

ID Badges Tutorial

“Badges? We ain’t got no badges. We don’t need no badges. I don’t have to show you any stinking badges!” Maybe so, but in this tutorial, we will use them to cover a few of the more advanced capabilities of the AccurioPro® VDP product for Adobe® InDesign®. You will use AccurioPro to create a multiple-page document where each page will contain two merged ID Badges. Note this tutorial demonstrates how to create a multi-up document interactively. If you are using the Premium edition of the AccurioPro VDP software, then you may prefer to apply the AccurioPro Imposition feature to create a multi-up document automatically. For more information about this Premium feature, see the Layout & Imposition tutorial.

Topics covered in this tutorial:

- ✓ Creating multiple-up layouts
- ✓ Merging a Step & Repeat job
- ✓ Sequencing Variable Links
- ✓ Merging a Step-by-Step Consecutive job
- ✓ Merging a Cut & Stack Consecutive job

AccurioPro
Variable Data

Overview

The Sample Document

The name of the sample document for this tutorial is named “ID Badges.indd” and it exists in the “3) ID Badges” Tutorial Files folder. The document is a single-page layout for two corporate ID Badges. Each ID Badge requires five Variable Text fields (Employee ID, First, Last, Department, Security Code) and one Variable Picture field (the Employee Photo).

The sample document, which has content for a single ID Badge where Variable Links have already been assigned, looks like this:



The Sample Data File

The variable data for this tutorial is contained within a tab-separated text file named “ID Badges.txt” and it exists in the “3) ID Badges” 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:

Employee ID	First	Last	Department	Security Code	Photo
EmpID-001	Michele	Brown	Accounts Payable	A-115	mbrown.eps
EmpID-002	Michael	Smith	Sales	B-215	msmith.eps
EmpID-003	Nancy	Mayers	Marketing	C-300	nmayers.eps
EmpID-004	Noel	Williams	Research	A-115	nwilliams.eps
EmpID-005	Erwin	Shanks	Customer Service	B-215	eshanks.eps
EmpID-006	John A.	Darwin	Engineering	A-115	jdarwin.eps
EmpID-007	Mark	Simon	Marketing	C-300	msimon.eps
EmpID-008	Mary	Carter	Customer Service	B-215	mcarter.eps

The file was created on a Macintosh and holds eight records, each containing six fields. Note the data file has been sorted by the “Employee ID” number (EmpID-001, EmpID-002, etc.). The reason for this particular sort will become clear later in this tutorial when we discuss the AccurioPro “Consecutive Order” feature.



*For more information about data files for AccurioPro, see the **Database Files** manual, which is available in PDF format in the “Supplemental Documentation” folder in AccurioPro VDP Documentation.*

Preliminary Setup

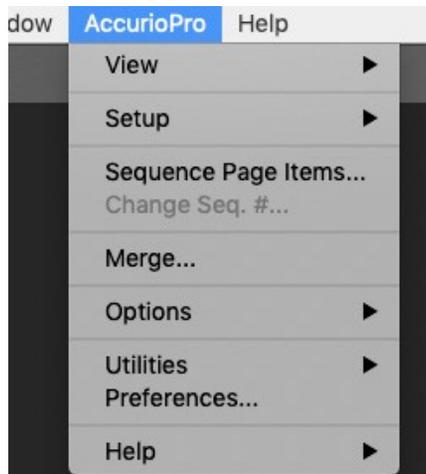
Prerequisites

Tutorial #1a

This tutorial assumes that you have completed **Tutorial #1a**. If you have not completed it, we recommend you do so before continuing.

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.



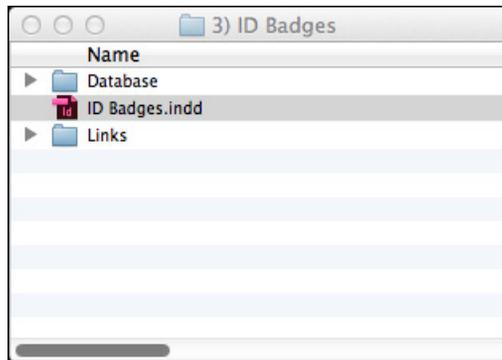
Open the Sample Document

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

1) **Open the InDesign File menu and select Open.**

2) **Select the file “ID Badges.indd”.**

The name of the sample document is “ID Badges.indd” and it exists in the “3) ID Badges” folder, which is inside the “AccurioPro Tutorial Files” folder. The files for this tutorial are shown below:



3) **Click Open 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). The sample document, where Variable Links have already been assigned, looks like this:



If you do not see green indicators for the Variable Links, confirm your **InDesign View** menu has its **Screen Mode** set to **Normal** and to **Show Frame Edges**.

This Document's Data Source Definition (DDF)

A DDF has already been set up and assigned to the sample document for this tutorial. By default, the document's DDF settings will be automatically loaded into your AccurioPro settings when you open the document.

However, if you are running the Premium edition and have turned Off (unchecked) the **Always use Document DDF** preference, open the **AccurioPro** menu and select **Setup** ⇒ **Database Definitions**. If you see a warning that the document's DDF "3) ID Badges" is missing, click **Yes**. The **Database Definitions** window will open and you will see "3) ID Badges" is the document's **Current DDF**. Click **OK** to close the **Database Definitions** window. Either one of these DDFs—"Document" or "3) ID Badges"—is appropriate for this tutorial. For more information, see the **Database Definitions** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.



*Do NOT run **Setup** since the DDF is already set up.*



*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.*

Working With the Document

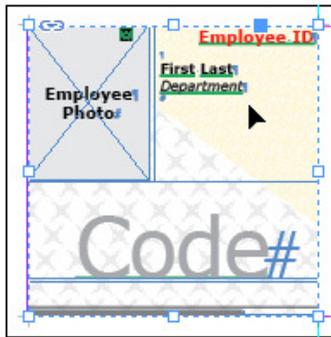
Create a 2-Up Layout

First you will turn this document into a 2-up layout so you will print two ID Badges side by side. To do this, you will use the InDesign “Step and Repeat” feature.

Follow the steps below to perform the Step and Repeat operation:

1) Click on the ID Badge content with the InDesign Selection  tool.

Confirm you have selected the entire group of objects.

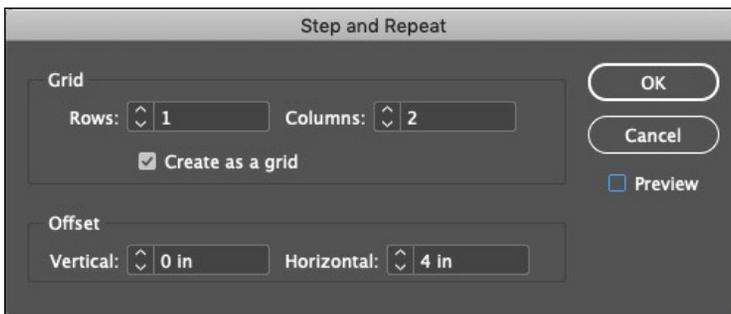


2) In InDesign, open the Edit menu and select Step and Repeat.

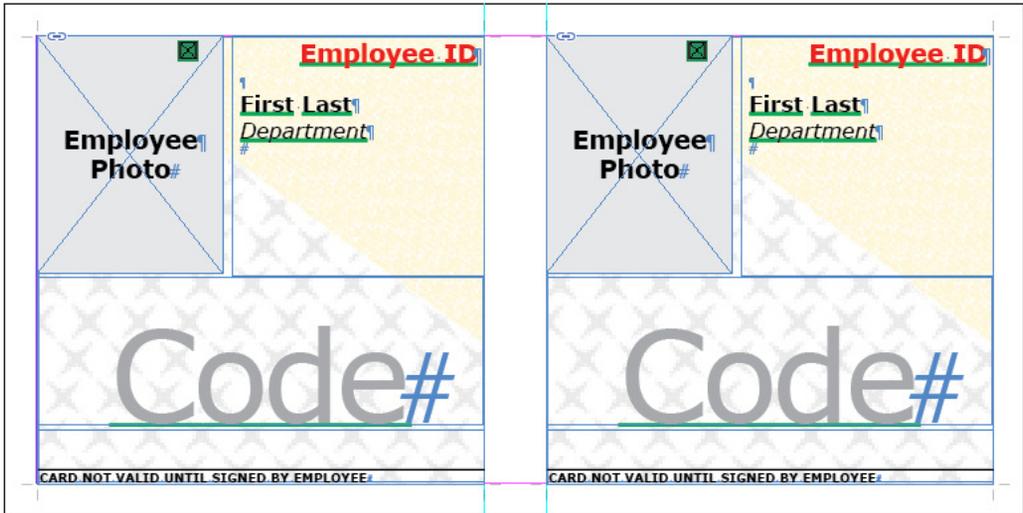
This opens your page layout application’s Step and Repeat window.

3) Enter the following Step and Repeat settings and click OK.

Create as a grid:	On (checked)
Rows:	1
Columns:	2
Vertical:	0 in
Horizontal:	4 in



4) You should now have a 2-up layout.



Note crop marks have already been placed in this document by applying the **CropMarks** script that is available in the InDesign **Scripts** panel.

Merge Records in a Step & Repeat Order

Next, you will see how to merge the same record more than once into a document:

1) Select **Merge** from the **AccurioPro** menu (or click **Merge** on the **AccurioPro** panel).

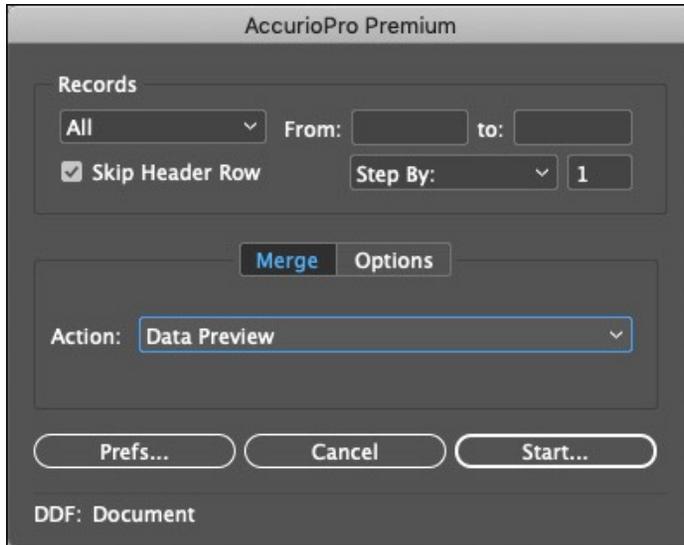
This opens the **AccurioPro** window.

2) For the **Records**, select **All**, check **Skip Header Row**, and select **Step by: 1**.

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.

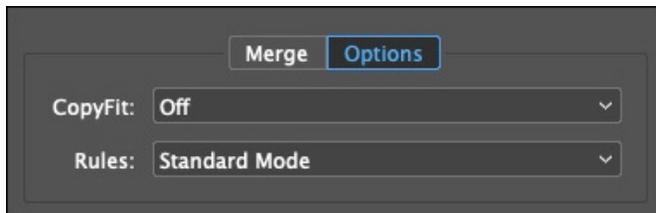
3) For the **Merge Action**, select **Data Preview**.

As in the previous tutorials, running **Data Preview** lets you see a preview of the data in the document. Your **AccurioPro** window should now look like this.



4) For the **Options**, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

To see the options for this merge session, click the **Options** button. These options are covered in other tutorials. For this tutorial, you may use their default settings as shown in the picture below:



5) Click **Start** and, if prompted for the data file, select “ID Badges.txt”.

If prompted to select a data file, select the “ID Badges.txt” data file, which exists in the “3) ID Badges” Tutorial Files folder.



Your current setting for the AccurioPro preference named **Prompt for Data File Each Time** determines whether AccurioPro prompts you to select a data file. If you prefer AccurioPro not prompt you to select a data file when a data file has already been selected, turn off (uncheck) this option. For more information about this preference, see the **AccurioPro VDP Preferences** manual, which is available in PDF format in the “Supplemental Documentation” folder in AccurioPro VDP Documentation.

6) Review the results.

When you preview a record, all of the Text Links and Picture Links on the page should be filled with data from that one record. For example, if successful, your document should look like this when you preview the first record:



7) When ready, close the Preview window.

Next, this tutorial will show you how to merge two different records on to each page.

Sequence Links

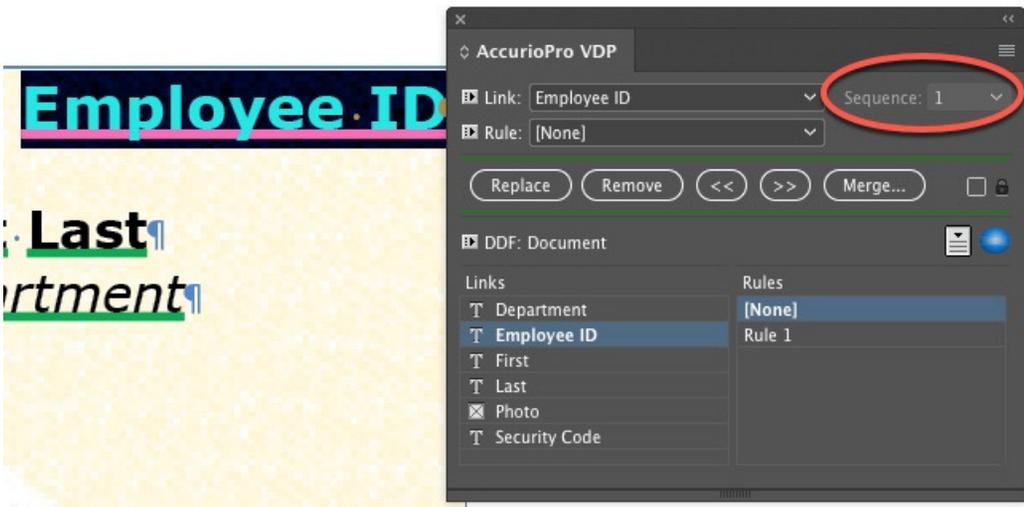
In the previous example, you created a 2-up layout and previewed the data in a Step & Repeat order into the document. Each merged page contained two identical copies of the ID Badge, both containing data from the same record (Michele Brown). Whenever you have a job that requires merging records in a Step & Repeat order (to merge each record into a document more than once), you can set up a document in a similar manner.

But assume that instead of having two identical ID Badges, you want to create a layout that has two different ID Badges (for example, Michele Brown’s on the left and Michael Smith’s on the right). To accomplish this, you need a way to tell AccurioPro that the Links should be populated with data from different data records. For example, you want one ID Badge to receive data from one record and the other ID Badge to receive data from a second record. In order to do this, we need to introduce the concept of “Link Sequencing”.

Link Sequencing

A sequence is assigned to each Link in a document. By default, the sequence that is initially assigned to a Link is the number 1. To see which sequence is assigned to a Link, select the Link and then look at the **Sequence** information on the **AccurioPro** panel.

To do this, if your **AccurioPro** panel is not showing, open the **AccurioPro** menu and select **View** ⇒ **Show AccurioPro Palette**. Then, use the InDesign Type **T** tool to select one of the Text Links in the document and look at the **Sequence** information on the panel. For example, below is a picture showing sequence number 1 is assigned to one of the “Employee ID” Text Links in this document:



The sequencing of the Links in a document determines the number of records that will be merged for each variation of the document. If all of the Links are assigned sequence number 1, only one record will be merged into the document. However, if some Links are assigned sequence number 1 and others sequence number 2, then two records will be merged into the document. Correspondingly, if some Links are assigned sequence number 1, others number 2, and others number 3, then three records will be merged.

In other words, to merge multiple records into a document, all you have to do is change which sequence numbers are assigned to the Links in the document. AccurioPro provides two different methods to change sequence numbers. This tutorial will first show you how to change which sequence number is assigned to a selection of Links, and then will show you how to automatically assign sequence numbers to all of the Links in the document.

Use “Change Sequence Numbers”

AccurioPro provides a shortcut to quickly change the sequence number that is assigned to one or more Links all at once.

Follow the steps below to change the sequence number for all of the Links in the 2nd-up:

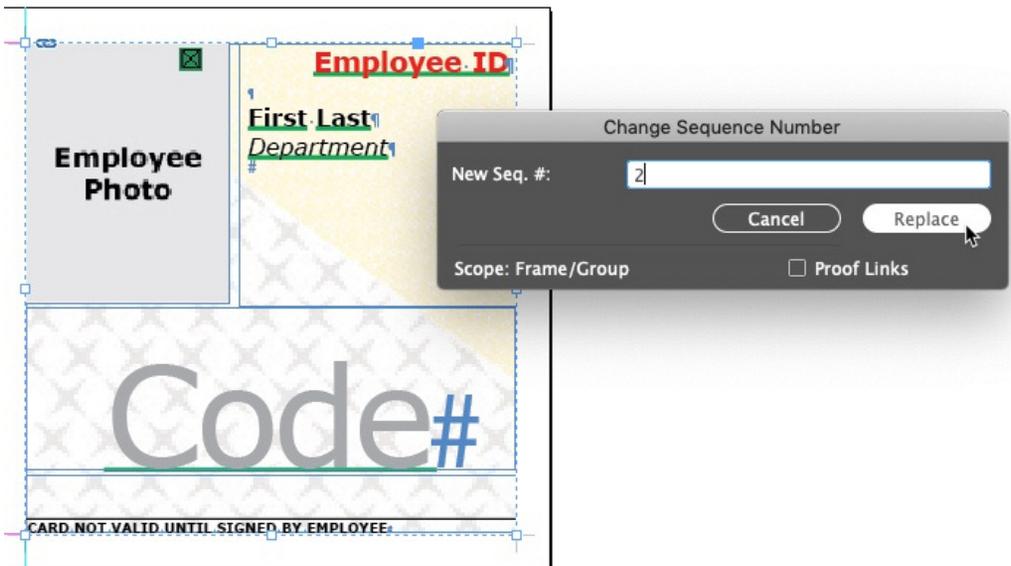
1) Click on the right-side ID Badge with the InDesign Selection tool.

Confirm you have selected the entire group of objects. The objects are grouped, so clicking on any one of them with the InDesign Selection tool selects all of them. (Shift-clicking to select multiple objects would also work for this sequencing shortcut.)

2) Open the AccurioPro menu and select Change Seq #.

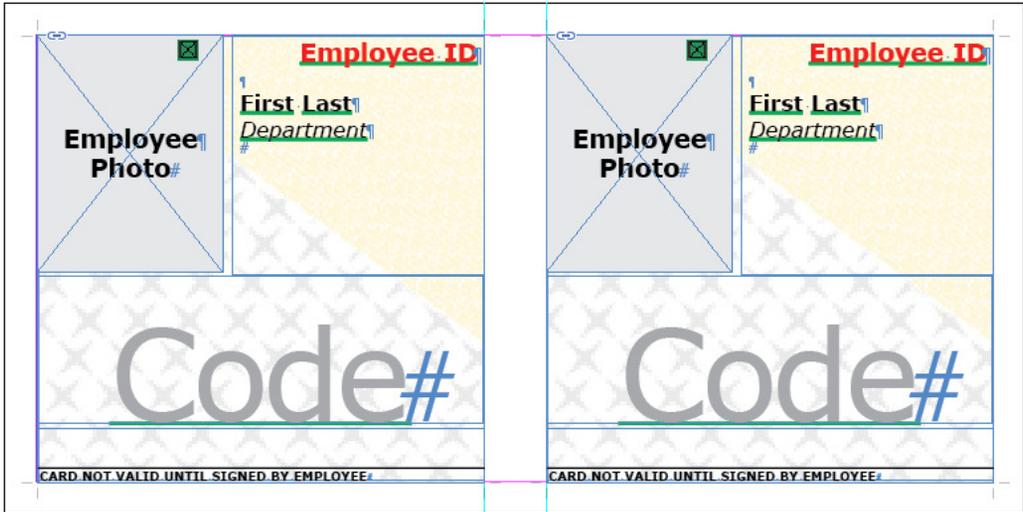
This opens the Change Sequence Number window, which is described in the next step.

3) Enter the number 2 and click Replace.



4) Note the appearance of the document may not be changed.

Applying **Change Sequence Number** will not change the appearance of the document if you did not proof links while changing the sequence number. If you applied the settings recommended in the previous step, then your document will look like this:



5) You can use the AccurioPro panel to verify the new sequence of these Links.

When you click or select a Link, the AccurioPro panel will display the sequence number that is assigned to that Link. For example, click on each Link in the ID Badge group on the right side of the page and examine the panel to confirm the Link is now assigned to sequence number 2. Remember to use the InDesign Tool that is appropriate for the type of content that is linked:

For Text Links, use the InDesign Type  tool.

For Picture Links, use the InDesign Selection  tool.

You can also verify the settings of all of the Links at once, including each one's sequence, by running a Variable Link Report. For more information about Variable Link Reports, see **Tutorial #1a**.

6) Save the document.

Before proceeding, open the InDesign **File** menu and select **Save** to save the document in its current state (2-up with Links sequenced numbers 1 and 2). You will then be able to revert the document anytime you need to “start fresh” as you continue with this tutorial.

Use “Sequence Page Items”

AccurioPro also provides a feature to change sequence numbers automatically. This is helpful when you would like to assign different sequence numbers to several sets of Links in a document all at once.

Follow the steps below to sequence page items automatically:

1) For this tutorial, first confirm nothing is selected in the document.

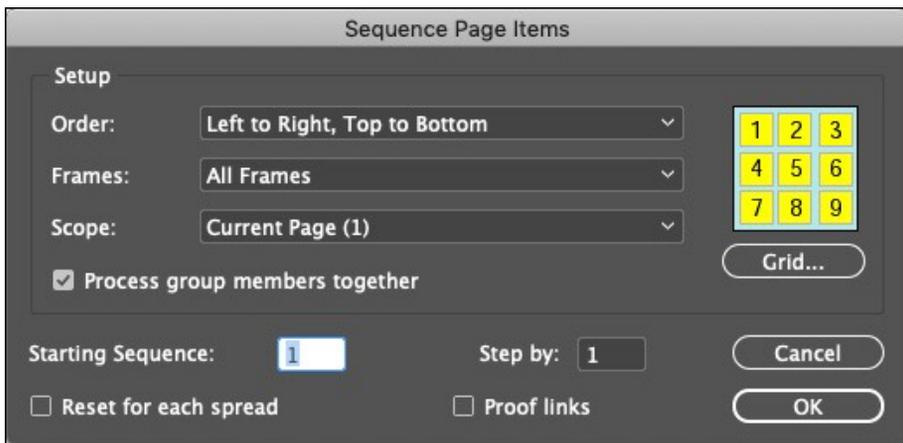
Note this is an optional step. You could, instead, select the content that you wish to sequence. However, when doing so, you would of course need to be careful that you have indeed selected all of that content and nothing extra (in this example, you would select both of the ups on this page).

For a simpler approach, since we are going to sequence all content that contains Variable Links on this page, we can have nothing selected. Then, when we sequence the page items in the next step, we will choose to have AccurioPro automatically select for us all content that contains Variable Links on this page.

To deselect all content, open the InDesign **Edit** menu and select **Deselect All**.

2) Open the **AccurioPro** menu and select **Sequence Page Items**.

This opens the **Sequence Page Items** window, shown below:



Order: Indicates the order in which to assign sequence numbers.

Frames: Indicates which frames to search for Links to sequence.

Scope: Indicates which area of the document to search for Links to sequence.

Process group members together: When this option is checked (its default setting), AccurioPro will assign the same sequence number to Links that are in the same group. When this option is unchecked, Links will be processed by frames, not by groups. The same sequence number will be assigned to Links that are in the same frame and a different sequence number will be assigned to Links in a different frame.

Scope: Indicates which area of the document to search for Links to sequence.

Grid: This process uses a grid to locate new frames or new groups within a page. Note the graphic is simply a visual aid and does not reflect the document’s actual layout.

Step by: Indicates the amount to increment the number for the next sequence. You will normally not change this number.

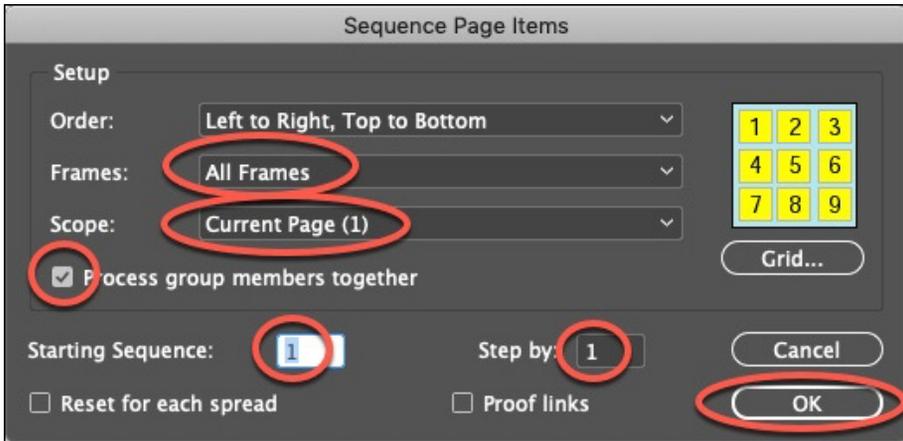
Reset for each spread: If you are sequencing all of the pages in a document and would like each page to start with the same sequence number, then turn on (check) this option. When this option is off (unchecked), the starting sequence number for a page will be determined by the last sequence number this process assigns to the previous page.

Proof Links: This option is off (unchecked) by default. When this option is on (checked), AccurioPro will proof the Links after changing their sequence numbers. Checking this option is equivalent to running a Proof Variable Links merge session. When AccurioPro proofs Links, the Links will display their assigned Variable Link names and sequence numbers so you can easily verify that they are correct. Note this may cause an overset where text may not fit within the area of a text frame. Of course, you do not need to turn on (check) this option to use the AccurioPro “Sequence Page Items” feature.

3) **Select the settings shown in the picture below, and click the OK button.**

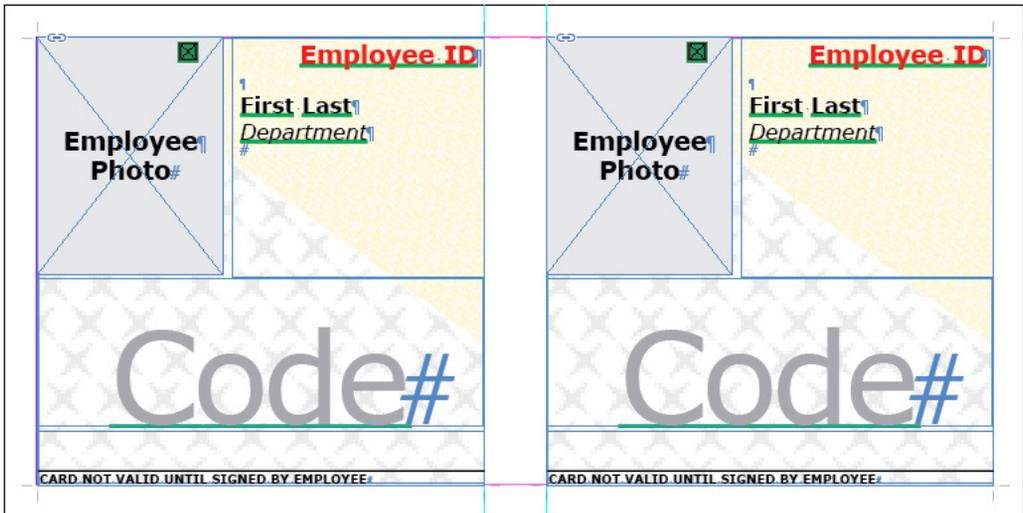
We will apply the default settings for this tutorial. Be sure to confirm you have selected **All Boxes** and **Current Page (1)**. Also, confirm the **Process group members together** option is turned on (checked) because in this tutorial we would like AccurioPro to assign the same sequence number to Links that are in the same group. Then, confirm both the **Starting Sequence** and **Step by** options are set to the number 1.

When ready, click the **OK** button, as shown below:



4) **Note the appearance of the document may not be changed.**

Applying **Change Sequence Number** will not change the appearance of the document if you did not proof links while changing the sequence number. If you applied the settings recommended in the previous step, then your document will look like this:



5) Verify the new sequence of these Links.

To verify the new sequence assignments, you can run a Variable Link Report, or you can click or select a Link to display its assigned sequence on the **AccurioPro** panel, as described earlier in this tutorial.

6) Save the document.

Before proceeding, open the InDesign **File** menu and select **Save** to save the document in its current state (2-up with Links sequenced numbers 1 and 2). You will then be able to revert the document anytime you need to “start fresh” as you continue with this tutorial.

About “Sequence Numbers” and “Record Numbers”

Sequence Numbers and Record Numbers sound like they refer to the same thing but it is helpful to know the difference between them.

Record Number: AccurioPro refers to a particular record by its record number, that is, the “line number” corresponding to its position in the list of records in the data file. For example, on the **AccurioPro** window, you specify which record(s) to merge by entering a particular record number or a range of record numbers.

Sequence Number: In contrast, the sequence number is a “relative” setting and doesn’t refer to an absolute record number. The sequence number tells AccurioPro which record to merge into a Link relative to the starting record number in the variation of the document that is currently being merged. For example, if a document has both Sequence Number 1 and Sequence Number 2 Links, when Record Number 3 is the starting record number, then AccurioPro will merge Record Number 3 into the Sequence Number 1 Links and Record Number 4 into the Sequence Number 2 Links. Note that a Cut & Stack merge session selects records differently, as described later in this tutorial.

Merge Records in a Consecutive Step-by-Step Order

Now you will preview merging the document again. What you should see, for example, is that the left-side ID Badge receives data from Record 1 of the data file (Michele Brown), and the right-side ID Badge receives data for Record 2 (Michael Smith).

Preview a Step-by-Step Merge

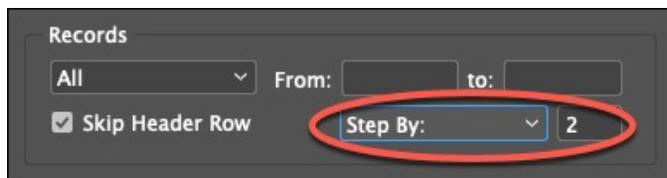
After you have saved your document, then follow the steps below to preview merging your new sequenced document in a Step-by-Step order:

1) Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).

This opens the **AccurioPro** window.

2) For the Records, select All, check Skip Header Row, and select Step by: 2.

AccurioPro automatically sets the **Step by** value to the largest sequence number in the current document. Note the **Step by** value used to be the number 1 but now, by default, it is the number 2, as shown below:



If you see a different default number than the number 2, repeat this tutorial.

Note the **Step by** value determines the starting record number for each variation of the document. For example, when stepping by 2, AccurioPro will increment the starting record number by 2 for each new variation of the document (if the starting record number for the first variation is 1, the starting record number for the second variation will be 3 (the previous starting record number 1 + the step by value 2 = 3)).

3) For the Merge Action, select Data Preview.

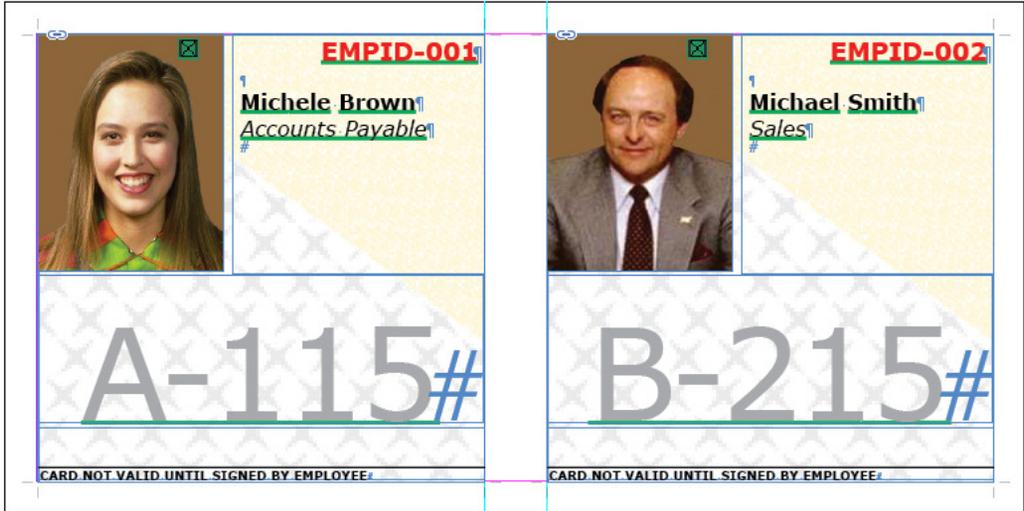
4) For the Options, use the same settings as before.

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 Start and, if prompted for the data file, select "ID Badges.txt".

6) Review the results.

For each step through the data file, the sequence number 1 Links should be filled with data from the first record in the set of records this step is merging, and the sequence number 2 Links should be filled with data from the second record. The merged result for the first step is shown below:



7) When ready, close the Data Preview window.

Once your data preview has been accomplished successfully, you are ready to produce merged output.

8) Save the document.

Once your preview has been accomplished successfully, save the document since you have completed setting it up for merging. You are now ready to produce merged output.

Run a Step-by-Step Merge Session

For this tutorial, you will merge all of the records Step-by-Step to produce a single document. Using the ID Badges tutorial files, the merge session will produce a four-page document where each page contains two unique ID Badges, properly sequenced and ready to print.

Follow the steps below to create a four-page Step-by-Step merged document for this tutorial:

1) Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).

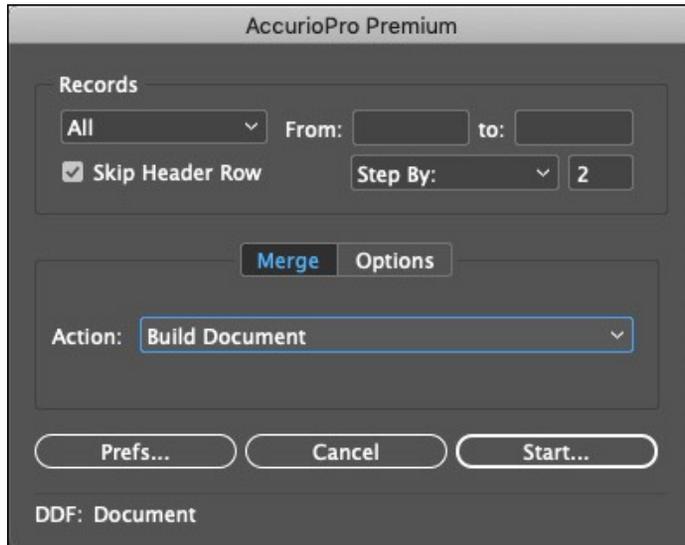
This opens the AccurioPro window.

2) For the Records, select All, check Skip Header Row, and select Step by: 2.

These options should be pre-selected. Check to make sure that the default Step by value is the number 2. If it is a different number, repeat this tutorial.

3) For the **Merge Action**, select **Build Document**.

Your **AccurioPro** window should now look like this:



4) For the **Options**, 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 **Start** and, if prompted for the data file, select **"ID Badges.txt"**.

For a **Build Document** merge session, AccurioPro first determines how many copies of the original pages in the 2-up document to add in order to merge all of the records that you selected for the session. For this tutorial, AccurioPro adds three pages.

Then, AccurioPro populates the Links on the first page according to the starting record number specified on the **AccurioPro** window and the sequence numbers assigned to the Links on that page. For this example, the starting record number is record #1, so AccurioPro merges records #1 and #2 into the Links on the first page.

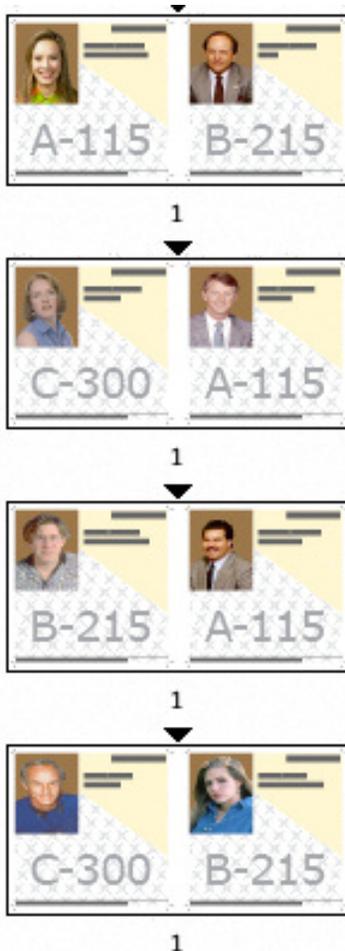
Before merging the Links on the second page, AccurioPro increments the starting record number by the **Step by** amount. In this example, 1 (the previous starting number) + 2 (the step by amount) = 3 , so AccurioPro merges records #3 and #4 into the second page.

This process is repeated for each of the inserted pages.

Tutorial #3 – ID Badges

6) Review the results.

When AccurioPro completes merging all of the records into the ID Badges document, you should have a four-page document, each page containing two unique ID Badges. Your document should look like this:



Note all of the pages in this built document have been assigned by default Page Number 1. If you would prefer pages be numbered consecutively when running a **Build Document** merge session, change your AccurioPro **Reset Page Numbering** preference (**AccurioPro** ⇨ **Preferences**). However, we recommend this preference be turned on (checked) when using any of the AccurioPro Print Drivers or when using the InDesign “Automatic Page Numbering” feature to display a page number on a page in the document.

Merging in a Consecutive Order

The remainder of this tutorial concerns using AccurioPro to create merged output in a Consecutive Order (such as Raffle Tickets, Admission Tickets, or Promotional Postcards sorted by Zip Code for postal discounts). If you are not interested in these sorts of projects, you can skip the remainder of this tutorial.

Previously in this tutorial you learned how to assign sequence numbers to the Variable Links in multiple copies of content (in the ups) in a document so a merged page can display data from multiple, unique records. Setting up a document to merge multiple, unique records onto the same page can be used to produce output that is in a consecutive order, such as Raffle Tickets, Admission Tickets, Promotional Postcards sorted by Zip Code for postal discounts, or similar documents.

AccurioPro allows you to merge records consecutively in a Step-by-Step order or in a Cut & Stack order. Additionally, the Cut & Stack method provides several different modes. In the steps below you will first review how to merge in a Step-by-Step order. Following these steps, you will see how to merge in various Cut & Stack orders. For this tutorial, we will run a Build Document merge session so you can see the results quickly in a merged document. Choosing to create variable data print output would yield similar results.



You can use a **_RECORD_NUM_** Keyword Link in your document to add Record Numbers to your merged output. A record number is the "line number" where a record appears in the list of records in the data file. This provides an easy reference to indicate which records were merged into a page. For more information about Keyword Links, as mentioned above, see the **Keyword Links** manual.



If you would like to include a Consecutive Number in each merged up, you may use the AccurioPro "Consecutive Numbering" feature. This feature provides a **_CONSECUTIVE_NUMBER_** Keyword Link, which creates a consecutive number on-the-fly while merging. When your document is using this Keyword Link, a merge session will prompt you to indicate the starting number, whether you wish to add any prefix or suffix, and also if you wish to specify a number of place digits. This is helpful when you are using a data file that does not contain the consecutive numbers you wish to print. For more information about the Consecutive Number Keyword Link, see the **Keyword Links** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.



The AccurioPro "Consecutive Numbering" feature also provides a **Consecutive Numbering** utility, which allows you to create a single-field data file of consecutive numbers when the only variable data that you wish to merge is a consecutive number. For more information about the Consecutive Numbering utility, see the **AccurioPro VDP Utilities** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

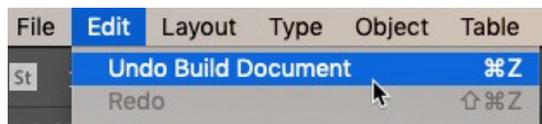
Use a Consecutive Step-by-Step Order

In general, assuming your data file is set up correctly, four simple steps are required to create Consecutive Step-by-Step merged output:

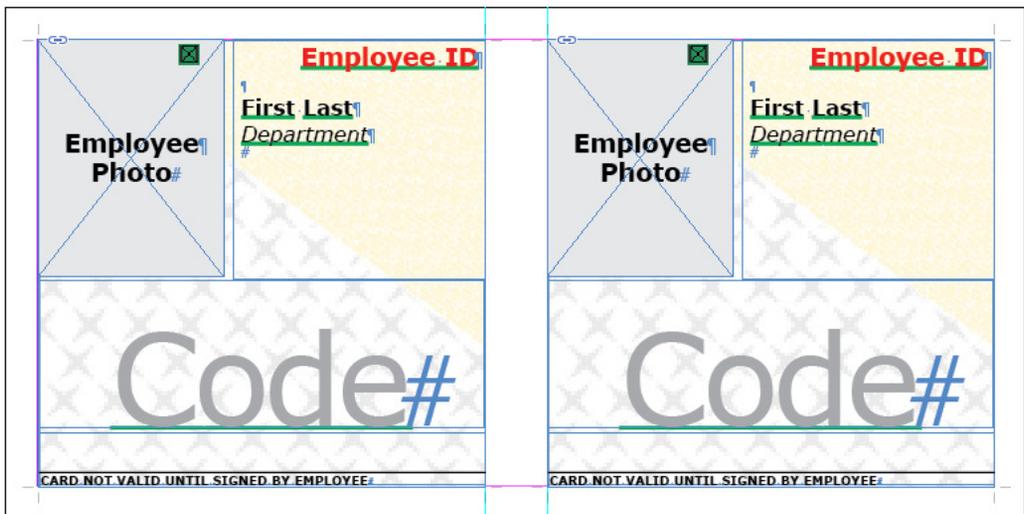
1) Assign Variable Links and then repeat the content to create a multi-up document.

Set up the document's page size to simulate the sheet of paper on which the job will be printed and place content in the document for one record. Then repeat this content for the number of records you wish to print on this sheet. Since this step has already been completed in this tutorial, you can simply return the document to its previous state (2-up with Links sequenced numbers 1 and 2). To do this, either open the InDesign **Edit** menu and select **Undo Build Document** or open the InDesign **File** menu and select **Revert**.

Before continuing with this tutorial, open the InDesign **Edit** menu now and select **Undo Build Document**, as shown in the picture below:



Your document should now look like this:



Each up in the ID Badges document contains an "Employee ID" Text Link that is linked to the "Employee ID" field in the data file, and the data file has been sorted by this field.

2) Assign consecutive sequence numbers to each up.

This step has also already been completed in this tutorial. As you recall, you can use **Change Sequence #** to assign a different consecutive sequence number (1, 2, 3, etc.) to each up (copy of content) or you can use **Sequence Page Items** to sequence automatically. For example, the multiple-up ID Badges document contains two ups. The Links in the first ID Badge in this document have been assigned sequence number 1, and the Links in the second ID Badge assigned sequence number 2.

3) Select Merge from the AccurioPro menu (or click Merge on the panel).

This opens the **AccurioPro** window.

4) Confirm the default Step by value.

The **Step by** box should automatically contain a number equal to the highest sequence number you've assigned to content in the document. For the ID Badges document, the **Step by** value should be the number 2. If you see a different number, close the **AccurioPro** window and reassign sequence numbers as described in a previous step.

5) Specify the Records for this merge session.

Before clicking **Start**, confirm which records you wish to merge. You can choose to merge all of the records or a shorter range of the records. If you choose **All** for this tutorial, you will produce a document (or print output) that contains data from all the records merged in a Step-by-Step consecutive order. If you specify a **Range**, your output will contain only the records within this range and these records will have been merged in a Step-by-Step consecutive order.

For this tutorial, let's select **All** for the records for this merge session.

Before continuing, also confirm there is a check in the **Skip Header Row** box.

6) Select an appropriate Merge Action.

For this tutorial, select **Build Document**.

7) Select Options that are appropriate for your document.

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

8) Click Start and, if prompted for the data file, select an appropriate file.

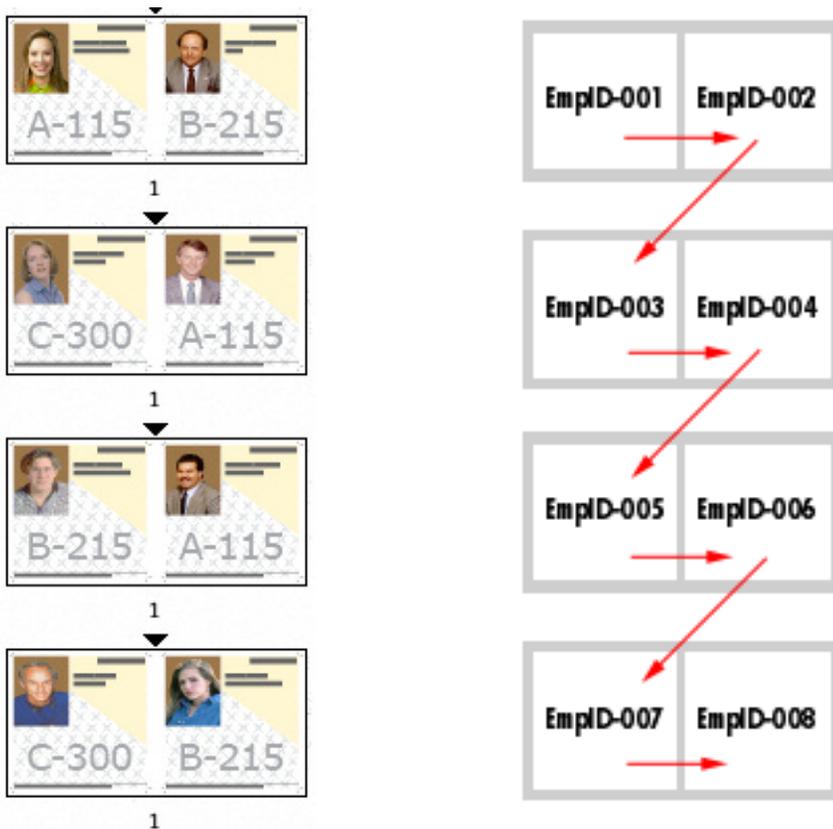
Select the "ID Badges.txt" data file for this tutorial. This will start the merge session. **AccurioPro** will merge your specified set of records into the ID Badges document in a Consecutive Step-by-Step order, as evidenced by the "Employee ID" number by which the records are ordered in the data file.

9) Review the results.

When complete, since you chose to merge all 8 records into a 2-up document, you will have 4 pages, and each of these pages will contain data from two consecutive records.

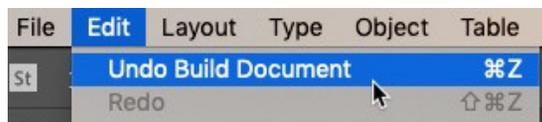
Tutorial #3 – ID Badges

A picture of the four merged pages is shown below. We've also added a diagram that shows just the "Employee ID" number for each Badge in the merged document:



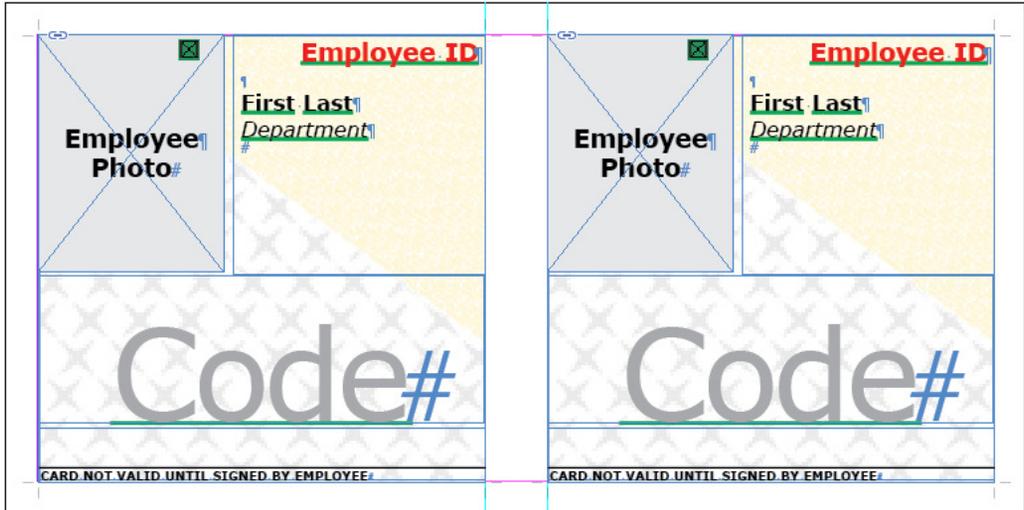
When using **Build Document**, once the merge session has ended, do not save the document in its merged state if you wish to merge this document again. Instead, use **Save As** to save it as a new document, or open the InDesign **Edit** menu and select **Undo Build Document** if you do not need to save these results.

Before continuing with this tutorial, open the InDesign **Edit** menu now and select **Undo Build Document**, as shown in the picture below:



Tutorial #3 – ID Badges

Your document should now look like this:



Use a Consecutive Cut & Stack Order

In the “real world” of commercial printing, the Consecutive Step-by-Step ID Badges you just created are not arranged efficiently. When these 2-up sheets are printed, cut, and stacked to create the eight individual ID Badges, one stack of badges (those in the left-hand column above) will contain all the odd-numbered badges, and the other stack (the right-hand column) will contain all the even-numbered ones.

Imagine if the print run actually contained hundreds or thousands of ID Badges (or numbered Raffle Tickets, or serialized Coupons, etc.) and it was critical that they be delivered as numerically-ordered stacks of individual badges. It would not be pretty. You can avoid this situation by creating merged output that will be in a consecutively-numbered order after cutting and stacking. To facilitate this, AccurioPro provides several Cut & Stack modes (**Cut & Stack**, **Stack Range**, and **Stack Subset**), which are each described below.

Merge All of the Records in the Cut & Stack Mode

Choose the **Cut & Stack** mode when merging all records in the data file. This is the mode that will normally be used when first running a Cut & Stack job. For example, you can use this mode to merge all of the records from this tutorial’s 8-record data file into the 2-up, single-page ID Badges document. In this example, cutting the printed pages would create two stacks of four badges each. The first stack would contain the pages for records 1 – 4, and the second stack the pages for records 5 – 8.

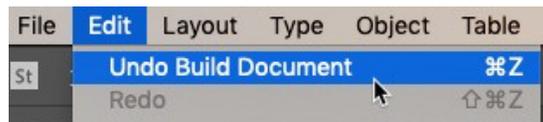
Tutorial #3 – ID Badges

To apply the Cut & Stack mode to the ID Badges document to produce merged output that can be printed, cut, and stacked in numerical order by “Employee ID” number, follow the steps below:

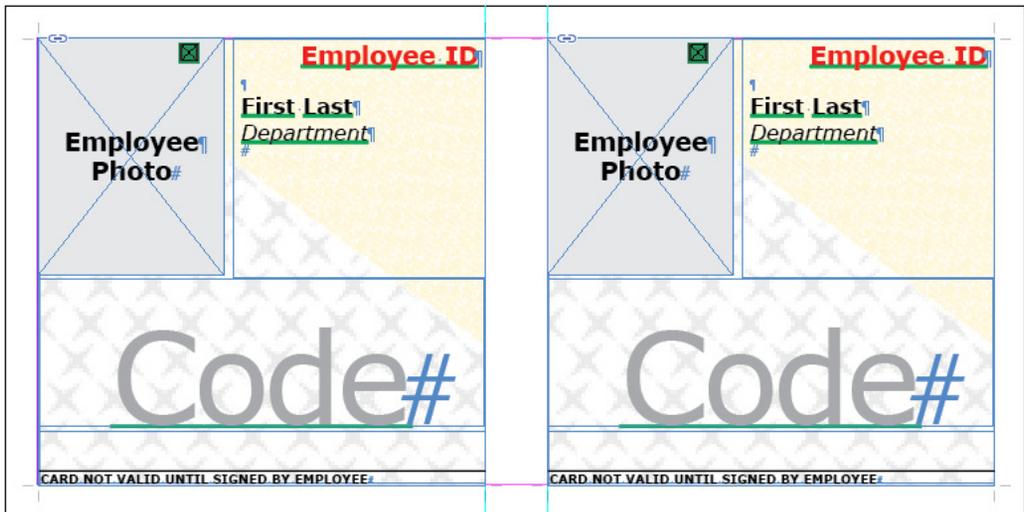
1) Assign Variable Links and then repeat the content to create a multi-up document.

As described in the previous set of steps, set up the document’s page size to simulate the sheet of paper on which the job will be printed and place content in the document for one record. Then repeat this content for the number of records you wish to print on this sheet. Since this step has already been completed in this tutorial, you can simply return the document to its previous state (2-up with Links sequenced numbers 1 and 2). To do this, either open the InDesign **Edit** menu and select **Undo Build Document** or open the InDesign **File** menu and select **Revert**.

Before continuing with this tutorial, if your tutorial document contains more than one page or if its links are displaying merged data, then open the InDesign **Edit** menu now and select **Undo Build Document**, as shown in the picture below:



This will return your document to its previous state (one page, 2-up). Your document should now look like this:



2) Assign consecutive sequence numbers to each up.

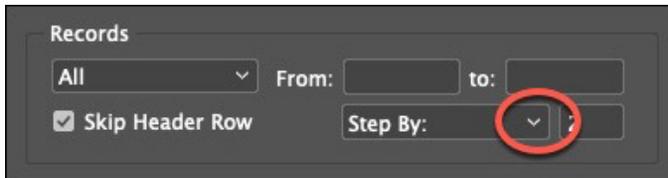
This step has also already been completed in this tutorial. Note the setup of a document for any Cut & Stack mode is similar to the setup of a document for a Step-by-Step merge: assign consecutive sequence numbers to each copy of content in the document. For example, the Links in the first ID Badge in this document have been assigned sequence number 1, and the Links in the second ID Badge assigned sequence number 2.

3) Select Merge from the AccurioPro menu (or click Merge on the panel).

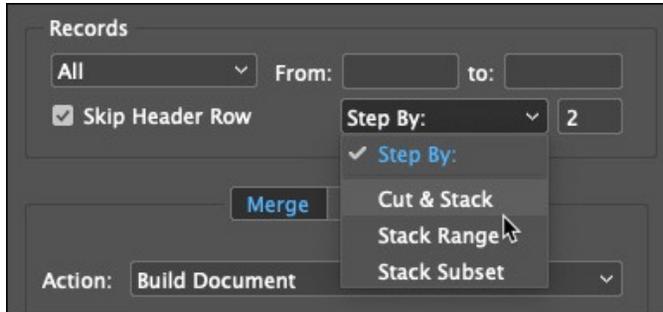
This opens the **AccurioPro** window.

4) In the Records box, open the Sequence Mode popup menu and select Cut & Stack.

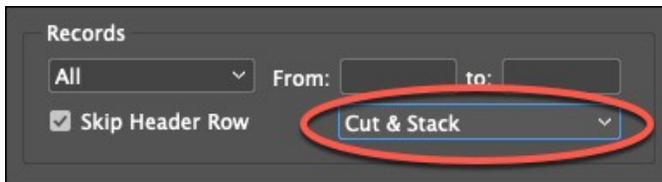
To select **Cut & Stack** for the **Records**, first note that **Step by** is displayed by a popup menu for the Sequence Mode. Click the Sequence Mode popup button, shown circled below, to see the list of Sequence Modes:



Then, select **Cut & Stack** from the list, as shown below:



Note when you select any of the Cut & Stack modes, the box for the Step by value will not be visible since AccurioPro sets it automatically, as shown in the picture below:



5) Specify the Records for this merge session.

Note that **All** is the only available selection for a Cut & Stack merge session. A Cut & Stack session will produce a document (or print output) that contains data from all the records merged in a Cut & Stack consecutive order. Later sections in this tutorial will demonstrate how to merge a shorter range of records in a Cut & Stack mode.

For this example, confirm **All** is the default selection for the **Records**. Also, confirm there is a check in the **Skip Header Row** box.

6) Select an appropriate Merge Action.

For this tutorial, select **Build Document**.

7) Select Options that are appropriate for your document.

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

8) Click Start and, if prompted for the data file, select an appropriate file.

Select the “ID Badges.txt” data file for this tutorial. This will start the merge session. AccurioPro will merge your specified set of records into the ID Badges document. As AccurioPro merges data into the document, AccurioPro determines for each page the appropriate Starting Record Number and appropriate Record Numbers for its companion records, based upon the type of Cut & Stack mode that has been selected, populating the ID Badges accordingly.

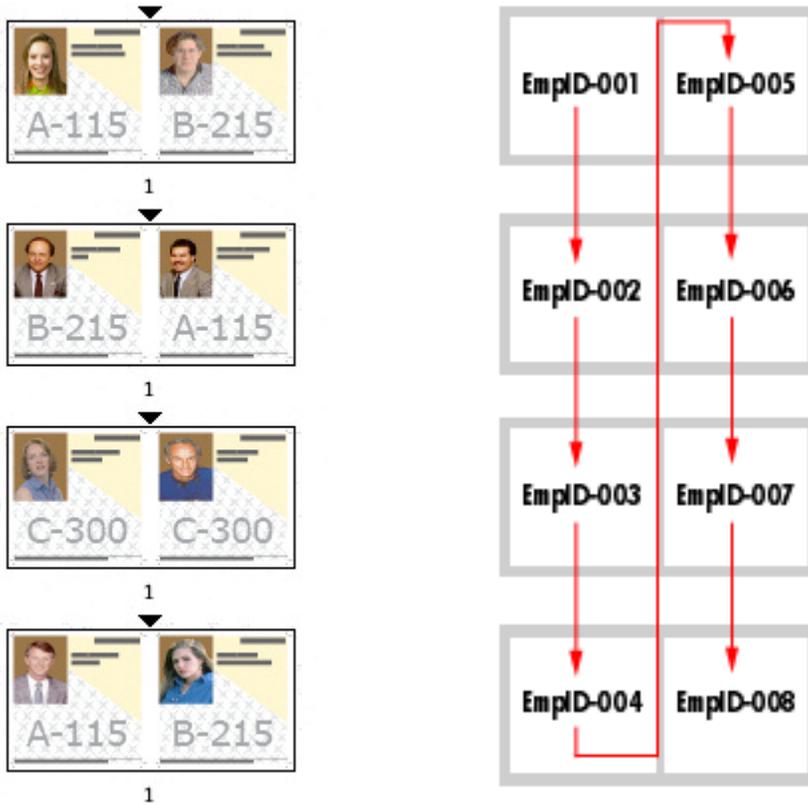
9) Review the results.

When complete, since you chose to merge all 8 records into a 2-up built document, you should have a four-page document, each page containing two unique ID Badges just as before. However, since AccurioPro used the Cut & Stack mode, the ordering is different.

As you can see, when these 2-up layouts are printed, cut, and stacked (to create the eight individual badges), the first stack — those in the left-hand column above — will contain the badges for Employee IDs 001 through 004 in numerical order. The second stack will contain the badges for Employee IDs 005 through 008.

Tutorial #3 – ID Badges

The first stack can be placed on top of the second stack, boxed, and delivered in complete numerical order, as shown below:



When using **Build Document**, once the merge session has ended, do not save the document in its merged state if you wish to merge this document again. Instead, use **Save As** to save it as a new document, or open the InDesign **Edit** menu and select **Undo Build Document** if you do not need to save these results.

Merge a Range of Records in the Stack Range Mode

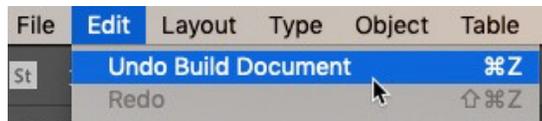
Choose the Stack Range mode when merging a range of records to replace pages that have been previously printed using the Cut & Stack mode, but not yet cut. For example, let's assume the first two pages of the previous Cut & Stack merge session, which has been printed but not yet cut, need to be reprinted. It will be important that the same records are merged into each page as before.

In this example, the first page should contain data from records 1 and 5, while the second page should contain data from records 2 and 6. To accomplish this, use the Stack Range mode. This mode will reprint the first two pages with the same records as before so that they can replace the previous two pages that needed to be reprinted.

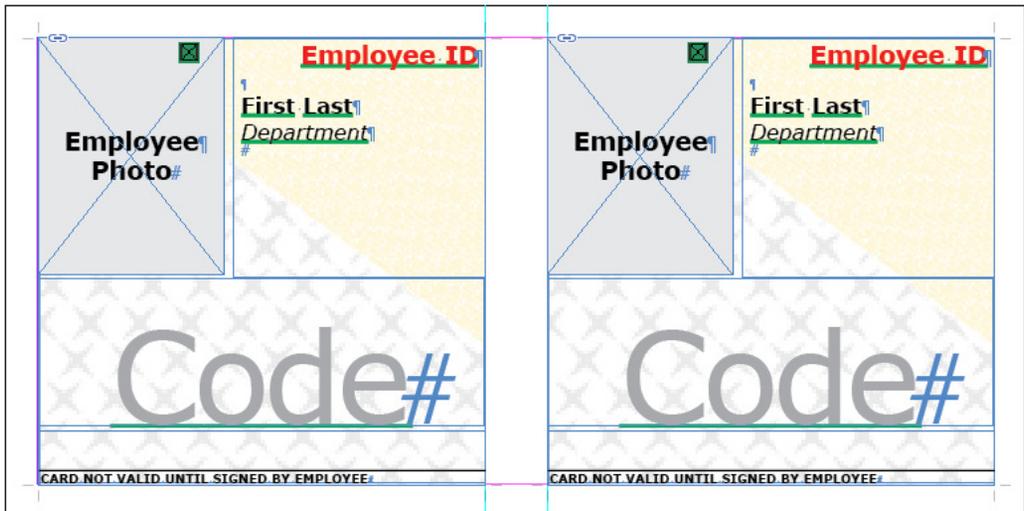
Follow the steps below to see this example:

1) Undo the previous **Build Document** by applying the InDesign **Undo** command.

Before continuing with this tutorial, if your tutorial document contains more than one page or if its links are displaying merged data, then open the InDesign **Edit** menu now and select **Undo Build Document**, as shown in the picture below:

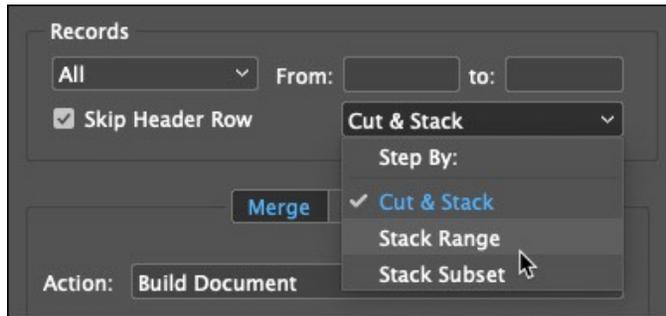


This will return your document to its previous state (one page, 2-up with Links sequenced numbers 1 and 2). Your document should now look like this:



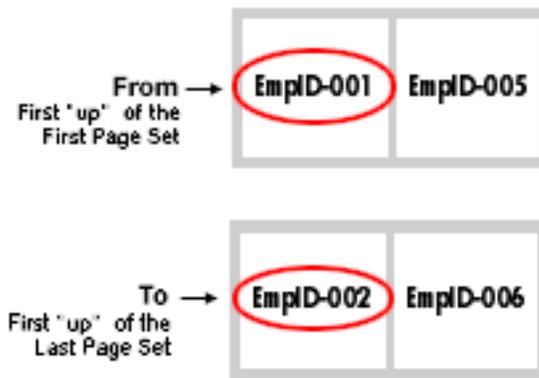
2) Select **Merge** from the **AccurioPro** menu (or click **Merge** on the panel).

3) In the **Records** box, open the **Sequence Mode** popup menu and select **Stack Range**.

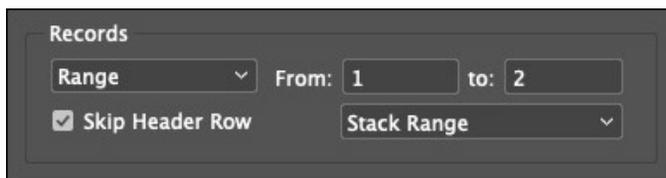


4) Specify the **Records** for this merge session.

Confirm **Range** is selected in the Records box. For the range, the “From” record should be the record for the first up in the first page set. The “To” record should be the record for the first up in the last page set. For this example, to reprint the first two pages, use **From: 1 To: 2**.



Also, confirm there is a check in the **Skip Header Row** box. Your **Records** settings should now look like the settings shown in the picture below:



5) Select an appropriate **Merge Action**.

For this tutorial, select **Build Document**.

6) **Select Options that are appropriate for your document.**

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

7) **Click Start and, if prompted for the data file, select an appropriate file.**

Select the “ID Badges.txt” data file for this tutorial. This will start the merge session.

8) **Review the results.**

When complete, since you chose to merge a stack range of two records into a 2-up built document, you should have a two-page document, each page containing two unique ID Badges for a Cut & Stack process, just as before. These 2-up layouts are ready to replace their corresponding pages in the previous Cut & Stack output before it is cut and stacked, as shown below:



When using **Build Document**, once the merge session has ended, do not save the document in its merged state if you wish to merge this document again. Instead, use **Save As** to save it as a new document, or open the InDesign **Edit** menu and select **Undo Build Document** if you do not need to save these results.



Another way to determine a record range for the **Stack Range** mode is to use the consecutive numbers of the Page Sets (the variations of the document) that you wish to reprint. For the example above, the first two Page Sets of the job need to be reprinted, starting with Page Set Number 1 (which contains the data from record number 1) and Page Set Number 2 (which contains the data from record number 2), so the range of records for the **Stack Range** should be **From: 1 To: 2**.



If you would like to merge one range of records at a time, then cut and stack all of the merged pages for all of the records (the entire data file) at the same time, use the **Stack Range** mode.

Merge a Range of Records in the Stack Subset Mode

Choose the Stack Subset mode when merging a subset of the records in the data file to replace pages that have already been printed, cut, and stacked. For example, let's assume the previous Cut & Stack output for all eight records in the data file has been printed, cut, and stacked. The stack contains eight ID Badges, one for each record, in order from 1 to 8.

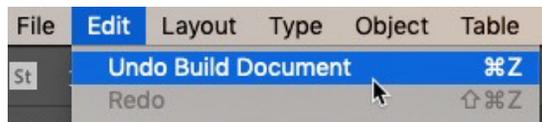
Then misfortune strikes and the first three badges are spoiled. New badges for records 1 through 3 need to be reprinted. It will be important that the first three records are reprinted in an order that can be cut and stacked to replace the three spoiled badges.

To accomplish this, use the Stack Subset mode. This mode can be used in this example to merge the first three records in a Cut & Stack mode into pages that can be cut and stacked in sequential order to replace the three spoiled badges in the finished stack.

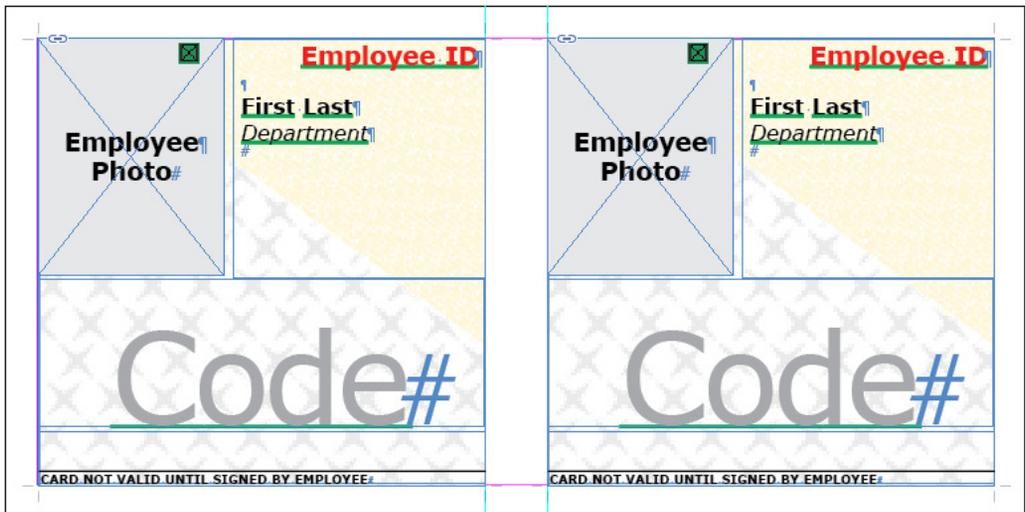
Follow the steps below to see this example:

1) Undo the previous Build Document by applying the InDesign Undo command.

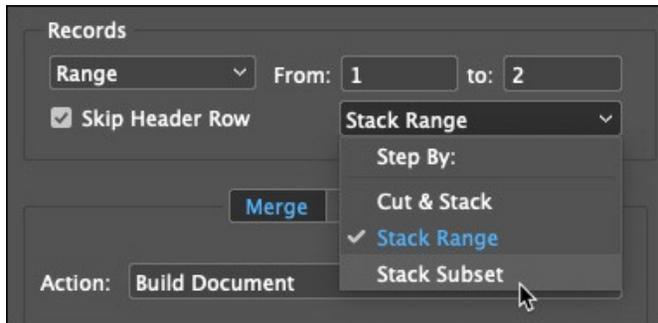
Before continuing with this tutorial, if your tutorial document contains more than one page or if its links are displaying merged data, then open the InDesign **Edit** menu now and select **Undo Build Document**, as shown in the picture below:



This will return your document to its previous state (one page, 2-up with Links sequenced numbers 1 and 2). Your document should now look like this:



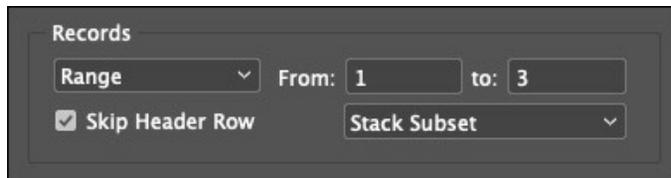
- 2) Select **Merge** from the **AccurioPro** menu (or click **Merge** on the panel).
- 3) In the **Records** box, open the **Sequence Mode** popup menu and select **Stack Subset**.



- 4) Specify the **Records** for this merge session.

Confirm **Range** is selected in the Records box. The “From” record should be the first record to be printed. The “To” record should be the last record to be printed.

For this example, to reprint the first three records, use **From: 1 To: 3**. Also, confirm there is a check in the **Skip Header Row** box. Your **Records** settings should now look like the settings shown in the picture below:



- 5) Select an appropriate **Merge Action**.
For this tutorial, select **Build Document**.
- 6) Select **Options** that are appropriate for your document.
To see options for this merge session, click the **Options** button. For this tutorial, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.
- 7) Click **Start** and, if prompted for the data file, select an appropriate file.
Select the “ID Badges.txt” data file for this tutorial. This will start the merge session.

8) Review the results.

When complete, since you chose to merge a stack subset of three records into a 2-up built document, you should have a two-page document, each page containing two unique badges, but sequenced differently than on pages from the other Cut & Stack mode. The document now contains the content for the first three badges that were spoiled. These new sheets are now ready to be printed, cut and stacked to replace the first three badges in the original stack, as shown below:



When using **Build Document**, once the merge session has ended, do not save the document in its merged state if you wish to merge this document again. Instead, use **Save As** to save it as a new document, or open the InDesign **Edit** menu and select **Undo Build Document** if you do not need to save these results.



As you can see in the picture above, any remaining ups that are not assigned a record are filled by AccurioPro with "SP", indicating that the end of the stack range was encountered. Similarly, if you run a Step-By-Step merge session, AccurioPro fills extra ups with an "EOF!" message. "SP" and "EOF!" ups will always be at the end once the content has been printed, cut, and stacked, which makes it easy to remove them when you are ready to do so.



Each Cut & Stack mode requires a different type of record selection since each mode serves a different purpose. For the **Stack Subset** mode, a record range is the only available selection. Start the range with the record number of the first record to be merged, and end the range with the record number of the last record to be merged. AccurioPro will merge only records within this range, cutting and stacking all the records that are within this specified subset.



If you would like to merge, print, cut, and stack one range of records at a time, use the **Stack Subset** mode.

Coming Up

That's it for the ID Badges tutorial. You saw how to set up sequencing in multiple-up layouts. Then, you used **Build Document** to merge all records into a single document to create a Step-by-Step job and to create a Cut & Stack job.

In the next tutorial, you will see how to apply variable layouts when merging by using the optional GroupPicture™ module for AccurioPro. By using GroupPicture, you can save a group of one or more elements on a page as a separate file, and then merge that group onto a page as a variable element. This allows you to merge variable groups in a document.