Version 1.5

Darwin VI Authoring Tool

for Adobe InDesign (Macintosh)



User Guide

English

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www.creopod.com/Darwin

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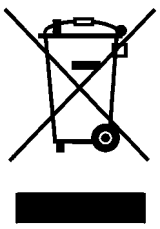
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1 About Darwin for InDesign

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Introduction

Darwin™ for Adobe® InDesign® CS2 is an authoring system used to produce high-quality variable printing. Darwin enables you to print pages with content customized for each reader. Any amount of text and graphics can be varied on each page. The variable content is based directly on your data or through rules you define. You can also specify rules to select which layout(s) is used for each reader.

For rapid and efficient printing, Darwin can generate output files for use on digital printers.

Darwin Components

There are two major components in the Darwin system:

- **Darwin Pilot,** enables you to manage the variable data and to set up printing.
- **Darwin CoPilot** is a Creo plug-in module of the InDesign page-layout application used to create pages for use with the Darwin system.

2 Getting Started

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Overview

The Darwin software consists of the Darwin Pilot application, the Darwin CoPilot plug-in to InDesign CS2, and other various support files.

Darwin is available in two configurations: Desktop and Pro.

System Requirements

This section lists the system requirements for Darwin for InDesign.

- Power Macintosh® G4 or later
- 256 MB available memory
- Mac OS X 10.3 or 10.4
- The correct Creo PPD (depends on the system to which you are printing)
- Adobe InDesign CS2
- 500 MB disk space

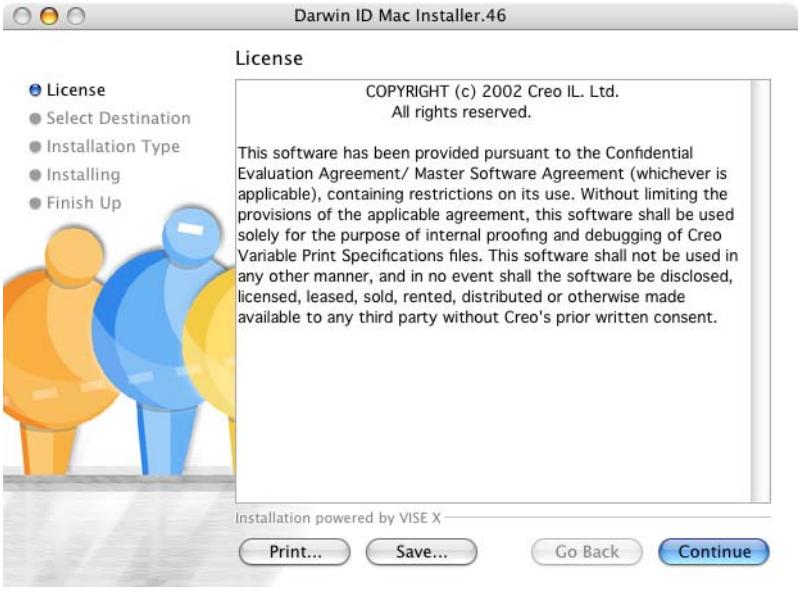
Easy Install Workflow

1. Shut down the Macintosh workstation.
2. Connect the USB dongle to an available USB port.
3. Restart the Macintosh.
4. Insert the Darwin application CD into the Macintosh.
5. Open and read the Release Notes on the CD. The Release Notes document includes important last-minute information that is not mentioned in this user guide.

6. Double-click the **Darwin ID Mac Installer** icon.



7. Enter your password, and click **OK**.



8. Click **Continue**.

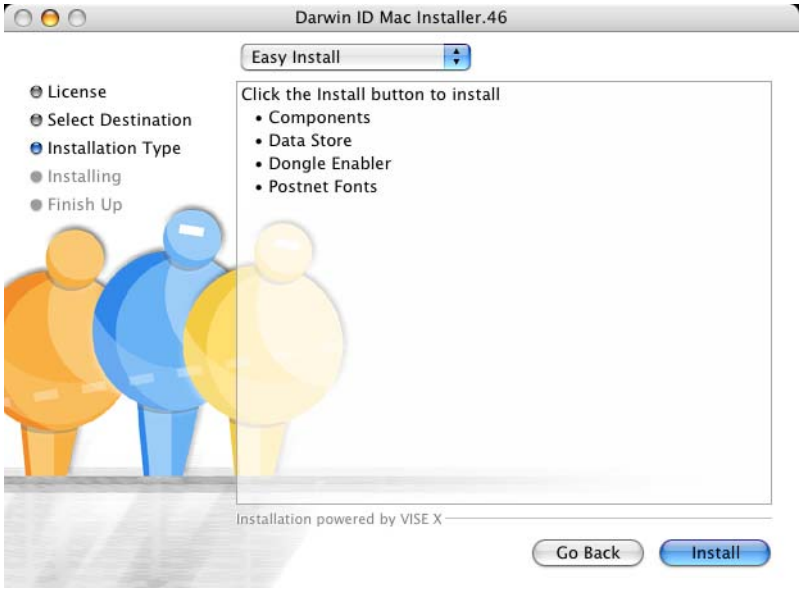


9. Click **Agree.**



10. Select the destination for the Darwin files (the same location where the InDesign files are installed) and click **Continue.**

11. Choose **Easy Install.**



12. Click **Install**.

    A message is displayed notifying you that you must restart your computer when the installation is complete.

13. Click **Continue**.

    Darwin installs all components into their correct locations.



14. When you are asked to authenticate the installation, enter the computer **Name** and **Password** and click **OK**.



15. Click **Continue** to install the Aladdin USB key support.



16. Click **Quit**.

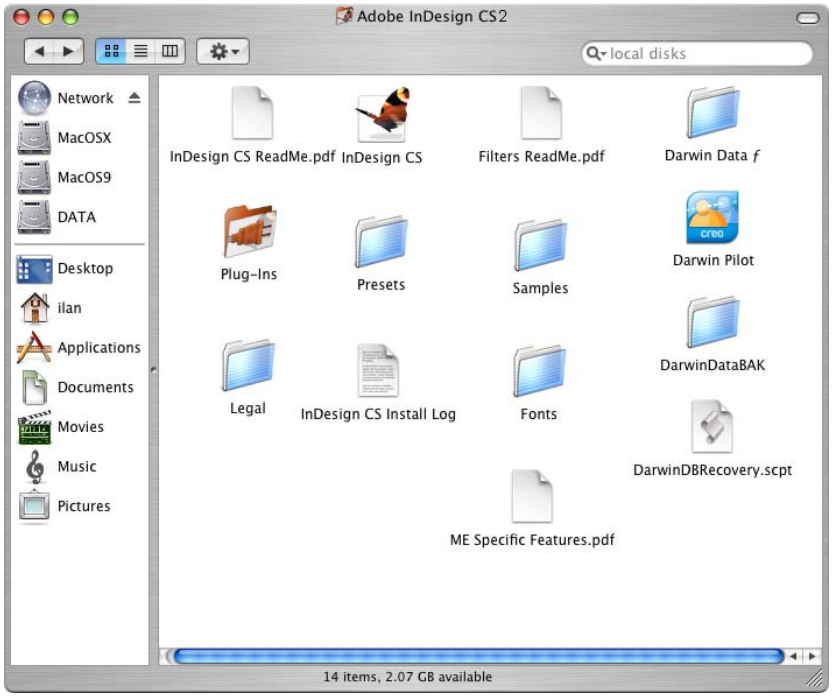


17. When the installation is complete, click **Restart** to restart your computer.

After installation, the **Adobe InDesign CS2** folder contains:

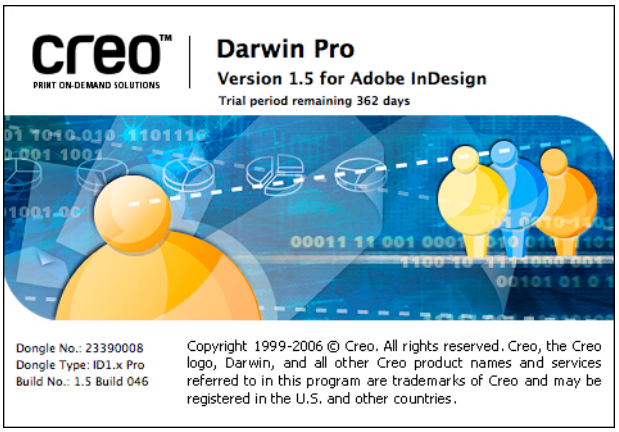
- Darwin Pilot application
- Databases folder (**Darwin Data *f***)
- **Plug-ins** folder into which the **Creo** folder was added containing the Darwin plug in

Your **Adobe InDesign CS2** folder after the easy install workflow:

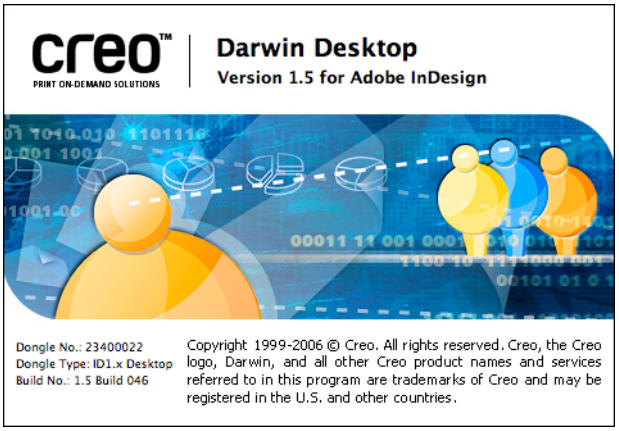


When you load the Darwin software, one of the following splash screens appears.

For Darwin Pro:



For Darwin Desktop:



Mac OS X

If you perform the Darwin software easy installation on a new version of Mac OS X v10.4, the following message appears after the installation:



➢ Click **Fix**.

The Macintosh restarts and the Darwin installation is complete.

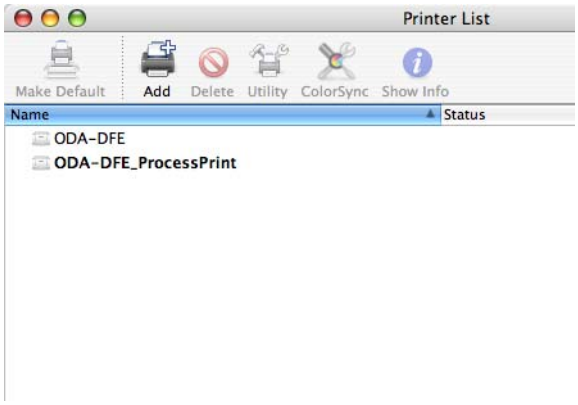
Note: This does not apply to versions of Mac OS X v10.4 where the version has been upgraded from v10.3.

Selecting the IP Printing (LPR) Protocol

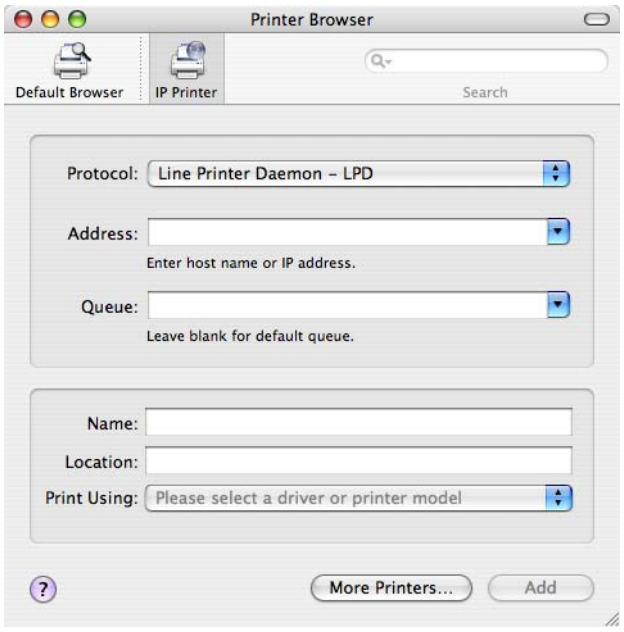
We recommend that you set the printer to the IP Printing protocol (LPR).

To select the IP Printing (LPR) protocol:

1. In the Finder, go to **Applications**>**Utilities** and open the **Printer Setup Utility**.



2. Click **Add**



3. In the Protocol list, select **Line Printer Daemon - LPD**.

4. In the **Address** list, enter the IP address of the printer you are printing to.
5. In the **Queue** list, enter the queue name as it appears on your printer. This parameter is case-sensitive.
6. In the **Print Using** list, select a driver or print model.
7. Click **Add**.

The IP Printing protocol is set.

Starting Darwin Pilot

Darwin Pilot application is available in two configurations.

- Darwin Pro
- Darwin Desktop

These configurations are enabled with a dongle. There are three types of dongles:

- Darwin Pro—which enables full functionality
- Darwin Desktop—which enables almost full functionality:
  - Enables the creation of Data Driven Graphics (DDGs), but limits the printing of records to five.
  - Does not enable database manipulation, such as change case, export record, the POSTnet barcode or Dynamic Page Exceptions.
- Darwin trial—which enables full functionality for a period of three months

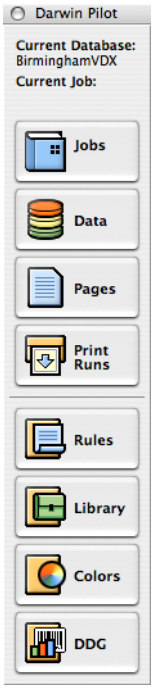
If you do not have a dongle, Darwin will work in demo mode which provides near full functionality and enables you to print up to five records at a time.

To start Darwin Pilot:

1. Connect the dongle to the USB port.
2. Check that the red light on the dongle is lit.
3. Double-click the **Darwin Pilot** icon in the Adobe InDesign CS2 application folder.

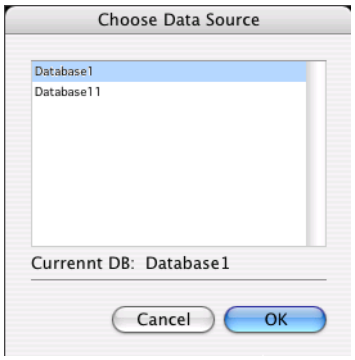
The Darwin Pilot startup window briefly appears displaying the Darwin Pilot version number.

The **Darwin Pilot** panel appears.



4. From the **File** menu, choose **Select Database**.

The Choose Data Source dialog box appears.



5. Select the database you want to work with.

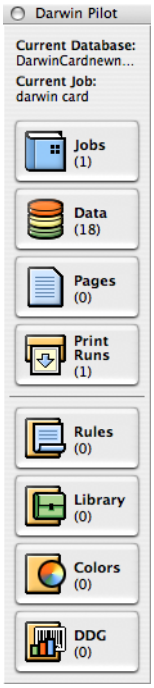


Note: Before you can open any windows from the Darwin Pilot panel, you connect to a database. Under certain conditions you are automatically connected to the last used database. The default database (DataBase1) opens the first time you use Darwin. See *Creating a Database* on page 25 for more information.

6. Click **OK**.

Once you are connected, the **Darwin Pilot** panel reappears.

7. If no job appears in the **Current Job** area, select a job or create a new one.



You are now ready to begin working with **Darwin Pilot** panel.



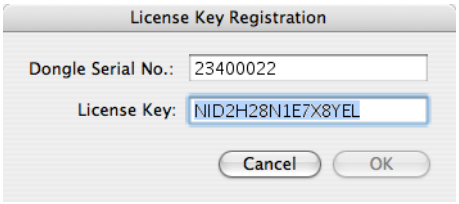
For many Darwin Pilot actions, Darwin CoPilot must be open. We recommend that you start InDesign and Darwin CoPilot when you want to use Darwin Pilot.

Upgrading Darwin

Upgrade your Darwin software by purchasing an appropriate dongle license. There is an option to upgrade from the Trial version to Desktop or Pro, and from the Desktop version to the Pro version.

1. Connect the dongle to an available USB Port.
2. Double-click the **Darwin Pilot** icon in the Adobe InDesign CS2 application folder.
3. From the **Darwin Pilot** menu, select **Register License**.

The License Key Registration dialog box appears:



4. Copy the license key number you received from your sales representative, and paste it into the **License Key** box.
5. Click **OK**.

   The Darwin software is upgraded. Check that you have upgraded to the required version of the Darwin software in the splash screen.

Crossgrading from QuarkXPress

Darwin enables QuarkXPress users to crossgrade to InDesign CS2 by purchasing a license to use with the same dongle purchased for QuarkXPress.

After crossgrading, Darwin can be used with both QuarkXPress and InDesign CS2 (not simultaneously).

Starting Darwin CoPilot

Darwin CoPilot consists of the following six panes that can be opened from the InDesign CS2 **Window** menu. Each pane can be dragged to a preferred position.

- **Darwin Fields and Rules**
- **Darwin Preview**
- **Darwin VI Properties**
- **Darwin View**
- **Darwin Preflight**
- **Darwin Auto Fitting**

Confirm that Darwin Pilot is running and connected to a database. If no job has been selected, **Darwin CoPilot** panel is inactive.

Darwin CoPilot is connected to the same database as the Darwin Pilot.



3 Working with Databases

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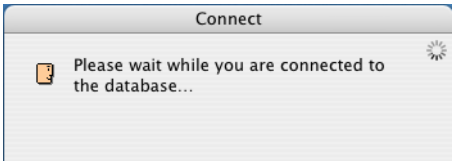
Database Overview

All the information you work with in Darwin for InDesign is stored in the **Database** folder in the **Adobe InDesign CS2** folder.

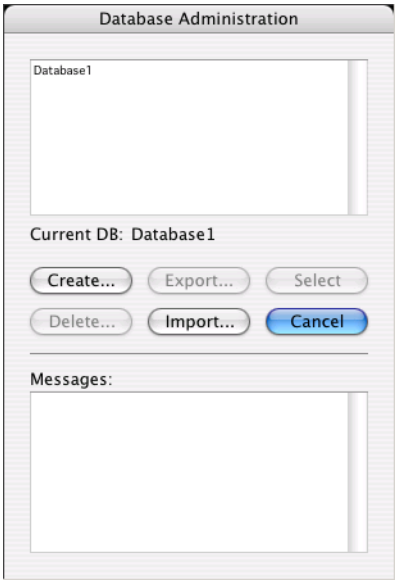
Managing Databases

The Darwin application can work with multiple databases, which you manage through the Database Administration window.

➢ From the Darwin Pilot **File** menu, choose **Database Administration**. The following message appears:



The Database Administration window appears after a few seconds.



Creating a Database

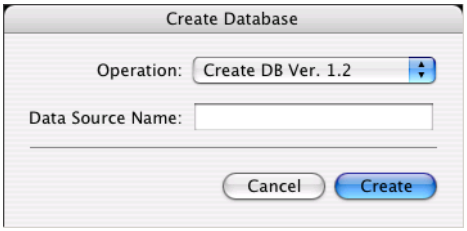
When you install Darwin, Darwin automatically creates a new (empty) database. The advantage to using only one database is simplicity. The advantage to creating and using several databases is that you can have shorter lists of jobs, rules, and so on.



Tip: Consider creating a separate database for each customer, since various jobs may share library items, rules, and so on.

To create a new Database:

1. In the Database Administration window, click the **Create** button.

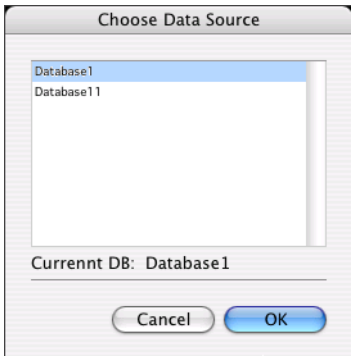


2. In the **Operation** box, select **Create DB**. (The database structure version number is also shown.)
3. In the **Data Source Name** box, type a name for the database. The database name must start with a letter and can contain only letters and numbers.
4. Click **Create.**

Opening a Database

If you have more than one database you can switch between databases.

1. In Darwin Pilot menu bar, from the **File** menu, choose **Select Database.**



2. Click the name of the database that you want to open.
3. Click **OK**.

Deleting a Database

You can delete only one database at a time.

To delete a database:

➢ In the Database Administration window, select the database you want to delete and click the **Delete** button.



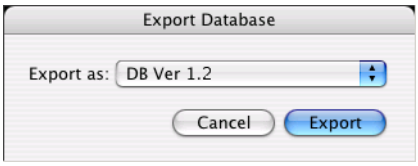
Attention: You cannot recover a database once it has been deleted.

Importing and Exporting Databases

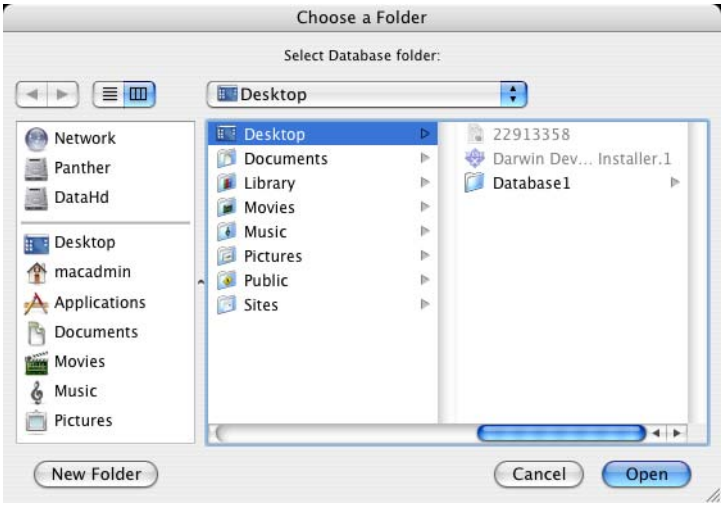
To use a database on another workstation, you must export the database from your workstation and then import it at the other workstation.

Exporting a Database

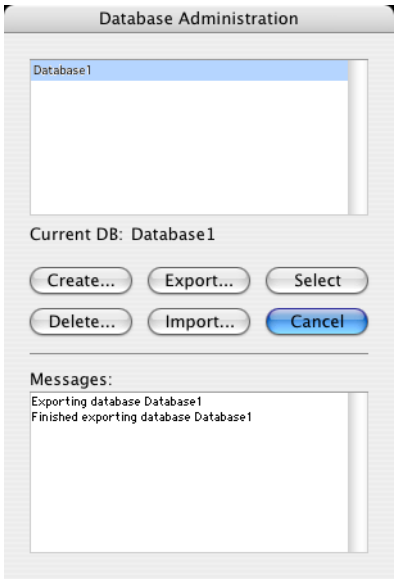
1. In the Database Administration window, click the database that you want to export.
2. Click **Export.**



3. Select the name you want to export the database as, and click **Export**.



4. Locate the folder where you want the exported database to reside, and then click **Open**.



Darwin exports the entire database to the new destination in the folder that you selected.

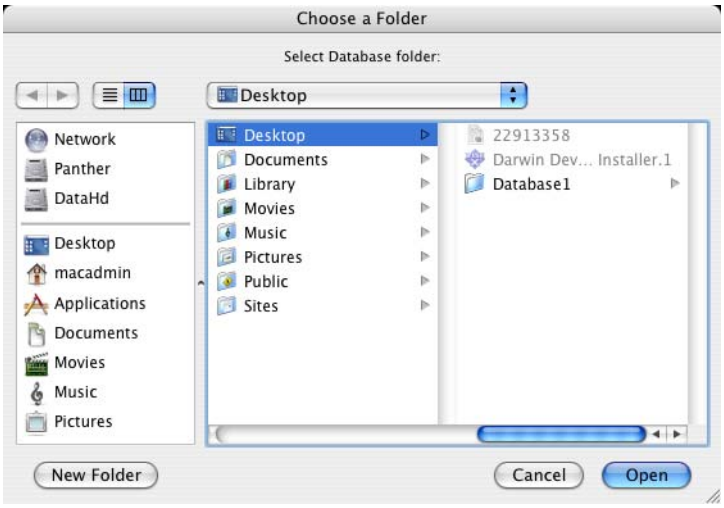
Darwin does not export the InDesign layout or images. You must manually copy the InDesign layout and images to the new destination.

Be sure that the workstation to which you exported the database can access the following elements via a network or removable media:

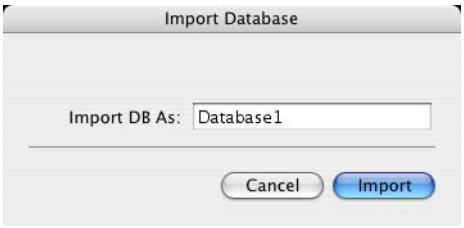
- InDesign CS2 layout
- Library elements
- InDesign CS2 elements (imported graphics)

To import a database:

1. In the Database Administration window, click **Import**.



2. Select the database file that you want to import.
3. Click **Open**.



4. If you have a database of the same name on your workstation and do not want to overwrite it, give the imported database a different name.
5. Click **Import**.

   Darwin imports the database.

Exiting the Database Administration Window

Working with the Database Administration window disconnects you from the database that you were working with.

To finish working with the Database Administration window:

➢ Once you have finished working in the Database Administration window and have selected the database you want to work with, click **Select**.

The database is selected and the Database Administration window closes.

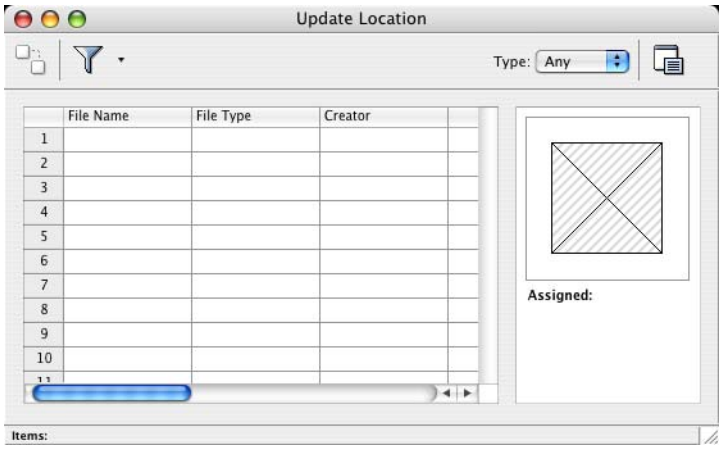
To work with the Darwin Pilot, you must now connect to a database.

Updating File Locations

After you import a database or change the location of high resolution files, check whether the paths to the files have remained intact. If the paths have changed, you need to update the file locations in Darwin.

To update file locations:

1. From the **Item** menu, choose **Update Location**.



If there are any missing files in your job, Darwin lists them in the **File Name** column.

2. If a file is missing, click the file name.
3. In the Darwin Pilot menu bar, from the **Item** menu choose **Locate**.
4. In the Locate dialog box, locate and select the file whose path you want to update.
5. Click **OK**.

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Overview

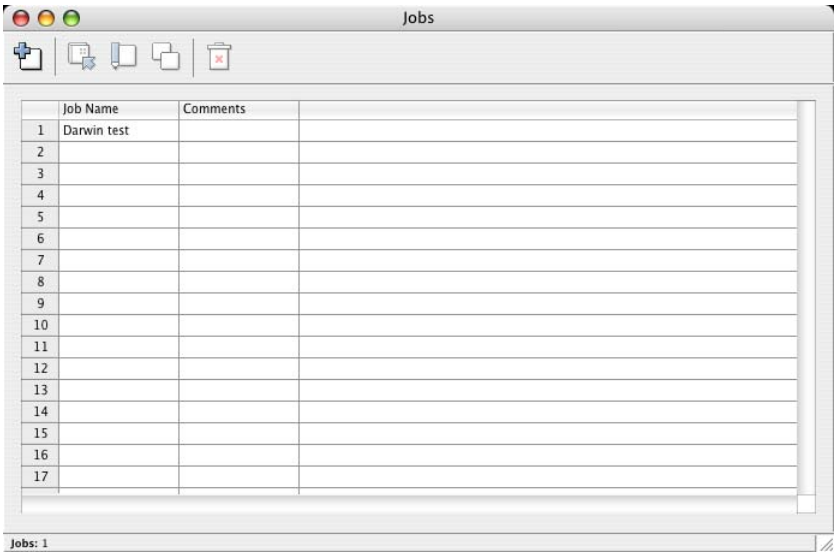
A Darwin for InDesign job contains a profile, data, pages, rules, job library items, and print run information.

Managing Jobs

Use the Jobs window to manage your jobs.

To open the Jobs window:

➢ On the **Darwin Pilot** panel, click **Jobs**.



The Jobs window shows all the jobs in the current database and enables you to manage them.



New job: Opens the New Job window and enables you to create a new job and profile. See *Creating a New Job* on page 36



Select Job: Enables you to switch the current job. The **Darwin Pilot** panel always displays the current job.



Edit Job: Opens the Job Information window. In this window, you can change the job name, write comments about the job, and edit the job profile. See *Editing a Job* on page 40.



Duplicate Job: Duplicates the currently selected job. See *Duplicating a Job* on page 41.



Delete Job: Deletes the currently selected job(s). When you delete a job, all associated data and job library items are also deleted.



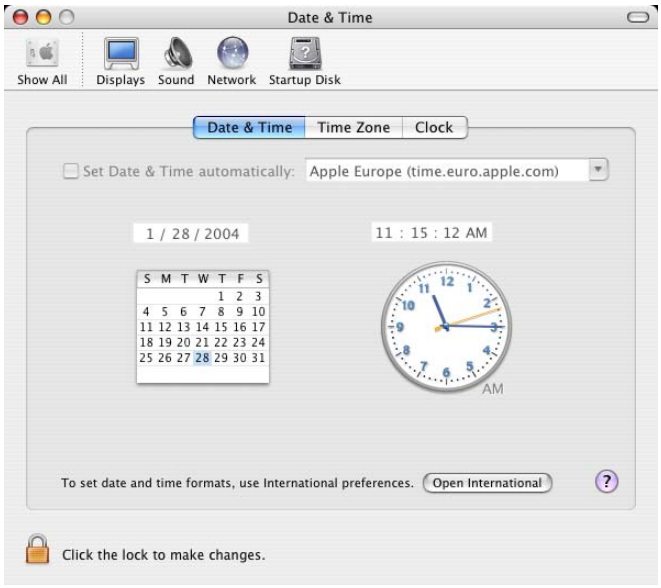
Attention: Once you delete a job, you cannot recover it.

Before Creating a Job or Profile

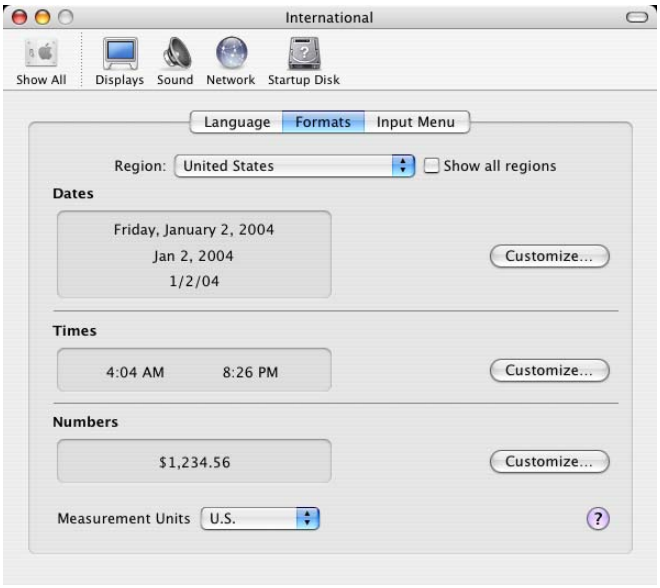
It is recommended that you manually synchronize the Darwin time with the date and time settings in the Macintosh control panel.

To configure the Macintosh date format:

1. From the **Apple** menu, choose **System Preferences>Date & Time**.



2. On the **Date & Time** tab, click **Open International.**



3. In the **Dates** section, click **Customize**.

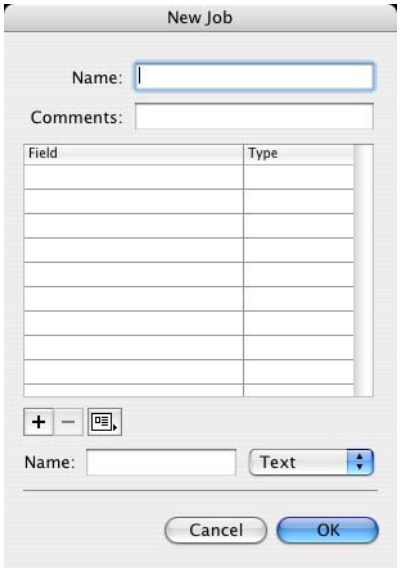


4. In the **Short Date** section, select **Day/Month/Year**.
5. Select the **Show century** check box.

Creating a New Job

Creating a new job consists of two tasks: giving the new job a name and assigning a profile.

1. In the Jobs window, click the **New Job** button.



2. In the upper **Name** box, type a name for the new job. When you create a new job, you must assign the job name.
3. In the **Comments** box, type your comments about the job.
4. Create a profile for the job, use a profile already created for another job, or create a profile from a data file. For more information, see *Assigning a Profile to a New Job* on page 36.
5. Click **OK** to create the new job.



Tip: While working on a job, if you want to switch databases, you can do so by choosing **File**>**Select Database**. For more information, see *Opening a Database* on page 26.

Assigning a Profile to a New Job

You can create a profile for the job. You can either create new fields for the job profile, use a profile already created for another job, or create a profile from a data file. If you use another profile, you can add new fields as desired.

To create new fields:

1. In the lower **Name** box, type a name for the new field.
2. In the **Type** list, select the type that you want to assign to the field:
   - **Text**—A **Text** field can contain up to 255 ASCII characters.
   - **Integer**—An **Integer** field can contain whole numbers.
   - **Real**—A **Real** field contains whole numbers and numbers with decimal points.
   - **Date**—A **Date** field contains dates. Only dates between January 1, 1904 to December 31, 2039 are accepted.
   - **Time**—A **Time** field contains the time in hours, minutes, and seconds.

     Darwin supports databases which contain up to 1000 fields of data. You can import data from databases that were exported from Excel or other database programs.

     For numeric information that you would not use for performing calculations, such as postal codes, we recommend that you select the **Text** field type. Even though 5-digit ZIP codes are exclusively numeric, problems will result if they are stored in a numeric field. For example, leading zeros are omitted (the ZIP code 01730 would be stored as 1730 because Darwin omits leading zeros).

     However, for storing data on ages, use a numeric field. For example, if you store the ages 5, 32, 102, 18 and 49 in a **Text** field, Darwin will sort that data as follows: 102, 18, 32, 49, 5. Then a search for children between the ages of 0 and 21 would yield 102, 18, and 5. Therefore, use the **Integer** field for data on ages.



3. Click the **Add Field** button.

To use a profile that was created for another job:



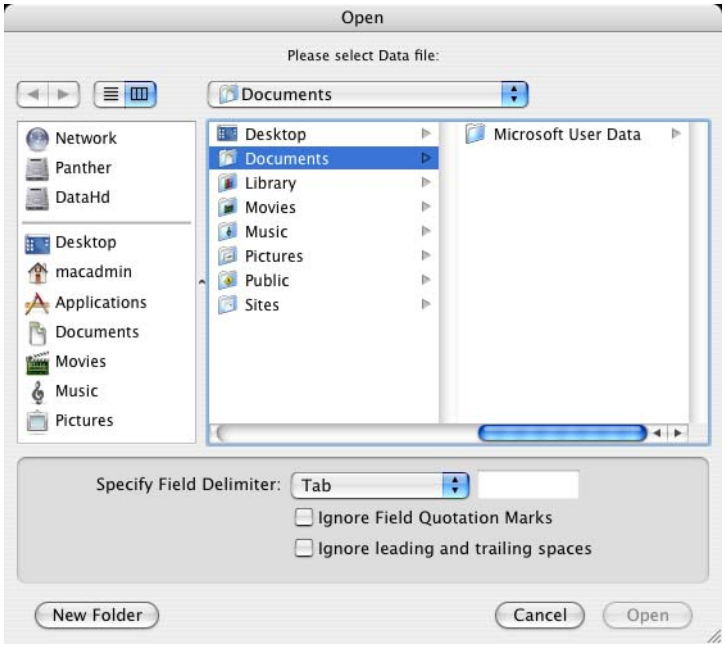
1. Click the **Apply Profile** button.



2. From the menu, select one of the following:

   a. The name of the job whose profile you want to use. The fields that were created for that job appear in the table, you can add new fields or delete fields as necessary.

b. Create Profile from data file.



c. Locate the desired file.

d. In the **Specify Field Delimiter** list, select the field delimiter for the file you are importing.

e. Select the **Ignore Field Quotation Marks** and **Ignore leading and trailing spaces** check boxes, as desired.

f. Click **Open**.

If the import file is a text-delimited file, the first record is used to define the field names and there are only text fields.

If the import file is a DBF file, the field names and types correspond to those of the original database. You can change the profile data if desired.

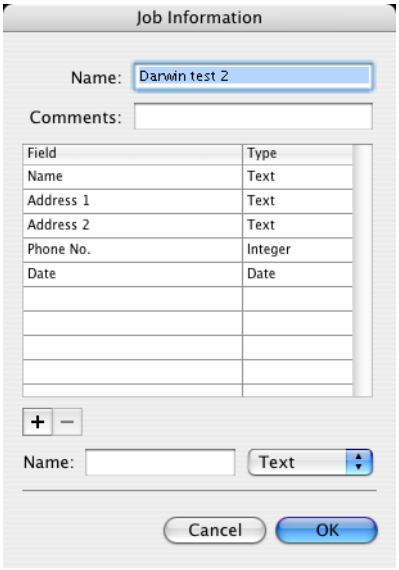
To delete fields:

➢ Click the **Delete Field** button.

Editing a Job

To edit a job:

1. In the Jobs window, click the **Edit Job** button.



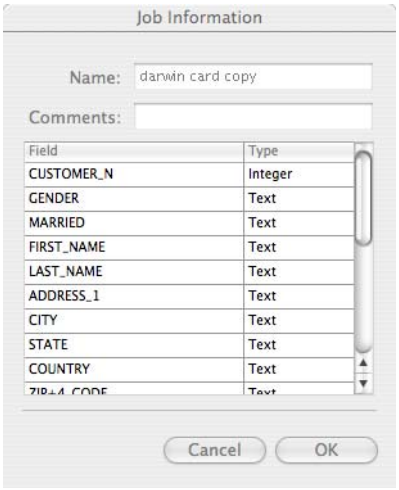
2. Edit the job and/or profile as required. For more information on adding, editing and deleting fields, see *Assigning a Profile to a New Job* on page 36.

Duplicating a Job

When you duplicate a job, all the InDesign files linked to the Job Pages window are also duplicated, as a single InDesign file cannot simultaneously be linked to more than one job. This means that the profile, rules, library, print run, and database are duplicated also.

To duplicate a job:

1. In the Jobs window, click the **Duplicate Job** button.



2. Edit the job and/or profile as required. You can change the job name, add or delete comments, and add, edit, or delete profile fields as necessary. For more information on adding, editing and deleting fields, see *Assigning a Profile to a New Job* on page 36.
3. Click **OK.** You are prompted to select a folder for the copied InDesign files.
4. Locate the desired folder, and click **OK**.

5

Working with Data

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Data Operations 45
Importing Records 46
Creating a New Record 53
Exporting Records 54
Change Case 54
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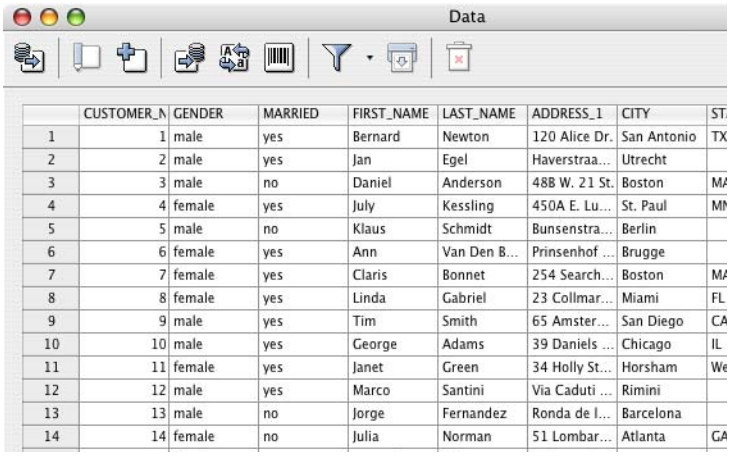
Data Overview

In Darwin for InDesign, data usually refers to information about people. Normally, each data record refers to a single person. Darwin records consist of fields that are defined by profiles. Records can be manually created within Darwin. Generally, however, you import data into Darwin from an external database.

Using the Data Window

Darwin data can be displayed in the Data window.

➢ To open the Data window, click **Data** on the **Darwin Pilot** panel.



	CUSTOMER_N	GENDER	MARRIED	FIRST_NAME	LAST_NAME	ADDRESS_1	CITY	ST
1	1	male	yes	Bernard	Newton	120 Alice Dr.	San Antonio	TX
2	2	male	yes	Jan	Egel	Haverstraa...	Utrecht	
3	3	male	no	Daniel	Anderson	488 W. 21 St.	Boston	MA
4	4	female	yes	July	Kessling	450A E. Lu...	St. Paul	MN
5	5	male	no	Klaus	Schmidt	Bunsenstra...	Berlin	
6	6	female	yes	Ann	Van Den B...	Prinsenhof ...	Brugge	
7	7	female	yes	Claris	Bonnet	254 Search...	Boston	MA
8	8	female	yes	Linda	Gabriel	23 Collmar...	Miami	FL
9	9	male	yes	Tim	Smith	65 Amster...	San Diego	CA
10	10	male	yes	George	Adams	39 Daniels ...	Chicago	IL
11	11	female	yes	Janet	Green	34 Holly St...	Horsham	We
12	12	male	yes	Marco	Santini	Via Caduti ...	Rimini	
13	13	male	no	Jorge	Fernandez	Ronda de l...	Barcelona	
14	14	female	no	Julia	Norman	51 Lombar...	Atlanta	GA

When you first open the Data window, all records are shown. The row of buttons along the top of the Data window enables you to perform various commands.

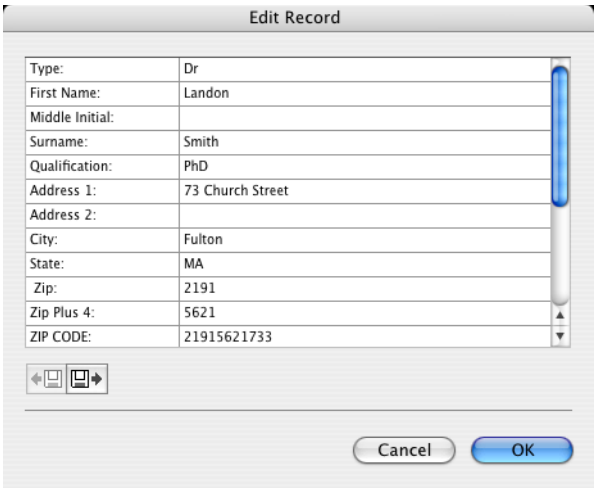
Data Operations



Import Records: Opens the Import window, which enables you to import records to the selected job.



Edit Record: Enables you to select a record in the Data window and then edit it. Click the **Edit record** button to open the Edit Record window. Then edit the selected record.





New Record: Opens the New Record window, which enables you to create a new record.



Export Records: Enables you to save your records as a text file.



Change Case: Enables you to change the case of the data records.



POSTNET Barcode: Enables you to create the POSTnet barcode.



Create Filter: Creates a filter to search for records. For further information, see *Appendix A, Searching in Darwin*.



Print: Prints the selected records.



Delete Record: Deletes any records currently selected.



Attention: Once you delete a record in Darwin, it is deleted from the Darwin database.

Importing Records

Why Import?

The Darwin Pilot contains the features required to input and edit records. So why import? One reason may be that the required data already exists on another system. But even when the data does not currently exist but must be collected and entered, it is better to enter and manage the data on a separate database system. The Darwin software is optimized to feed variable data to pages at print time – not to maintain a general purpose database.

Use any database system to maintain your data. The only requirement is that the system you use to manage data must be able to export the needed data to one of the following formats:

- Tab-delimited—This format separates each field in a line with a <TAB > character, and ends each line with a <RETURN> character.
- DBF—In order for Darwin to read a DBF file, it must have a Macintosh file type of **F+DB** or **TEXT**. Various utilities are available for changing file types.

  If you have difficulty importing a DBF file into Darwin, try importing it into a desktop database application first and then exporting it in **tab-delimited** format for use with Darwin.
- Space-delimited—This format is similar to the tab-delimited format, but it separates each field in a line with a <SPACE> character, and ends each line with a <SPACE> character.
- Semi-colon
- Comma
- Other (definable) format.

When you are ready to assemble a Darwin job, export the data from your database system and import it into Darwin.



Note: Some mainframe database systems cannot easily output either tab-delimited or DBF format files. In such cases, output the data in another format and use a desktop database application like Microsoft Excel or Access to read the exported file. Then use the desktop database application to export tab-delimited or DBF files.

Importing

Importing records involves two steps:

1. Selecting the data file in which the records are stored. This file, referred to as the "import file", must be in either a tab-delimited, DBF or space delimited format.
2. Selecting the fields that you want to import and assigning them to field names that you have specified in the profile.

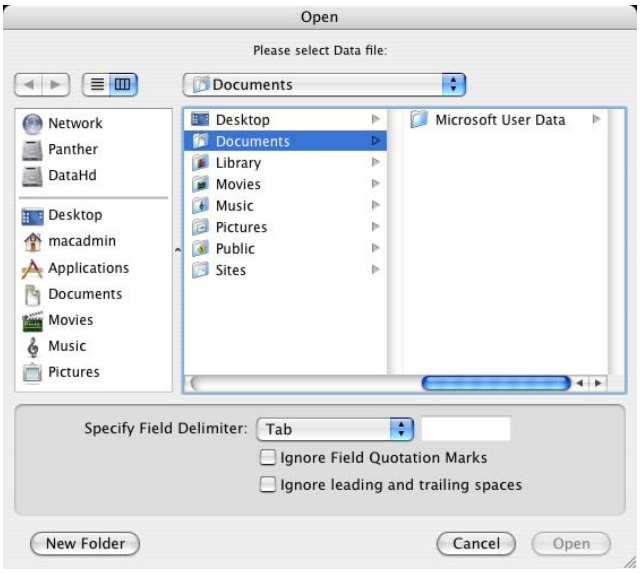
To select a data file:

1. In the Data window, click **Import Records**.



2. Click **Select** to select an import file.

The Open dialog box appears.



3. Locate the file you wish to import.
4. Choose a field delimiter option. The default setting is **Tab**. When you import data, the fields from the external database's rows are separated by the selected field delimiter option.
5. Select one or both of the following options:
   - **Ignore Field Quotation Marks:** Use this option if the field name in the import file is in quotation marks, for example, **"Location"**.
   - **Ignore leading and trailing spaces:** Use this option if the import file has spaces before the field name and you want the spaces to be ignored.
6. Click **Open**. The Import window appears.

If you have used an import file previously to create a profile, or have recently imported a file, an import file may already be displayed. After you select an import file, Darwin displays the file path, the number of records, and the first record.



The **First record contains field names** option is selected by default. When some applications export tab-delimited data, they create a dummy first record that contains field names, for example, first name, last name, age, and so on, instead of actual data. This option is unavailable in Darwin if the source file is a DBF file.

The **Import File Fields** column displays all of the fields and records in the file to be imported. You need to assign these fields to the **Profile Fields** column, which displays the field names for the current job.

To import records:

1. From the **Import File Fields** column, drag the fields that you want to use to the corresponding fields in the **Assignments** column.



Alternatively, you can also click the **auto-assign** button to automatically assign all fields in the **Import File Fields** to the **Assignments** column.

The fields in the **Import File Fields** column that are already assigned appear underlined.



Tip: Use the **auto-assign** button if the profile fields correspond exactly to the data in the **Import File Fields**.





Note: To remove a field from the **Assignments** column, drag the field back to the **Import File Fields** column.

2. If required, enter a constant value for a particular field, for example, you might want all of the **Location** field records to display **Boston**.

   a. In the **Assignments** column, double-click the field for which you want to add a constant value, for example **State**.

The **State** field box appears (The field box name is the field name).



b. In the text box, type a constant value for the field, for example, **Illinois.** The constant value appears in the **Assignments** column when you click elsewhere in the dialog box.

3. Select the desired **Import** options.

   a. To import all records select **All.**

   b. To import a certain group of records, type the range of record numbers in the **From** and **To** boxes.

   c. To add new records to your current job, select the **Add new records to existing ones** option.

   d. To replace existing records in your current job, select the **Replace existing records with new ones** option.

   e. To preview the records and to ensure that you have arranged the field name correctly, click the **Prev. Record** and **Next Record** buttons.

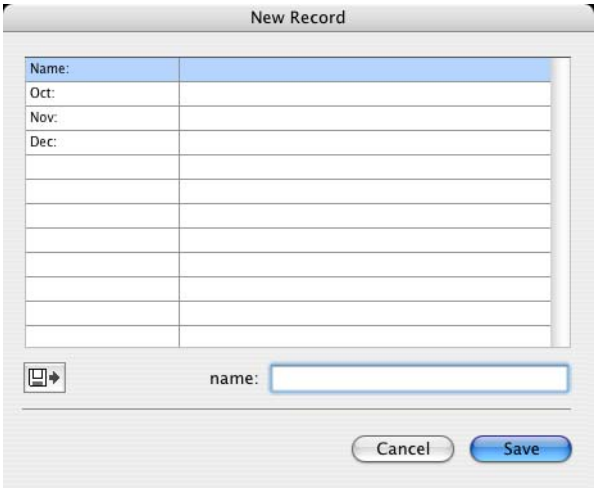
   f. To update existing records with new data, select the fields you want to update, and select the **Update existing records with new data** check box.

4. Click **Import**.
   The Import Progress window appears while Darwin imports the records.

   You can now view your records in the Data window.

Creating a New Record

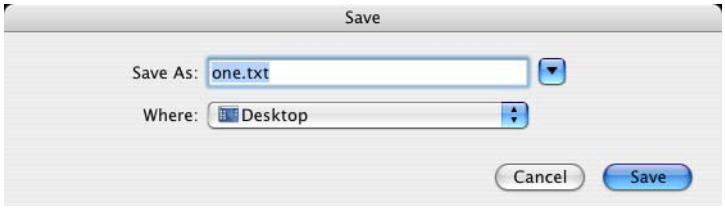
1. In the Data window, click the **New Record** button.



2. Enter new fields, as desired.
3. Press the TAB key to move from field to field.
4. When you have filled in all of the fields, do one of the following:
   - Click **Save** to store the record and return to the Data window.
   - Click the **Save & Progress** button to store the new record and enter another.

Exporting Records

1. In the Data window, click the **Export Record** button.



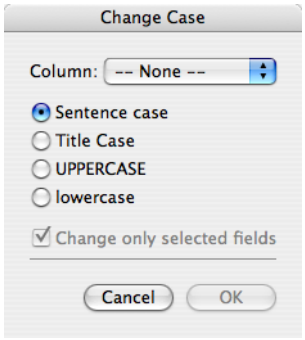
2. In the **Save As** box, type the text file name you want to use to save the records.
3. Select the location in the **Where** list.
4. Click **Save**. The records are saved as a text file.

Change Case

The **Change Case** feature enables you to change the case of the data records. The case change can be made for the data in each column of data records in the Data window, providing they are defined as text fields.

To change case:

1. In the Data window, click the **Change Case** button.



2. In the **Column** list, select the column for which you would like to change the case.

Note: The case can be changed only for columns where the data entries are defined as **Text**.

3. Select one of the following case options:
   - **Sentence case:** To give the text a capital letter only for the first word
   - **Title Case:** To give the text initial capital letters
   - **UPPERCASE:** To capitalize all the text
   - **lowercase:** To make all the text lower-case
4. Select the **Change only selected fields** check box to make a case change to selected fields only.
5. Click **OK**.

The case of the data entries in the selected column are updated accordingly.

POSTnet Barcode

Darwin Pro provides the postnet font to enable you to create the POSTnet barcode. You must provide a reliable five-digit ZIP code, a 4-code and address, and enter it in the correct structure, according to USPS regulations. Darwin does not match the validity of this information with the USPS database.

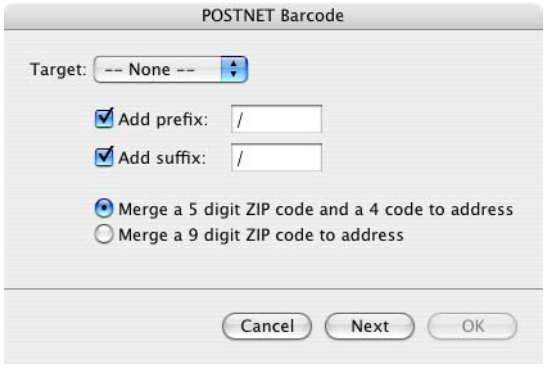
The POSTnet font is installed to the **Postnet** folder when you install Darwin Pro.

Your data record must include fields for the five-digit ZIP code, and the 4-code, in either a separate field or in the same field, the address and an empty field for the barcode that is created.

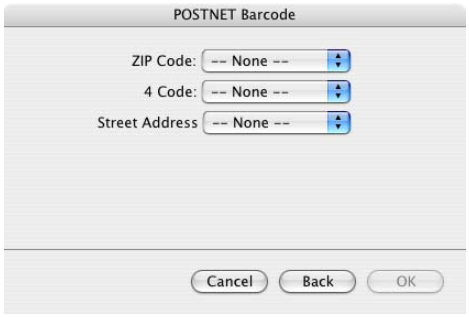
To create the POSTnet barcode



1. In the Data window, click the **US Postnet Bar Code** button.



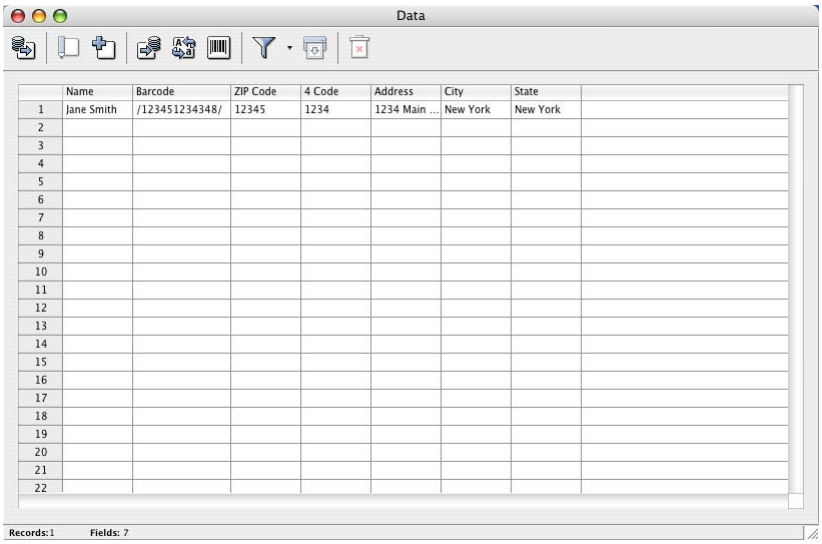
2. From the **Target** list, select the name of the field in which you want to enter the barcode information.
3. Make sure that the **Add prefix** and **Add suffix** boxes display a backslash. This represents the framebar at the start and end of the generated barcode.
4. Select one of the following:
   - **Merge a 5 digit ZIP code and a 4 code to address** if your data has separate fields for the 5-digit ZIP code and the 4 code.
   - **Merge a 9 digit ZIP code to address** if your data has one field for the 5-digit ZIP code and the 4 code.
5. Click **Next**.



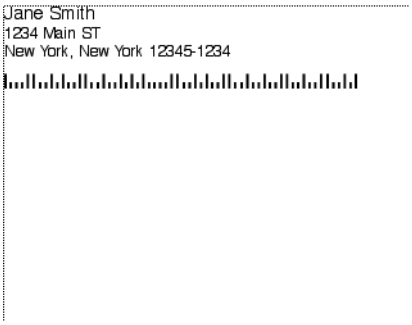
The Delivery Point window displays the options available when you choose to merge a 5 digit ZIP code and a 4 code with an address. If you choose to merge a 9 digit ZIP code with an address, the **4 Code** option is not displayed.

6. From the appropriate lists, select the names that represent the **ZIP Code**, **4 Code** and **Street Address** in your record, and click **OK**.

7. The string from which the barcode is calculated appears in the field you created for the barcode.



8. In InDesign, apply the POSTnet font and a font size of 18 points.



6 Using the Library

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Library Overview

The Darwin for InDesign library contains library items that are pointers to picture and text files. You use library items with text and image rules.

It is important to distinguish between the library item and the file that is being pointed to. The Darwin database maintains the library items list, which includes the library item name, its filename, file location, whether you linked the item to a particular job or it is available to all jobs in the database, and a thumbnail view of the item. The files themselves are not stored in the Darwin database, but may be located on any mounted volume.

Image Library Items

Picture items can be in several formats. Darwin displays a thumbnail in the Library window if the picture file contains a PICT preview or PNOT resource. You can add the following picture formats to the Library window:

- EPS
- CT
- PICT
- TIFF/TIF
- JPEG
- PDF

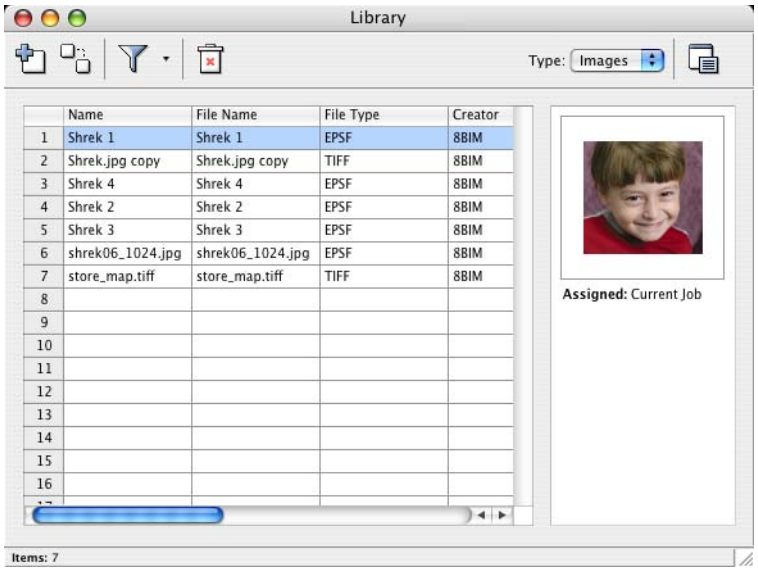
Text Library Items

Text items are files containing text and optionally tags to control formatting. You can add the following Copy formats to the Library window:

- Text (simple text files that can be opened with any text editor)
- InDesign Tags

Using the Library Window

Use the Library window to display library items. A row of buttons along the top of the window enables you to perform various commands.



Operations with the Library Window

The operation buttons enable you to perform operations in the Darwin library.



Tip: When adding folders, Darwin adds all valid files, but ignores folders within the folder.



Add Item: To add library items, click the **Add new item** button to open the directory dialog box for adding items or folders.



Assign File: To open a file selection window for selecting the new file to be used, select a single library item and click this button. Sometimes you need to update a library item link to the actual file. You may need to do this to change the link to an entirely new file, or because you wish to update the thumbnail as you edited the file.



Create Filter: Creates a filter for the records. For further information, see *Appendix A, Searching in Darwin*.



Delete: Deletes any records currently selected.



Switch View: Enables you to select the display mode; **by Thumbnail** or **by List**.



Tip: If you want to find where a library image is stored, in the Library window, select the image, and press COMMAND + L. Darwin displays the location of the image. For information on locating missing file paths, see *Updating File Locations* on page 30.

Adding Library Items

When you add items to the library, Darwin automatically adds a file location and a thumbnail to the database, so even a large library does not require much space on the Darwin database.

To add an item to the library:



- Click the **Add item** button in the Library window to open a file selection window.

  Or:

- Drag the desired item to the Library window.

You can also drag a folder to the window or select a folder using the file selection window. In this case, Darwin adds all allowable files within the folder and ignores any folders within the folder.

Searching for Library Items

See *Appendix A, Searching in Darwin* on page 124 for information on searching.

Displaying Library Items

The **Type** list controls what is displayed in the Library window.

Display Type

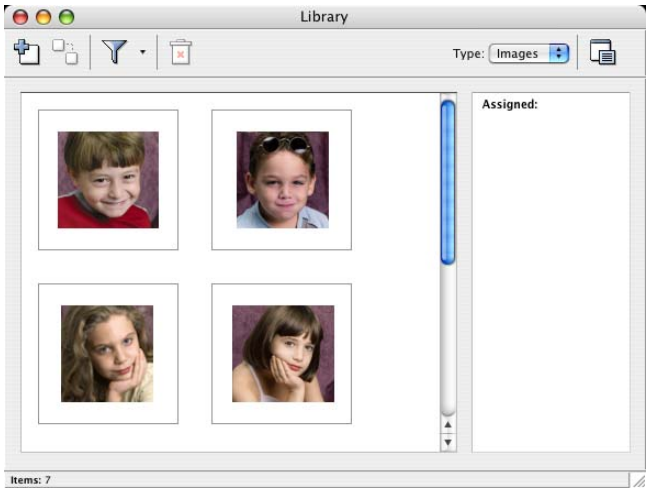
In the **Type** list, set the display type to one of three positions to determine what type of library item appears:

- **Images**: When set to **Images**, only images appear in the Library window.
- **Text**: When set to **Text**, only text appears in the Library window.
- **Any:** When set to **Any**, both library types appear in the Library window.

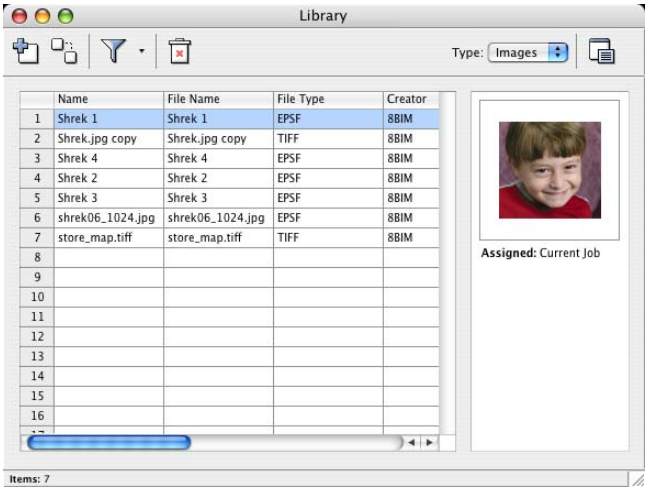
Switch View

Set the display mode to determine how library items appear:

- **by Thumbnail:** When set to **by Thumbnail**, Darwin displays all library items visually. If you select a single item, Darwin displays its data on the right portion of the window.



- **by List**: When set to **by List**, all library items appear in a list format. If you select a single item, Darwin shows its thumbnail view on the right portion of the window.



7

Working with Rules

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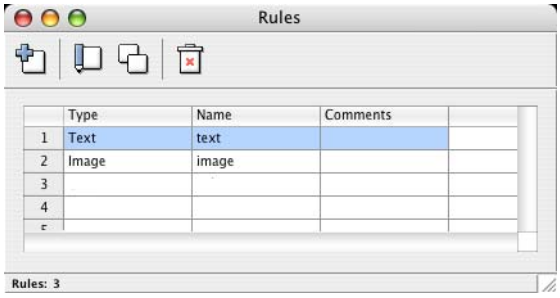
Rules Overview

A Darwin rule is an object that returns a result based on the content of Darwin data. The possible rule types are:

- Text: enables you to place text on pages where the data varies depending on the record for that page.
- Image: enables you to place an image on pages where the data varies depending on the record for that page.
- Color: enables you to create variable colored data for text & graphic elements. For example, you can create a color rule to print male names in red and female names in green.
- Page: enables you to select which page to print depending on the information contained in each record. You can define page rules so that the page that is printed is based on the information contained in the database for that customer. For example, you may want to send Letter-sized reports to your US customers and A4-size reports to your European customers.

Using the Rules Window

➢ To open the Rules window, click **Rules** on the **Darwin Pilot** panel.



The Rules window displays the following buttons:



New Rule: Creates a new rule.



Edit Rule: Opens the Rule Definition window to enable you to edit the selected rule.



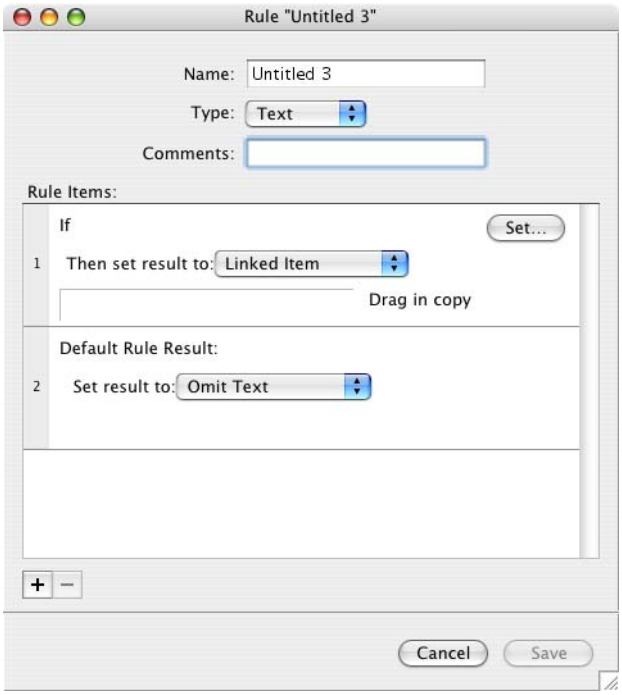
Duplicate Rule: Duplicate the rule.



Delete Rule: Deletes the selected rule(s).

Creating a New Rule

1. In the Rules window, click the **New Rule** button.



2. In the **Name** box, type a meaningful rule name.
3. In the **Type** box, select the rule type from the options:
   - Image
   - Text
   - Color
   - Page

   Do this before working on the rule items.

   If you subsequently change the rule type, you need to re-define the result for each rule item.
4. In the **Comments** box, type a comment about the rule.

Darwin Rule Items

Darwin rules are comprised of a list of **if/then statements** called rule items. Each rule item has two parts, a criterion and a result. The criterion always asks an if question that can be answered as true or false. If the criterion is true, then Darwin triggers the result. If the criterion is false, then Darwin moves down to the next section. Depending on the rule type the result may be an image, some text, a color element, or a page.

Default Rule Item

When the first rule item that evaluates as true has a lookup result, and the lookup itself fails, the Darwin uses the default result instead.

A default rule item is always the last item in a rule. The default item has no criterion, only a result. If none of the preceding criteria were found to be true, then Darwin uses the result of the default item.

Rule Item Order

The order of rule items is important. Darwin evaluates items within a rule, in order, one at a time. The rule returns the result of the first item that has a true criterion.

Adding a Rule Item

To add a rule Item:



➢ In the Rules window, click the **Add Rule Item** button. Darwin adds an item to the top of the list.

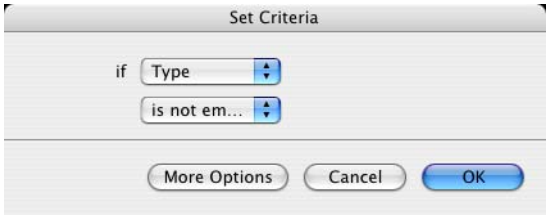
Setting a Rule Item

There are two portions of the rule item that should be set: the **criterion** and the **result**.

A blank rule item criterion means that Darwin will always evaluate it as true.

Setting the Rule Item Criterion

➢ To set the criterion, click **Set** to open the Set Criteria window.



The Set Criteria window opens in its simple mode so that you can use the contents of a single profile field in your criterion (such as, **if City is Tulsa)**. For a more complex criterion (such as, if City is Tulsa **and** if Gender is Female), click the **More Options** button to open the Set Criteria window in its compound mode. The Set Criteria window (in either mode) works in the same way as the Record Search window. For details on using the Set Criteria window, see *Appendix A, Searching in Darwin* on page 124.

Setting the Rule Item Result

➢ In the Set Criteria window, select the relevant result type, using the **Set result** box, as explained below.

Once the rule is set, it appears in the **Darwin CoPilot** panel.

Text Rule Results

Text rule results may be one of the following:

- **Linked Item**: A specific text file dragged to the result specification area from the Library window.
- **Literal Text**: Specific text typed into the result specification area text box.
- **Profile Field**: The contents of a field in the same record. For example, a text rule item might return the contents of the **MiddleInitial** field if the **MiddleInitial** field is not empty.
- **Lookup Copy**: A copy library file is returned, based on the contents of a selected field. For example, the contents of the text file called Joe is returned when the **FirstName** field contains Joe.
- **Omit Copy**: This result indicates that no copy item is desired.

Image Rule Results

Image rule results may be one of the following:

- **Linked Item**: Specific image library file, dragged to the result specification area from the Library window.
- **Lookup Image**: An image library file is returned based on the contents of a selected field. For example, you add a photograph of each person in the Library window with filenames set to the person's ID-number. Image 37425 is then returned when the **ID** field contents are 37425.
- **Omit Image**: This result indicates that no image is desired.

Moving a Rule Item

You can move a rule item up or down the Item list by dragging it. The default item must always be last. The rule items order can be very important. Darwin evaluates items within a rule in order. Darwin triggers the first item with a true condition, and then ignores all other items.

Deleting a Rule Item

➢ To delete rule items, select the item and click the **Delete Rule Item** button.



The default rule item cannot be deleted.

Copying Criteria

A criterion can be copied from one rule item to another by dragging it. The criterion can be modified after it is copied.

Copying Results

Certain results can be copied (dragged) from one rule item to another, such as linked items. Literal text may be copied using the copy and paste procedure in the **Edit** menu.

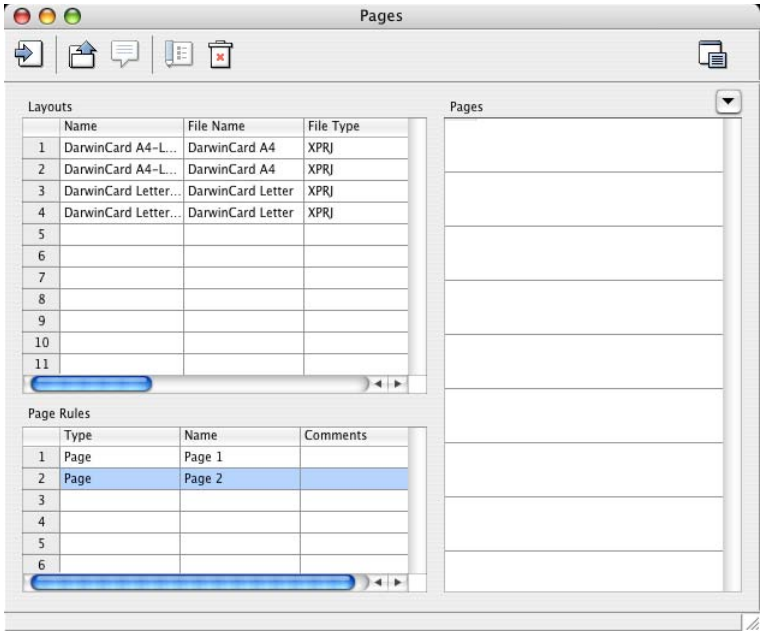
Page Rules

You can define page rules so that the page that is printed is based on the information contained in the database for that customer. For example you may want to send Letter-sized reports to your US customers and A4-size reports to your European customers.

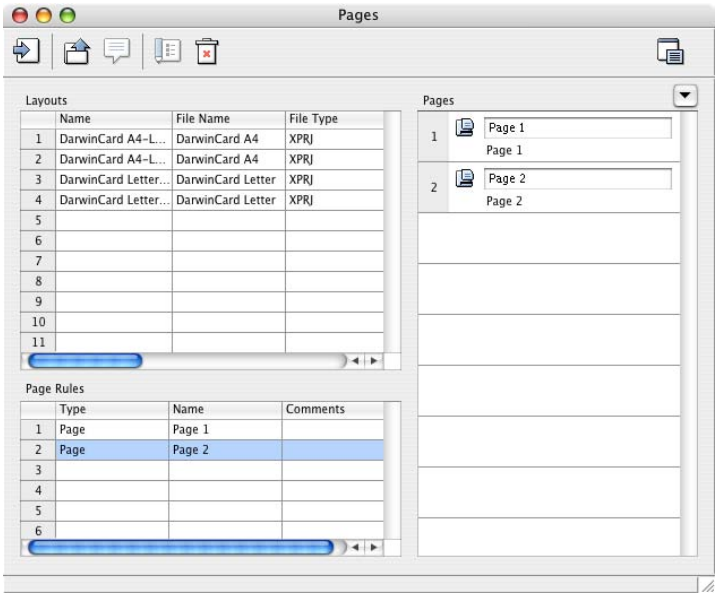
Creating Page Rules

1. In the Rules window, click the **New Rule** button. A new rule window appears.
2. In the **Name** box, type a descriptive rule name.
3. From the **Type** list, select **Page**.
4. In the **Comments** box, type a comment about the rule (optional).
5. Click the **Add** button. Darwin adds the rule to the top of the **Rule Items** list.
6. Click the **Set** button. The Set Criteria window appears.
7. Set the page rule criteria.

8. Select the result type, using the **Set result** box, page rule results may be one of the following:
   - **Linked Item** - a specific page that is dragged to the result from the Pages window.
   - **Omit Page** - this result indicates that no page is desired.
9. Click **OK** in the Set Criteria dialog box, and click **Save** in the new rule window.
10. In the Pages window, the new rule appears in the **Page Rules** area.



11. Drag the new rule from the **Page Rules** area to the **Pages** area.



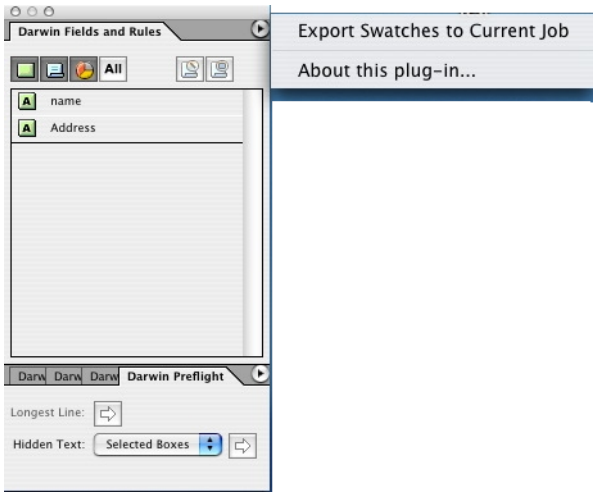
Color Rules

You can add color rules to create variable colored data for text & graphic elements. For example, you can create a color rule to print male names in red and female names in green.

Color rules use colors that you export from the InDesign job.

To export colors:

➢ Select **Export Swatches to Current Job** from the CoPilot palette menu.

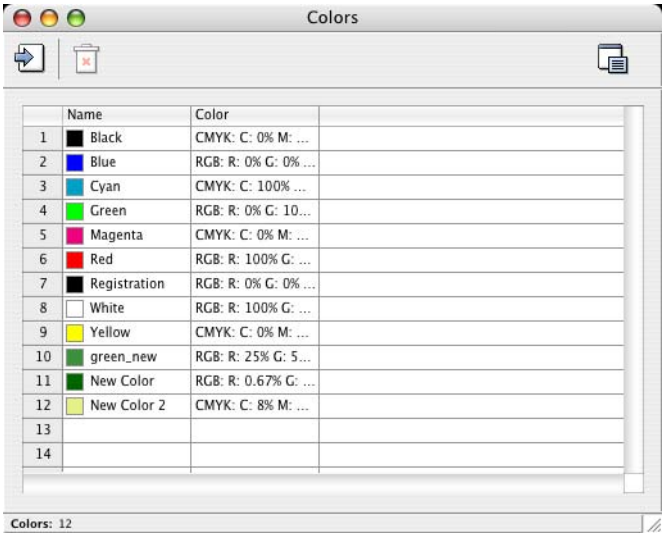


The colors appear in the Darwin Pilot.

Creating Color Rules

To create a color rule:

1. Export colors from an InDesign document to Darwin.
2. On the **Darwin Pilot** panel, click the **Colors** button.



3. On the **Darwin Pilot** panel, click the **Rules** button.

   The Rules window appears.
4. Click the **Create New Rule** button.

   A new rule window appears.
5. In the **Rule Name** box, type a descriptive rule name.
6. From the **Type** list, select **Color**.
7. In the **Comments** box, type a comment about the rule (optional).
8. Click the **Add** button.

   Darwin adds the rule to the top of the **Rule Items** list.
9. Click the **Set** button.

   The Set Criteria window appears.
10. Set the color rule criteria.

11. Select the result type, using the **Set result** box, color rule results may be one of the following:
    - **Linked Color** - a specific color that is dragged to the result from the Colors window.
    - **Lookup Color** - a specific color from the Colors window based on the content of a selected field. For example, if the field contains the string **blue**, the **blue** that appears in the Colors window will be used for this record.

To add a color rule to the InDesign layout:

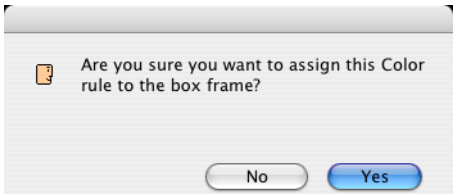
1. Open the CoPilot window.
2. Select the element for which you would like to add a color rule.
3. Click one of the color rule buttons:


Click the **frame** button if you want to add a color rule to the selected text box frame.


Click the **fill** button if you want to add a color rule to the selected text box fill.


Click the **text** button if you want to add a color rule to the selected text box text.

4. Double-click the required color rule in the **Darwin CoPilot** panel. The following message appears.



5. Click **Yes** to assign the color rule to the selected element.


Note: Elements may refer either to a text selection (only the highlighted text) or to entire text boxes.


Tip: You can draw a box in InDesign, convert it to a text box and assign a color rule to it. To do so, from the InDesign **Item** menu choose **Content>Text**.

8 Creating Data Driven Graphics (DDGs)

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Overview

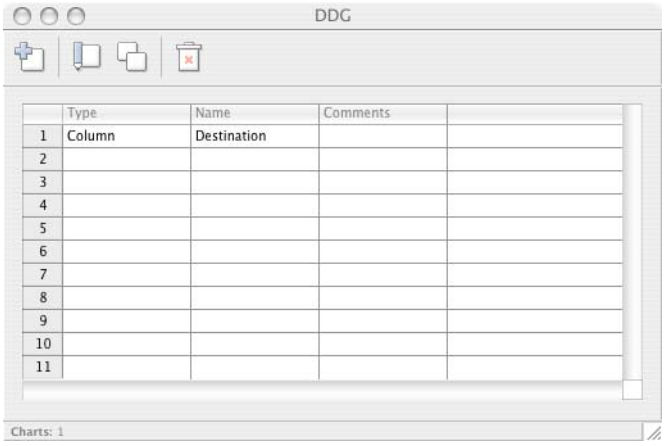
Note: DDG is a Darwin Pro feature. You can create charts and barcodes in Darwin Desktop, but no more than five records will be printed.

DDGs, such as charts and barcodes, are generated by sending the raw numerical data to the RIP rather than creating individual charts or barcodes in advance for each document in a print run.

Working with DDGs

The DDG window enables you to manage of all of the DDGs in the connected database.

➢ On the **Darwin Pilot** panel, click the **DDG** button



New DDG: Enables you to create a new chart or a new barcode.

Edit DDG: Opens the relevant Chart or Barcode window, which enables you to edit information about the selected DDG.



Duplicate DDG: Duplicates the currently selected DDG. You cannot change the profile that the chart is based on.

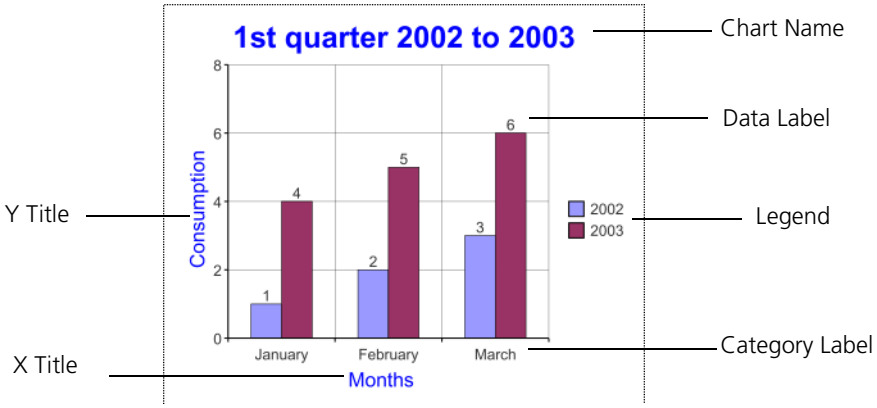


Delete DDG: Deletes the currently selected DDG(s).

Working with Charts

A chart is a good way to visually display and clarify the data in your jobs. In Darwin for InDesign, you can create multiple charts for each record, and then preview each chart in InDesign before you execute a print run. You can change the look of your chart by choosing different chart types, colors, labels, and text properties.

A chart consists of various parts: a chart area, x and y axes, a legend, gridlines, and labels.

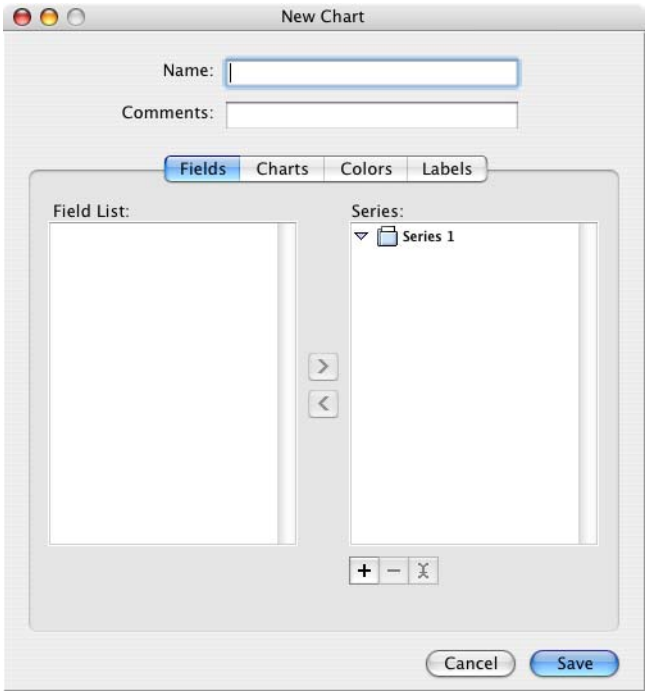


Creating a chart involves four steps:

1. Selecting the fields that you want to use and assigning them to a series that you have specified in the **Series List**.
2. Selecting a chart type and sub-type.
3. Selecting different colors for the chart, titles, and background.
4. Selecting labels and formatting their text properties.

Opening the Charts Window

1. On the Darwin Pilot panel, click the **DDG** button to open the DDG window.
2. In the DDG window, select **New DDG** and then select **Chart**.



Selecting Fields for Charts

1. When the Charts window opens, the default tab **Fields**, appears and displays the numeric fields for your current job.

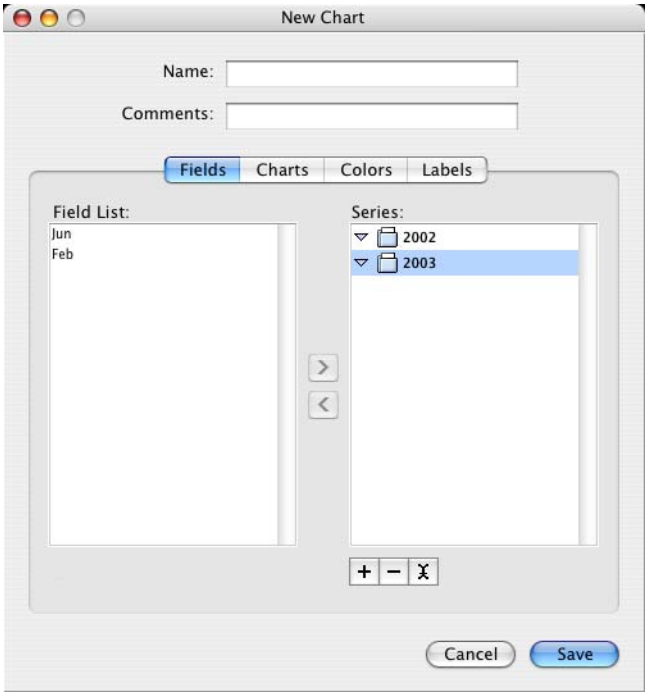


2. In the **Name** box, type the chart name. In the **Comments** box, you can also insert a comment about the chart.



3. Click the **new** button to add a new **Series** to the **Series** list.

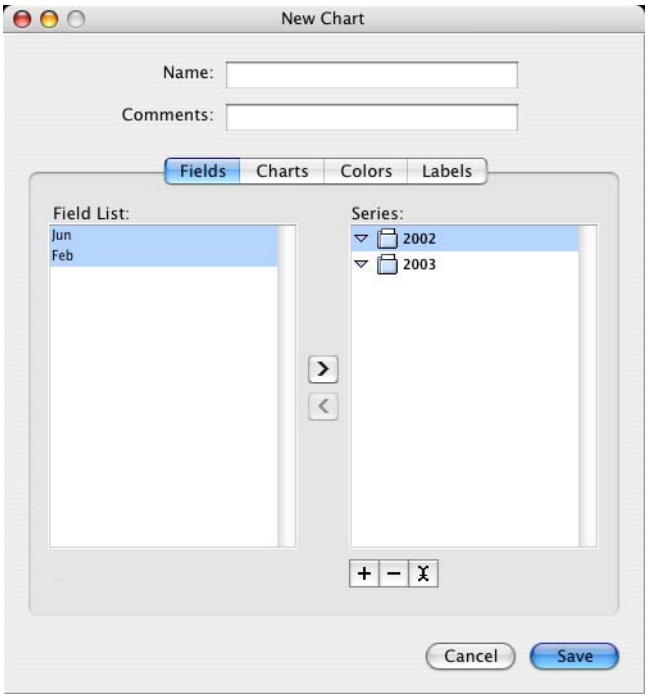
   Each **Series** is a folder that contains the fields that you want to use in your chart. Depending on the type of chart that you want to use, you can add as many **Series** as you want and assign fields accordingly. For example, if you want to create a chart that compares first quarter expenses for 2002 and 2003, you need to add two **Series, Series 1** and **Series 2.**



4. Select the **Series** in which you want to add a field, and from the **Field List** select the field.

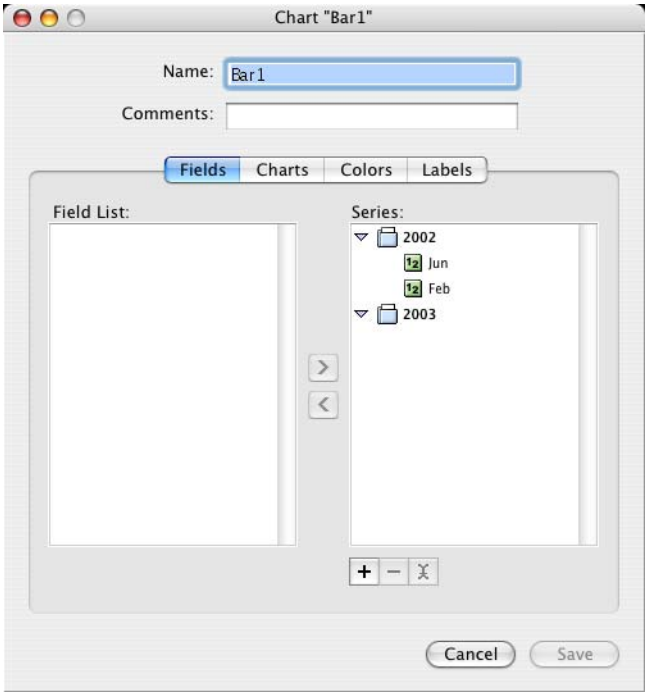


Tip: To select more than one field at a time, press the SHIFT key and then select the fields.



5. Click the **add** button to add the selected field.

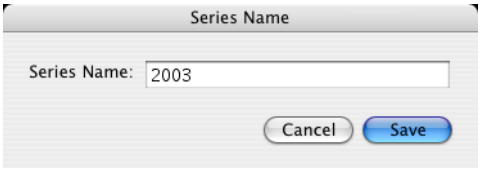
Tip: You can place a field in a particular place in the **Series** list. To do so, select the field you want to insert from the **Field List.** In the **Series** list, select the field that you want to be above that field in the list. Then click the **add** button. The field from the **Field List** is inserted into the **Series** list below the field you selected.



Tip: To remove a field from a **Series**, select the field, and then click the **Remove** button. The field is returned to the **List of Fields**.

Renaming a Series

1. Click the **rename** button.



2. In the **Series Name** box, type the new name, for example, **2002**.
3. Click **Save**. The new series name appears in the **Series** list.

Saving Charts

You can save your chart at any stage of your work. Once you save a chart, it is added to the **Darwin CoPilot** panel with a chart icon, and to the **Darwin Pilot** panel under **Charts**.

To save a chart:



➢ In the Chart window, click **Save**.

Selecting Types of Charts

The **Charts** tab includes five types of charts, column, bar, pie, area and line. Each chart type has sub-types. You can select a sub-type for each chart that you create. The following table describes each **Chart Type** and its **Chart Sub-type**.

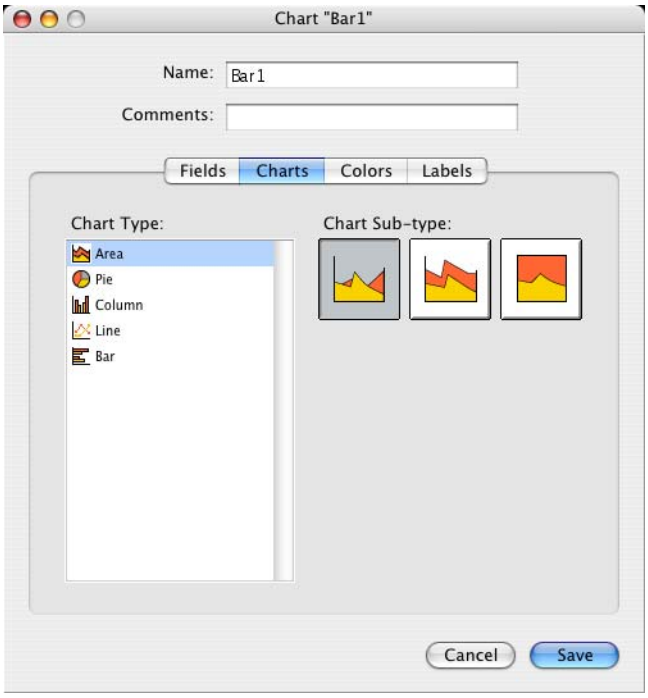
Chart Type	Chart Sub-Type	Description
		**Area:** Displays the trend of values over time or categories.
		**Stacked Area:** Displays the trend of the contribution of each value contributes over time or categories.
		**100% Stacked Area:** Displays the trend of the percentage each value contributes over time or categories.

Chart Type	Chart Sub-Type	Description
Pie		**Pie:** Shows the contribution of individual values to a total. **Note:** A Pie chart uses only one Series.
		**Exploded Pie:** Shows the contribution of individual values to a total while highlighting individual values.
		**3-D Pie:** Shows the contribution of individual values to a total.
		**Exploded 3-D Pie:** Shows the contribution of individual values to a total.
Column		**Clustered columns:** Comparison of values across categories.
		**Stacked columns:** Compares the relationship of individual items to the whole.
		**3-D Clustered columns:** Comparison of values across categories.

Chart Type	Chart Sub-Type	Description
Line		**Line:** Displays trend over time or categories.
		**Line:** Line with markers displayed at each marker value.
		**3-D Line:** Displays trend over time or categories with a 3-D visual effect.
Bar		**Clustered bars:** Comparison of values across categories.
		**Stacked bars:** Compares the relationship of individual items to the whole.
		**3-D Clustered Bars:** Comparison of values across categories.

To select a chart type:

1. In the Chart window, select the **Charts** tab.



2. In the **Chart Type** list, select the type of chart that you want to create.
3. In the **Chart Sub-type** list, select a chart sub-type.

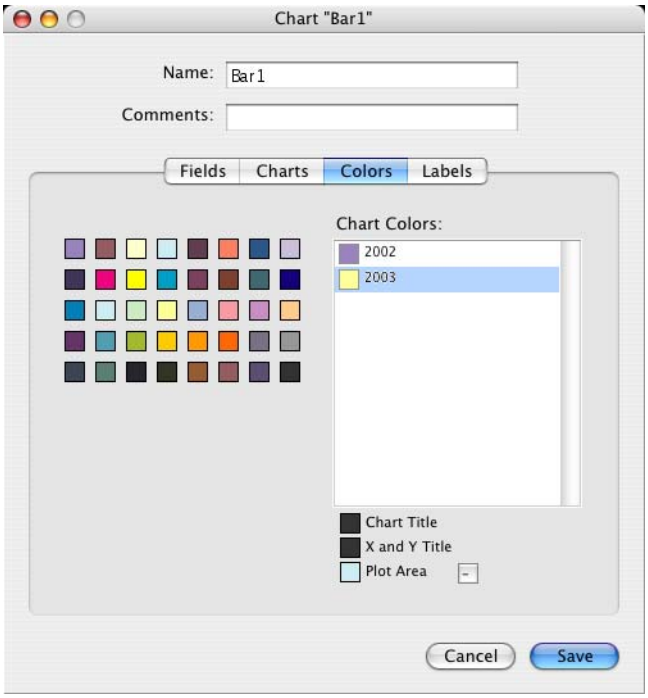
Customizing Charts

The **Colors** and **Labels** tabs enable you to customize and enhance the look of your chart. In the **Colors** tab, you can change chart colors, change the color of your X and Y titles, and select a plot area for your chart.

In the **Labels** tab, you have the option to add chart labels, titles, and gridlines. For each label and title that you add, you can format the text properties.

Selecting Colors for Charts

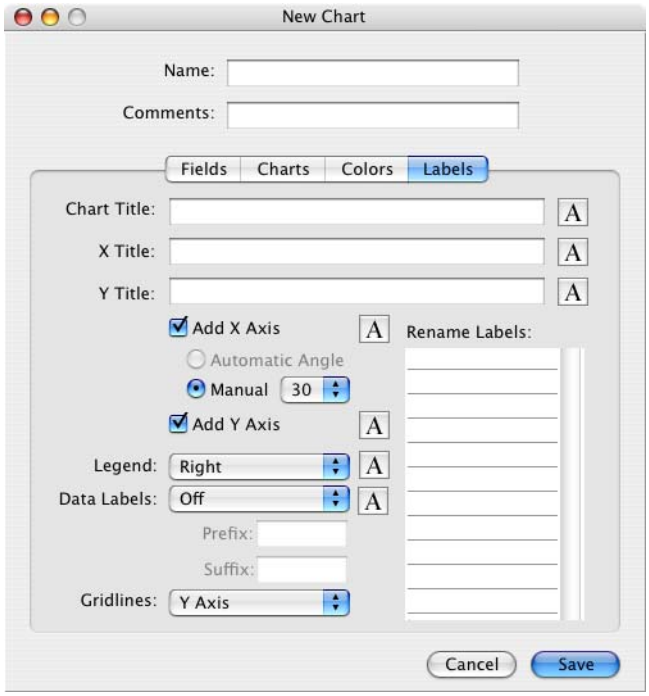
1. In the Chart window, select the **Colors** tab.



2. In the **Chart Colors** list, select the color that you want to change and then choose a new color from the color chart.
3. If you want to change the **Chart title** color and **X and Y title** color, select a new color from the color chart and drag it to the appropriate box.
4. If you want to add a **Plot Area**, select a color from the color chart and drag it to the box.
5. To define a color, drag and drop the color from the Darwin Pilot **Color** tab to the **Chart Colors** list.

Labeling Charts

1. In the New Chart window, select the **Labels** tab.



2. If you want to add a title to your chart, the x axis, or y axis, type a title in the appropriate box:
   - **Chart title**
   - **X title**
   - **Y title**

   By default, the **Add X Axis** and **Add Y Axis** boxes are selected. If you don't want to view the x or y axes in your chart, then clear these boxes.
3. To set the angle of the category labels of the X axis, either select **Automatic Angle**, or select **Manual** and select the required angle degrees.
4. In the **Legend** box, select the placement of the legend on your chart, for example, **Right**. The legend is a box that describes the colors assigned to each series in the chart.
5. In the **Data Labels** box, select the label you want, either **value** or **percentage**. The data label is a value derived from the database.

6. In the **Prefix** box, type the prefix you want to add to the label.
7. In the **Suffix** box, type the suffix you want to add to the label.
8. In the **Gridlines** box, select one of the options to display gridlines.
9. In the **Rename Labels** list double-click a category to edit the label.

Note: The category labels are automatically taken from the field names defined in the first series in the Fields tab (see *Selecting Fields for Charts* on page 81). However, if there are a greater number of fields names in a subsequent series, the category labels are taken from there.



a. In the **Category Label** box, type the new category name.
b. Click **Save.**

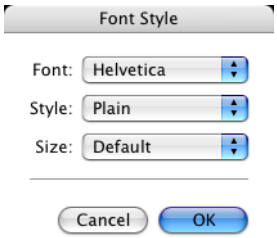
Formatting Text

You can format the text properties for the following labels:

- **Chart title**
- **X title**
- **Y title**
- **Add X Axis**
- **Add Y Axis**
- **Legend**
- **Data Labels**

To format text:

1. In the **Labels** tab, click the **Text** button.



2. Select the desired font, style, and size.
3. Click **OK** to save the formatted text.

Once you have saved your chart, you are ready to preview it in InDesign.

Working with Barcodes

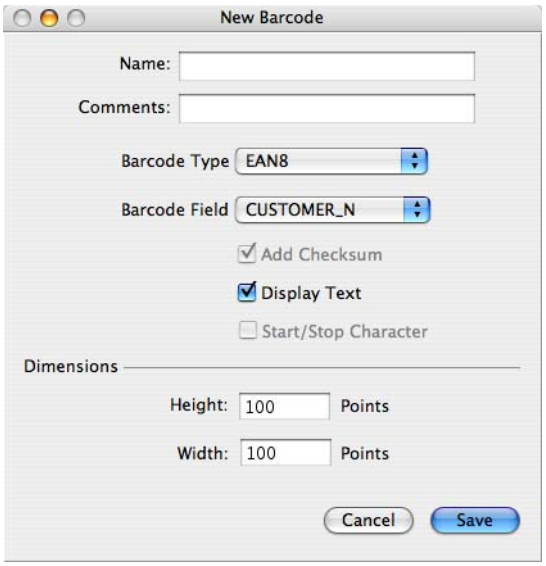
Darwin supports three types of barcodes: EAN8, EAN13, and Code 128. Selecting the right barcode is critical to the success of your barcode implementation plan, but here are some high level tips:

- If you barcode a trade item that will be scanned at the retail point-of-sale (POS), you must use an EAN/UPC symbol.
- If you are printing a barcode with variable information like serial numbers, expiry dates, or measures, then you will use Code 128.

If you enter incorrect information, Darwin will not create the barcode.

To create a barcode:

1. On the Darwin Pilot panel, click the **DDG** button to open the DDG window.
2. In the DDG window, click **New DDG** and then select **Barcode**.



3. In the **Name** field, type a name for the barcode.
4. In the **Comments** field, type any comments you may have.
5. In the **Barcode Type** list, select the barcode type.

Note: Check your barcode matches your barcode type. Darwin does not match the validity of this information

6. In the **Barcode Field** list, select the field from which you want to create the barcode.
7. Select the **Add Checksum** check box to add the checksum to the message (if available). This ensures information integrity in the barcode.
8. Select the **Display Text** check box to display text under the barcode (if available).
9. Select the **Start/Stop Character** check box to add a start and stop character to the barcode (if available). These characters are not included in the checksum calculation and enable correct scanning of the barcode.
10. In the **Dimensions** area, type the **Height** and **Width** of the barcode in the appropriate boxes.
11. Click **Save** to save the barcode.

9

Defining Pages in Darwin

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Overview

The Pages window enables you to work with Darwin pages.

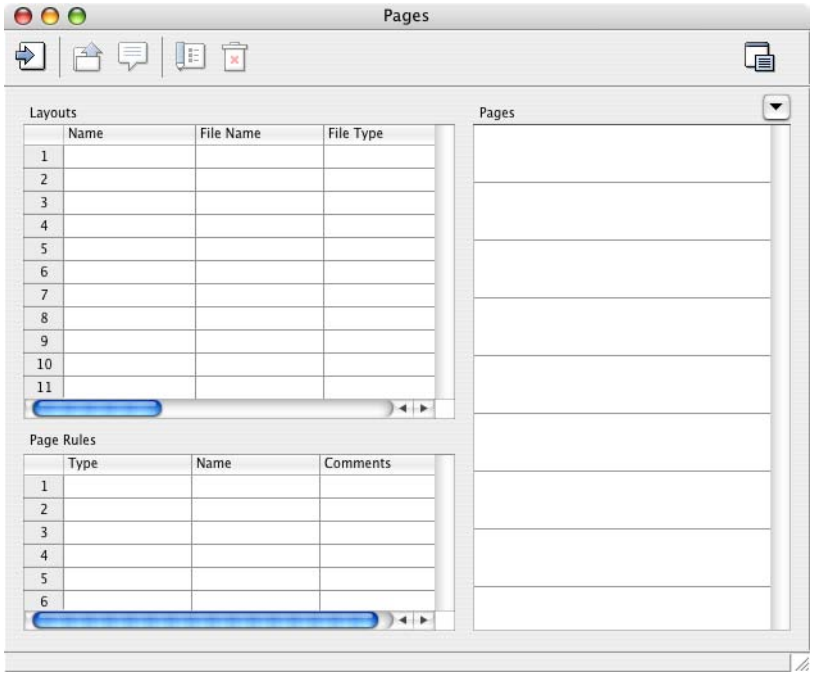
- **Darwin Layouts**—Each Darwin layout is the individual page of an InDesign file that has been added to Darwin. You add the InDesign file to the **Layouts** area of the Pages window.
- **Darwin Pages**—A Darwin page represents what layouts to print for each record during a print run. Simple jobs may only contain a single Darwin page, whereas more complex jobs may contain dozens of Darwin pages. Each Darwin page has a name and is linked to either a layout or a page rule.

  When you link a Darwin page to a layout, Darwin prints that layout according to the layout settings. When you link a Darwin page to a page rule, the page rule determines for each record which, if any, layout will be used. (A page rule can return one particular layout or no layout at all.)

  For example, if there are four Darwin pages and each points to a specific layout, then each record to be printed will generate four sheets of paper (or two double-sided sheets, if duplex printing is being used). On the other hand, if two of the four job pages point to specific layouts and the other two point to page rules, then each record to be printed may generate two, three, or four sheets of paper, depending on how the rules are set up as well depending on the data in the individual record.

Using the Darwin Pages Window

➢ To open the Darwin Pages window, on the **Darwin Pilot** panel, click **Pages**.



The Pages window is divided into three areas:

- **Layouts**—shows the InDesign layouts you have added to the job and that you can link to a job page.
- **Pages**—lists the layouts for the current job to print. Click the **Dynamic Page Exceptions Settings (DPE)** button for the dynamic page exceptions settings.
- **Page Rules**—shows page rules you have created.

Operation Buttons

The Pages window has the following operation buttons.



Import Page: Imports a page from another job.



Open Item: Opens the page or layout or rule.



Page Info: Shows selected page information, including its sequence number within a job, the page name, and the layout or rule name linked to the page.



Save Setup: Saves changes made to the **Pages** list. If you make changes, but do not save them, Darwin prompts you to save the changes either when you close the Pages window or if you execute a print run.



Delete Item: Deletes all selected pages. Darwin only deletes the page item. This does not affect linked layouts or rules.



Switch View: Changes by **Thumbnail** or by **List** the display for the Pages area.



Dynamic Page Exceptions Settings (DPE): Displays the dynamic page exceptions information that has been set for the page.

Working with Darwin Layouts

When you add InDesign files to Darwin, Darwin displays each page within the InDesign file as a separate layout in the **Layouts** area of the Pages window. For example, if the InDesign file contains four pages, then Darwin adds four layouts to the Available Layouts window. When the InDesign file is added to Darwin, special embedded data tags are added to the InDesign file to identify it as part of the Darwin system.

To add a Layout to the Pages window:

- Drag an InDesign file to the **Layouts** area. Add each page of the file as a separate layout.

When you save a document in InDesign with the **Darwin CoPilot** panel active, Darwin prompts you to save it to the database. If you answer **Yes**, Darwin adds each page in the document to the **Layouts** area.

Working with Darwin Pages

- To assign a Darwin layout to the Darwin page, drag a layout from the **Layouts** area to the **Pages** area.
- To assign a page rule to the Darwin page, drag a rule from the **Page Rules** area to the **Pages** area.
- To change the default job page name, click in the name field and type in the new name.

The printing order of pages within the job can be rearranged by dragging them up or down in the **Pages** area.

Dynamic Page Exceptions



Note: The Dynamic Page Exceptions feature is only available to Darwin Pro users.

Dynamic page exceptions are page exceptions or inserts that you want to include within a file, mainly VI jobs or a very large PostScript file.

Standard PostScript setpagedevice commands that specify different paper types are embedded into the incoming files and enable you to print complex jobs of varying paper size, stocks, and paperweight. These commands indicate that the printer must switch media during the printing of a job. When a job is RIPed, the printer server identifies the dynamic page exception commands and maps them to the selected paper sets. The printer then uses the desired paper sets for the job.

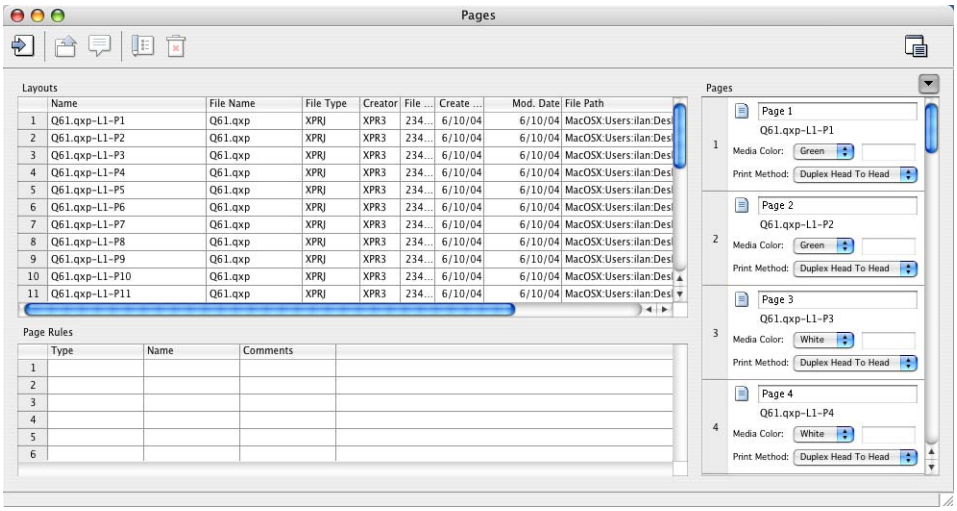


Note: The dynamic page exceptions feature works with the Creo Color Server. Ensure that the settings that you select in Darwin correspond exactly with the Creo color server (or equivalent) settings.

To set the dynamic page exceptions in Darwin:

1. In the Pages window, click the **Dynamic Page Exceptions Settings (DPE)** button.

   The dynamic page exception information is displayed in the Pages area.



2. Set the values for the following:

   - **Media Color**: Select the media color for the job from the list. This identifies the media type that is used on the Creo color server. Ensure that the media color you select here corresponds exactly to the paper in the Creo color server.
   - **Print Method**: Select the print method from the list; **Simplex**, **Duplex Head to Toe** or **Duplex Head to Head**.

Note: To implement the dynamic page exceptions settings, ensure that **Use DPE** is selected in the Print Run Monitor window. For more information on the Print Run Monitor window, see *Executing a Print Run* on page 119.

10 Designing Darwin Pages in InDesign

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Overview

You design Darwin for InDesign Pages using the **Darwin CoPilot** panel. The **Darwin CoPilot** panel enables you to specify where to place variable data on each layout to be used. You can place certain Darwin data in text boxes and other types of Darwin data in picture boxes.

Text boxes can contain Darwin profile fields (containing text, numbers, dates, or times), Darwin color rules, Darwin text rules, along with non-variable (fixed) text.

Picture boxes can contain Darwin image rules and charts.

You apply formatting to the variable information in much the same way as you apply formatting to normal fixed page elements. Use the **Darwin CoPilot** panel to preview layouts on the screen.

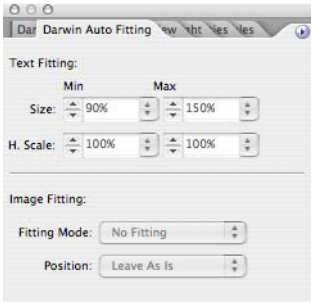
The Darwin CoPilot Panel

The **Darwin CoPilot** consists of six panes with different functions that can be opened by selecting one of the following options from the InDesign **Window** menu.

- **Darwin Auto Fitting**
- **Darwin Fields and Rules**
- **Darwin Preflight**
- **Darwin Preview**
- **Darwin VI Properties**
- **Darwin View**

Auto Fitting

The **Darwin Auto Fitting** pane enables you to fit text and images in your job.



To manipulate the text in a text box:

- In the **Size** box, enter the percentage of the size of the smallest and largest font.

  The font size and leading (weight) is increased or decreased accordingly. For example, a Name field that is too long for the text box is shrunk by the specified percentage.

- In the **H. Scale** box, enter values for the smallest and largest horizontal scale.

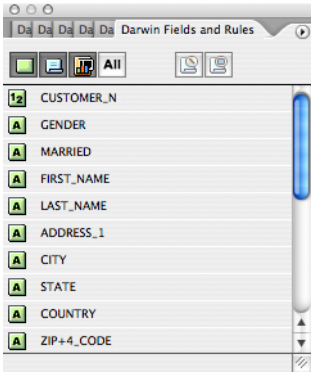
  The horizontal scale is increased or decreased accordingly. For example, a you can increase the size of a field so that it fills the text box.

- To disable this option, ensure all values are set to **100%**.

To manipulate the image in an image box:

1. In the **Fitting Mode** box, select the desired fit. For example, select **center** to position the image in the center of the image box.
2. In the **Position** box, select the desired position. For example, to position the image in the top left corner of the image box, select **top left**.

Fields and Rules



The **Darwin Fields and Rules** pane contains show buttons to control the type of items shown in the panel, and color rules buttons to apply color rules and a list of items that can be dragged to the page.



Show Data Fields: Click this button to show the profile fields, in the **Darwin CoPilot** panel.



Show Rules: Click this button to show or hide any text or image and color rules in the **Darwin CoPilot** panel.



Show DDGs: Click this button to show or hide only DDGs in the **Darwin CoPilot** panel.



Show all types: Click this button to show all types of information in the **Darwin CoPilot** panel.



Apply Color Rule to Frame: Click this button if you want to add a color rule to the selected text box frame.



Apply Color Rule to Background: Click this button if you want to add a color rule to the selected text box fill.



Apply Color Rule to Text: Click this button if you want to add a color rule to the selected text box text.

Preflight

Use the **Darwin Preflight** pane to determine whether any field data is too long for its text box, or if the length of the field data will cause text to be hidden within a text box.



Important: Darwin only checks the data from internal databases. It does not check the data from external databases. If the field data is from an external database, Darwin displays an error message that it cannot check the field's length.





Lookup Longest Line/Check for Hidden Text: Use these buttons to show the longest line and any hidden text before sending to print.

Checking the Longest Lines of Text

When you run a check for the longest field with in a paragraph, Darwin checks and displays the following information:

- The longest field of data in the selected paragraph

  Darwin separates paragraphs based on the carriage return. Therefore, if you place the text cursor in the midst of a 4 or 5 line paragraph, Darwin checks for the longest field of data within that paragraph.

  If you have many paragraphs within a text box, you must individually check each paragraph for the longest field.

- The longest combination of fields

  If there are two or more fields in a single paragraph, Darwin checks the combined length of the related fields.

  For example, if a paragraph contains the following data fields:

  ```
  <First name><Last name> text text text text text text
  text text text text <age>.
  ```

And in the job, the field options are:

First Name	Last Name	Age
Patsy	Brown	45
Jon	Trumpet	3

Darwin determines that the longest combination of related fields is Patsy Brown, 45. *Not*, Patsy Trumpet, 45.

To check for the longest field of data in a paragraph:

1. On the InDesign page, place the text cursor in the paragraph you want to check.



2. In the **Darwin CoPilot** panel, click the **Lookup Longest Line** button.

   Darwin runs the check and displays the longest field data in the paragraph and you preview the job with the longest record in the attached database.

Checking for Hidden Text

Check for hidden text to make sure that your field data does not cause hidden text within the text box.

When you check for hidden text, you have three options to check for hidden text:

- in the **Selected boxes** only
- on the **Current Page**
- in the entire **Document**

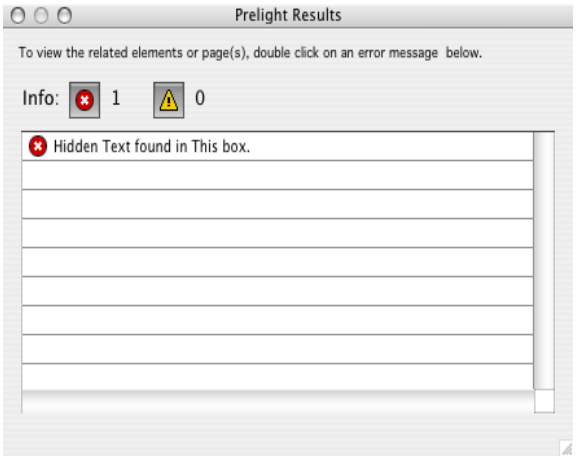
When Darwin checks for hidden text, it checks first for the longest field data and then that the longest field data will not create hidden text. Therefore, you preview the job for the longest records in the database, and for the text boxes which contain hidden text.

Unlike when Darwin checks for the longest field in individual paragraphs, the longest fields that create hidden text within text boxes may not be related to each other.

To check for hidden text:



➢ In the **Preflight** area, select the desired search area in the **Hidden Text** drop-down list (**Selected Boxes**, **Current Page** or **Document**), and click the **Check for Hidden Text** button.



Darwin checks the selected boxes, current page or all the pages in the entire document. If there is hidden text, an error message appears in the bottom of the Check for Hidden Text dialog box, and a hidden text icon appears in the InDesign text box.

To view the hidden text:

➢ In the Preflight Results dialog box, double-click a Hidden Text error message.

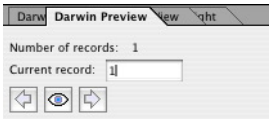
In InDesign, the location of the text box with the hidden text appears.



Note: An error message appears for each instance of hidden text found.

Preview

The **Darwin Preview** pane enables you to scroll through the records in your job to preview how each page looks.



It enables you to search for records, preview the current InDesign page to see how it will look when Darwin insets the variable data, and proof selected pages to a printer to see how they appear on paper.



Preview Previous Record: If you select a single record (other than the first record on the list), this button switches to the previous record and previews the layout using data from that record.



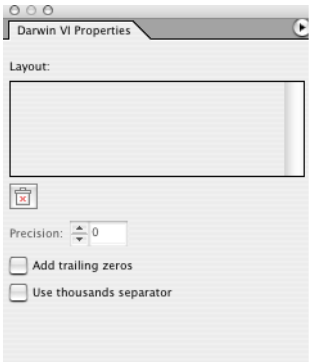
Preview Current Record: If you select a single record this button previews the layout using data from that record.



Preview Next Record: If you select a single record (other than the last record on the list), this button switches to the next record and previews the layout using data from that record.

VI Properties

The **Darwin VI Properties** pane enables you to view all the rules and variable fields that are assigned to the selected element.





Delete VI Element: Click this button to delete the VI element.

The VI Properties pane enables you to view all the rules and variable fields that are assigned to a selected element. You can edit fields that are defined as real or integer in the VI Element Properties area. Other field types cannot be edited, but can be deleted.



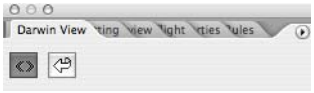
Tip: Click the VI element in the **Layout** list and it will be highlighted in the InDesign file.

To edit fields:

1. In the InDesign file, select the element for which you would like to view the assigned rules.
2. Select the field you want to edit.
3. To edit real or integer fields:
   - To edit the decimal places, from the **Precision** list, select the number of digits you want to the right of the decimal point.
   - To add zeroes for numbers that do not have a decimal point, select the **Add trailing zeros** check box.
   - To add commas to separate thousands, select the **Use thousands separator** check box.
   - To omit the picture box in cases where a picture box and a text box overlap but the picture box is empty, select **Omit box if empty**.
   - To hide text tags, and to display text with the correct attributes, select **Is Styled Text**.

View

The **Darwin View** pane contains buttons that enable you to change what you view in the layout, You can choose to show/hide VI brackets, reset the VI preview, or open the Preview window.





Show: From the **Show** list, select **VI** to show only variable components in the InDesign file, **Fixed** to show only fixed components in the InDesign file, or **All** to show all.



Toggle VI Brackets: Click this button to show/hide the VI brackets.



Reset VI Preview: Click this button to reset the VI preview.



Open Preview Palette: Click this button to open the preview window.

Darwinized Documents

Once you add an InDesign file to the **Layouts** section of the Pages window, Darwin records the file name and location in the Darwin Database and adds special tags to the file itself. At this point, the file has been Darwinized. It can only be opened by Darwin.



Note: It is recommended that you backup the InDesign file before using it in Darwin.

Opening an InDesign File for Use With Darwin

Before opening an InDesign file for use with Darwin ensure the following:

- The Darwin Pilot is running and connected to a database
- The correct current job is selected in the Darwin Pilot
- InDesign CS2 is running
- The **Darwin CoPilot** panel is displayed

Once you meet these conditions, you have several options for opening an InDesign file for use with Darwin. It is important to distinguish between new files, non-Darwinized files, and Darwinized files.

Creating a New Darwin File

In InDesign, choose **New** from the **File** menu to create and open a new file. Darwin assigns a default name to the file based on the current job. When you save the file, you can save it to the database. The file is then Darwinized. In the standard InDesign file save window you can rename the file and select its folder. Darwin automatically adds the saved file to the **Layouts** area of the Pages window.

Darwinizing an Existing File

Add the file to the **Layouts** section of the Darwin Pilot Pages window by dragging the InDesign file to the **Layouts** area. The InDesign file is now Darwinized.

Opening a Darwinized File

From the Darwin Pilot Pages window do one of the following:

- Select a layout or a Darwin page that you linked to a layout and from the **Item** menu, choose **Open**.
- Double-click a layout to open it.
- Click the **Open selected page(s)** or **Open selected layout(s)** button.



Note: Once a file has been Darwinized, it should only be opened via the Darwin Pilot Pages window.

Placing Variable Data on the Layout



Note: Variable data can only be placed on file pages, not on a master page.

Adding Text Items to the Page

To add a single text item to a page, simply double-click the text box in the **Darwin CoPilot**.

Text boxes can receive the following items:

- Profile fields (containing text, numbers, dates, or times)
- Text rules

Each variable text item is shown enclosed by VI brackets (<< and >>) that serve as field delimiters.

You may drag variable text items anywhere in a text box to position them, except to within an with existing variable text item.

Adding Picture Items to the Page

Picture boxes can receive only image rules and charts.

To add a single picture to a picture box, double-click the image rule or chart in the **Darwin CoPilot** panel. Use Auto Fitting to fit the picture to the picture box. Darwin automatically resizes the chart to fit the box size.

Formatting Variable Text Data

Formatting Text Items

Any text typed into the text box can be formatted as usual in InDesign.

Blank Line Suppression

Darwin automatically omits any line in a text box that contains one or more fields or text rules if there is no printable data. This is very useful for addresses that may contain extra address lines. If an address line is blank, Darwin omits it and all lines below it move up.

If you wish to maintain line spacing even if a line is blank, insert a small fixed character (such as a period) on the line, and change its color to match the background so that it is invisible when printing.

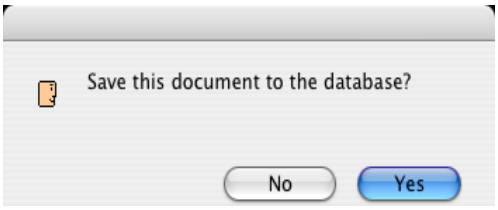
When previewing, Darwin only displays the **Blank Line Suppression** on the screen when the Field Delimiters have been hidden (using the **Hide Field Delimiters** button on the **Darwin CoPilot** panel).

Formatting Variable Picture Data

When you apply formatting to a picture box containing an image rule, Darwin applies the same formatting to every picture placed in the box by that rule. The pictures used by the rule must be very consistent; otherwise, the results may be incorrect.

Saving the Layout

From the **File** menu, choose **Save** to save the layout in InDesign. If this is the first time you are saving the page, Darwin prompts you to save the layout to the Darwin database.



If you click **Yes**, the following occurs:

- The InDesign file itself becomes internally tagged as belonging to the current Darwin database and job.
- Darwin adds the file to the **Layouts** section for the current job so that if you open the Pages window on the **Darwin Pilot** panel, all pages of the InDesign file appear in the **Layouts** section.

Searching for Records

Use the search buttons to find the records you wish to work with. See *Appendix A, Searching in Darwin* on page 124 for details about searching.

11 Setting Up Print Runs

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Overview

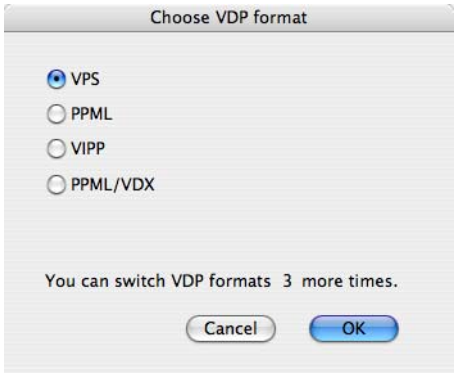
A Darwin for InDesign print run describes which data records are printed and how they are sorted.

Darwin Pro users can print to all the supported VDP formats.

Darwin Desktop users can print to Optimized Postscript by default, and choose one other output type. Darwin Desktop users can change this output type to one other output type before deciding on their final output type.

To choose an output type:

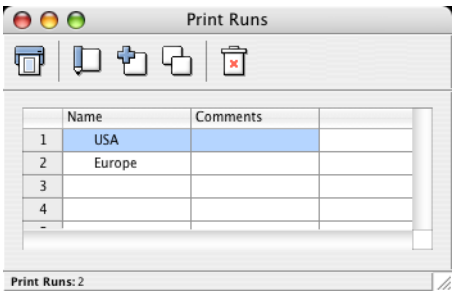
1. In Darwin Desktop, from the **Darwin Pilot** menu, select **Choose VDP format.**



2. Choose a VDP format, and click **OK.**

Using the Print Runs window

➢ To open the Print Runs window for the current job, click the **Print Runs** button on the **Darwin Pilot** panel.



The Print Runs window shows all currently defined print runs and a row of buttons for managing the print runs and hot folders.



Print: Begins the currently selected print run.



Edit Print Run: Opens the Print Run Information window for the currently selected print run. The print run parameters can be changed and saved.



New Print Run: Creates a new print run and opens the Print Run Information window.



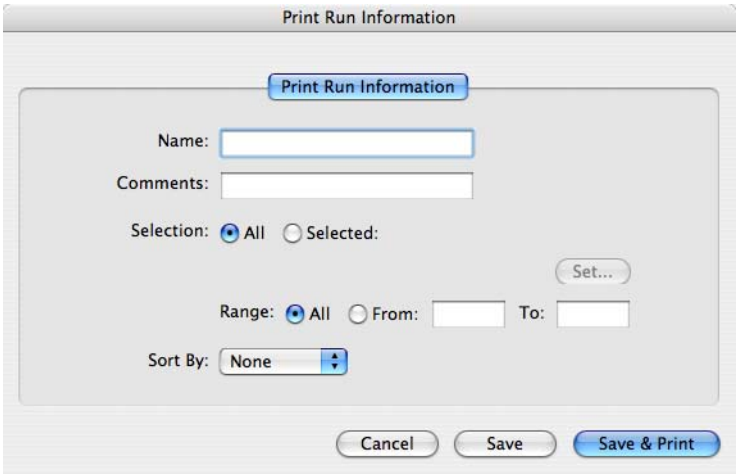
Duplicate print run: Duplicates the currently selected print run. The duplicated print run can then be changed.



Delete the selected print run(s): Deletes the selected print run(s).

Creating a New Print Run

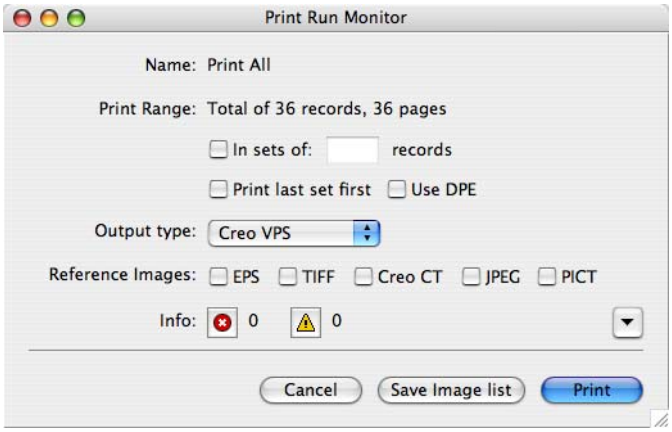
➢ In the Print Runs window, click the **New Print Run** button.



3. In the **Name** box, type a name for the print run.
4. In the **Comments** box, type any comments you may have for the print run.
5. Use the **Selection** controls to define what which records to print in the print run, and in what order they should be sorted. You can choose **All** or **Selected**.
6. For selected records, enter the selection criterion by clicking the **Set** button. This opens a window similar to that used by the **Search** function and the **Rule criterion** function. See *Appendix A*, *Searching in Darwin* on page 124 for details about selecting records.
7. You can also choose to print all selected records or a range of records. For example, if you anticipate printing several thousand pages you may wish to only print a few hundred at a time.
8. Set the sort order for printing. Darwin can sort the output using any field you select, such as zip code or last name.
9. After setting the Print Run Information window, click **Save** to save the print run configuration, or click **Save & Print** to save and execute the print run immediately.

Executing a Print Run

During the print run processing, Darwin evaluates the rules and generates the variable data.



1. If no problems are found with the print run, in the output type, choose one of the following options:
   - **Creo VPS**
   - **Optimized PostScript®**
   - **Xerox VIPP**
   - **PPML/VDX**
   - **PPML.**
2. For Variable Print Specification and PostScript output, you can also specify that the output be grouped in sets by choosing the **In Sets of** check box and typing a numeric value in the **records** field.

   Darwin divides the print run into smaller chunks so that less disk space is required on the Variable Print Specification printer. Another advantage of using the **In Sets of** option is that while the Creo color server prepares the first set, Darwin can prepare the second set. You can also specify to print the last set first.
3. Select **Use DPE** if your job uses dynamic page exceptions.
4. In the **Reference Images** area, choose **EPS**, **TIFF, Creo CT**, **JPEG** and **PICT** as appropriate. **Reference Images** options are available when you select **Creo VPS** only. Select one of these options to reference these file

types to the VPS file (Thin VPS), then place the images in the HiRes folder of the color server. If you do not select an option, the images are embedded in the VPS file (fat VPS).

5. Click the **Save Image List** button for a list of all images used by the rules in the print run.
6. When you are ready, click the **Print** button to initiate the printing stage.

   After a few moments, the standard InDesign Print window appears. Check that the various options are set correctly. After you click the **Print** button on the Print window, the print run continues executing.

To print the Darwin booklet number, page number, date and time of printing in the crop marks:

1. After you have clicked the **Print** button to initiate the printing stage, and the InDesign Print window appears, in the InDesign Print window, choose the **crop marks** check box.
2. Click **Print**.

   Darwin automatically applies the booklet number, page number, date and time of the printing between the crop marks during the print run.

Printing Using Optimized Postscript

If you choose the **Optimized Postscript** option in the Print Run Monitor window, the standard InDesign Print window appears. You may choose to print to the **Printer** or to a **File**. Each record is represented by a single Postscript file. Graphics in this print format are always embedded.



Important: You must **Save** changes you make to the **Print** option settings before printing when using PostScript. Otherwise, only the first pages from the first record will use your settings.

Printing Using Variable Print Specification

Variable Print Specification (VPS) is an extension to the PostScript language, designated to describe Variable Information documents efficiently. The Creo color servers are capable of processing VPS files. Consequently, the Creo color server can effectively print Variable

Information jobs. It accepts VPS as a file format that can be RIPped and printed. The output of a VPS file RIP process is a Ready To Print job on the Printer Disks.

If you choose the **Creo Variable Print Specification** option in the Print Run Monitor window, the standard InDesign Print window appears. Before the **Variable Print Specification** is sent to a Variable Print Specification printer, you must ensure that all EPS files called by your Image rules, or used in fixed picture boxes, are already in a high resolution folder on the Color Server (RIP). Other picture formats are simply included (the first time they are used) in the **Variable Print Specification code**, but only callouts to EPS pictures are included in the **Variable Print Specification code**.

If you choose to print to a **Printer**, the printer currently selected must be able to accept Variable Print Specification code.

Graphics in this print format are always embedded.

Printing Using VIPP

During output, Darwin creates a VIPP file in hybrid mode. This means that only one file, containing all the PostScript commands and necessary information, is sent to print.

Printing Using PPML and PPML/VDX

During output Darwin creates two files. A PDF file that contains all the elements in the job, and a PPML file that contains references to the elements in the PDF file.

Debugging a Print Run

When you execute a print run, **Warnings** or **Errors** might be generated by Darwin if it detects problems. Errors are considered to be more serious than warnings.

Warnings

You may decide to continue the print run even if there are **Warnings** (as long as there are no **Errors**). However, Darwin does not print the records that caused the **Warning**.

Darwin generates **Warnings** when a lookup rule item fails (no library item name matches the data in the lookup field), or if a literal text result is blank.

Errors

You cannot execute a print run if there are **Errors.** You must solve the problem(s) causing the **Errors** and then re-execute the print run.

Darwin generates **Errors** when the following problems appear during the print run:

- No pages were defined, or a page was defined with no layout or page rule assigned to it.
- A linked rule item with a bad link was evaluated. A bad link could be caused by no item being linked to the rule item, or if the linked item was later deleted from the library.

Re-executing a Print Run

To re-execute the print run;

1. Close the Print Run Monitor window (if open).
2. Select the desired print run in the Print Run window.
3. Click **Execute the selected print run**.

   Darwin checks the database to find out what has changed, and only regenerates the portion of the print run that was affected.

Output Document Names

Whether the result of a print run is **Variable Print Specification** or **PostScript** code, and whether it is printed directly to a printer or saved to disk, all PostScript output contains a file name. In Darwin, the output file names are composed of the job name followed by the print run name, separated by an underscore.

Whether a print run is printed directly to a printer or saved to disk, the output file name created is composed of the job name followed by the print run name, separated by an underscore.

A

Searching in Darwin

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Searching in Darwin

Several Darwin for InDesign windows have search capabilities. These windows include:

- Library window
- Data window
- Preview/Proof window

In addition, Darwin rules and print runs use criteria that are set using the same methods.

Initiating a Search



➢ To initiate a new search, click the **Create Filter** button. The Record Search window opens.



The Record Search window contains two boxes. The first contains a list of relevant options for searching. Select the option you wish to use. The second box contains a list of comparison operators. The available comparison operators depends on the type of field used for the search. Depending on the comparison operator, there may be a text box to enter a compared value or an additional box with options.

Searches Using Text Fields

When Darwin searches for records using a text field, it uses seven types of comparison operators, plus their opposites.

Table 1: Comparison operators for text fields.

is/is not	an exact match is required
starts with/doesn't start with	matches the beginning of text
ends with/doesn't end with	matches the end of text
contains/doesn't contain	matches a portion of text
is before/is not before	sorted before or not sorted before
is after/is not after	sorted after or not sorted after
is empty/is not empty	matches empty or non-empty fields

Searches Using Number Fields

When Darwin searches for records using integer or real fields, it uses four types of comparison operators, plus their opposites.

Table 2: Comparison operators for number of fields.

is/is not	an exact match is required
is greater than/is not greater than	numerically larger or not larger
is less than/is not less than	numerically smaller or not smaller
is empty/is not empty	matches empty or non-empty fields

Searches Using Date and Time Fields

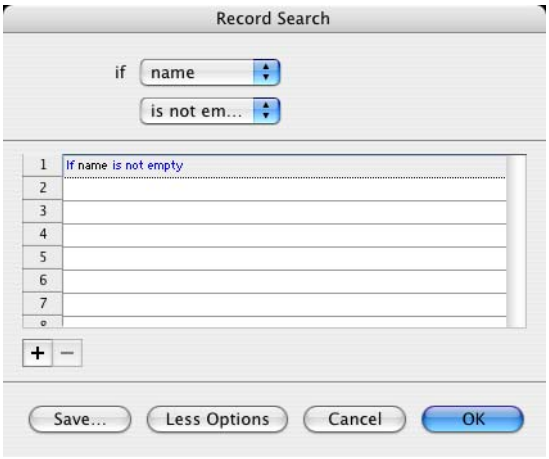
When Darwin searches for records using date or time fields, it uses four types of comparison operators, plus their opposites.

Table 3: Comparison operators for date and time fields.

is/is not	matches the date/time exactly
is before/is not before	before or not before the date/time
is after/is not after	after or not after the date/time
is empty/is not empty	matches empty or non-empty fields

Complex Search Criteria (Compound Searches)

Click the **More Options** button to create compound search criteria. You can then specify multiple criteria for the search connected by **AND** and **OR** operators.



Order of Precedence

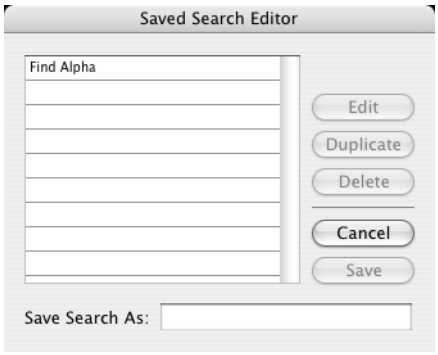
If you use both **AND** and **OR** operators to connect several criteria, the **AND** operators take precedence. For example, if the compound search is Sex **is** Male **AND** Country **is** Austria **OR** Country **is** Brazil **AND** Sex **is** Female then the search would find Austrian men and Brazilian women, but not Austrian women or Brazilian men (or anyone at all from another country).

Saved Searches

In a Record Search window, click the **Save** button to save a Search. Once saved, a search can be performed by selecting its name from the **Saved Searches** menu that opens when pressing the triangle icon in the Darwin Pilot Data window.

The first item in the **Saved Searches** menu is **All**. This search is built-in and is always available. When selected, Darwin displays all current records. Darwin lists other saved searches below the All search. When you save at least one search, you may edit the **Saved Searches.**

➢ Select **Modify this menu** from the **Saved Searches** menu to open the Saved Search Editor window.



The Saved Search Editor window enables you to edit previously saved searches, duplicate them, and delete them.

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