

XMPie Training

EDU Tutorial - Part 3 - Using Rules and Logic

Document version: v3

Software version: v12.1

Published date: April 2023



A CareAR Company

one to one in one™



Notices

© 2023 XMPie®, A CareAR Company. All rights reserved.

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

For information, contact XMPie Inc.

485 Lexington Avenue

10th. Floor

New York, NY 10017

More information can be found at www.xmpie.com

XMPie provides this publication "as is" without warranty of any kind, either express or implied. This publication may contain technical inaccuracies or typographical errors. While every precaution has been taken in the preparation of this document, the publisher and author assume no responsibility for errors or omissions. Nor is any liability assumed for damages resulting from the use of the information contained herein. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. XMPie may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time.

XMPie, the XMPie logo, PersonalEffect, uChart, uCreate, uDirect, uEdit, ulmage, uPlan, uProduce, uStore, StoreFlow, Circle, ADOR, XLIM, RURL, Hosted e-Media Express Edition, and the slogan "one to one in one" are trademarks or registered trademarks of XMPie, A CareAR Company, and may not be used without permission. No part of these materials may be used or reproduced in any form, or by any means, without the express written consent of XMPie. To request permission to use these materials, please contact marketing@xmpie.com.

XEROX® and XEROX FreeFlow®, FreeFlow Output Manager® and FreeFlow Process Manager® are trademarks of Xerox Corporation in the United States and/or other countries.

Adobe Acrobat, Adobe Dreamweaver, Adobe Illustrator, Adobe InDesign, Adobe Photoshop and Adobe After Effects are trademarks of Adobe Systems Incorporated.

SQL Server, Windows Server, Windows, Microsoft Office, Microsoft Excel and Microsoft Access are trademarks or registered trademarks of Microsoft Corporation.

Mac OS is a trademark of Apple Computer, Inc.

ComponentArt is a trademark of ComponentArt Inc.

Other trademarks and service marks are the property of their respective owners.

Contents

About this tutorial	5
Target audience	6
Document structure	6
Reference materials	6
Prerequisites	6
Module 1:	
Introduction and overview	7
Duration	7
Objectives	7
Procedure	7
Previous tutorials and sample files	7
Unzip and review the contents	7
Open the InDesign document	8
Re-link to the data source (if necessary)	8
Re-link images (if necessary)	8
Install or replace missing document fonts (if necessary)	9
Set High Quality display performance	9
Review campaign requirements	10
Front page tasks	11
Back page tasks	11
Module 2:	
Using built-in functions	12
Duration	12
Objectives	12
Procedure	12
Formatting or modifying database values	12
Save a new copy of the document	14
Module 3:	
Using rules or logic	15
Duration	15
Objectives	15
Procedure	15
Creating a new Content object	15
Setting the rule or logic	16
Place the new Text Content object into the design	17
Detecting if a database field is empty	18
Place the new Text Content object into the design	19
Handling text box overflow	19
Setting a default graphic	20

Module 4:	
Dynamic Print	22
Duration	22
Objectives	22
Procedure	22
Basic variable data print.	22
Variable data print with imposition	24
Appendix A - Rule editor	26
Launching the Rule editor	26
Using the Rule Editor's Building Blocks	26
Creating various types of rules.	27
Value Rules	27
Conditional Rules	27
Functions.	27
Review and extra exercises	28
Review questions	28
Additional exercises	28
Exercise 1	28

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 InDesign CC,
- 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 rules or conditions that are needed to change the text and in the document for this tutorial.

Procedure

Previous tutorials and sample files

This tutorial is part of a series. It is recommended that you have downloaded and completed the previous tutorials. If you have, you can continue to use the files you have already started creating. Alternatively you can download the files ready to start this tutorial.

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

Open the InDesign document



Step by step instructions

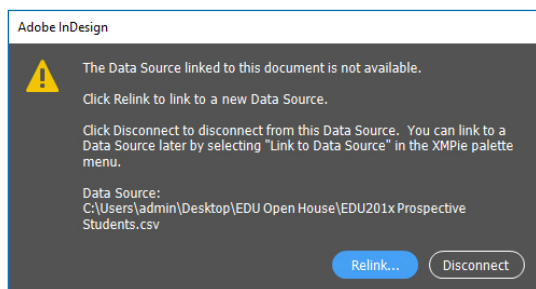
Launch InDesign and open the **EDU Postcard CC2023 - TUTORAL 3.indd** file.

If you have problems opening the file with your version of InDesign, then open the **EDU_Static.idml** file and **Save as...** to save it as an INDD document. You will need to repeat the steps outlined in Tutorial 2 before starting this tutorial.

Re-link to the data source (if necessary)



Step by step instructions

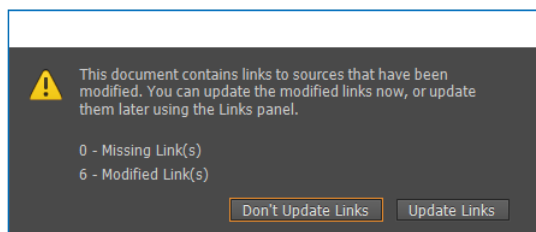


If you receive this warning dialog, then click **Relink** and browse to the **EDU201x Prospective Students.csv** file provided in the tutorial zip file.

Re-link images (if necessary)

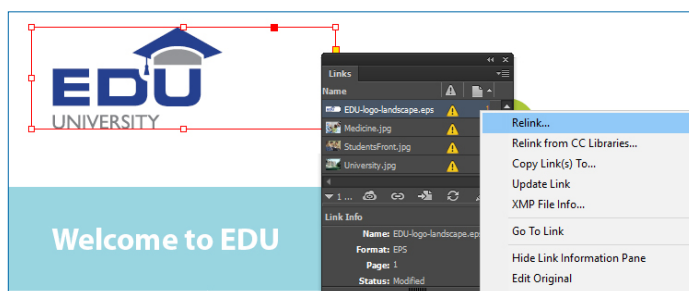


Step by step instructions



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.

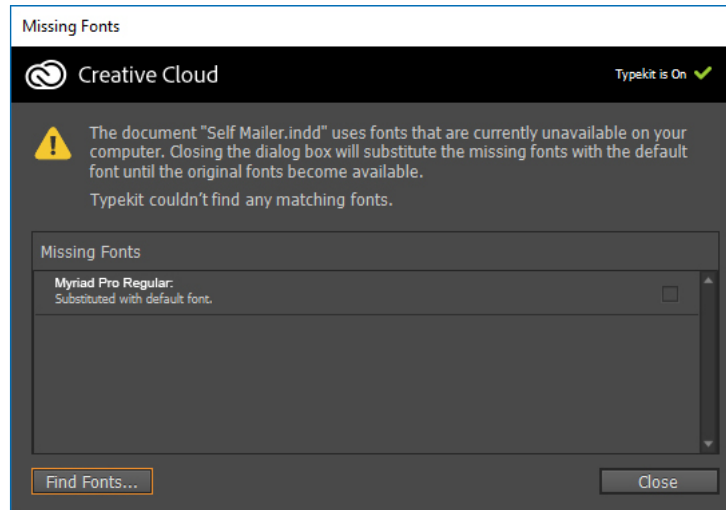
Locate the image of the same name in the resources or assets folder. InDesign should offer to relink other images found in the same folder. If not, repeat the process until all images are relinked.

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

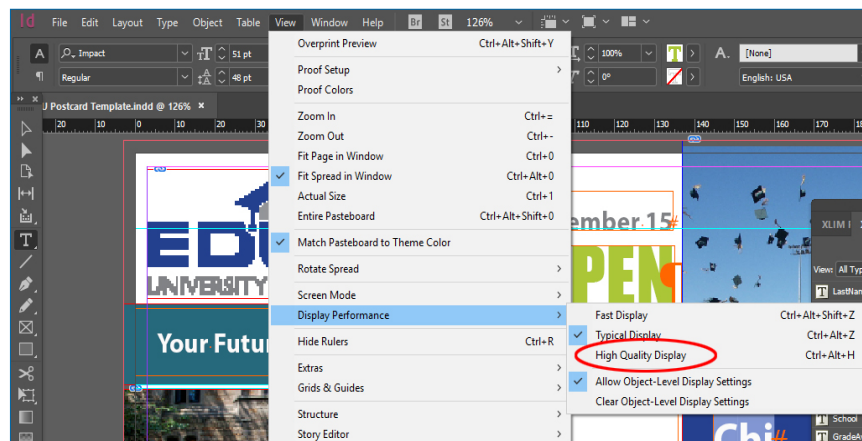


If InDesign prompts you about missing fonts, then click **Find Fonts...** and select to replace the missing fonts with one already installed on your computer.

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 continue the EDU Postcard document we started in the previous tutorial.

The invitation postcard document looks like this:

EDU UNIVERSITY

Your Future Starts Here

November 15

OPEN HOUSE

Chi
Welcome to EDU University

* Chi, you may be eligible for a scholarship!

15% OFF
Application Fees
* If you apply during the open house

8:00 AM - 10:30 AM Registration & Introduction to EDU - Main Administration Building.
11:00 AM - 12:30 PM Tour of the Campus given by current undergraduates.
12:30 PM - 2:00 PM Student social activities and lunch break.
2:30 PM - 3:30 PM Presentation by the Student Union on student life on campus.
4:00 PM - 6:30 PM Meet the EDU Faculty, Advisors and Alumni.

Display General.PDF when there is no school provided

20% Discount for Engineering

Relevant school name or "EDU University" if no school provided

EDU UNIVERSITY

Open house

NOV 15

EDU University
70 Walnut St.
Anytown, NY 10012
(212) 998-2500
www.edu-university.edu

Postage Paid

Dear Chi,
In order to choose the right university, you will need to ask questions, challenge your preconceptions and develop your opinions through talking to others. Our open house is designed to provide you with all the information you need to make an informed choice.

As a new student you are entitled to a 15% discount on your application fee, if you apply during the open house registration.

Additionally, based on your grades and scores, you may be eligible for a scholarship. Stop by the Scholarship Desk.

Graduation Rates (average all schools)

	2011	2010	2009	2008
Law	48	47	49	37
Medical	52	55	50	48
Engineering	53	54	53	42
All	51	52	51	42

For more information on the open house visit:
<http://www.edu-university.edu/openhouse>

Chi Cotton
588 Frank Avenue
Springfield, MA 01103

20% Discount for Engineering

City text should be upper-case









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	388 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 Tennille 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	4/18/1996	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

- Display a general image when no school name is provided in the data source - page 20.
- Change the discount from 15% to 20% if the student is interested in Engineering - page 15.
- Place in the School name as text (if available) and put EDU University if there is no school in the data source - page 18.

Back page tasks

- Format the City in the address block to appear upper-case - page 12.
- Change the discount from 15% to 20% if the student is interested in Engineering - page 17.

Module 2:

Using built-in functions

Placing database values directly into the document is very simple, as demonstrated in the previous tutorial. However, in many cases, the values in the database may not be consistently formatted, or you may instead need to display an image or message based on a database value rather than use the value itself. This is when we use the Rule Editor.

Duration

About 5 minutes.

Objectives

After completing this module, you will be able to:

- Edit a Content object using the Rule editor, and
- Use built-in functions to format database values.

Procedure

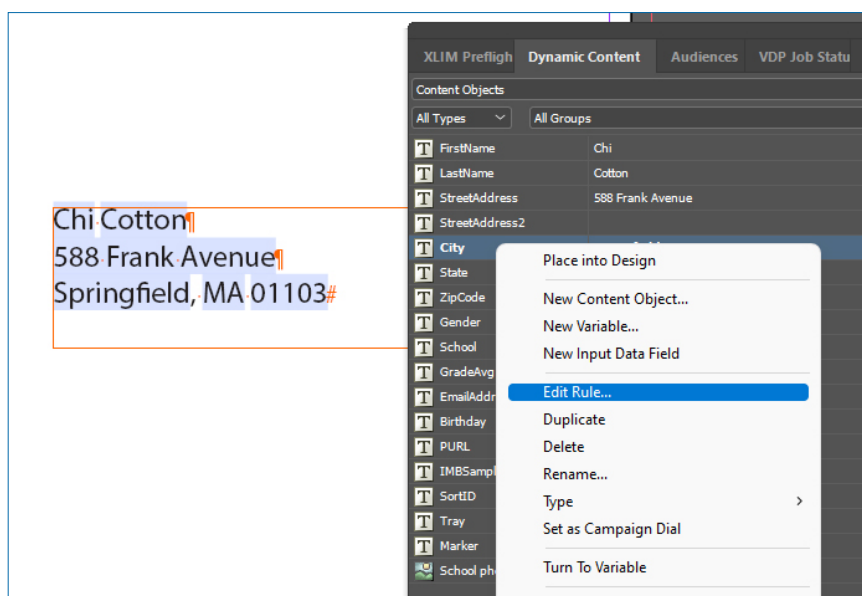
Formatting or modifying database values

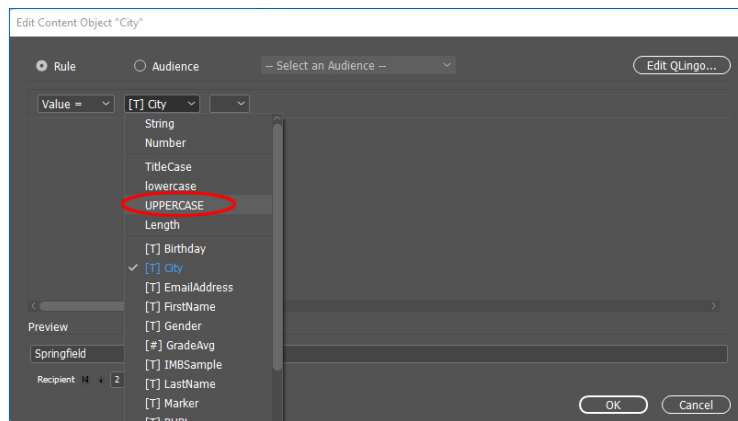
One of the requirements is to display the City in upper-case in the address block. So regardless of the formatting of the City in the database, we need to force the value to be upper-case.



Step by step instructions

In the Dynamic Content panel, right-click on the **City** Content object and select **Edit Rule...**

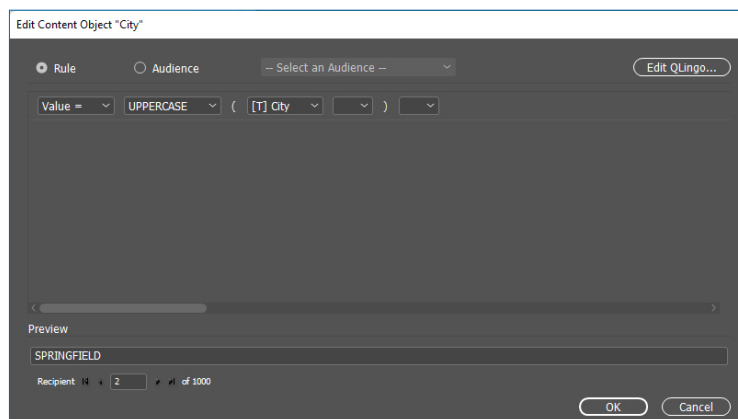




The rule editor will open with the current expression used for the City content object.

By default, the expression is to take the value from the database's City field.

Click on the drop-down that currently says **[T] City**. Scroll up and select **UPPERCASE**.



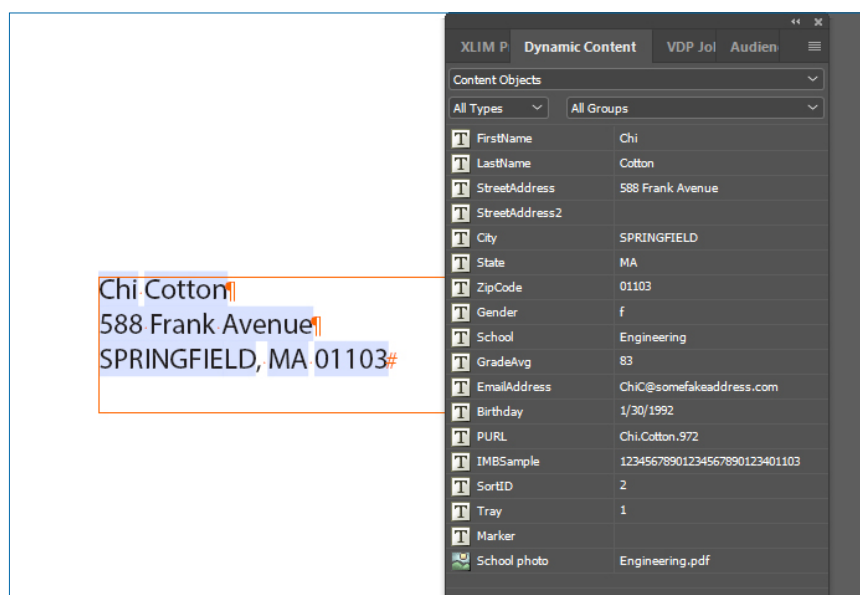
Notice that the value is now:

UPPERCASE([T] City)

The City database field is inside the UPPERCASE() function.

Also notice at the bottom of the Rule Editor is a Preview area that allows you to scroll through the database records and see how the current expression is working.

Click **OK** to save your change.



Where ever you placed the City Content object in the InDesign document now appears in upper-case.



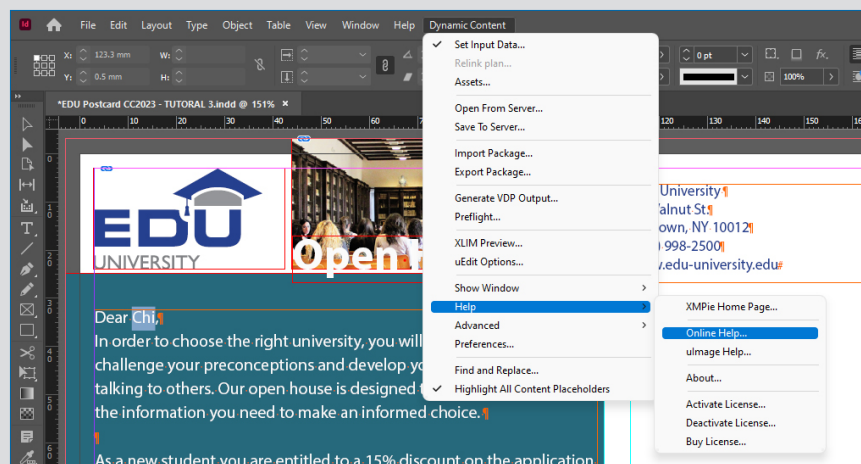
Additional information and notes

For more detailed information about the Rule Editor dialog, please refer to Appendix A.



Additional information and notes

uCreate Print has many built-in functions. For more information on how to use each function, refer to the Online Help:



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 is helpful to now **Save as...** to create a new copy of the document.



Step by step instructions

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

Give your working copy of the file a new name.

Click **Save**.

Module 3:

Using rules or logic

In addition to functions, the Rule editor allows us to create rules and logic, for example "If-Then-Else" logic, which we will use in this module.

Duration

About 20 minutes.

Objectives

After completing this module, you will be able to:

- Create new Content objects using the Rule editor, and
- Use if-then-else logic to control Content object content based on a database value.

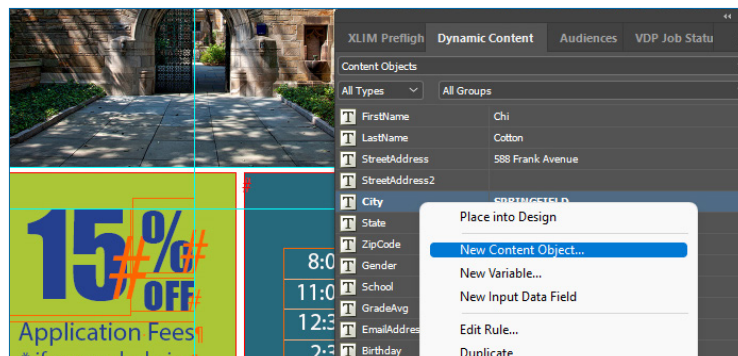
Procedure

Creating a new Content object

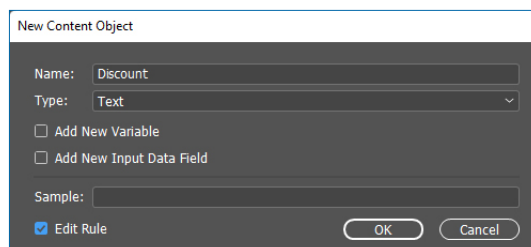
For our first example, we will create the Discount Content object to offer Engineering students 20% discount and other students 15% discount on their application fees.



Step by step instructions

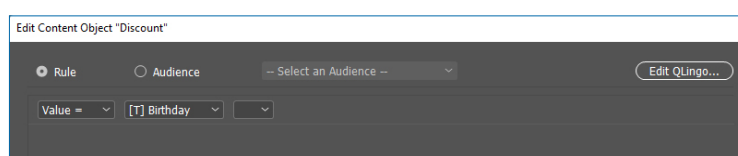


In the Dynamic Content panel, right-click (or Cmd-click on Macintosh) on any of the Content Objects in the list, and from the menu, select **New Content Object...**



Enter a **Name** for the new **Discount** Content object. The **Type** will be **Text** since we want to place the content object into text in the document.

Check the box to **Edit Rule** and click **OK**.



The Rule Editor will appear for you to define the new Content object rule or logic.

Setting the rule or logic



Step by step instructions

Using the first drop-down, change **Value=** to **If** so we can define the logic.

From the second drop-down, select the **School** database field.

From the third drop-down, select = (equals sign).

From the fourth drop-down, select **String** and then type the word **Engineering** into the text box.

On the second line, use the drop-down to select **String** and enter **20** into the text box.

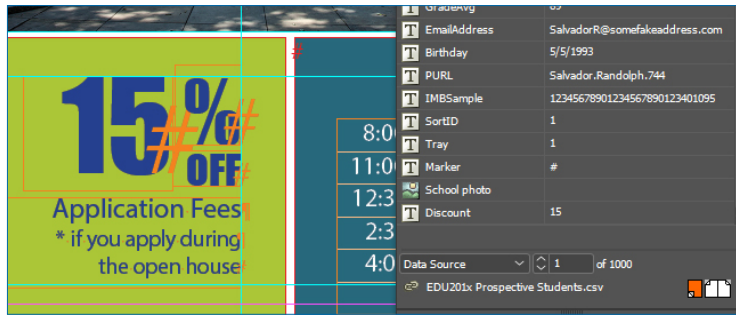
On the third line, enter **15** into the text box.

Our expression is complete. It says: if the School field for the current recipient contains "Engineering", then display "20" else display "15". You can use the preview area at the bottom of the Rule editor to see the values change for different recipients.



Additional information and notes

The text comparison used in the above expression is case-sensitive. In this example, all the database values are "Engineering". In your future work, you may have a situation where the database is not clean and may have different case for example: Engineering/engineering/ENGINEERING for different recipients. In this situation, you can use a formatting function to push the database value to always be in one case, and then enter the comparison string in that case.



Click OK to save your new Content object.

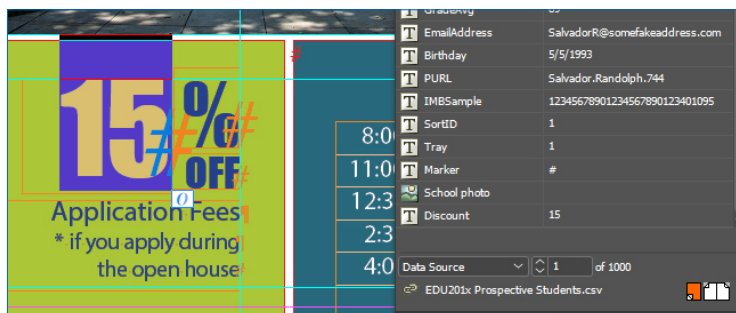
The new Content object is added to the bottom of the list in the Dynamic Content panel.

Place the new Text Content object into the design



Step by step instructions

From the InDesign tool box, select the **Type tool** .



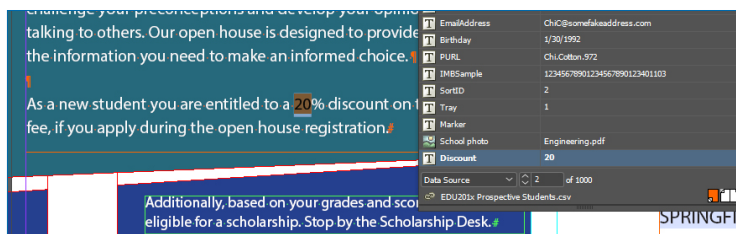
Select the static text in the InDesign document, and then double-click the **Discount** content object in the Dynamic Content panel.

Scroll through your records to confirm that the discount changes to 20% when the School field is Engineering.



Additional information and notes

If you cannot see the Content object values in the Dynamic Content panel, select **Preferences...** from the Dynamic Content menu and check the box to **Show Data column in Dynamic Content Panel**.



Move to the second page of the document and repeat the process to update the discount percentage in the text of the letter.

Detecting if a database field is empty

In some places in the document, we would like to put the name of the school - for example to say "Welcome to the School of Engineering". But, many records in the database do not have an entry in the School field, so we need to use logic to put "Welcome to EDU University" if there is no School in the database.



Step by step instructions

In the Dynamic Content panel, right-click (or Cmd-click on Macintosh) on any of the Content Objects in the list, and from the menu, select **New Content Object...**

Enter a **Name** for the new Content object.

Set **Type** to **Text**.

Check **Edit Rule**.

Click **OK**.

The Rule Editor will appear for you to define the new Content object.

Change the first drop-down to **If**.

From the second drop-down select the **IsNullOrEmpty** function.

Inside the **IsNullOrEmpty** function, select the **School** database field.

The **IsNullOrEmpty** function will return either True or False, so there is no need to do any comparison. Select the empty top row of the drop-down to remove the comparison fields.

If the school field is empty, the **Then value =** should be the string **"EDU University"**.

The **Else value=** will be "the **School of**" and the name of the **School** from the database.

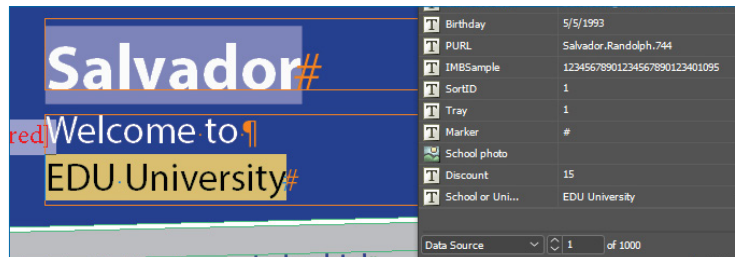
Use the Preview area to check your logic, and click **OK** to save your new Content object.

Place the new Text Content object into the design

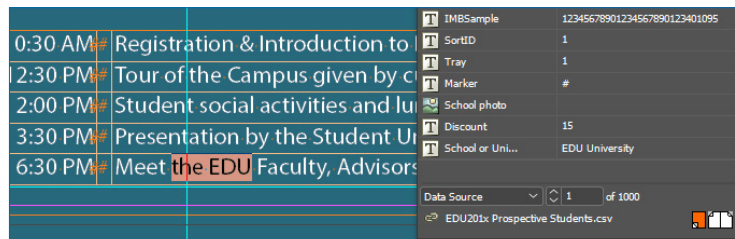


Step by step instructions

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

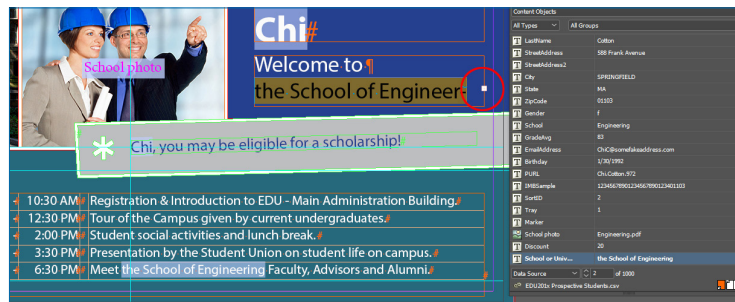


Select the static text in the InDesign document, and then double-click the **School or University** content object in the Dynamic Content panel.



In the open day agenda, select the static text and double-click the **School or University** Content object in the Dynamic Content panel.

Scroll through your records to check your work.



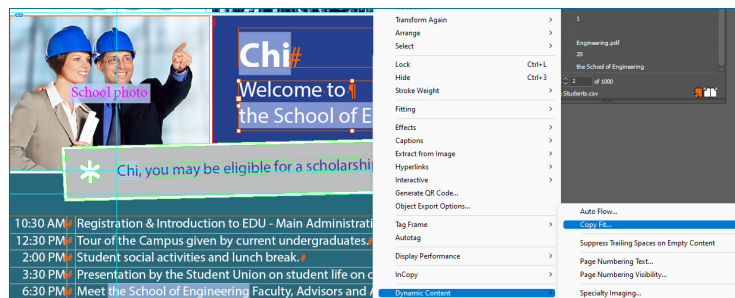
You should find that the welcome text box overflows for some records.

Handling text box overflow



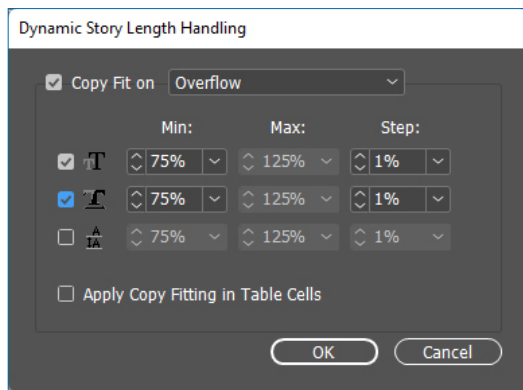
Step by step instructions

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



Click to select the welcome text box.

Right-click and select **Copy Fit..** from the **Dynamic Content** group.



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**.

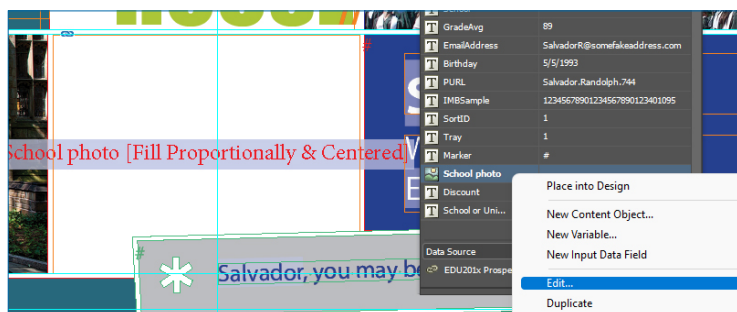
You should now see the font size and scaling is adjusted if the text overflows the text box.

Setting a default graphic

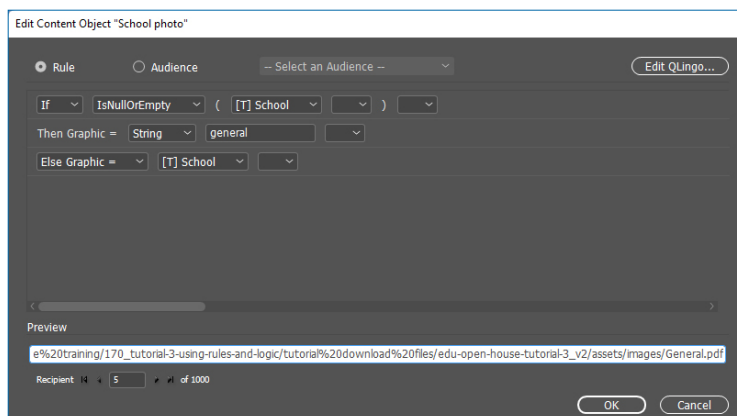
In the previous tutorial, we created a new Graphic Content object to change the School photo based on School name in the database. Currently, this is working fine when there is a School defined, but no image appears when there is no School in the database. The logic is the same as our last example, only we are setting the image name to use when there is no School value.



Step by step instructions



In the Dynamic Content panel, right-click on the **School photo** Content object and select **Edit Rule...**



Change **Graphic = to If**.

Select the **IsNullOrEmpty** function, and the **School** database field.

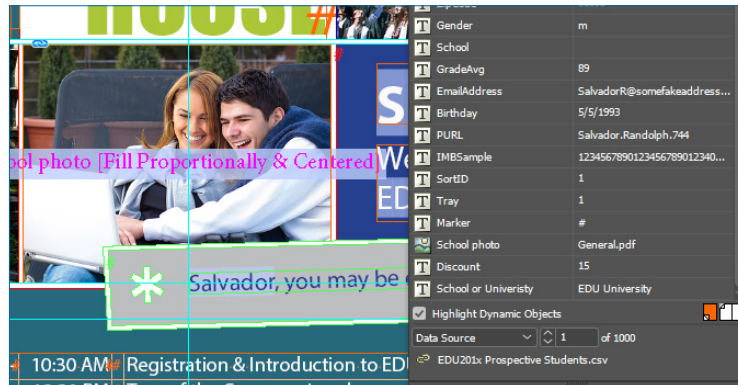
When the field is empty, we want the **String "general"**.

Else the **School** database value.

Notice in the Preview area, that the logic has found the General.pdf file in the Assets folder.

Click **OK** to save your edits to the School photo content object.

We already placed the Content object into the design in the previous tutorial. There is no need to replace or update the document. As soon as the rule is updated, the changes will be reflected in the document.



Scroll through the records to see that an image appears now for all records.

Module 4:

Dynamic Print

Our dynamic template is complete. We are ready to create the output file to print. Please note that Dynamic Print 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 print output of one or more data source records, and
- impose the output for optimized press sheet coverage.

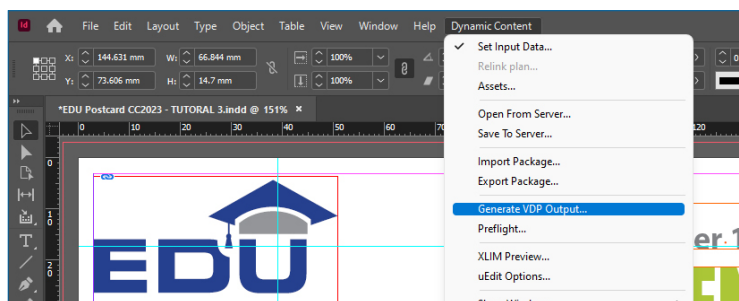
Procedure

Basic variable data print

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

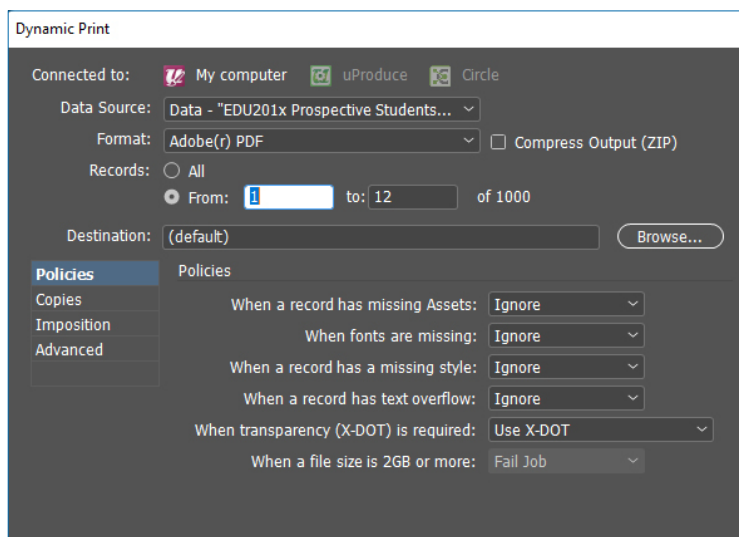


Step by step instructions



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. After a few moments, the dialog will close and you are returned to the document.



Additional information and notes


For more information on other settings in the Dynamic Print dialog, refer to the uCreate Print User Guide by selecting **Online Help** from the Dynamic Content menu Help group.



Additional information and notes

In addition to PDF, uCreate Print can output several other VDP output formats including PS, VIPP, VPS, PPML and PDF/VT-1. The best one to use will depend on your printer so you should do some tests to see which is smallest/fastest.

In the folder where your InDesign document is saved, look for a new folder called **output**. Inside the output folder, uCreate Print will create a subfolder with the current date and time and save the output file into this folder.

tutorial download files > EDU-Open-House-Tutorial-3 > output > 2022_10_24_13_09_30		
Name	Date modified	Type
 EDU Postcard CC2022 - TUTORAL 3.pdf	24/10/2022 1:09 PM	Adobe Acrobat D...



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 panel menu, select **Dynamic Print...**

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 **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**.

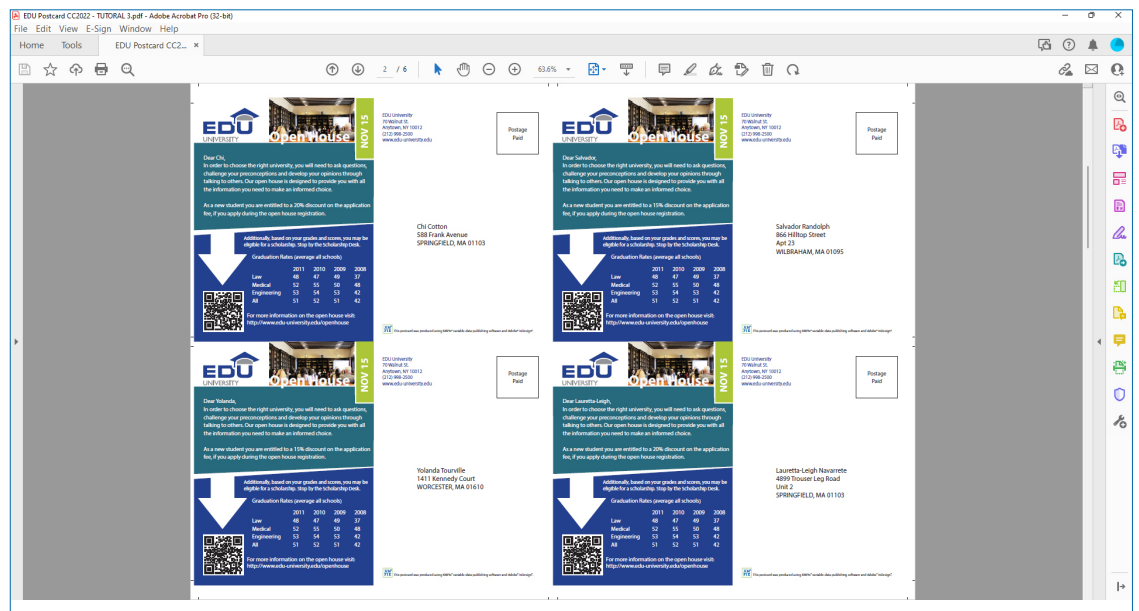
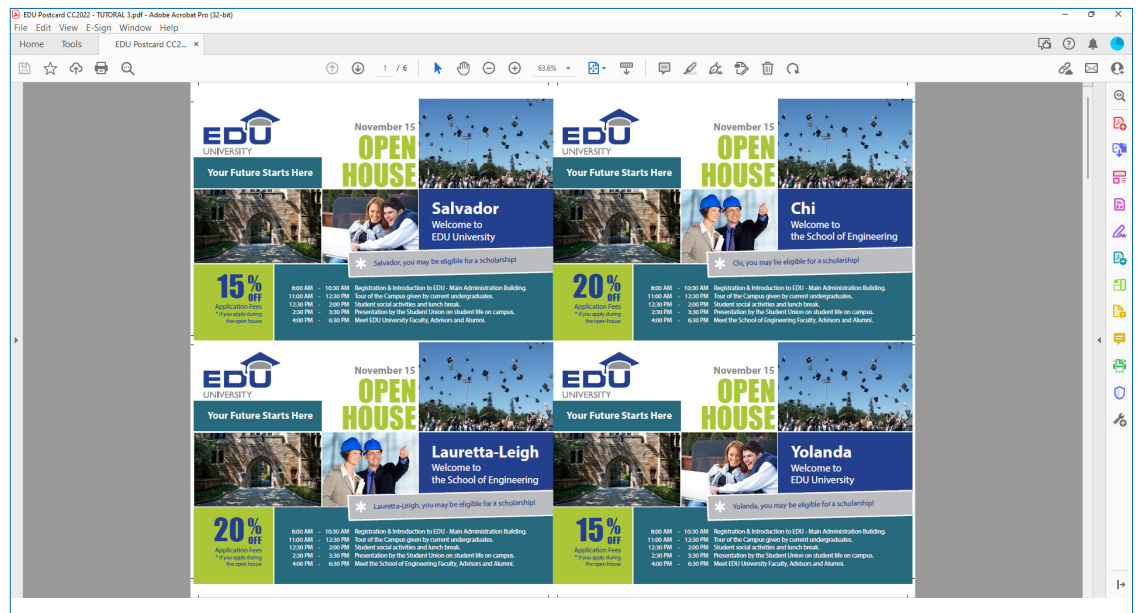
Check **Duplex**.

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 on the next page.



Appendix A - Rule editor

The rule editor is a simple graphic user interface, consisting of basic drop-down lists and text boxes. It is specifically designed to allow non-technical users to easily define or modify Content object rules.

Here are some of the “rule editing basics” you should be aware of:

Launching the Rule editor

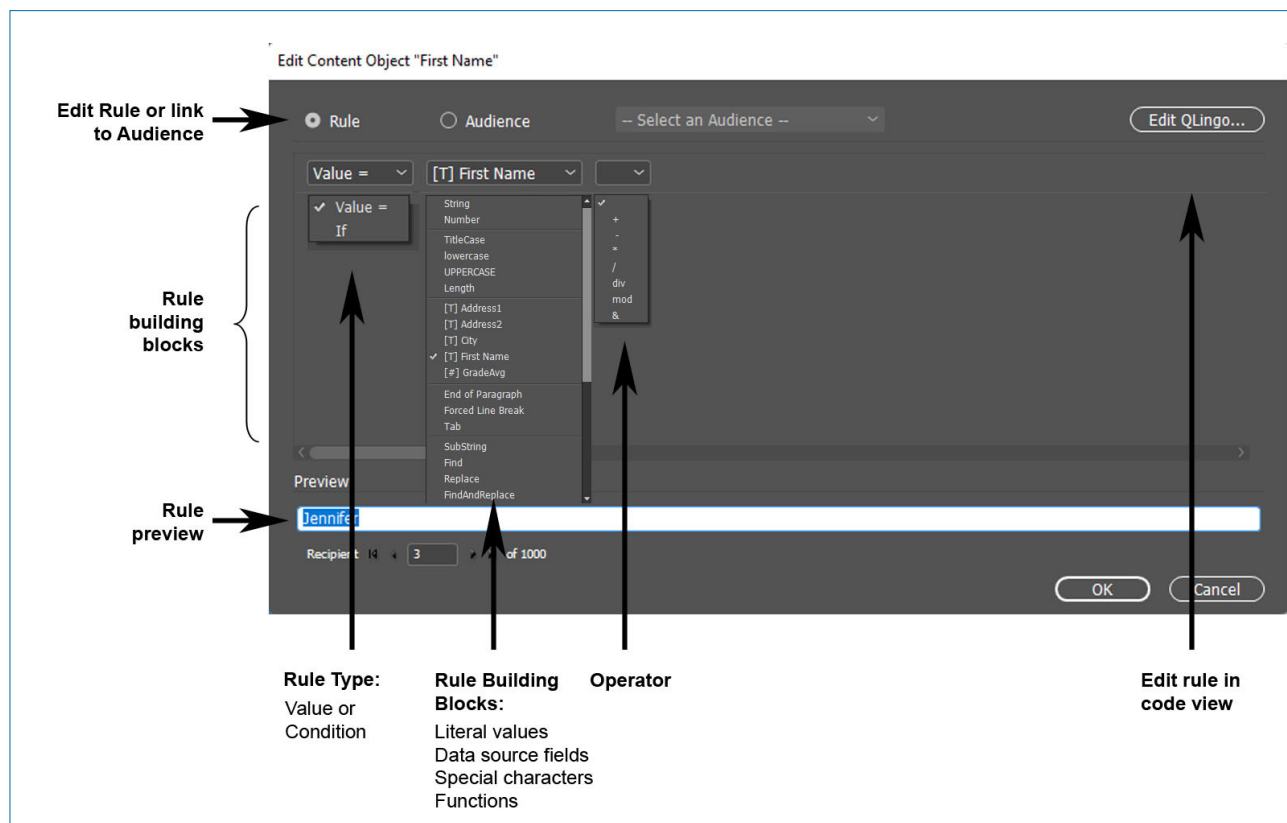
You can launch the rule editor in one of the following ways:

- To edit an existing Content object— in the content object list, identify the content object you want to edit. Right-click on the relevant content object, or Cmd-click it on the Macintosh. Then select **Edit Rule...** from the menu.
- To add a new Content object— in the content object list, right-click, or Cmd-click on the Macintosh, anywhere, and select **New Content Object...** from the menu. You can check the **Edit Rule** checkbox to open the Rule editor when the new content object dialog closes.

Using the Rule Editor's Building Blocks

The image below shows the rule editor window, used to edit a text content object (First Name). The drop-down lists have been expanded to reveal the available options.

The rule editor options vary, depending on the type of content object you are currently editing or defining (text, graphic etc.).



The editor defines the Content object's rule, in the form of an expression.

- The first drop-down list determines whether this rule sets a value or a condition.
- The second drop-down list contains building blocks for defining the Content object's value or

condition: literal values (string or number), functions (common and extended), and an alphabetical list of the data source columns.

- The third drop-down list includes operations, such as "+", "-". When you define a condition (by setting the first drop-down list to "If"), the operations list is enhanced with comparison operators, such as "AND", "OR".

Creating various types of rules

Value Rules

To define a rule as a value, set the first drop-down list to **Value=** for text content objects, **Graphic=** for graphic content objects, etc. Value expressions are used in the following cases:

- i. The Content object is a data source column header:

A Content object created for a data source column header is fed with the value of the appropriate data source field, and this value changes dynamically per-recipient. For example, the FirstName content object receives the value of each recipient's FirstName field (for example, Jane).

You can use value rules to recreate Content objects that were deleted from the design.

- i. The Content object has a literal value (a number or a string of text):

You can set a Content object to use a fixed value, which will be common to all recipients. For example, to set the value of a Graphic Content object, specify the image's filename, for example: Medicine.

Conditional Rules

Conditional rules allow you to determine a Content object's value using "If-Then-Else" statements. In this case, we will use a conditional rule to determine the value. For example, the name of the school Graphic Content object is set to the school name, or to General.

Functions

Functions are displayed in the second drop-down list. Functions give you advanced way for the flexibility to convert and manipulate the data source value so that it fits your specific needs.

For a detailed description of all uCreate Print functions, please refer to the uCreate Print User Guide by selecting **Online Help** from the Dynamic Content menu Help group.

Note that a rule may consist of one or more "Value rule" and "Conditional rule" lines. To add more rule lines, use the AND/OR options of the operations drop-down 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 is the name of the function that detects if a database field is empty? (Page 18)
-
- Where can you find information about uCreate Print functions? (Page 14)
-
- When you change or edit a content object expression, do you need to replace it in the document too, or is the document updated automatically? (Page 21)
-
- Content objects can only be data source fields. True or false? (Page 15)
- Once you create a Content object, you cannot edit it. True or false? (Page 12)
- What are the three different font characteristics that can be changed when applying dynamic copy fitting? (Page 20)
-
- What print output formats can uCreate Print produce? (Page 23)
-

Additional exercises

Exercise 1

In the previous tutorial we suggested that you 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).

To continue the same theme, edit your sample database and delete an entry for one record - for example remove an email address or mobile phone number from one record.

Now, in your InDesign document, relink to the modified data source, and try to set some rules to handle records with missing values. For example you may need to remove a prefix "Mobile: " when there is no mobile number in the database.