

# XM Pie Training

## EDU Tutorial - Part 2 - Basic VDP job

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A CareAR Company

one to one in one™



# Notices

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U.S. Patent 6948115, 7406194, 7548338, 7757169 and pending patents. JP Patent 4406364B and pending patents.

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# About this tutorial

Congratulations on your selection of XMPie uCreate Print for your Variable Data Print (VDP) needs.

The XMPie EDU Tutorial is a series of tutorials that together will provide a thorough introduction to VDP techniques using Adobe InDesign and XMPie uCreate Print.

The EDU Tutorial is divided into different sections to enable you to quickly jump forward or backward to find help to learn different aspects of the product functionality:

- Part 1 - Project planning, preparation and gathering
  - Understanding the project
  - Checking the available data
  - Checking the available image and text file assets
  - Planning what content objects are needed to achieve the desired outcome
- Part 2 - Basic VDP job
  - Linking to your data source
  - Placing Text and Graphic Content objects into the InDesign document
  - Managing text copy fitting and dynamic graphic fitting
  - Creating your first VDP output
- Part 3 - Using rules and logic
  - Introduction to the Rule editor
  - Functions and how to use them
  - Creating rule or logic
- Part 4 - Introducing more content object types
  - Creating and using Visibility, Style and Text File content objects
- Part 5 - Barcodes
  - Creating and using print barcodes
- Part 6 - ulmage regular font effects
  - Creating a font-based ulmage template with Adobe Photoshop
  - Creating a ulmage Document Package
  - Optimization techniques
- Part 7 - ulmage image font effects
  - Creating an image-font-based ulmage template with Adobe Photoshop
  - Creating a ulmage Document Package
  - Optimization techniques
- Part 8 - Using the ulmage package in uCreate Print
  - Linking InDesign and uCreate Print to the ulmage package
- Part 9 - Table Content objects and uChart
  - Linking to secondary data sources
  - Table Content objects
  - Adding uChart to the document
- Part 10 - Working with uProduce
  - Creating Campaign- and Document-packages
  - Uploading packages to the uProduce Dashboard
  - Processing the document on the server
  - Working with Circle

## Target audience

This tutorial is designed to provide basic information, step-by-step instructions, and sample materials for self-learning. Should you require more visual assistance, there are accompanying videos available at <http://campus.xmpie.com/s/uCreatePrint>.

At the end of this Tutorial, there are review questions, and suggested exercises to build on the skills outlined in the tutorial.

The content is designed for customers who have bought XMPie uDirect or PersonalEffect and wish to learn how to use XMPie's uCreate Print product to create document templates for VDP production.

It is expected that the reader will already have a basic working knowledge of Adobe InDesign. If not, it is recommended to first complete some basic InDesign training for example, courses with Adobe: <https://helpx.adobe.com/indesign/tutorials.html> or a 3rd party organization such as Lynda.com: <https://www.lynda.com/InDesign-training-tutorials/233-0.html>

## Document structure

This tutorial uses the following icons to draw your attention to special key items to help you identify the information you are looking for when completing the tutorial.



### **Additional information and notes**

This is an example of additional information and notes.



### **NOTE: Special attention and warning**

This is an example of special attention and warning.

Sections of the tutorial which require hands on action will be highlighted with the following icon.



### **Step by step instructions**

This is an example of step by step instructions.

## Reference materials

- uCreate Print User Guide (Access via the online help link in the Dynamic Content menu).
- uCreate Print Tutorial videos (Access at <http://campus.xmpie.com/s/uCreatePrint>)

## Prerequisites

This tutorial assumes that you:

- Are familiar with Adobe InDesign,
- have a basic understanding of Excel or text-based data, and
- have a basic understanding of the aims of Variable Data Print (VDP).
- have Adobe InDesign CC2023 installed (trial version is acceptable)

# Module 1:

## Introduction and overview

In this module, we download and unzip the tutorial resource files. We will investigate the provided files, and get ready to start work in InDesign. This overview will also describe what we want to achieve in this sample tutorial.

### Duration

About 10 minutes

### Objectives

After completing this module, you will be able to:

- Unzip and open a sample InDesign file provided by a colleague or customer, and
- Describe the text and images in the document that will be made dynamic.

### Procedure

#### Install uCreate Print

If you have already installed uCreate Print, you can skip over this step. This tutorial will require uCreate Print version 12.1 or later.

If you do not have an installer, you can download the trial version from:

<http://www.xmpie.com/trial-software-and-tutorials/>.

You can find the recommended system requirements in the Customer Expectation Document:

[https://downloads.xmpie.net/PE/PE-12.1/XMP/Documentation-F98KPS/XMPie%20uDirect%20CED\\_v.12.1.pdf](https://downloads.xmpie.net/PE/PE-12.1/XMP/Documentation-F98KPS/XMPie%20uDirect%20CED_v.12.1.pdf)



#### Step by step instructions

On a computer which has Adobe InDesign CC 2023 installed, double-click the uCreate Print installer, and follow the prompts to install the application.

If you have a uCreate Print or uDirect license, after installing, license your product by opening Adobe InDesign and select **Activate license...** from the **Dynamic Content** menu **Help** group.

#### Download the sample files

In order to follow along with the steps in this tutorial, you will need to download the document files provided in the resources zip file.



#### Step by step instructions

If you don't already have the zip file of resources that accompanies this tutorial, download it from the XMPie Campus website at <http://campus.xmpie.com/s/uCreatePrint>.



## Unzip and review the contents



### Step by step instructions

Unzip the resources package. You should see the following files:

Name	Date modified	Type	Size
assets	18/08/2017 9:37 AM	File folder	
images	25/09/2017 8:45 AM	File folder	
Engineering.pdf	27/08/2016 4:53 PM	PDF File	342 KB
General.pdf	27/08/2016 4:52 PM	PDF File	1,068 KB
Law.pdf	27/08/2016 4:50 PM	PDF File	266 KB
Medicine.pdf	27/08/2016 4:49 PM	PDF File	394 KB
text files	18/08/2017 9:37 AM	File folder	
general-schedule.txt	19/09/2016 9:10 AM	Text Document	23 KB
Law open house schedule.txt	19/09/2016 9:14 AM	Text Document	23 KB
medicial - OpenHouse Schedule.txt	19/09/2016 9:21 AM	Text Document	23 KB
Open House engineering schedule.txt	19/09/2016 9:18 AM	Text Document	23 KB
resources	18/09/2017 8:45 AM	File folder	
edu logo.pdf	2/09/2016 6:05 AM	PDF File	6 KB
edu-smaller.pdf	25/08/2016 7:40 PM	PDF File	2,463 KB
graduation-smaller.pdf	4/09/2016 10:52 AM	PDF File	3,426 KB
library-small.pdf	4/09/2016 10:45 AM	PDF File	1,542 KB
meetingroom.pdf	4/09/2016 6:11 PM	PDF File	772 KB
XMPieLogo.pdf	4/09/2016 6:58 PM	PDF File	4 KB
EDU Postcard CC2023.indd	14/09/2022 8:54 PM	InDesign Document	2,108 KB
EDU Static.idml	12/10/2017 9:04 AM	InDesign Markup ...	335 KB
EDU_Scores.csv	10/10/2017 2:13 PM	Microsoft Excel C...	1 KB
EDU201x Prospective Students.csv	5/09/2017 2:38 PM	Microsoft Excel C...	318 KB



### Additional information and notes

XMPie refers to static images, or images that are the same for every recipient in the database as **Resources**. Images (or text files) that will vary based on database rules or logic are called **Assets**. This is why there are two folders of images in the downloaded zip file.

## Open the InDesign document



### Step by step instructions

Launch InDesign and open the **EDU Postcard CC2023.indd** file.

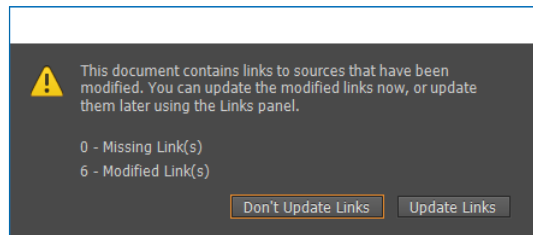
If you have problems opening the file, then open the **EDU\_Static.idml** file and **Save as...** to save it as an indd document.



## Re-link images (if necessary)

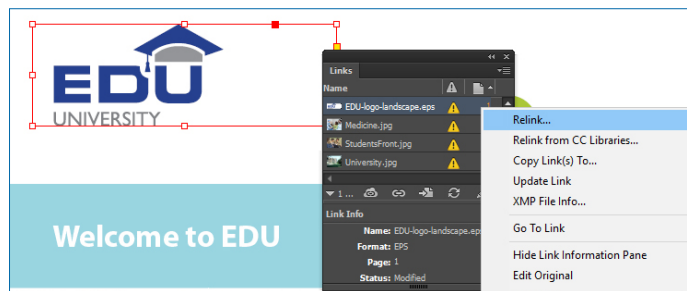


### Step by step instructions



If InDesign prompts you about modified links, click to **Update Links**

InDesign should locate the images automatically. If not, follow these optional steps:



Open the Links panel: **Window -> Links** (Ctrl-Shift-D).

Select the links that have the caution icon, and select to **Relink...** the links from the panel menu.

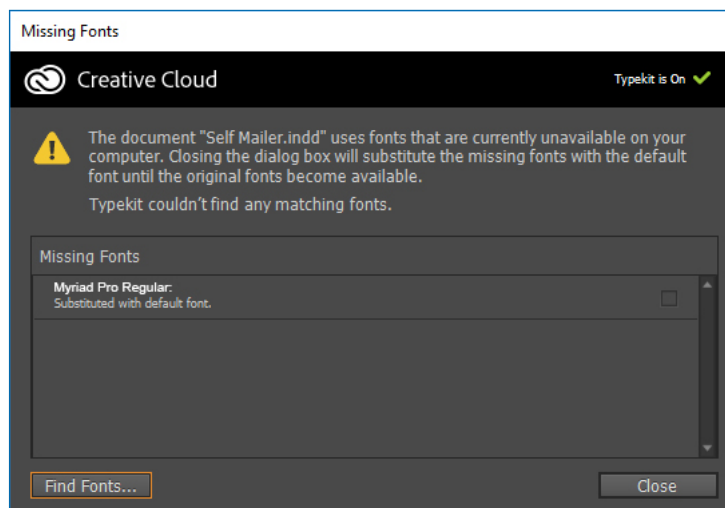
Locate the image of the same name in the resources or assets folder. InDesign should offer to relink other images found in the same folder. If not, repeat the process until all images are relinked.

## Install or replace missing document fonts (if necessary)

The tutorial document uses the fonts Impact and Myriad Pro, which should be automatically installed by Adobe InDesign. If either or both fonts are not available on your computer, InDesign will prompt you about missing fonts. You can look for them online and install them, or simply replace the fonts with one you already have installed.



### Step by step instructions

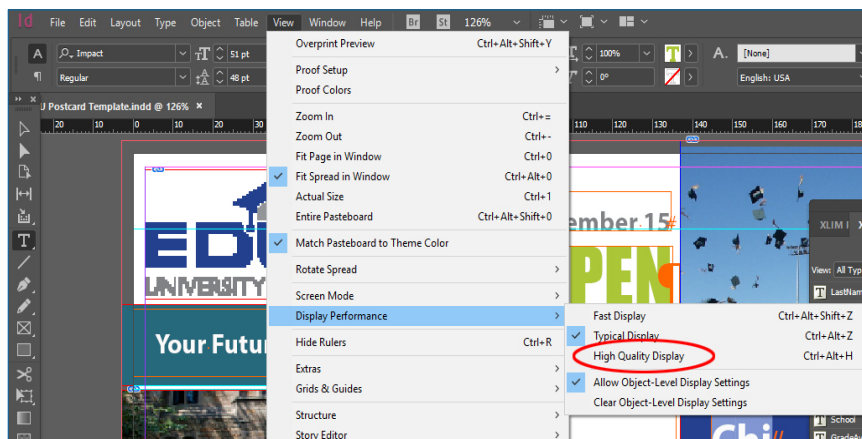


If InDesign prompts you about missing fonts, then click **Find Fonts...** and select to replace the missing fonts with one already installed on your computer.

## Set High Quality display performance



### Step by step instructions



From the InDesign **View** menu, select **Display Performance** and then **High Quality Display**.

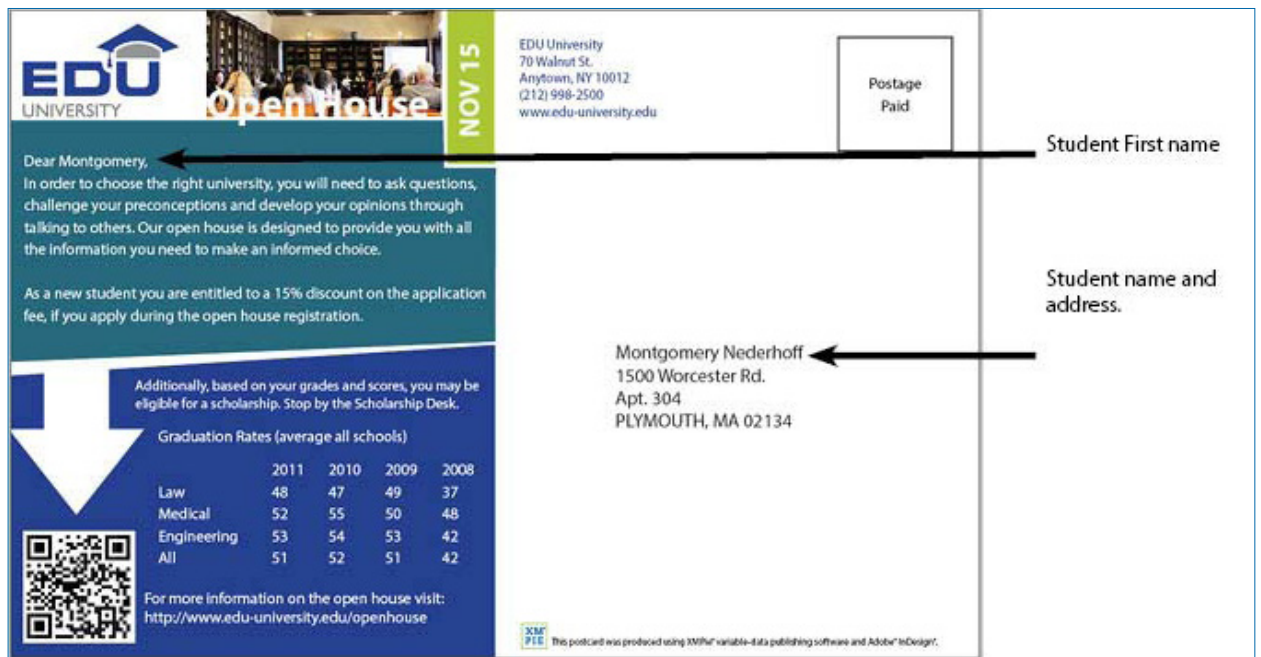
Alternatively, use the **Ctrl+Alt+H** keyboard shortcut.

## Review campaign requirements

Before starting any VDP job, it is recommended to look at the document and the data to understand what information you have, and what needs to change in the document. It can also be very helpful to write a list of ADORs or content objects that are needed to complete the job.

In this tutorial, we are going to create a postcard inviting prospective students to a university open day. The invitation postcard document looks like this:





### Additional information and notes

ADOR (Automatic Dynamic Object Replacement) is a patented XMPie technology for objects that can be dynamically changed or replaced in the document. For example a Text ADOR can change text in the document. We also refer to ADORs as Content Objects.

The data for this tutorial looks like this:

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	FirstName	LastName	StreetAddress	StreetAddress2	City	State	ZipCode	Gender	School	GradeAvg	EmailAddress	BirthDay	PURL	IMBSample	SortID	Tray	Marker
2	Salvador	Randolph	866 Hilltop Street	Apt 23	Wilbraham	MA	01095	m			89 SalvadorR@somefakeaddress.com	5/5/1993	Salvador.Randolph.744	123456789012345678901234010951234	1	1	#
3	Chi	Cotton	588 Frank Avenue		Springfield	MA	01103	f	Engineering		83 ChiC@somefakeaddress.com	1/30/1992	Chi.Cotton.972	123456789012345678901234011031234	2	1	
4	Lauretta-Leigh	Navarrete	4899 Trouser Leg Road	Unit 2	Springfield	MA	01103	m	Engineering		95 Lauretta-Leigh@somefakeaddress.c	9/16/1993	Lauretta-Leigh.Navarrete.208	123456789012345678901234011031234	3	1	
5	Yolanda	Tourville	1411 Kennedy Court		Worcester	MA	01610	f			87 YolandaT@somefakeaddress.com	2/27/1992	Yolanda.Tourville.378	123456789012345678901234016101234	4	1	
6	Rita	Nock	940 C Street		Framingham	MA	01702	f			83 RitaN@somefakeaddress.com	8/6/1984	Rita.Nock.869	123456789012345678901234017021234	5	1	
7	Dorothy	Beaumont	2835 Smith Street	Level 4	Framingham	MA	01702	f			78 DorothyB@somefakeaddress.com	12/18/1993	Dorothy.Beaumont.377	123456789012345678901234017021234	6	1	
8	Anthony	Britton	132 Russell Street		Acton	MA	01720	m			81 AnthonyB@somefakeaddress.com	4/5/1986	Anthony.Britton.338	123456789012345678901234017201234	7	1	
9	Jenny	Race	3067 Pearlman Avenue		Bedford	MA	01730	f	Law		94 JennyR@somefakeaddress.com	4/18/1992	Jenny.Race.914	123456789012345678901234017301234	8	1	
10	Maria	Price	2636 Rainy Day Drive		Woburn	MA	01801	f	Law		94 MariaP@somefakeaddress.com	9/15/1981	Maria.Price.164	123456789012345678901234018011234	9	1	
11	Alta	Smith	4230 Tenmile Road		Burlington	MA	01803	f	Law		79 AltaS@somefakeaddress.com	6/13/1990	Alta.Smith.104	123456789012345678901234018031234	10	1	
12	Gwendolyn	Hernandez	3971 Hampton Meadows		Haverhill	MA	01830	f	Law		82 GwendolynH@somefakeaddress.coi	4/16/1996	Gwendolyn.Hernandez.143	123456789012345678901234018301234	11	1	
13	Michelle	Labrecque	1698 Levy Court		Lawrence	MA	01840	f	Law		100 MichelleL@somefakeaddress.com	8/7/1981	Michelle.Labrecque.766	123456789012345678901234018401234	12	1	
14	Angie	Mifflin	1982 Hampton Meadows		West Newbury	MA	01985	f			87 AngieM@somefakeaddress.com	7/26/1987	Angie.Mifflin.578	123456789012345678901234019851234	13	1	
15	Michael	Danek	1554 Huntz Lane		Foxboro	MA	02035	m	Engineering		91 MichaelD@somefakeaddress.com	8/29/1988	Michael.Danek.047	123456789012345678901234020351234	14	1	

And the available asset images include:

Name	Date modified	Type	Size
assets	18/08/2017 9:37 AM	File folder	
images	25/09/2017 8:45 AM	File folder	
Engineering.pdf	27/08/2016 4:53 PM	PDF File	342 KB
General.pdf	27/08/2016 4:52 PM	PDF File	1,068 KB
Law.pdf	27/08/2016 4:50 PM	PDF File	266 KB
Medicine.pdf	27/08/2016 4:49 PM	PDF File	394 KB

With the document design requirements, data, and assets, we can now define the content objects and rules we need to create. Below is the list of tasks for this tutorial. For your reference, each is followed by the tutorial page number.

## Front page tasks

- Connect the InDesign document with the provided data source - page 14.
- Replace the static name with recipient's FirstName from the database (in two locations) - page 18.
- Handle copy fitting of long FirstNames - page 20.
- Dynamically replace the central image with one representing the school the student is interested in. - page 24.
- Handle fitting different size images into the graphic frame - page 27.

## Back page tasks

- Replace static name and address with fields from the database - page 21.
- Handle empty address lines when address2 field is empty - page 22.
- Print and review the output by Generating VDP output - page 29.



# Module 2:

## Linking to a data source

Now that the static InDesign document is open, and we have our data source and list of tasks needed to create the template, we are ready to get started.

In this module we will use the Dynamic Content menu to link the document to a data source and then take a moment to save our work.

### Duration

About 5 minutes.

### Objectives

After completing this module, you will be able to:

- Locate and open the Dynamic Content panel in InDesign,
- Open and use the Dynamic Content panel, and Dynamic Content menu,
- Link the InDesign document to a data source.

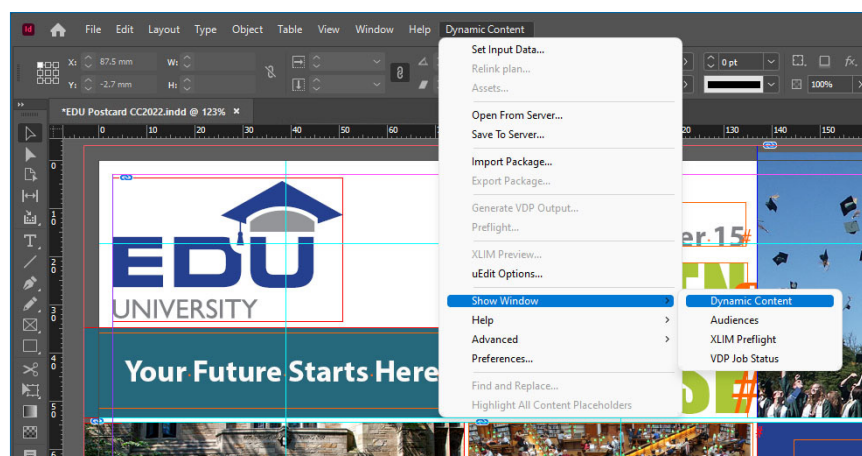
### Procedure

#### Open the Dynamic Content panel



#### Step by step instructions

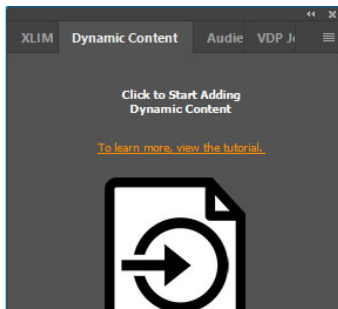
If the Dynamic Content panel is not visible, open it by selecting it from **Dynamic Content -> Show Window** menu.



## Linking to a data source



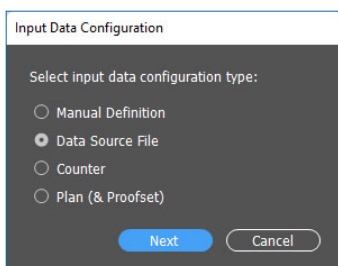
### Step by step instructions



The panel contains a link to uCreate Print training material in XMPie Campus.

And, a large button to link to the datasource or plan and start making the InDesign document a variable data template.

Click the button on the panel, or select **Set input data** from the **Dynamic Content** menu.



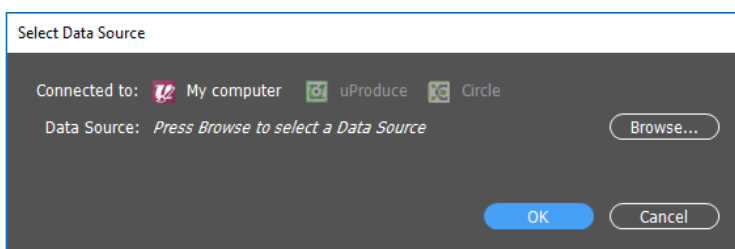
Select **Data Source File** and click **Next**.



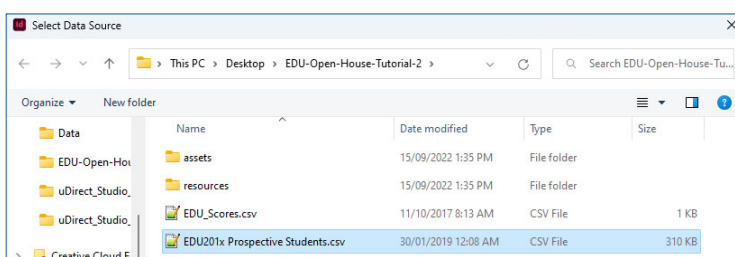
### Additional information and notes

In addition to linking to data sources, uCreate Print can also use

- A Plan file created by uPlan (which is part of the PersonalEffect server suite of tools);
- A Counter, which is useful for doing ticketing or other document types where a recipient list is not necessary (eg documents created for uStore customization).
- Or, by manually defining the structure of a data file that you will connect to later.

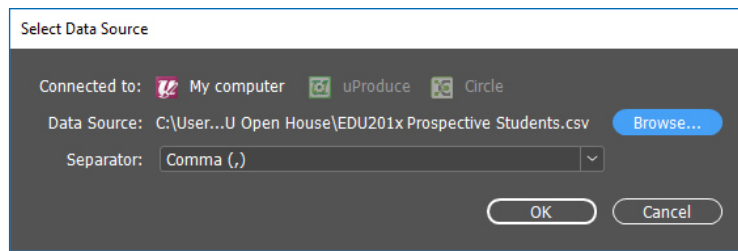


Click **Browse...**



Navigate to and select the **EDU\_201x Prospective Students.csv** file in the tutorial folder.

Click **OK**.

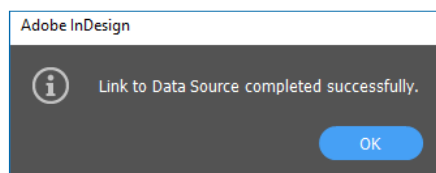


Select **Comma** as the field separator. Click **OK**.



### Additional information and notes

Later when working on your own documents, you can select the required separator from the drop-down list, or simply type the separator character. Also, if you later connect with Excel or Access, this dialog gives you the opportunity to select the specific spreadsheet or table that you want to connect to.



You will see a dialog indicating that the document has been successfully connected with the data source.

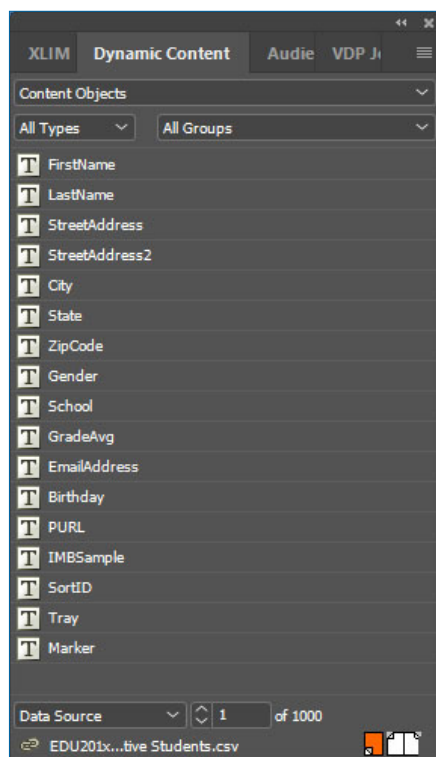
Click **OK**.



### Additional information and notes

On Macintosh, uCreate Print can connect with .TXT or .CSV (comma separated value) text files.

On Windows, uCreate Print can connect to .TXT or .CSV files as well as Microsoft Excel and Access files.



When you link to a data source, the Dynamic Content panel will create Text content objects for each field in the data source.

This is now a good time to familiarize yourself with the panel. For full details, refer to Appendix A.



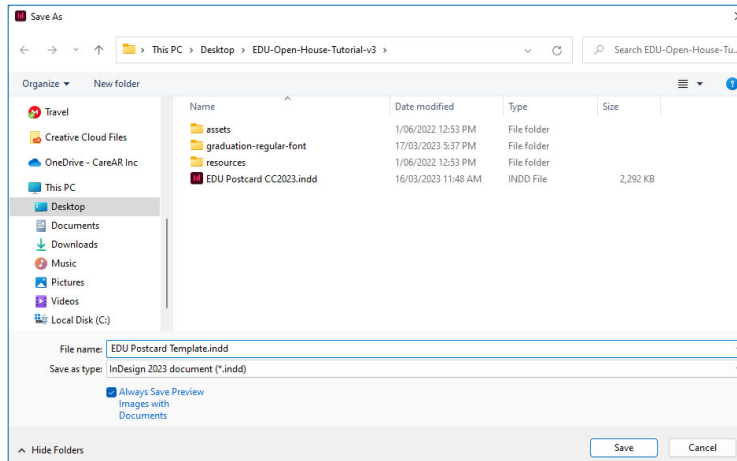
## Save a new copy of the document

In case you want to return to the original document to complete this tutorial again in future, it might be helpful to now **Save as...** to create a new copy of the document.



### Step by step instructions

From the **File** menu, select **Save as...**



Name your new file **EDU Postcard Template.indd**.

Click **Save**.

# Module 3:

## Placing Dynamic Text

Now that we are linked to the data, we can start to place content objects into the document design.

### Duration

About 20 minutes.

### Objectives

After completing this module, you will be able to:

- Place text content objects into the InDesign document,
- manage copy fitting of dynamic text in the text box,
- create new text ADORs or content objects, and
- hide or suppress empty text rows.

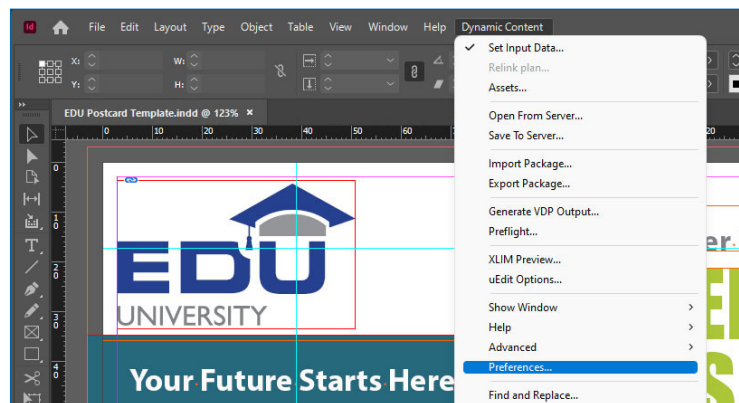
### Procedure

#### Showing the Data Column

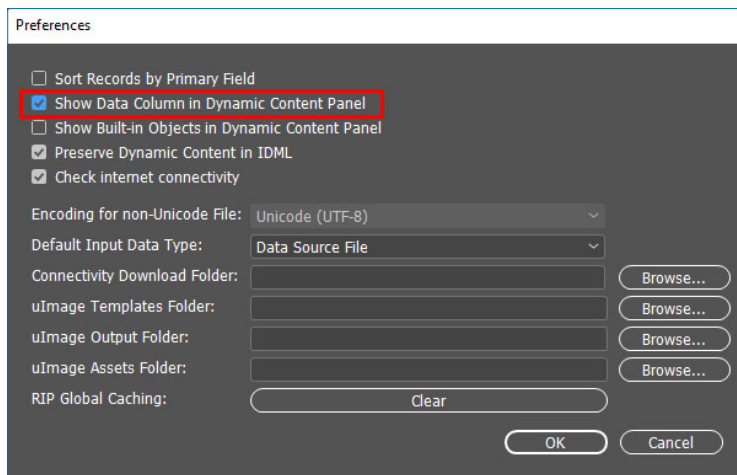
Sometimes it is helpful to see the values in the data source. For example if the data field or column names don't clearly say what it contains.



#### Step by step instructions

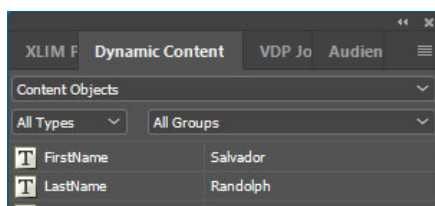


From the **Dynamic Content** menu, select **Preferences**.



Check the **Show Data Column in Dynamic Content Panel** checkbox.

Click **OK**.

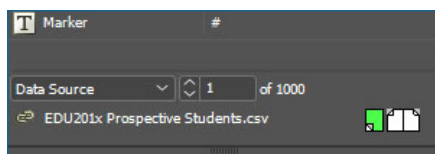


The list of Content Objects will now display values from the data source.

## Viewing different data records



### Step by step instructions



At the bottom of the Dynamic Content panel, you can see the name of the data source that you are connected to.

Just above this, you can see that the data source contains 1000 records and that the data column is showing the values from record number 1.

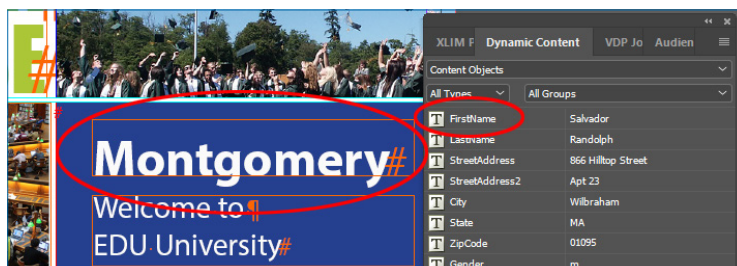
You can use the up and down arrows next to the record number, or enter in any number between 1 and 1000 to view the data of that record in the Dynamic Content panel.

## Making static text dynamic



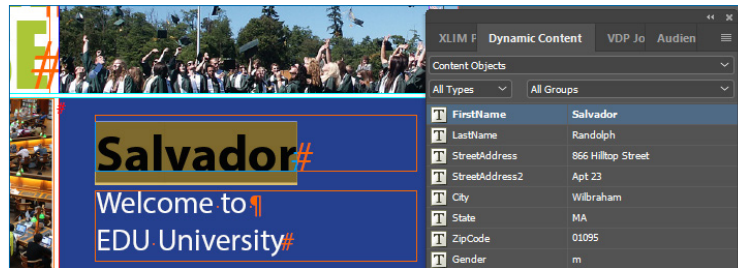
### Step by step instructions

From the InDesign toolbox, select the **Type** tool

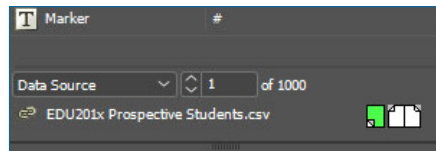


Select the text **Montgomery**.

Then in the Dynamic Content panel, double-click on the **FirstName** content object to place it into the document.



You will now see the document contains another name. Assuming that you are still viewing record 1, this will be Salvador.

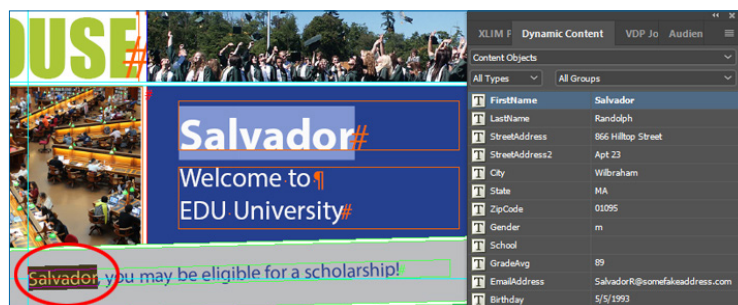


On the Dynamic Content panel, use the up and down arrows to scroll through the data records to see the InDesign document update for the current record.



### Additional information and notes

InDesign has multiple screen modes. When in **Normal** screen mode, the uCreate Print will highlight dynamic objects in the design. (In **Preview** screen mode highlighting is disabled.) If the highlighting of the dynamic objects is distracting you from the document design, you can toggle off the **Highlight All Dynamic Placeholders** setting either from the Dynamic Content menu, or from the menu on the Dynamic Content panel.



Repeat the process to place the FirstName in a second place on the page.

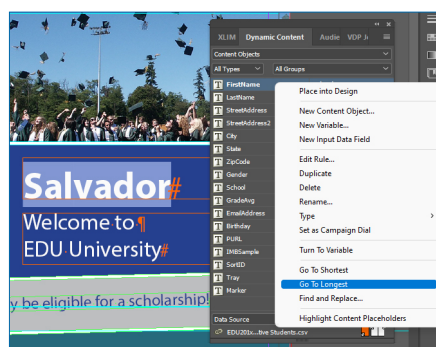
Use the Type tool, select the text and double-click the content object.

## Find the longest First Name

Now the name Salvador fits in the text box, but what happens if there is a really long name in the database?

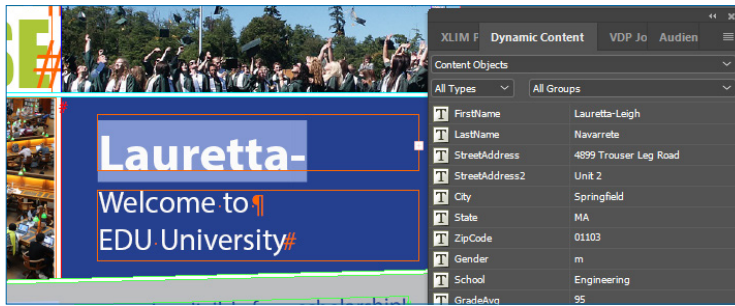


### Step by step instructions



In the Dynamic Content panel, right-click (or Cmd-click on Macintosh) on the **FirstName** content object.

From the menu, select **Go to Longest**.




In the Dynamic Content panel, you will see the longest FirstName is **Lauretta-Leigh** which is too long for the first text box, while it fits OK in the second text box.

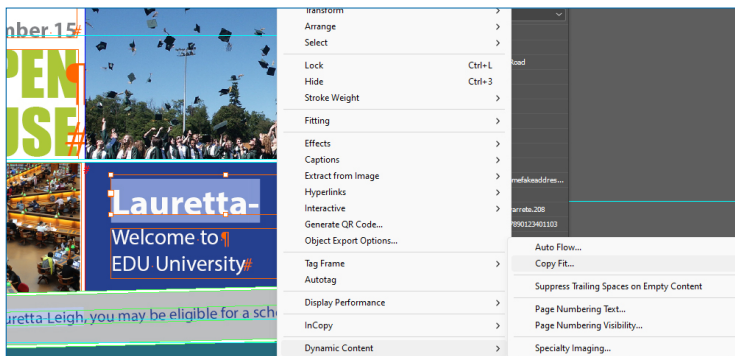
## Dynamic story length handling

Dynamic story length handling allows us to control how text values will be adjusted to fit in the text frame.



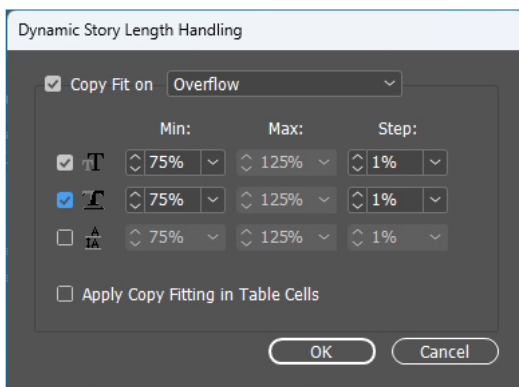
### Step by step instructions

From the InDesign tool box, select the **Selection** tool (black pointer) .



Click the first text box to select it. Then right-click on the selected text box.

From the menu, select **Dynamic Content** and then **Copy fit...**



The **Dynamic Story Length Handling** dialog appears.

Check the box to **Copy Fit on Overflow**.

Check the boxes to automatically change **font size** and **horizontal scaling**.

Click **OK**.





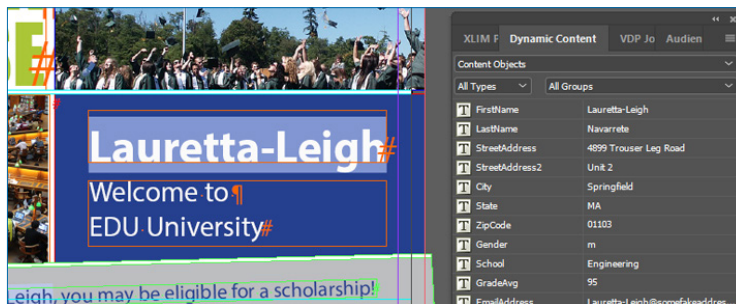
### Additional information and notes

The Dynamic Story Length Handling dialog allows you to control how the text within the dynamic text box will be controlled for each recipient.

If you are dealing with a lot of text, you could use Auto Flow to have text flow over to a new page if one recipient will have more text than another.

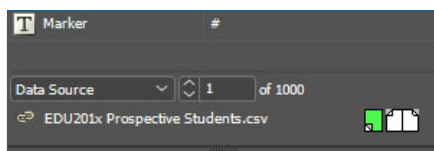
Alternatively, the Copy Fit option allows you to automatically change the font size, horizontal scaling and leading when the text overflows the text box, or underflows, or both.

The Min and Max settings allow you to control the largest percentage (from your document defined font settings) that uCreate Print will use to try to fit the text. For example on a business card where you already have small text, you would not want to reduce font size to a point where it is unreadable, so you might want to increase the minimum to say 90% of your set font size.



You should now see the full First Name of this recipient fits within the text box.

Repeat the process to turn on the copy fitting for the second text box.



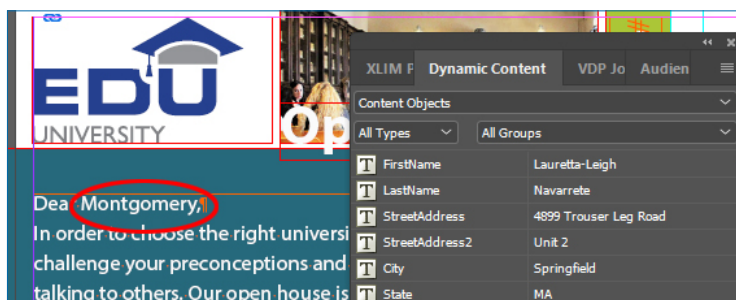
Scroll through some recipient records. You should see that uCreate only changes the font attributes if the First Name does not fit within the text box.

## Page 2 - more text content objects

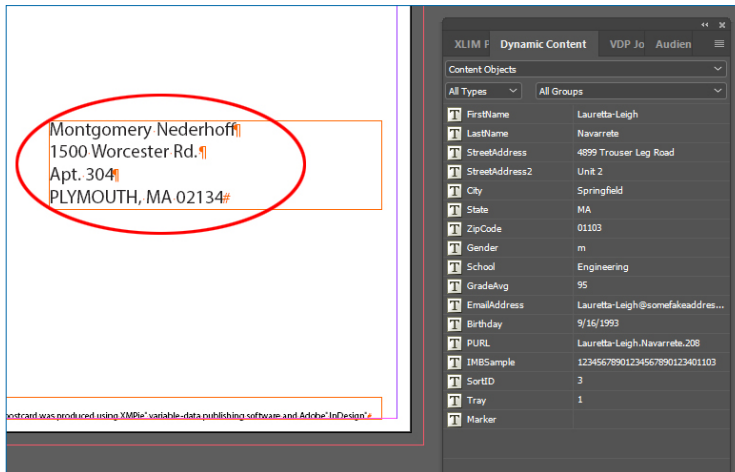


### Step by step instructions

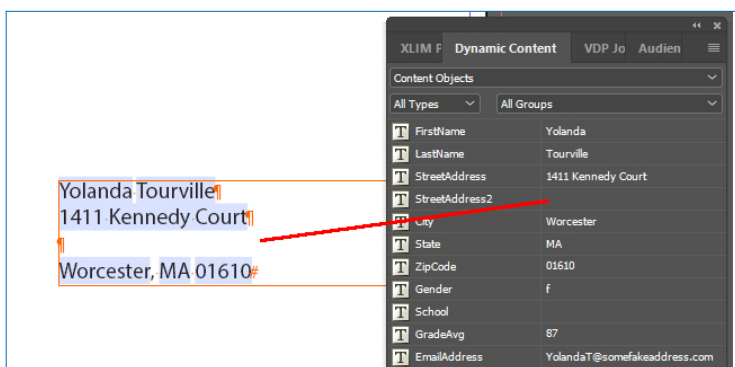
Scroll down or use the pages panel to move to the second page.



Use the Type tool to replace the static name with the FirstName content object.



Repeat the process to replace each of the name and address fields in the address block.




Note that some records do not have any data for the second address row.

Depending on the record you are currently viewing, you may or may not see any value for the second address line.

## Suppress trailing spaces on empty content



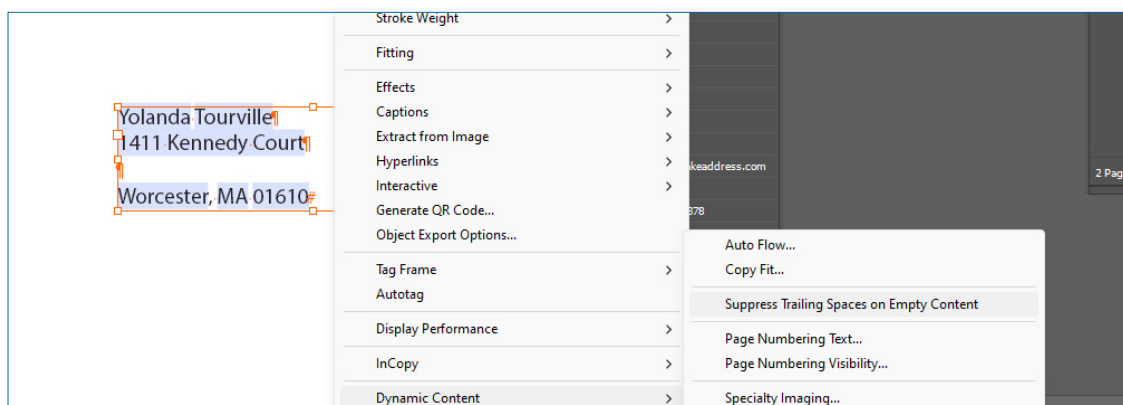
### Step by step instructions

From the InDesign tool box, select the **Selection** tool (black pointer) .

Click on the address block to select that text frame.

Right-click on the selected text frame.

From the **Dynamic Content** group, select **Suppress Trailing Spaces on Empty Content**.





Scroll through some data records to see the behavior. Record 2 has no data in the address2 field, while record 1 does. So, for the second record, you should see the last line of text move up to remove the empty line, but on record 1 where there is data, the last row of text should move down.



#### Additional information and notes

TIP: in this case, the lower lines move upwards when there is empty content. Sometimes, you may want the design to have the top lines move downwards, or you may want the rows of text to be centered vertically in the text frame. To do this, right-click on the text frame and select **Text Frame Options...** The **Vertical Alignment** setting allows you to control the position of the text in the frame.

# Module 4:

## Placing Dynamic Graphics

When you link to a data source, the columns or fields become Text content objects that can be placed directly into the document design as seen in Moldue 3. In this module we look at creating and placing Graphic content objects.

### Duration

About 10 minutes.

### Objectives

After completing this module, you will be able to:

- Duplicate a content object,
- change the content object type,
- set the assets folder,
- place the Graphic content object into the design, and
- manage Dynamic graphic properties.

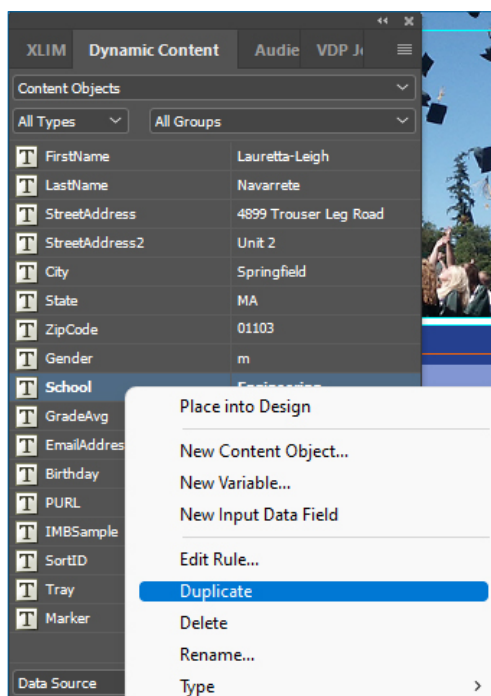
### Procedure

#### Duplicating and editing a content object

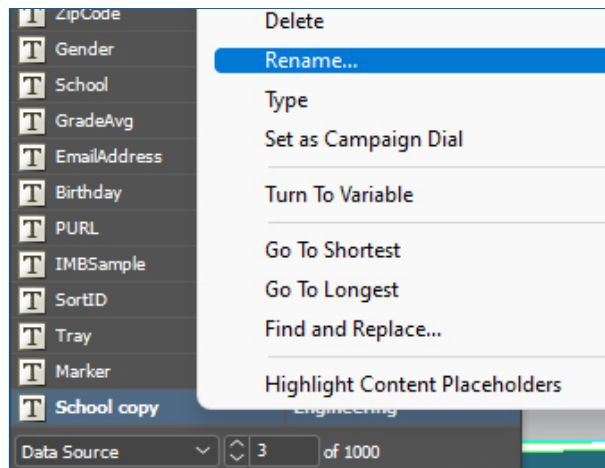
For the central image on the front page of the design, we want to display a graphic that is more representative of the school the prospective student is interested in. Our Assets folder contains an image for each of the schools named by the school name.



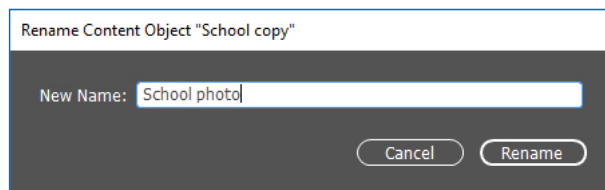
#### Step by step instructions



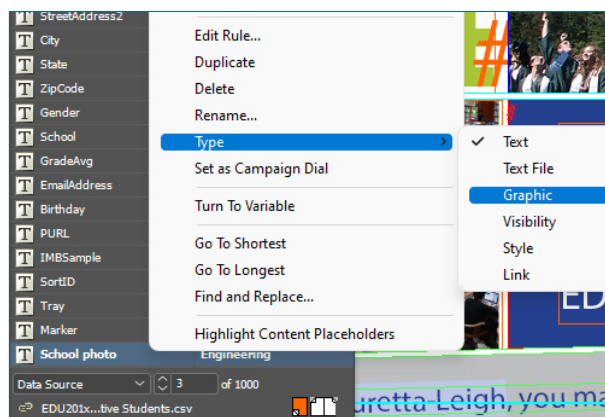
Right-click on the **School** content object and select **Duplicate**.



Right-click on the **School copy** content object and select **Rename...**



Change the Name to **School photo**.



Right-click on the **School photo** content object and select **Type**.

Change the **Type** to **Graphic**.

SortID	1
Tray	1
Marker	#
School photo	

The content object's icon will change indicating that it is now a Graphic content object instead of a Text content object.



### Additional information and notes

Notice that we did not need to create any logic to select a specific image if the school equaled a specific value. By naming the asset images with the same name as each school, there is no need for any logic - the name of the school in the data source already equals the school graphic name.



### Additional information and notes

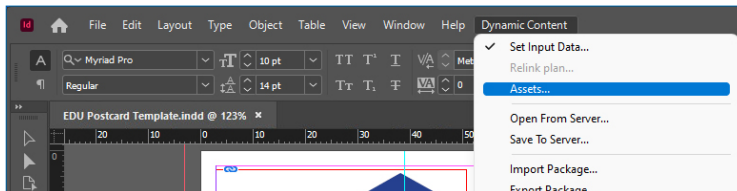
Also notice that we did not need to specify any file type extension. XMPie features an asset resolution mechanism that is designed to select the right file type for different types of production. This means that you can use the same graphic content object to change a graphic in print or in web or email.

## Set the assets folder

By default, uCreate Print will look for image assets from the folder containing the data source and any subfolders. To ensure that images are found quickly and efficiently, you should set the assets folder to specify the right location.



### Step by step instructions



From the **Dynamic Content** menu, select **Assets...**

Browse to and select the folder named **Assets** in the tutorial resources folder.




### Additional information and notes

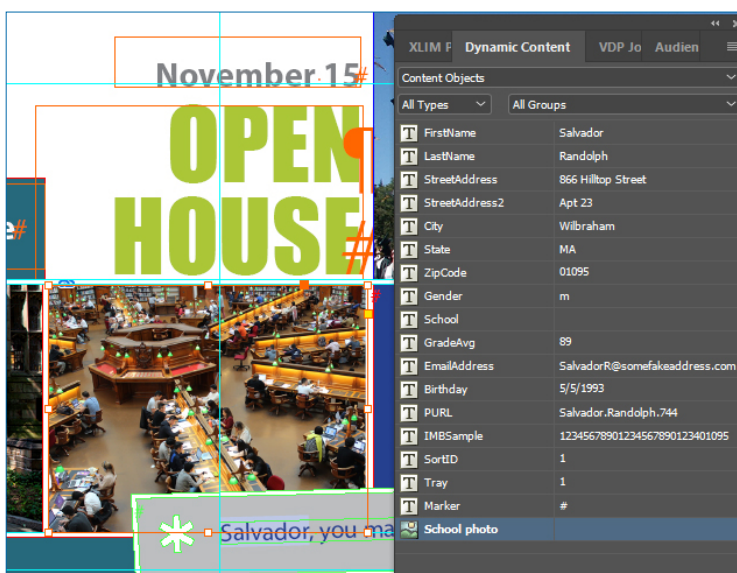
If you do not set the assets folder, uCreate Print will look for assets from the folder containing the linked data source and any sub folders. Because this folder may contain many irrelevant images, it is recommended to set the assets folder correctly to improve performance..

## Place the graphic content object into the document design



### Step by step instructions

From the InDesign tool box, select the **Selection** tool (black pointer) .



Click on the graphic box to select it.

In the **Dynamic Content** panel, double-click on the **School photo** content object.



Depending on which record you are currently viewing, the image may be different.

**Additional information and notes**

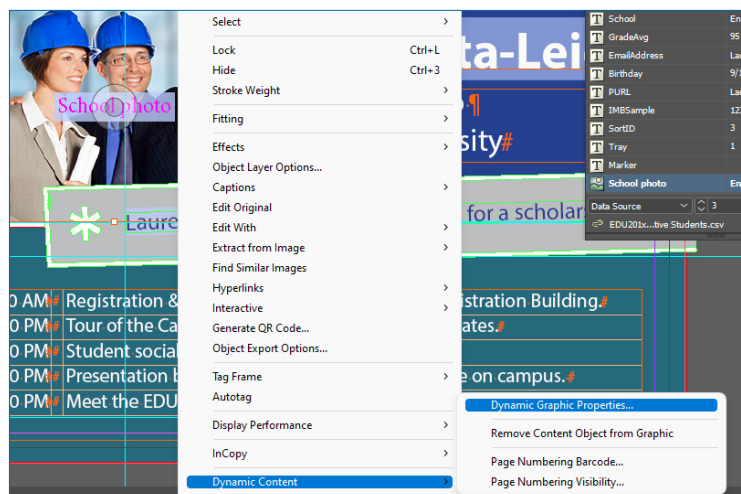
You will notice that for some recipients there will be no image displayed. This will happen where the data does not have an entry for the recipient's school selection. In the next tutorial (Using rules and logic) we will show how to display a generic or default image when there is no school.

## Dynamic graphic properties

By default, when you place a Graphic content object, uCreate Print assumes that all the asset images are the same size, and so what ever scale and crop options you define will be applied to all assets. In some cases, your asset images may be in different sizes. To automatically set the "fitting" of the image in the image frame, XMPie provides a dialog to control Dynamic Graphic Properties.



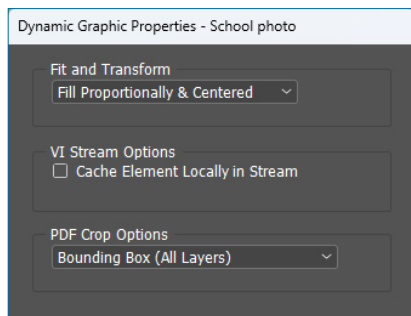
## Step by step instructions



From the InDesign tool box, select the **Selection** tool (black pointer) .

Click to select the school graphic frame.

Right-click on it and from the **Dynamic Content** menu, select **Dynamic Graphic Properties...**



Select **Fill Proportionally & Centered**.

Click **OK**.

Scroll through some records to confirm that the image is fitting as required for different recipients.

Our dynamic template is now complete.

You should save your work.



# Module 5:

## Your first VDP Output

Our dynamic template is complete. We are ready to create the output file to print. Please note that generating VDP output is only possible with a licensed version of uCreate Print.

### Duration

About 10 minutes.

### Objectives

After completing this module, you will be able to:

- Create VDP output of one or more data source records, and
- impose the output for optimized press sheet coverage.

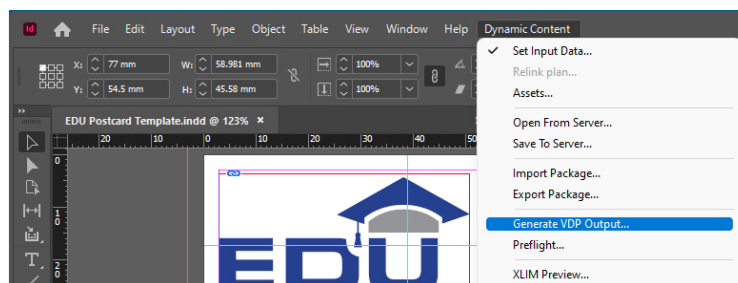
### Procedure

#### Basic variable data print

In this example we use default print settings to create page-by-page output for each record.



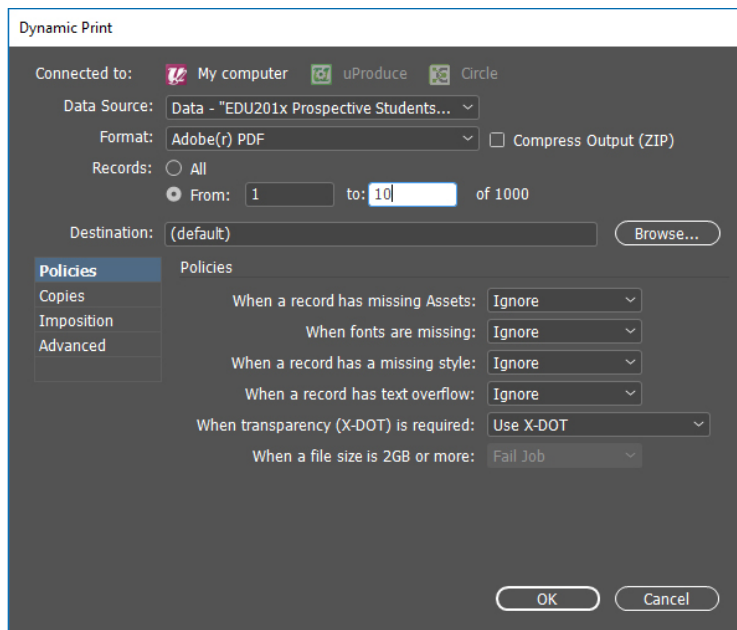
#### Step by step instructions



From the **Dynamic Content** menu, select **Generate VDP Output...**

If you have not already saved the document, you will be prompted to do so.



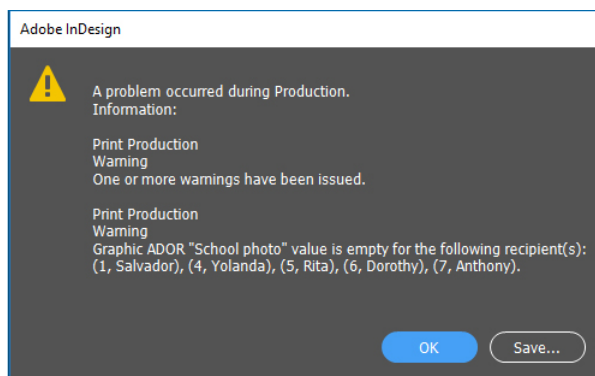



Set the output **Format** to **Adobe(r) PDF**.

Set the range of **Records** that you would like to print. I will set **1 to 10**.

Click **OK**.

You will see a dialog indicating the print production progress.



desktop > EDU Open House > output > 2017_09_25_13_56_13			
Search 2017_09_25_13_56_13			
Name	Date modified	Type	Size
 EDU Postcard Template.pdf	25/09/2017 1:56 PM	PDF File	2,792 KB



### Additional information and notes

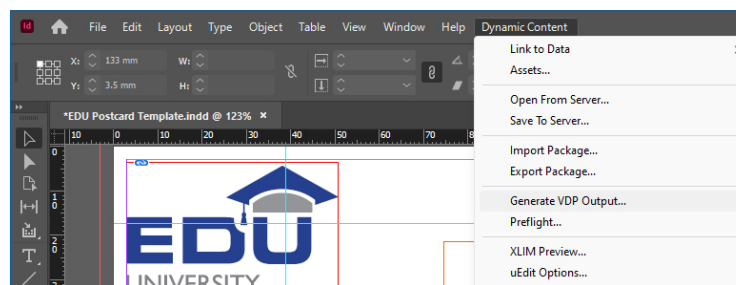
On the Dynamic print dialog, you can also choose to set the **Destination**. If you choose to set a destination, uCreate Print will save the output file in the folder of your choice. If you print multiple times with a custom destination, each print will overwrite any previous output file in that location.

## Variable data print with imposition

In this example we output the postcards imposed to a larger sheet size with bleed and trim marks.

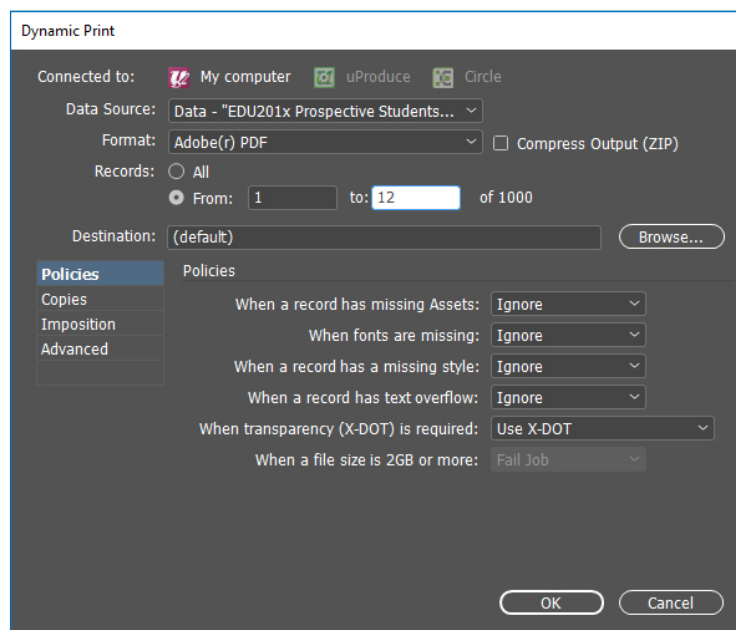


### Step by step instructions



From the Dynamic Content menu, select **Generate VDP Output...**

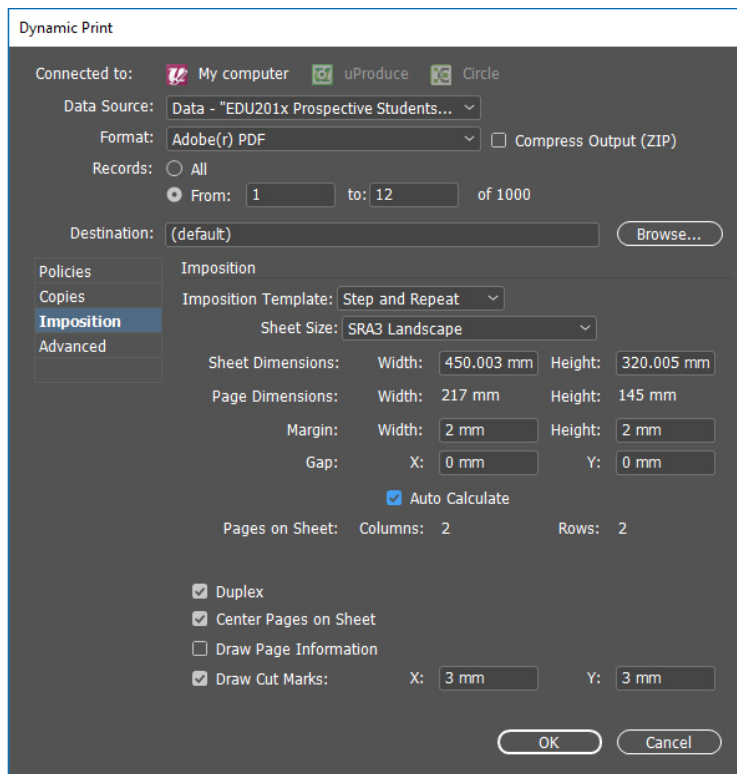
If you have not already saved the document, you will be prompted to do so.



Set the output **Format** to **Adobe PDF**.

Set the range of **Records** that you would like to print. I will set **From 1** and **To 12**.

Click **OK**.



Click **Imposition**.

Set **Imposition Template to Step and Repeat**.

Set **Sheet Size to SRA3 Landscape**.

Set both **Margin Width and Height to 0.08in (or 2mm)**

Check **Auto Calculate**.

Check **Duplex**.

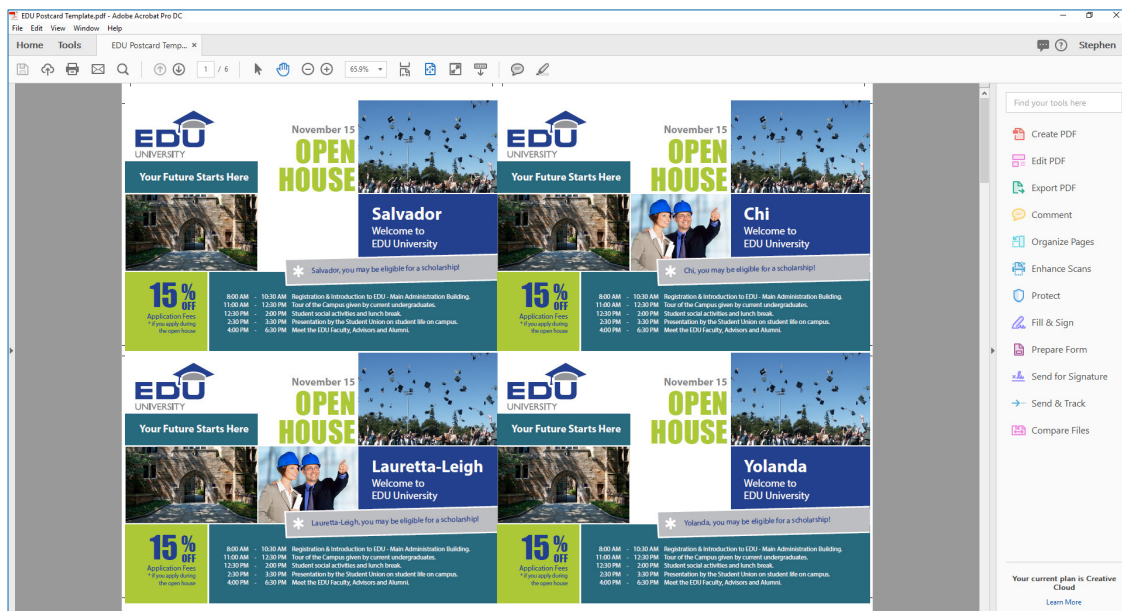
Check **Centre Pages on Sheet**.

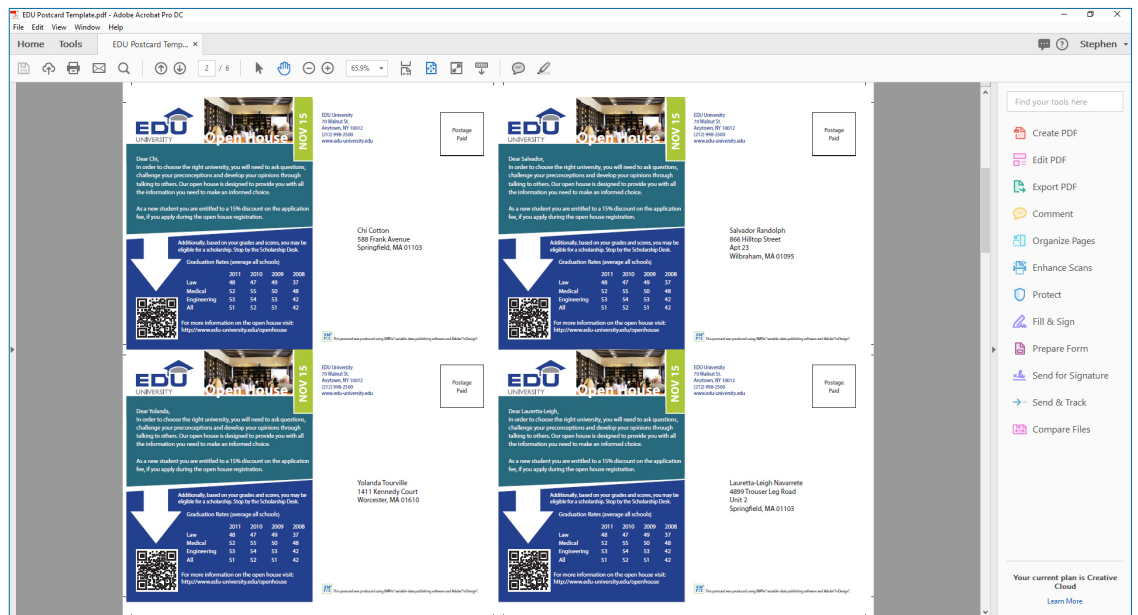
Check **Draw Cut Marks** and enter **0.12in (or 3mm)** for both **x** and **y** values.

Click **OK**.

When production finishes, check the output folder for a second subfolder, and open the output PDF to check your work.

Samples of the first two pages of the PDF output are shown below and on the next page.





# Appendix A - Dynamic Content panel

A data table's columns contain different types of data: ID, FirstName, LastName, School, etc.

The table's column headers are known as fields and each row contains the data for a record.

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	FirstName	LastName	StreetAddress	StreetAddress2	City	State	ZipCode	Gender	School	GradeAvg	EmailAddress	Birthday	PURL	IMBSample	SortID	Tray	Marker
2	Salvador	Randolph	866 Hilltop Street	Apt 23	Wilbraham	MA	01095	m		89	SalvadorR@somefakeaddress.com	5/5/1993	Salvador.Randolph.744	123456789012345678901234010951234	1	1	#
3	Chi	Cotton	588 Frank Avenue		Springfield	MA	01103	f	Engineering	83	ChiC@somefakeaddress.com	1/30/1992	Chi.Cotton.972	123456789012345678901234011031234	2	1	
4	Lauretta-Leigh	Navarrete	4899 Trouser Leg Road	Unit 2	Springfield	MA	01103	m	Engineering	95	Lauretta-Leigh@somefakeaddress.c	9/16/1993	Lauretta-Leigh.Navarrete.208	123456789012345678901234011031234	3	1	
5	Yolanda	Tourville	1411 Kennedy Court		Worcester	MA	01610	f		87	YolandaT@somefakeaddress.com	2/27/1992	Yolanda.Tourville.378	123456789012345678901234016101234	4	1	
6	Rita	Nock	840 C Street		Framingham	MA	01702	f		83	RitaN@somefakeaddress.com	8/6/1984	Rita.Nock.869	123456789012345678901234017021234	5	1	
7	Dorothy	Beaumont	2835 Smith Street	Level 4	Framingham	MA	01702	f		76	DorothyB@somefakeaddress.com	12/18/1993	Dorothy.Beaumont.377	123456789012345678901234017021234	6	1	
8	Anthony	Britton	132 Russell Street		Acton	MA	01720	m		81	AnthonyB@somefakeaddress.com	4/5/1986	Anthony.Britton.338	123456789012345678901234017201234	7	1	
9	Jenny	Race	3067 Pearlman Avenue		Bedford	MA	01730	f	Law	94	JennyR@somefakeaddress.com	4/18/1992	Jenny.Race.914	123456789012345678901234017301234	8	1	
10	Maria	Price	2636 Rainy Day Drive		Woburn	MA	01801	f	Law	94	MariaP@somefakeaddress.com	9/15/1981	Maria.Price.164	123456789012345678901234018011234	9	1	
11	Alta	Smith	4230 Tenmile Road		Burlington	MA	01803	f	Law	79	AltaS@somefakeaddress.com	6/13/1990	Alta.Smith.104	123456789012345678901234018031234	10	1	
12	Gwendolyn	Hernandez	3971 Hampton Meadows		Haverhill	MA	01830	f	Law	82	GwendolynH@somefakeaddress.co	4/16/1996	Gwendolyn.Hernandez.143	123456789012345678901234018301234	11	1	
13	Michelle	Labrecque	1698 Levy Court		Lawrence	MA	01840	f	Law	100	MichelleL@somefakeaddress.com	8/7/1981	Michelle.Labrecque.766	123456789012345678901234018401234	12	1	
14	Angie	Mifflin	1982 Hampton Meadows		West Newbury	MA	01985	f		87	AngieM@somefakeaddress.com	7/26/1987	Angie.Mifflin.578	123456789012345678901234019851234	13	1	
15	Michael	Danek	1554 Hunt Lane		Foxboro	MA	02035	m	Engineering	91	MichaelD@somefakeaddress.com	8/29/1988	Michael.Danek.047	123456789012345678901234020351234	14	1	

When you link to a data source table, uCreate Print automatically creates a Text content object for each of the table's column headers.

When you edit your document design with uCreate Print, you use simple point-and-click operations to tag different design objects, such as a text frame or graphic frame, with the desired type of content object; for example the First Name text content object or the school Image graphic content object. Such a tagged design object becomes a dynamic object: a design object that derives its content and/or appearance from the content object's value.

The Dynamic Content panel lists the Content Objects created for the column headers of the linked data source:

The screenshot shows the 'Dynamic Content' panel with the following annotations:

- Opens the panel menu:** Points to the menu icon in the top right corner.
- Filter view of Content Object type:** Points to the 'All Types' dropdown menu.
- Filter view of Content Object group:** Points to the 'All Groups' dropdown menu.
- Content Object list:** Points to the list of content objects (RID, First Name, Last Name, Club Level, DOB, Phone Model, Activation, Gender, Address1, Address2, City, State).
- Content Object data for current recipient:** Points to the values for the selected content objects (Jane, JONES, Stellar, April 3, SC\_001.eps, internet, f, 9 MAYFLOWER DR, PLYMOUTH, MA).
- Record selector (eg 1 of 1000):** Points to the '1 of 1000' text in the bottom right.
- Dynamic visibility of the active layer & spread:** Points to the icons in the bottom right.
- Resize panel:** Points to the handle in the bottom right corner.
- Current content source (eg the name of the linked data source):** Points to the 'StarCom\_Customers.csv' text in the bottom left.
- Proofing options (content sources):** Points to the 'Data Source' dropdown menu.
- Browse to data source:** Points to the folder icon next to the data source.

The populated Dynamic Content panel shows the following details and options:

- **Show Content Objects, Variables or Input Data Fields**—While content objects are available to place into the document design, variables are used behind the scenes. Variables use the same kind of business rules or logic that we used for content objects in this tutorial. Variables are useful to calculate a value once – you can then use that variable in several content objects instead of having to calculate



the value each time. Input Data Fields are the fields or columns expected to be found in the data source linked to the document.

- **Filter View** —Use the **View** drop-down list to show **All Types** of content objects, or to filter the list to show a specific type (e.g., **Text**, **Graphic**, **Visibility** etc.).
- **Filter Groups** —When connected to a plan file, uCreate Print can filter the list of content objects by the group that contains them. Like folders, groups can help sort content objects into logical categories.
- **Content object list**—lists the names and types of the content objects available to place into the document. These include content objects automatically created when you link to a data source, or have created manually.
- **Proofing options**—uCreate Print offers you a number of ways to check what your dynamic document will look like when actual values are used in place of the dynamic objects. These actual values can come from various types of content sources, including your data source, a proof set file or content samples.
- **Browse to data source** —This option allows you to connect to a different datasource. The functionality is the same as using the menu to select Dynamic Content > Link to Data > Datasource...
- **Dynamic Visibility**—Opens the dynamic visibility dialog, so you can assign a visibility content object to the active spread or active layer (Note that the icon is the color of the active layer). When dynamic visibility is assigned, an eye symbol is added to the respective icon (e.g. ).
- **Record selector**—used to proof your dynamic document: browse through the records of your content source (the linked proof set, a content sample or the linked data source), and see how the dynamic objects' value changes the document when you scroll from recipient to recipient.
- **Resize panel**—to see the complete list of content objects, resize the panel by dragging its bottom right corner. Alternatively, use the horizontal scroll bar to scroll down the list.



# Review and extra exercises

To consolidate your understanding of the topics covered in this tutorial, please answer the following review questions, and complete the additional exercises:

## Review questions

- What kind of data source files can you connect to uCreate Print? (Page 15)
- .....
- What type of content objects are created when you link uCreate Print with a data source? (Page 15)
- .....
- When you are selecting text to apply copy fitting, do you use the Type tool, or the Selection tool? (Page 18)
- .....
- Content objects can only be data source fields. True or false? (Page 24) . . . . .
- Image assets for Graphic Content object must all be the same size. True or false? (Page 27) . . . . .
- From which folder will uCreate Print search for assets if you don't set the assets folder? (Page 26)
- .....
- What print output formats can uCreate Print produce? (Page 30)
- .....

## Additional exercises

### Exercise 1

Take an existing InDesign document used in your company (for example a business card) and create a data source in Excel or CSV to contain all the data fields necessary for the document (firstname, lastname, address, phone, fax, email, etc). Enter a couple rows of data representing some of your colleagues and convert the static InDesign document to a dynamic template.