to proof records or to handle very short run VDP jobs.

*You will notice each page has the same page number, the number 1. Whether a **Build Document** merge session resets the page numbering or increments the page numbering for each new page set that is added to the document is determined by the AccurioPro **Reset Page Numbering** preference. For more information about this preference, see the **AccurioPro VDP Preferences** manual, available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

Reviewing the Basic Steps

Below is a summary of the basic steps to use AccurioPro with a document to produce variable data output:

1) Create Document and Set Up a DDF

1) Lay out the document as you normally would.

2) Use **Setup** to set up the document's DDF to describe your data file.

3) Optional: Edit the document's DDF settings, including Variable Link settings.

2) Assign Links to Content in the Document

1) Select the page content that will be assigned to a Link.

To assign a Text Link or Article Text Link:
Highlight the text for the new Text Link using the InDesign Type [T] tool.

To assign a Picture Link or GroupPicture Link:
Click on the picture frame using the InDesign Selection [▷] tool.

To assign a Text Frame Link or an Article Frame Link:
Click on the text frame using the InDesign Selection [▷] tool.

2) Use the **AccurioPro** panel to select the **Link** you wish to assign to the page content.

3) Click the **Assign / Tag Pic / Tag Frame** button to establish the Link.

4) Repeat for all Links in your document.

3) Check Your Work by Running Reports and Tests

1) Run **Data Preview** to preview results merging records in your data file.

2) Run a **Variable Link Report** to check for Link errors.

3) Run a **Preflight Report** if you will be merging, for example, Variable Pictures.

4) Start the Merge

1) Select **AccurioPro** ⇨ **Merge** to open the **AccurioPro** window.

2) Select the range of **Records** you wish to process.

3) Select the **Merge Action** you want (File or Print).

4) Select **Options** for the merge session.

5) Click the **Start** button.

6) Select the data file, if prompted to do so.

7) Select options for the output, if prompted to do so.

Coming Up

That's it for the first tutorial. We have introduced you to the basics and you should now be able to perform simple merge routines. The next tutorial, **Tutorial #1b**, introduces the conditional logic features that are provided by the Rules Module for AccurioPro. You will learn how to modify your data on-the-fly based on a set of user-defined parameters.