

Presented and written by: François Gintzburger
Perth InDesign User Group Meeting
Wednesday 11 February 2009

Data Merge

From wedding invites to ID cards and to personalised mailing, Data Merge is an InDesign feature that will allow you to generate such documents in no time at all.

To use Data Merge you need 2 things: your client's data base and an InDesign file. I have included some sample files as examples.

Client's Data

Ask your client to supply you with a spread sheet of all the information. This can be done in any spreadsheet application: Excel, Numbers, OpenOffice, NeoOffice, etc...

You will need to convert this spreadsheet to a **CSV** (comma separated value) file or a text tab delimited file. I strongly recommend to use CSV files. Your client might even be able to provide you directly with such files.

The first line of the file will be the names of each field: make sure they mean something to you. In my examples (the wedding files) there is only one field: Name.

InDesign file

Identify on the file what will be variable (what will change for each document). I suggest to move these elements to a **separate layer**.

Meet the Data Merge palette

Go to **Window > Automation** and choose **Data Merge**. If no data file has been chosen, the palette guides you through what to do.

- **Select the data source:** go to the palette's fly out menu and choose Select Data Source
- **Assign the data to the areas in your layout:** you can select the placeholder or place your text cursor where you want the field to be and click on the data field name required in the palette. You can also drag and drop the data to where ever you need it to be placed.

- You can choose to **preview** how the data flows by ticking the preview button of the palette or choosing preview in the fly out menu.
- If all is fine, choose **Create Merged Document** from the fly out menu (or use the button in the palette).

Creating the merged document

In the records panel you can choose whether to merge all records or a single record. You can also choose to generate a single or multiple records per page.

Once again you can preview your work. If all is good, click on **OK** and let Data Merge do the work for you. That's it! All done! As easy as that...

To create multiple records on a page, you need to generate a page big enough to contain n-up of your document (see the place cards example). Do not put anything outside of the document (i.e. no bleed, it must be included in your imposition). If you have several elements in your original layout, Indesign and Data Merge considers them as a group and will repeat all of the across the page.

On the records tab, choose **Multiple Records** in the drop down menu. Then go to the Multiple Records Tab. You can choose margins, layout, spacing...

Working with graphic elements

Data Merge can even use graphic elements! You need to "hack" the CSV file. To do that open it up in TextEdit (MacOS) or NotePad (Windows) and add a @ sign in front of the name of the field related to the graphic elements. The @ sign tells Data Merge that the data contained in that field relates to a graphic element.

If your graphic elements are in a Link folder at the same directory of your Indesign file, the file name is enough in the spreadsheet. Otherwise you will have to specify the path for each file.

Numbering

You can use Data Merge to generate numbered documents: raffle tickets, job sheets, etc... I have attached some files to play around with.