▼INDESIGN TUTORIAL

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Quickly Customize Layouts with Data Merge

As a photographer, digital workflow consists of Lightroom and Photoshop; however, when it comes to publishing—even simple postcards—InDesign is a powerful application that all creatives should add to their software toolbox.

▶ In the June 2011 issue of *Photoshop User* (p. 98), Margie Rosenstein provided users the steps for creating beautiful templates for portrait clients with InDesign. This issue, we tackle the task of repeating that design over and over again for multiple clients. Imagine using a single postcard design that customizes the images and text for each of your clients. To accomplish this task, we'll be using the Data Merge panel in InDesign.

STEP ONE: We'll start by creating a new document. Choose File>New>Document. The default settings for an 8.5x11" page with .5" Margins will work for our postcard layout. For the purpose of this tutorial, we'll be adding the front and back of our postcard on a single page. (Depending on printer settings or your print service provider, the front and back may be two separate documents.)

STEP TWO: Before we can merge data, we need to create our layout. Grab the Rectangle Frame tool (F) and click on the page. In the resulting dialog, set the Width to 7.5" and the Height to 4.75". Use the Selection tool (V) to align the graphic frame to the top-left margin of the page.

STEP THREE: We'll fill the graphic frame with a CMYK swatch. Find the Swatches panel (Window>Color>Swatches), and select the Cyan swatch. Grab the Tint control and set the value to 20%.

STEP FOUR: Our next step is to generate a Live Caption for our graphic frame. Choose Object>Captions>Caption Setup and select the Description option in the Metadata drop-down menu for our postcard, and click OK. Once the options are set, select the empty graphic frame and choose Object>Captions>Generate Live Caption. Don't be alarmed if the caption reads "No intersecting link," as we haven't added the image yet. In our example, the caption has been moved to the top-right corner and the text has been formatted (Marker Felt font, 36 pt, Paper swatch) along with a drop shadow (Object>Effects>Drop Shadow).

STEP FIVE: Next, we'll add two more graphic frames for a total of three photographs on the front of our postcard. Here, the graphic frames are stacked vertically with rounded corners

Step One
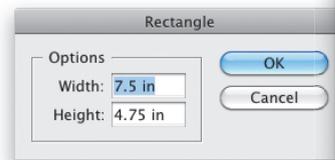
Step Two
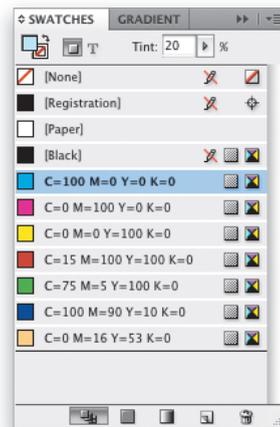
Step Three
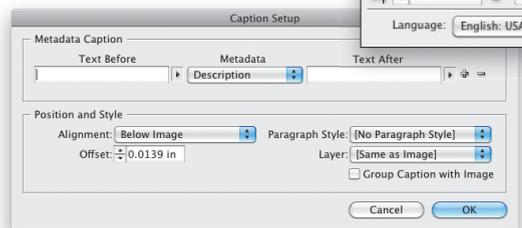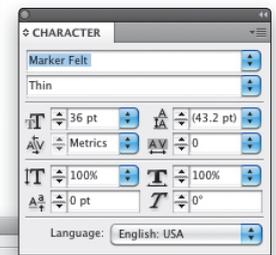
Step Four

and a 3-pt white stroke. You can activate the Live Corners feature in InDesign by selecting the frame and clicking the yellow box on the right side of the frame. Then, click-and-drag the yellow diamond at the top-right corner to set the corner radius. Use the Stroke panel (Window>Stroke) to add a stroke to the frames. You can also add more text elements using the Type tool (T). In this case we added a faux studio name placed at the bottom of the frame.

STEP SIX: Now that we've finished the layout on the front of the postcard, let's create the text layout for the back. Grab the Type tool and drag out a text frame 7.5" by 4.75" (you can use the Selection tool or Control panel to resize the frame if necessary). Align the text frame to the bottom-left margin.

STEP SEVEN: This is another important design step. Certain static text elements (e.g., client's name, child's name) will be replaced later with live data during our data merge. The intent for this step is to choose the fonts, colors, and other design elements you wish to use on the back of the card. In our example, we've listed a return address, a brief salutation to the client, our contact number, logo, and the customer address. (Take advantage of character and paragraph properties to control formatting of your text. Notice the use of margin controls [Right and Left Indents] in the Paragraph panel for exact placement of text in this example.)

STEP EIGHT: Now that the layout is complete, it's time to create the data file. Our postcard uses three images and the customer information. In this tutorial, the image chosen as the background is saved as a grayscale image so it can be tinted in InDesign. You'll also want to make sure that the background image has the correct metadata for the Live Caption that you set up in Step Four. In Photoshop, go to File>File Info, click on the Description tab, and then type the info in the Description field. Make note of where you save the images, as you'll need the file path information for the data file.

A text editor (e.g., Notepad for Windows) is all that's needed to create the data file. You can choose to use Excel for data entry, but the data file has to be a plain text file (.txt). It's best to use a tab-delimited file to organize the data (this means each column of data is separated with a tab character). The first row sets the field names for the data with each field being tab-separated.

Note: The "@" symbol should precede field names that denote image data. For the image to properly display, it's important to list the complete file path to the image. In the first example figure, note the difference in writing file paths between Mac and Windows computers. In the second example figure, note how the data seems to run together even though it's tab-delimited.
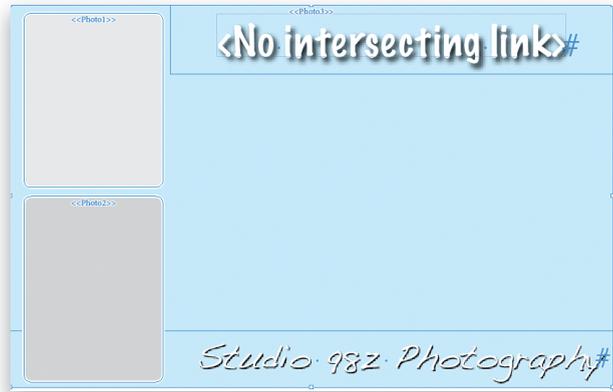
Step Five
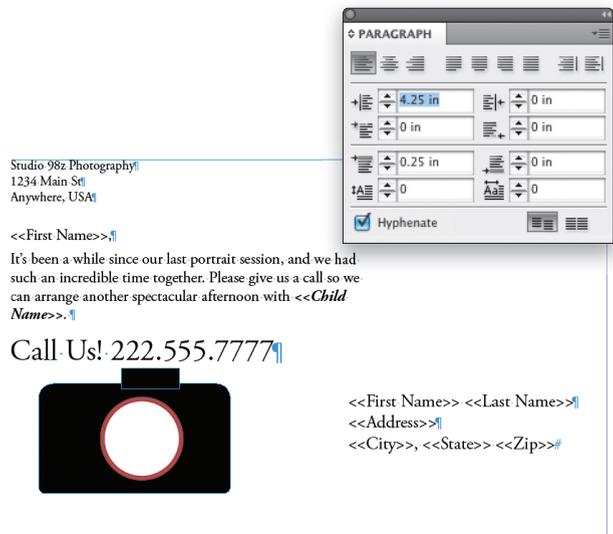
Step Seven
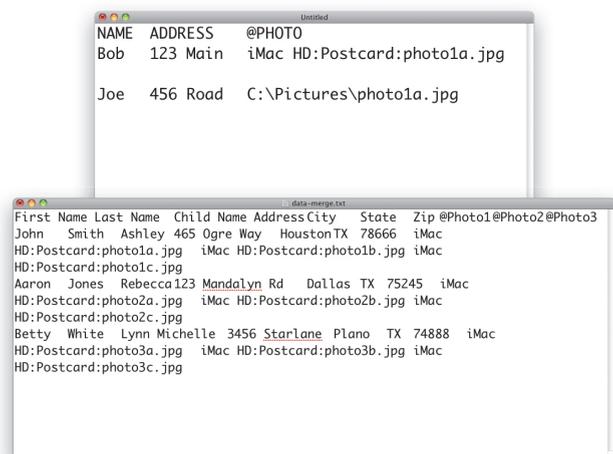
Step Eight

STEP NINE: The data file is ready to go; now it's time to connect it to our InDesign document. Choose Window> Utilities>Data Merge to open the panel. Steps to connect the data file are displayed directly in the panel. Go to the panel's flyout menu and choose Select Data Source and navigate to the text file you just created. Once selected, the panel will display all the available data fields. Start by dragging the Image fields on top of the graphic frames. Make sure the Preview option is checked in the Data Merge panel to see the images you've placed.

In our example, you can see the images don't fit perfectly in the frames. Rather than set the fitting property now, we'll wait until the next steps when we merge the data to address those details.

STEP TEN: After adding the three images to the front of the card, the next step is to add the text fields. Adding the text fields can be done by highlighting the words that need to be replaced and clicking the field value to add in the Data Merge panel.

Once all the fields have been added to the front and back of the postcard, you can preview all the records by clicking the controls at the bottom of the Data Merge panel.

STEP ELEVEN: Click the Create Merged Document icon or select the option from the Data Merge flyout menu. In the dialog, we'll choose All Records and select Multiple Records in the Records per Document Page drop-down menu. You can then check the option to Preview Multiple Record Layout.

At the top of the dialog, select the Options tab. Here, we'll address Fitting and choose the option to Fill Frames Proportionally. You can also choose Center in Frame as an option. Once again, you can preview all the records by clicking the controls at the bottom of the dialog.

STEP TWELVE: After reviewing the records, click the OK button to create the new document. Each layout will appear on its own page. The InDesign document can be printed or turned into a PDF for print vendor output.

As you've just learned, InDesign provides some powerful features that not only automate repetitive tasks, but also create personalized products for your clients. ■
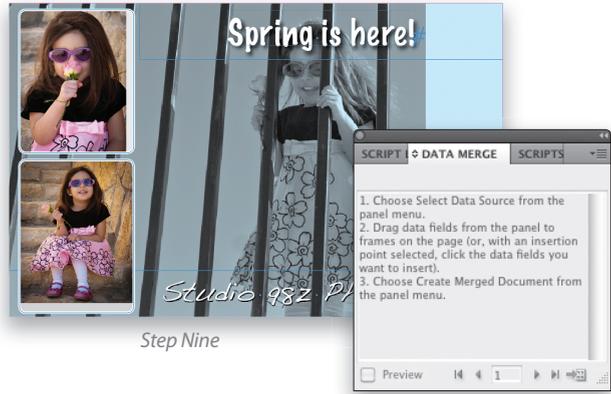
Step Nine

Step Eleven

Step Twelve