Form Letter Tutorial

Part Three — Premium Features

This tutorial, the third and final part of the Form Letter tutorial, covers three features that are available only for **AccurioPro® VDP Premium**. These features include Frame Rules, Page Rules, and Article Links. You will learn how to completely change the entire layout of a page based upon the City that the letter is being sent to. In addition, you will learn how to change the color of frames based upon a rule, and also how to import external text files (articles) as variable elements.

Topics covered in this tutorial:

- ✔ Setting up Article Variable Links
- ✔ Placing Article Variable Links in a document
- ✔ Previewing a document with an Article Link
- ✔ Using a Frame Rule to change the color of a Frame
- ✔ Using a Page Rule to conditionally select a different Master Page to use
- ✔ Viewing Frame and Page Rule assignments
- ✔ Creating Variable InDesign File Output with Page and Frame Rules

AccurioPro
Variable Data

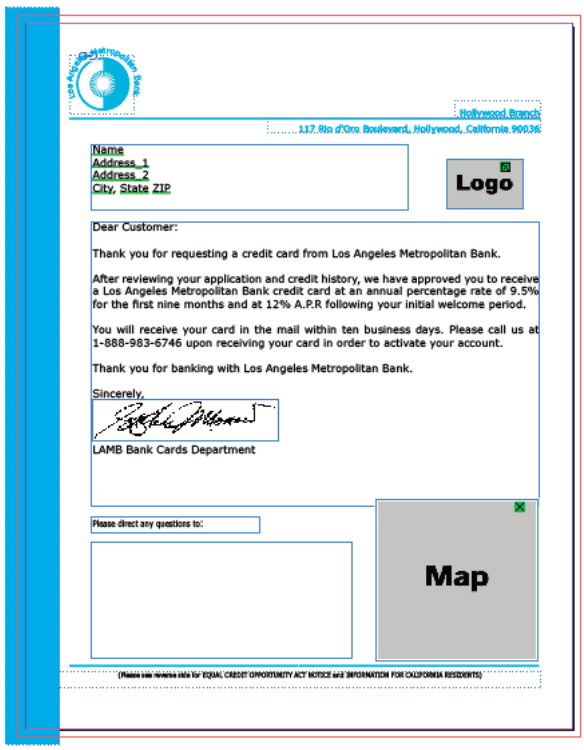
Overview

In this third and final part of the Form Letter tutorial, you will learn how to use more advanced AccurioPro features, including Frame Rules, Page Rules, and Article Links. Frame Rules allow you to delete or style InDesign frames based on a rule. Page Rules let you set up a merge session to skip pages or to apply different master pages. Article Links can be used to import the contents of external text-based files.

Note that all of these features are available with AccurioPro VDP Premium. If you are running a different edition of AccurioPro, such as AccurioPro VDP Essential, then you should skip this tutorial and proceed to **Tutorial #2**.

The Sample Document

The name of the sample document for this tutorial is “Form Letter Pro.indd” and it exists in the “1) Form Letter” Tutorial Files folder. The document is similar to the personalized form letter used in **Tutorial #1b**. The sample document looks like this:



The Sample Database File

The sample data file for this tutorial is the same tab-separated text file used in **Tutorial #1a**. The file is named "Form Letter.txt" and it 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

For part of this tutorial, we will be discussing the **Contact** field of the data file. This field holds the name of an external text file that we will import as a variable element. You will create a link using AccurioPro that will import this data as an "Article Link". With an Article Link, the entire *content* of the external text file will be imported as a variable. This feature is useful when you have multi-paragraph, and possibly styled text, that you have stored in an external file. When the content of the file is imported by AccurioPro, it picks up the styling attributes of the text that is being replaced in the document.

In this example, there are three separate Contact files, all of which contain multiple lines of contact/address information. The data is stored in standard Text format. Although this data does not include any particular styling information, Article Links do support this feature. For example, you can include in the text file Adobe InDesign Tags or Rich Text that contains style information. When the content of one of these styled text files is imported, all of the styling will be retained.

*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

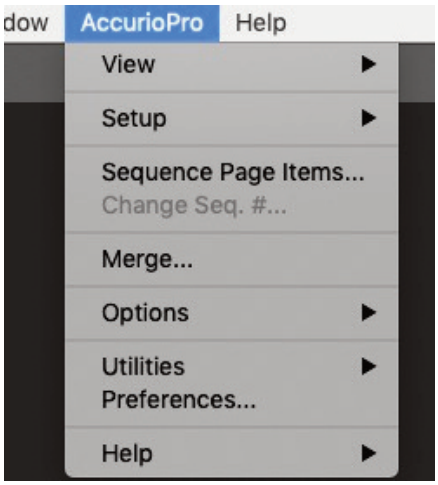
This tutorial assumes that you have completed **Tutorial #1a**. If you have not completed it, we recommend you do so before continuing.

Tutorial #1b

This tutorial assumes that you have completed **Tutorial #1b**. 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.



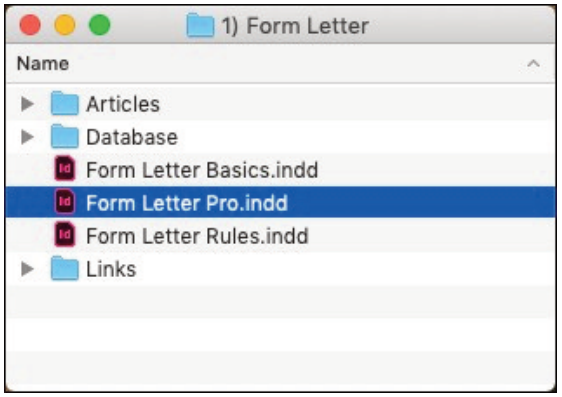
Open the Sample Document

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

1) Select Open from the File menu.

2) Select the file "Form Letter Pro.indd".

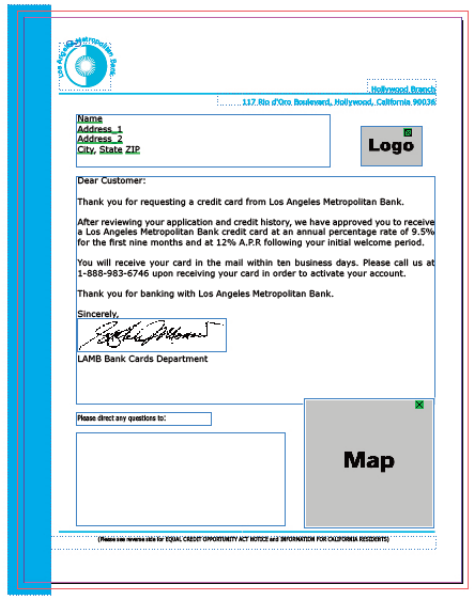
The name of the sample document is "Form Letter Pro.indd" and it exists in the "1) Form Letter" folder, which is inside the "AccurioPro Tutorial Files" folder.



3) Click the Open button 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 the same Variable Links and Link Rules that you used in **Tutorial #1a** and **Tutorial #1b** 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 "1) Form Letter (Pro)" is missing, click **Yes**. The **Database Definitions** window will open and you will see "1) Form Letter Pro" is the document's **Current DDF**. Click **OK** to close the **Database Definitions** window. Either one of these DDFs—"Document" or "1) Form Letter (Pro)"—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.*

Using Article Variable Links

About Article Links

Tutorial #1a introduced you to two Variable Link Types: Text and Picture. The Premium edition of the software provides another Variable Link Type: **Article**.

A Variable Link whose Type is Article will place the *content* of a text file in a document. Like a Picture Link, the text file is referenced by its file name, or by its full path, in a field in the data file. The name of the file to be merged can also be set by a Link Rule.

For the Article 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 Text Links in InDesign Tagged Text files that will be imported by an Article Frame Link.

An Article Variable Link can be assigned to an entire text frame or to a range of text, as described below:

Article Frame Link

An Article Frame Link is a text frame whose entire content will be replaced by variable data. When your job requires replacing all of the content in a frame with the contents of a text file, use an Article Frame Link. Also, if your text file for the Article Link is an InDesign Tagged Text File that contains Variable Text Links, use an Article Frame Link.

Article Text Link

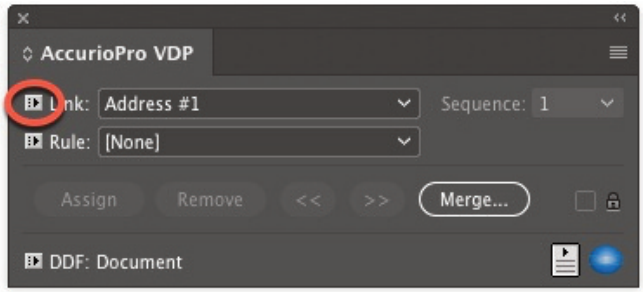
An Article Text Link is a range of text that will be replaced by the contents of a text file. The contents of the text file will replace only the Article Text Link's range of text. Any other text in the frame that is not inside the Article Text Link will remain in the frame.

Set up an Article Variable Link

In the following set of steps, you will review the settings for a Variable Article Link:

1) **Open the AccurioPro panel if it is not already open.**
   To open the panel, select **View** ⇨ **AccurioPro Panel** from the **AccurioPro** menu.

2) **On the left edge of the panel, click the Edit Link button next to the word "Link".**
   Clicking the **Edit Link** button opens the **Variable Links** window.

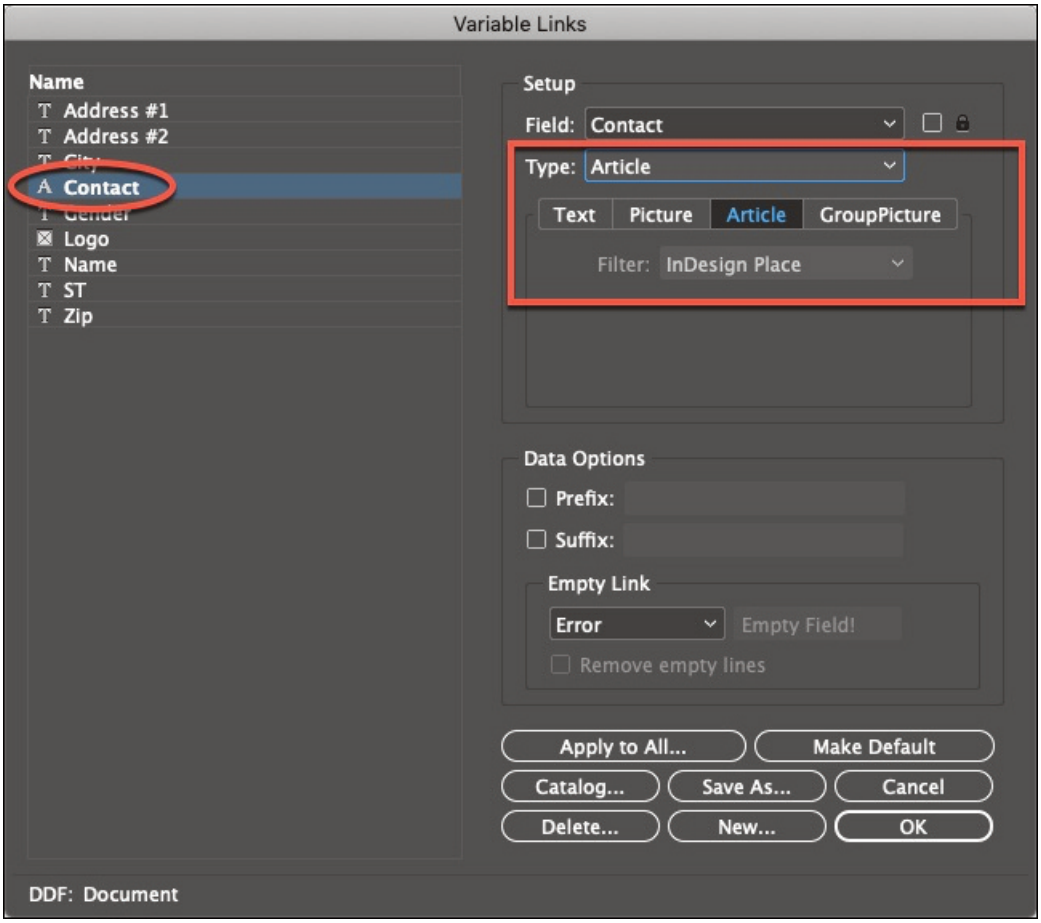


3) **Click on Contact in the list of Variable Links to select it.**
   This displays the settings for the parameters for the **Contact** Link on the right side of the window. Some parameters are common to all Variable Links, while other parameters are specific to the Article Link Type. For a description of all Variable Link parameters, see **Tutorial #1a**.

4) **Select Article from the Type popup menu.**
   When a Link's Type is set to Article, then the Link will treat data as the file name of a text file to be imported into a text frame. There is one Link Type parameter specific to Articles, as described below:

   Filter: Note this parameter is automatically set to **InDesign Place** and dimmed by default for Article Variable Links. When an Article Link merges a text file, you will see the same results that you would see if you used the InDesign *Place* command to place this text file in the frame.

5) The "Contact" Link on the Variable Links window should now look like this.



6) Click OK to close the window.

Place an Article Frame Link in the Document

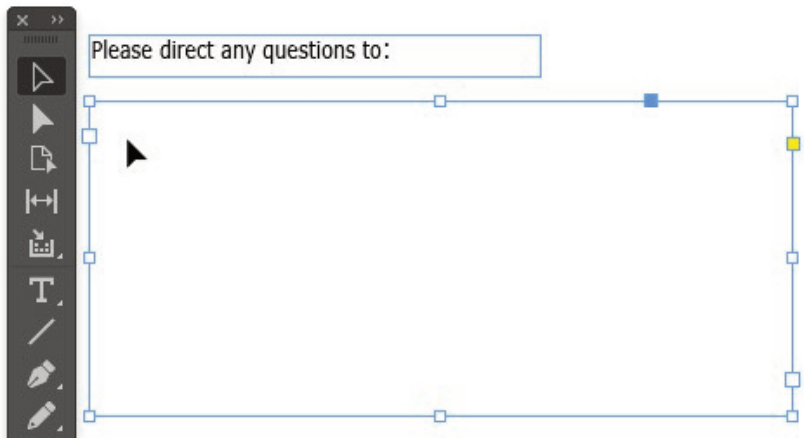
As explained earlier, Frame Links are text frames that have been tagged with a Text Variable Link or with an Article Variable Link. When a Frame Link is merged, the entire content of the linked frame is completely replaced by the merged data.

In this tutorial, you will assign the "Contact" Article Variable Link to a text frame. The "Contact" Link is an Article Link that will import content from text files whose file names are in the "Contact" field of the data file. These text files contain the contact information for certain employees of the bank.

Follow the steps below to place the Article Link in the document:

1) Select the InDesign Selection tool.

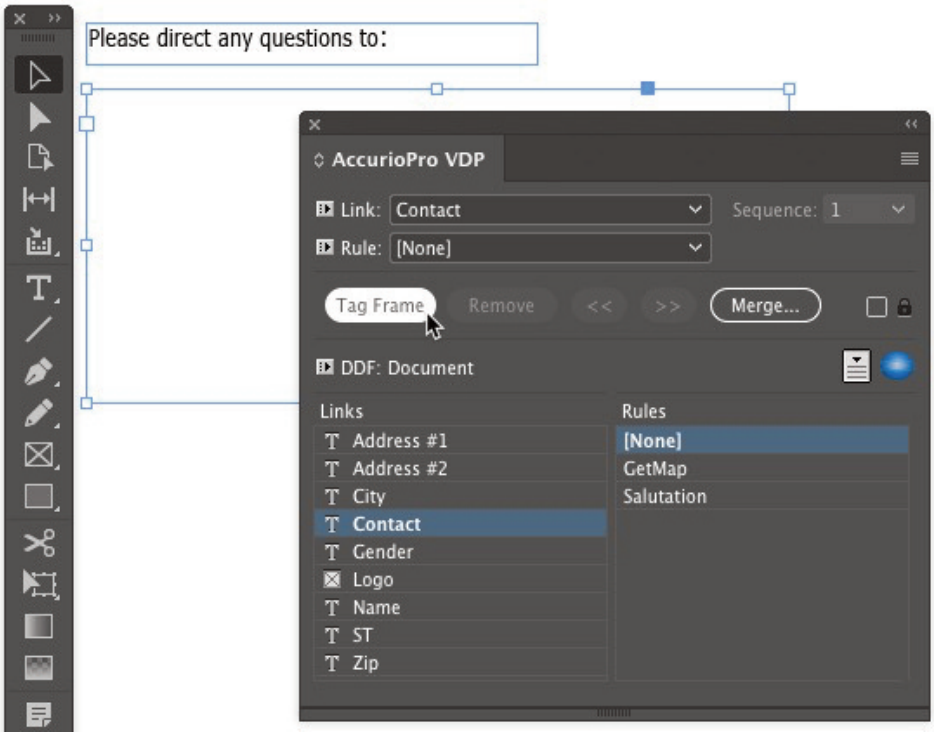
2) Click on the text frame under the "Please direct any questions to:" text frame.
The text frame is near the bottom left corner of the page.



3) Select Contact from the Link popup menu on the AccurioPro panel.
Note that the **Assign** button on the panel now reads **Tag Frame** to indicate you have selected a text frame for the Link.

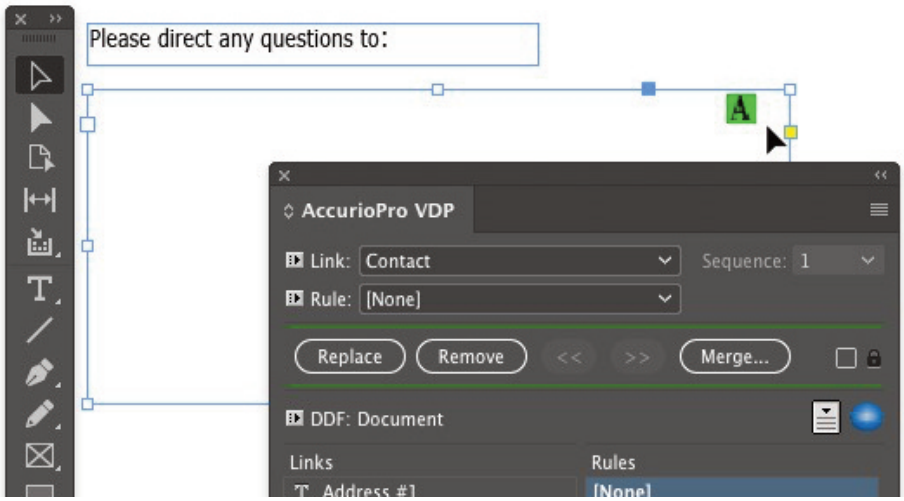
4) Click the Tag Frame button.

The **Tag Frame** button establishes a Frame Link, as shown below:



5) The AccurioPro 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, if your InDesign application is set to **Show Frame Edges**, a small non-printing green icon will be displayed to mark the Frame Link, as shown below:



6) Select Save from the File menu to save the changes in this document.

Merge a Document with an Article Variable Link

You can run any type of merge session on a document that contains Article Links. For example, to preview merging all of the Links in the document, including the Article Link, run a **Data Preview**. You can also run a **Variable Link Report** to see information about all of the Links in the document, including an Article Link. The report will also indicate whether an Article Link is an Article Frame Link. Additionally, you can run a **Preflight Report** to confirm AccurioPro will be able to find all of the external files for this job, including the text files for the Article Link. When ready to produce output, you can run any **File** or **Print** merge session.

Preview a Document with an Article Link

To preview data, do the following:

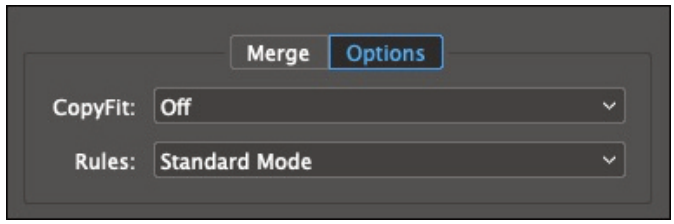
1) **Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).**

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.**

4) **Show the merge options on the window.**
To see options for this merge session, click the **Options** button.

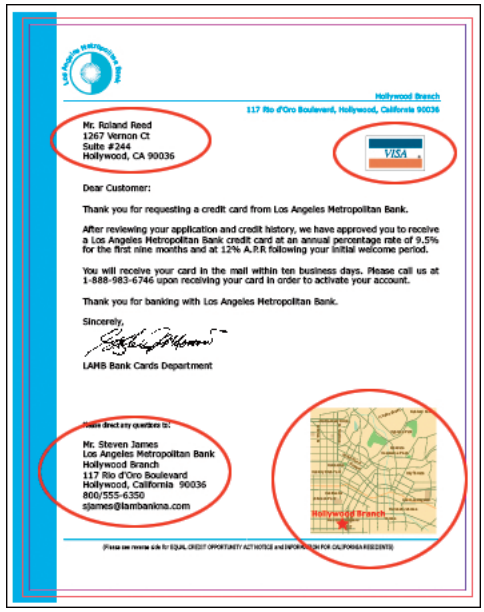
5) **For the Options, select Off for CopyFit, and select Standard Mode for Rules.**

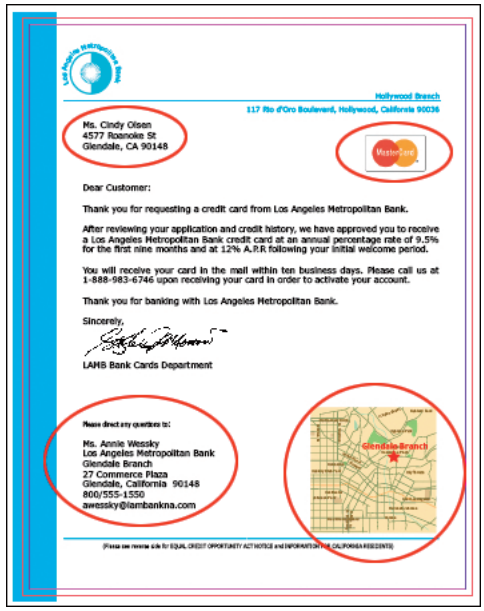


6) **Click the Start button and, if prompted for the data file, select "Form Letter. txt".**
The "Form Letter.txt" data file, described in **Tutorial #1a**, exists in the "1) Form Letter" Tutorial Files folder.

7) Preview merging records into the document.

As in the previous tutorials, **Data Preview** displays the data in the document. Note the Article Frame Link is merged with content from a text file. Also note the entire content of the frame has been completely replaced with the text from that text file. For example, the merged results for the first two records are shown below:





About Frame Rules and Page Rules

Tutorial #1b introduced you to one type of Rule, the Link Rule. The Premium edition of the AccurioPro software provides two additional Rule Types: Frame and Page.

Types of Rules

In the Premium edition of the software, there are three types of rules – Link, Frame, and Page. Each type of Rule has its own unique set of actions.

Link Rules - Covered in Tutorial #1b

Link Rules can be assigned to any Link in a document – Text Link, Text Frame Link, Picture Link, Article Link, or Article Frame Link. Use a Link Rule to modify the data that AccurioPro is merging into a Link. For example, you can set the data to a substitute value, set the data to be empty, get the data from a different Variable Link, add a prefix/suffix, or apply a paragraph/character style.

Frame Rules

Frame Rules can be assigned to any frame and not just frames that contain Links. In fact, you can assign a Frame Rule to any frame. Use a Frame Rule to modify the attributes of a frame or to delete a frame, based upon the conditions you set for the Rule. For example, set the color and shade for the frame's fill. A Frame Rule can also set the color, shade, and width of a frame's stroke.

Page Rules

Page rules can be assigned to any page in the document. Use a Page Rule to modify the content of a page when merging. For example, you can apply a specific master page while merging or omit a page from printing, all based upon the conditions you set for the Rule.

More Information about Rules

This tutorial provides a preliminary introduction to AccurioPro Rules. Complete details can be found in the **AccurioPro Rules** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

Using a Frame Rule

A Frame Rule lets you modify the attributes of any text frame or picture frame – the frame does not have to contain variable content. For example, you can use a Frame Rule to vary the fill color, fill shade, stroke color, stroke shade, and stroke width of any frame while merging. You can also have a Frame Rule delete a frame if you wish.

Create a Frame Rule

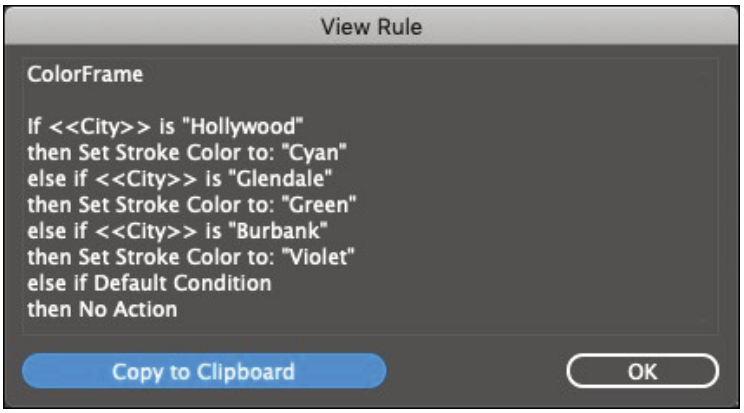
For this tutorial, we have already created the Frame Rule that we will use. If you want to create other Frame Rules, you can do so in a manner similar to the way you create a Link Rule. The only difference is that you need to be sure to choose **Frame** as the **Link Type** when you create the new rule, as shown below:

Once your new Frame Rule has been created, you can then set up, view and test your new Frame Rule in the same way that you set up, view and test a Link Rule, as described in Tutorial #1b. In fact, Frame Rules and Page Rules use the same setup for their Criteria as the Link Rules you learned about earlier. The main difference between these different Rule Types are the Actions that the Rules can perform.

*For a detailed description of the Actions that each Rule Type can apply, including Frame Rules, see the **AccurioPro Rules** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

View the "ColorFrame" Frame Rule

One of the rules that was created for this tutorial before you started working with it is the "ColorFrame" Frame Rule. The "ColorFrame" Frame Rule will color the stroke around the frame. The color will differ depending upon the "City" data, as shown below:

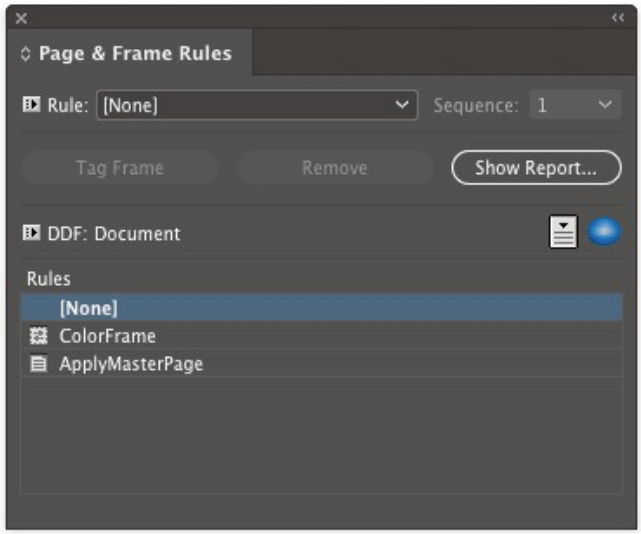


Assign the "ColorFrame" Rule to a Picture Frame

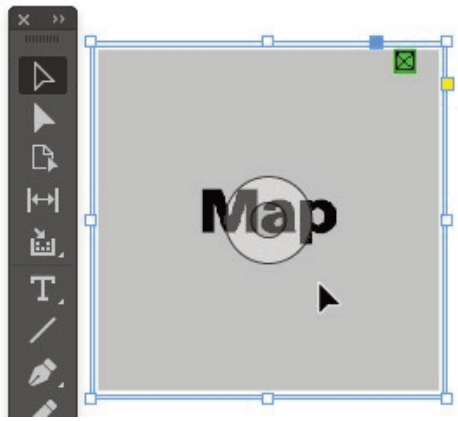
You can assign a Frame Rule to any text frame or picture frame, including frames that do not contain any Links. To assign Page and Frame Rules, you will need to use the **Page & Frame Rules** panel, instead of the main AccurioPro panel.

In the following steps, you will assign the "ColorFrame" Frame Rule to the "Map" picture frame that is near the bottom right corner of the page.

1) **Show the Page & Frame Rules panel if it is not already showing.**
   To show the **Page & Frame Rules** panel, open the **AccurioPro** menu and select **View ⇨ Rules Panel**. This opens the **Page & Frame Rules** panel, as shown below:



2) Use the InDesign Selection tool to click on the "Map" picture frame.
The map is near the bottom right corner of the page.

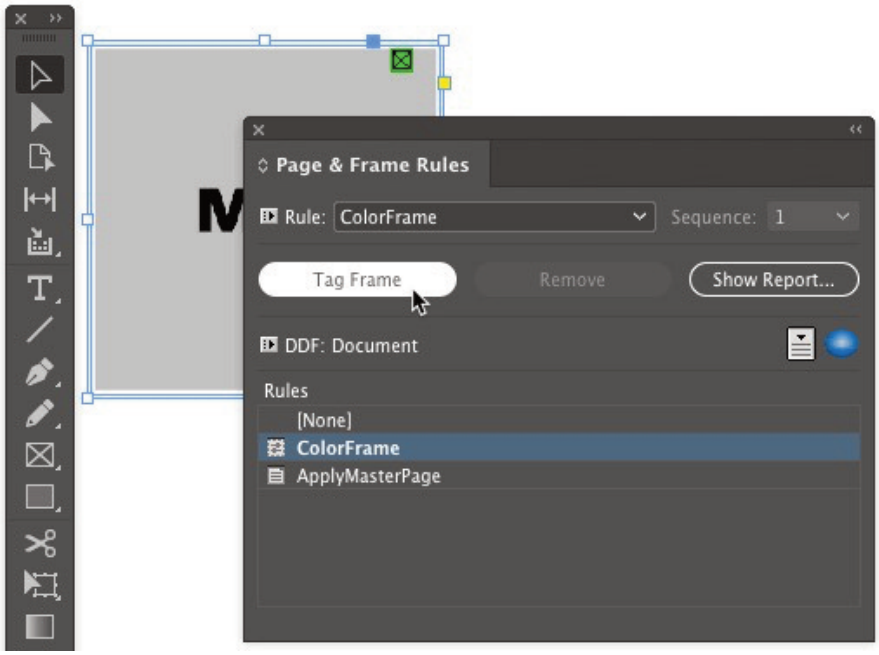


3) On the Page & Frame Rules panel, select ColorFrame from the Rule popup menu.

4) Confirm "1" is the Sequence number for this Frame Rule assignment.
Since this document merges only one record at a time, the sequence number should always be the number 1. For more information about sequence numbers, see **Tutorial #3**.

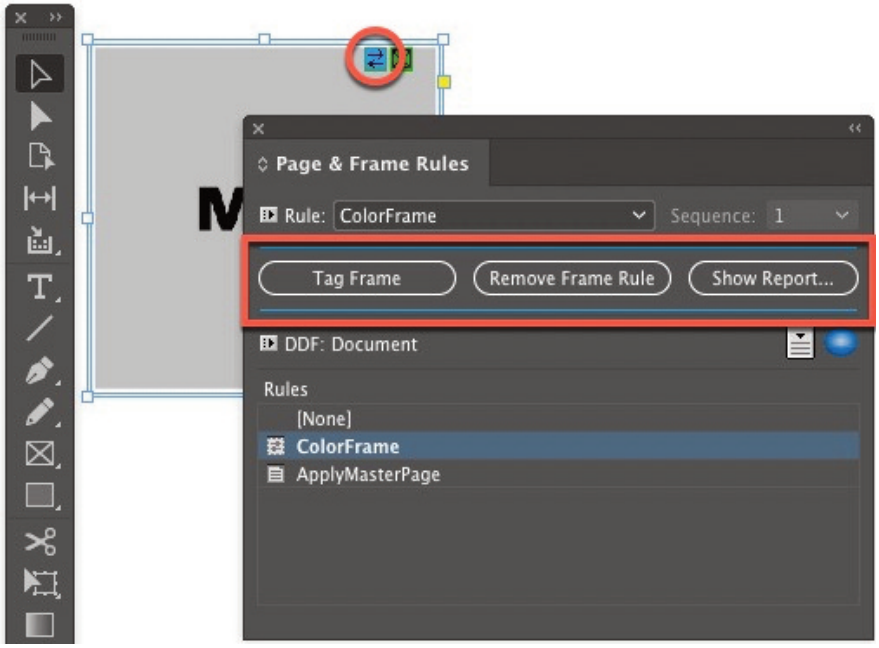
5) Click the Tag Frame button on the panel.

This assigns the "ColorFrame" Frame Rule to the picture frame, as shown below:



6) The Page & Frame Rules panel now displays blue bars.

If the Frame Rule was successfully assigned, then the panel should now display a set of blue bars above and below its row of buttons. Additionally, depending on the current view settings for your page layout application, a small non-printing blue icon may be displayed to mark the Frame Rule assignment, as shown below:



You can assign both a Link Rule and a Frame Rule to the same picture frame. For example, this picture frame has a Picture Link with a Link Rule assigned to it, as well as the Frame Rule.

7) Your Frame Rule assignment is now complete.

Next, you will assign a Page Rule to the page in this document.

Using a Page Rule

A Page Rule lets you modify the contents of an entire page based on the data being merged into the document. For example, you can use a Page Rule to apply different Master Pages (which can contain different sets Variable Links as well) or to omit a page from printing.

Create a Page Rule

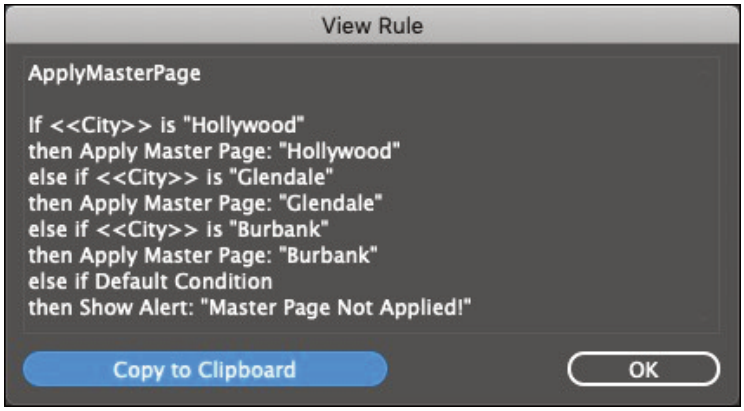
For this tutorial, we have already created the Page Rule that we will use. If you want to create other Page Rules, you can do so in a manner similar to the way you create a Link Rule or Frame Rule. The only difference is that you need to be sure to choose **Page** as the **Link Type** when you create the new rule, as shown below:

Once your new Page Rule has been created, you can then set up, view and test your new Page Rule in the same way that you set up, view and test a Link Rule, as described in Tutorial #1b. In fact, Frame Rules and Page Rules use the same setup for their Criteria as the Link Rules you learned about earlier. The main difference between these different Rule Types are the Actions that the Rules can perform.

*For a detailed description of the Actions that each Rule Type can apply, including Frame Rules, see the **AccurioPro Rules** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

View the "ApplyMasterPage" Page Rule

You can view and test a Page Rule in the same way that you can view and test a Link Rule or Frame Rule. Your new Page Rule is then ready for assignment to any page in your document. For example, one of the rules that was created for this tutorial's DDF before you started working with it is the "ApplyMasterPage" Page Rule. While merging, the "ApplyMasterPage" Rule will apply a master page based on the recipient's "City" data, as shown below:



Assign the "ApplyMasterPage" Rule to a Page

You can assign a Page Rule to any page in the document. In the following steps, you will assign the "ApplyMasterPage" Page Rule to the first page in this document:

1) **Show the Page & Frame Rules panel if it is not already showing.**
   To show the **Page & Frame Rules** panel, open the **AccurioPro** menu and select **View ⇨ Rules Panel**. This opens the **Page & Frame Rules** panel.

2) **Go to the page that requires the "ApplyMasterPage" Page Rule assignment.**
   In this case, the document has only one page. Confirm you are displaying that page.

3) **On the Page & Frame Rules panel, select ApplyMasterPage from the Rule popup menu.**

4) **Confirm the page number that is displayed on the Page & Frame Rules panel.**
   The panel displays a page number in parentheses on the **Tag Page** button to indicate which page will be tagged with the Page Rule.

5) **Confirm "1" is the Sequence number for this Page Rule assignment.**

6) Click the Tag Page button on the panel.

This assigns the "ApplyMasterPage" Page Rule to the first page, as shown below:

7) Select Save from the File menu to save the changes in this document.

You have finished assigning rules to the document. In the next set of steps, you will see how to confirm which rules are assigned to content in a document.

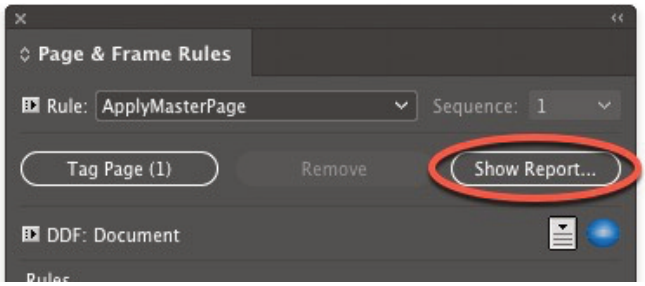
Viewing Rule Assignments

You can view which rules have been used in a document at any time. This allows you to confirm rule assignments before merging a document with its data.

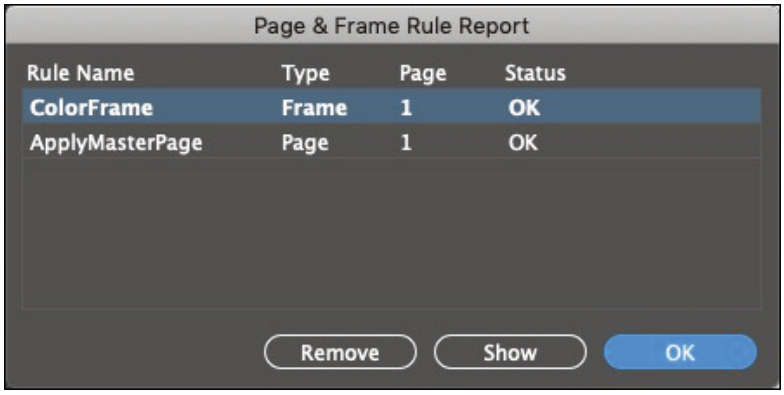
View a Page and Frame Rule Report

To see which Page and Frame Rules are assigned, show the **Page & Frame Rules** panel if it is not already showing, by selecting **View** ⇨ **Rules Panel** from the **AccurioPro** menu. Then, follow the steps below:

1) Click the Show Report button on the Page & Frame Rules panel.



2) Examine the list of Page Rule and Frame Rule assignments.
The **Page & Frame Rule Report** window displays information about each Page Rule and Frame Rule assignment in the document, as shown below:

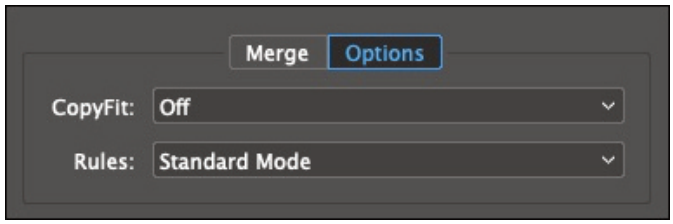


*To see the where the Rule is used in the document, select the entry in the list and then click the **Show** button. This will show you the Frame or Page that has been tagged. (For best results, zoom view of document page until width and height of page exceeds size of document window.)*

3) When done, click the OK button to close the Page & Frame Rule Report window.

Merging a Document with Rules

There are no special requirements for merging a document that contains Rules. The only thing you need to do is to be sure that **Rules Processing is enabled**. This is easy to do, as the option appears on the main **AccurioPro** window, as shown below:



To enable Rules Processing, choose either **Standard Mode** (as shown above) or **Interactive Mode**. This will ensure that your Rules are processed during the merge session. The difference between Standard and Interactive modes is discussed in a previous tutorial. Basically, Interactive Mode will prompt you to preview each rule as it is processed, and Standard Mode does not.

Any type of a merge session (**PDF**, **PPML**, **PostScript**, **Preview**, etc.) will process the Link, Frame or Page Rules that have been assigned to the document. For example, to preview how your Rules will behave during a merge, simply run a **Data Preview**, as discussed in previous tutorials. Additionally, you can run a **Preflight Report** to confirm your installation will be able to find all of the external files for this job, including any files that were imported by a Link Rule. When ready to produce output, you can select any **Print Driver** that you want to use. You can also use the **Build Document** feature to proof a few records if you wish. This function is described next.

Merge All Records into a Single Document

Instead of producing a PDF file, this time we will try something different. Let's merge all of the records to produce a multi-page Adobe InDesign document where you will be able to scan quickly to see the differences in the results due to Frame and Page Rule assignments.

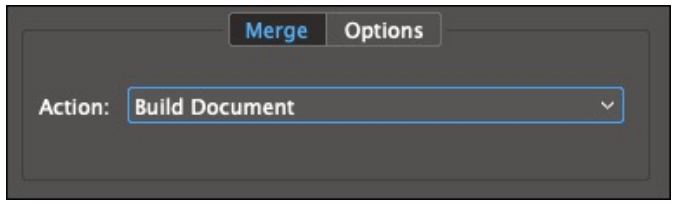
Note that this type of a merge is typically used only for Testing and Proofing purposes. This type of merge is not typically used for actual variable data output. We use it in this tutorial because it demonstrates clearly how the Page and Frame Rules get processed.

To merge all of the records into this document, do the following:

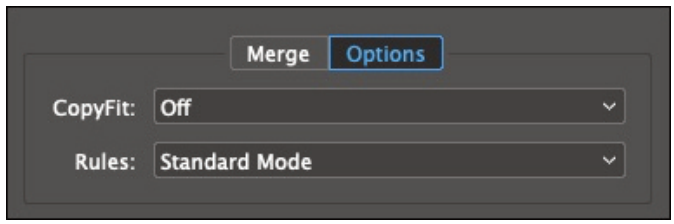
1) **Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).**

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



4) For the Options, select Off for CopyFit, and select Standard Mode for Rules.
Select **Standard Mode** for Rules if you have not already done so. The settings for the **Options** should now look like the settings in the picture below:

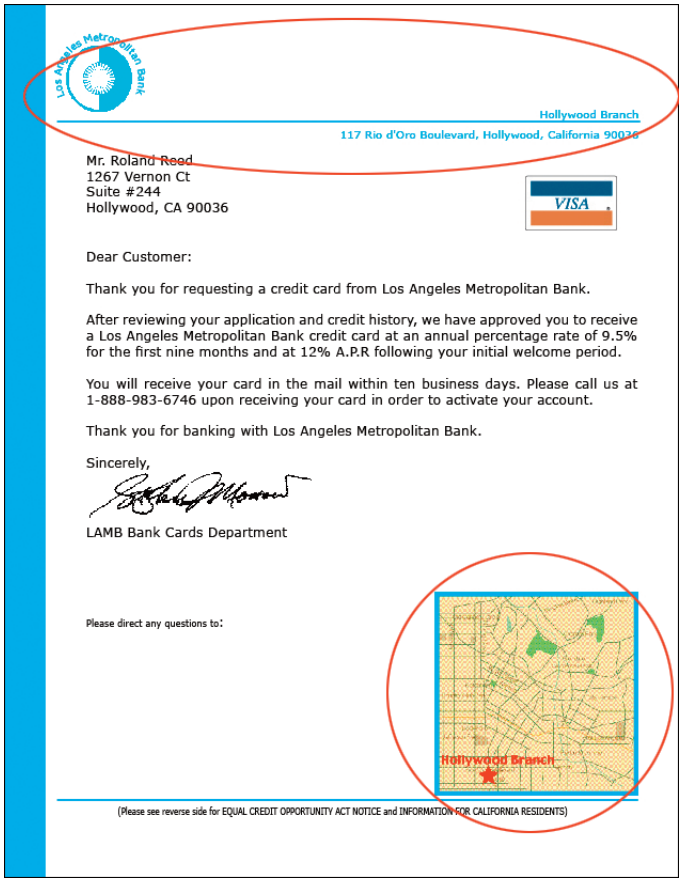


5) Click the Start button.
This starts the merge session. AccurioPro inserts the new pages in the document and then merges the appropriate data into each page.

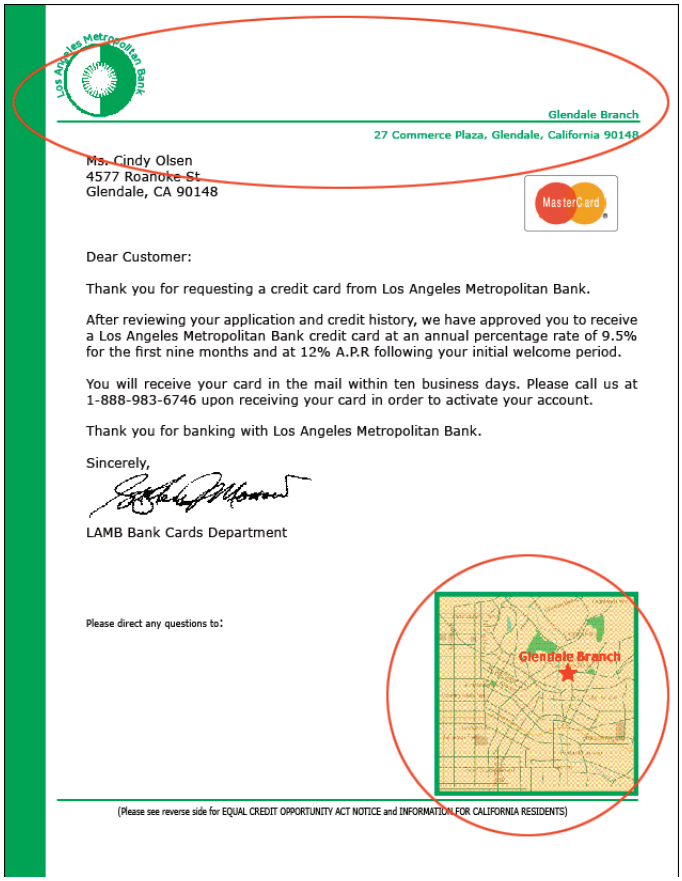
6) Examine the resulting document.
Once the merge process has finished, the sample document will now contain five pages, one for each of the five records in the data file. You should notice the following results of the Rules assigned in this tutorial:

- The "ApplyMasterPage" Page Rule has selected the appropriate master page (letterhead) depending upon the city where the recipient lives.
- The "ColorFrame" Frame Rule has selected a corresponding color for the frame of the "Map" picture frame.
- The "GetMap" Link Rule has imported the map that corresponds to the city where the recipient lives.
- The "Salutation" Link Rule has added the appropriate salutation before the name of each recipient in the Address Block.

For example, see the merged results of the first record below (the top circle shows the Master Page elements; the bottom circle shows the Colored Frame that was applied):



See the merged results of the second record below (the top circle shows different Master Page elements; the bottom circle shows a different Colored Frame):



So you can see by this example that Frame and Page rules provide some very powerful features. You can completely change the entire page layout of a variable piece based on Rules, and you can modify or delete any frame on the page using Rules as well.

Coming Up

That's it for the "Form Letter (Premium Features)" tutorial, which has covered setting up and using an Article Link to merge content from text files named by a data record and previewing the merged results. This tutorial also covered setting up rules to apply conditional processing to frames and pages in a document when merging. You have seen how to set up and assign two different types of rules – Frame and Page. You then merged data into a document that has assigned Frame Rules and Page Rules to produce a multi-page document. For complete details on Rules, see the **AccurioPro Rules** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

The next tutorial, **Tutorial #2**, discusses how to perform "longest line" testing to avoid an overflow in variable text frames in merged results and how to use the CopyFit module with AccurioPro to automate fitting text while merging. You will also learn how to create a USPS Intelligent Mail Bar Code Link.