Version 1.5

Darwin VI Authoring Tool

for Adobe InDesign - Macintosh



Learning Guide

English

653-01060B-EN Rev A
Internal 741-00048B-EN Rev A

www.creopod.com/Darwin

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4,558,302	5,339,176	5,561,691	5,764,374	5,998,067	6,159,659	6,366,339
4,743,091	5,343,059	5,568,595	5,764,381	6,003,442	6,164,637	6,371,026
4,992,864	5,355,446	5,576,754	5,771,794	6,014,471	6,180,325	6,377,739
5,049,901	5,359,451	5,579,115	5,785,309	6,016,752	6,181,362	6,387,597
5,079,721	5,359,458	5,592,309	5,813,346	6,031,932	6,181,439	6,396,422
5,103,407	5,367,360	5,594,556	5,818,498	6,043,865	6,186,068	6,396,618
5,111,308	5,384,648	5,600,448	5,854,883	6,060,208	6,189,452	6,407,849
5,113,249	5,384,899	5,608,822	5,861,904	6,063,528	6,191,882	6,414,755
5,122,871	5,412,491	5,615,282	5,861,992	6,063,546	6,204,874	6,422,801
5,124,547	5,412,737	5,625,766	5,875,288	6,072,518	6,208,369	6,435,091
5,132,723	5,420,702	5,636,330	5,894,342	6,090,529	6,214,276	6,441,914
5,150,225	5,420,722	5,649,220	5,900,981	6,096,461	6,217,965	6,450,092
5,153,769	5,459,505	5,650,076	5,934,196	6,098,544	6,260,482	6,456,396
5,155,782	5,473,733	5,652,804	5,942,137	6,107,011	6,266,080	6,476,931
5,157,516	5,481,379	5,680,129	5,946,426	6,112,663	6,266,134	6,477,955
5,208,818	5,488,906	5,691,823	5,947,028	6,115,056	6,267,054	6,509,903
5,208,888	5,497,252	5,691,828	5,958,647	6,121,996	6,268,948	6,541,181
5,247,174	5,508,828	5,696,393	5,966,504	6,130,702	6,283,589	6,545,772
5,249,067	5,509,561	5,699,174	5,969,872	6,134,393	6,295,076	6,564,018
5,283,140	5,517,359	5,699,740	5,973,801	6,136,509	6,299,572	
5,291,273	5,519,852	5,708,736	5,986,819	6,137,580	6,318,266	
5,323,248	5,526,143	5,713,287	5,995,475	6,147,789	6,352,816	

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Tutorial Description

Course description	A tutorial that will familiarize the user with the functionality of Darwin™.
Duration	• New Darwin users — 6 hours • Users with previous knowledge or upgrading from a previous version — 3 hours
Target Audience	• New users with no previous experience with Darwin • Darwin users who are familiar with previous versions of Darwin
Student prerequisites	• Working knowledge of prepress operations • Familiarity with the Macintosh® operating system • Familiarity with InDesign®
Hardware and software configuration	• One Power Macintosh® G4 or later • Mac OS X version 10.3 • Darwin version 1.5 for InDesign • 128 MB available memory • The appropriate Creo PPD file (depends on the system to which you are printing) • 250 MB disk space • Darwin Pro dongle • VIPP license • InDesign 3.0.1 or later for Macintosh • Spire color server (optional: for printing the jobs) • Xerox printer (optional: for printing the jobs)

Using This Guide

Guiding Principles

This learning guide incorporates the following adult learning principles:

- Provides a conceptual framework that shows how training fits in the larger picture
- Provides realistic examples connecting training to real-world working environments
- Relates training to what learners already know
- Incorporates hands-on practice for learning through doing
- Provides scope of training through learning objectives
- Relates hands-on activities to stated learning objectives

Guide Structure

This course is divided into modules, which are broken down into lessons. These lessons will help you learn effectively and efficiently.

- Modules are a collection of related concepts and tasks and consist of the following components:
  - Introduction
  - Lessons
  - Summary
- Lessons consist of the following three sections:



Why You Need to Know This: Explains why the content of the lesson can help you; it might also describe how the content relates to other lessons in the module.



What You Need to Know: Summarizes the instructional content of the lesson.



Apply What You Know: Reinforces student learning through hands-on activities, question and answer sessions, quizzes, and other observable and measurable activities.

Steps to Success

A Path to Follow...

1 Set aside time to complete this course.



Allow yourself approximately 6 hours to complete the course.

Find a quiet place to study the material.

2 Organize your time well.

Notify your colleagues that you are working through the tutorial. Organize a schedule that will allow you to complete all aspects of the training, either all at once or in blocks of time.

3 Complete the tutorial.

- Read the learning guide.
- Perform the hands-on activities.

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Creo Internet Address: www.creo.com

Files Supplied With the Tutorial

The files that you need for the Darwin Card tutorial are in the **Learning Guide** folder on the Darwin 1.5 for InDesign CD-ROM. In this folder you will find two subfolders that contain all the necessary files for performing the activities in this tutorial.

PDF File

Folder	File Name	Icon	Description
Learning Guide	**Darwin1.5LG.pdf**		The Darwin 1.5 Learning Guide. Print this file for easy reference.

Darwin Card Mailer Folder

Folder	File Name	Icon	Description
ID Files			Contains the InDesign® files
	DarwinCard A4		InDesign® file in A4 format
	DarwinCard Letter		InDesign file in letter format
Card_Fonts			Folder containing the fonts required for the tutorial
Images			Folder containing the static images required for the tutorial
VI Images			Folder containing the variable images required for the tutorial
Data			Folder containing the data files required for the tutorial
	Darwin Card.xls		Excel file containing the data required for the tutorial
	Darwin Card.dbf		Database containing the data required for the tutorial

Lincoln High School Report Card Folder

Folder	File Name	Icon	Description
ID Files			Contains the InDesign® files
	Certificate A4		InDesign® file in A4 format
	Certificate Letter		InDesign file in letter format
Fonts			Folder containing the fonts required for the report card activity
Images			Folder containing the static images required for the report card activity
VI Images			Folder containing the variable images required for the report card activity
Data			Folder containing the data files required for the report card activity
	Certificate.txt		Database containing the data required for the report card activity
	Certificate.xls		Excel file containing the data required for the report card activity
Text Files			Folder containing the variable texts required for the report card activity

Tutorial Overview

Introduction

The aim of this tutorial is to give you hands-on experience with Darwin™. We provide you with a project to complete using Darwin. By the time you have completed the tutorial, you should be able to use the Darwin features that enable you to print with variable data.

The tutorial consists of six modules and should take you less than six hours to complete if you completely new to the Darwin workflow.

Outcomes

By the end of this Darwin tutorial, you should be able to:

1. Create a new database
2. Create a job
3. Define your data
4. Insert variable data into the document
5. Define rules
6. Create charts
7. Define page rules
8. Print the document

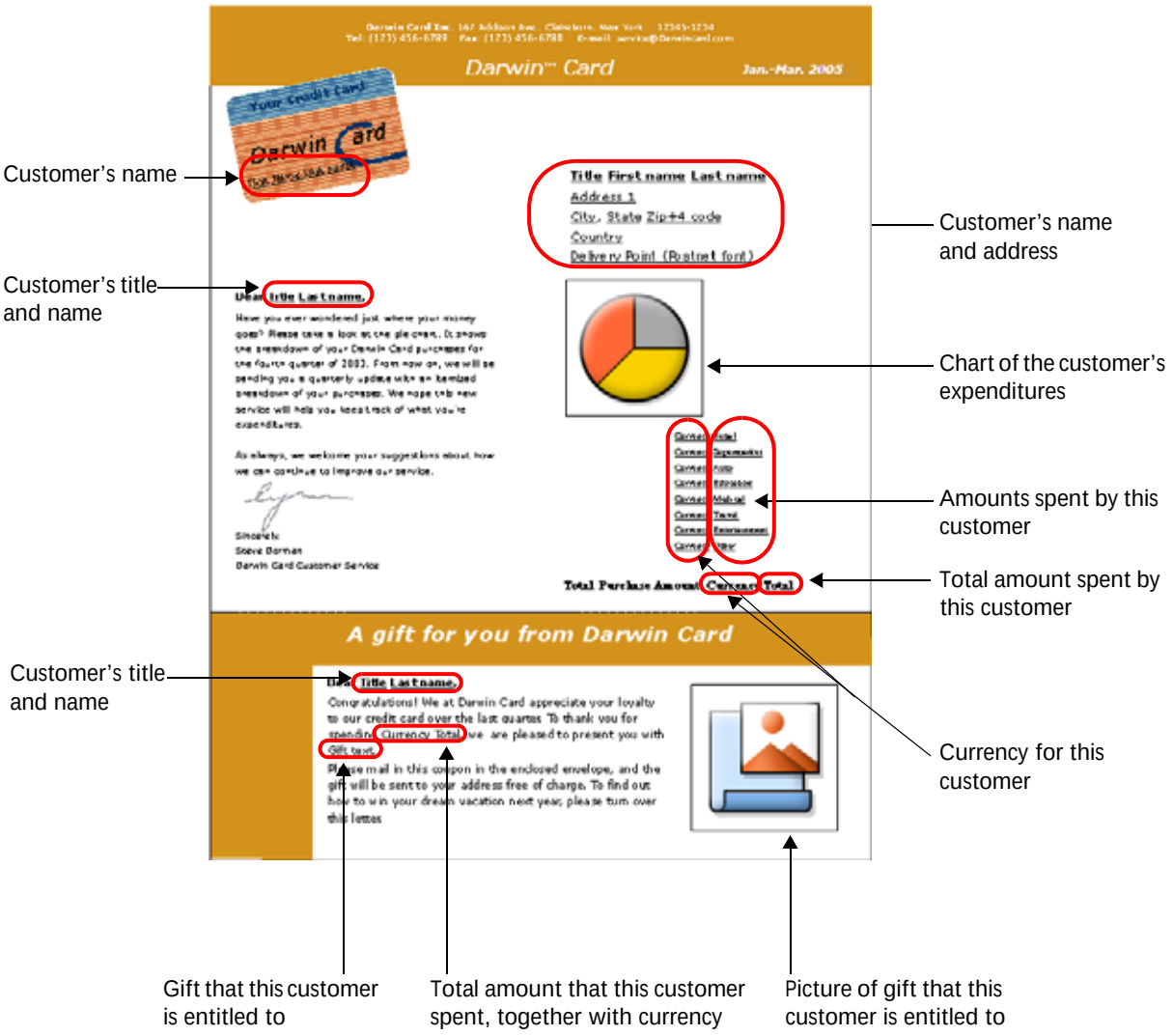
About the Darwin Tutorial

Darwin Card is a credit card company that is mailing out a promotional mailer to its customers worldwide. The graphic artists who are preparing the promotional mailer have already produced InDesign® files based on the variable information that Darwin Card has defined.

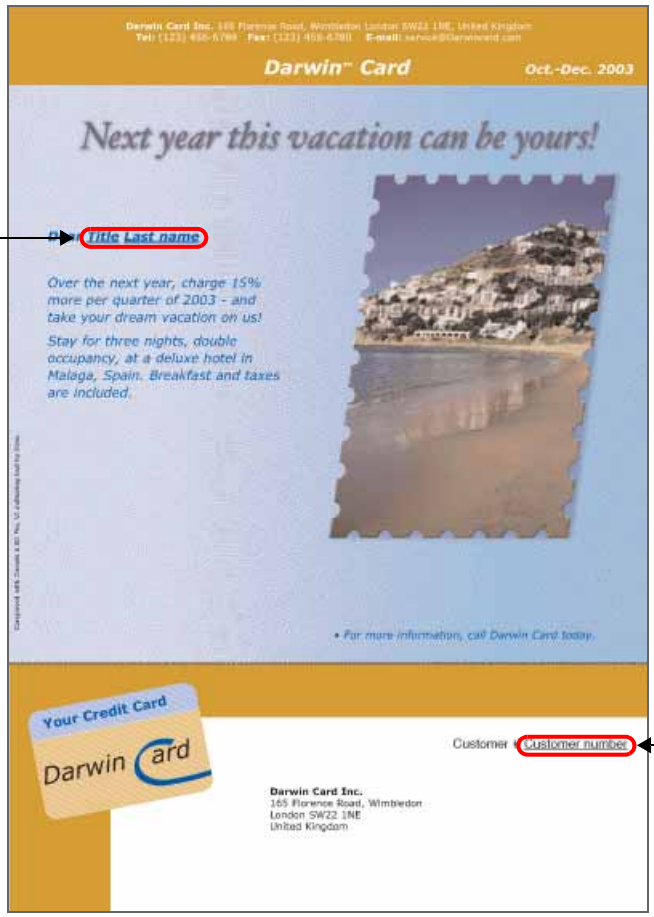
Your job is to work on the InDesign pages and to define and insert all the variable information according to the following criteria:

1. Each mailer is personally addressed to the customer.
    a. The salutation varies according to the gender of the customer.
    b. The Darwin Card graphic displays the name of the customer on the card.
2. Each mailer displays a pie chart based on the amounts that the customer has spent. The mailer also lists the amount that the customer spent in each of various categories.
3. The currency varies depending on the country in which the customer lives. For example, if the customer lives in the United States, then the currency will be “$”.
4. Each mailer offers a free gift that varies according to the amount that the customer has spent with the Darwin Card.
5. The page size varies depending on the country in which the customer lives. For example, Americans will receive letter-size paper.
6. The vacation offered varies depending on the continent in which the customer lives. For example, if the customer lives in the United States, the vacation will be in Cancun, Mexico.

Tutorial Page Layout and Variable Information



First page of the InDesign file



Customer's title and name

Customer number

Second page of the InDesign file - the vacation destination, picture, and return address depend on whether you are working with A4 or letter-size paper

Learning Resources

Resource	Language	Part Number
Darwin version 1.5 for InDesign User Guide	English	653-00959A-EN
Darwin version 1.5 for InDesign Release Notes	English	739-00151D-EN
www.creo.com/Darwin	English	

MODULE 1

Basic Darwin Workflow

Why You Need to Know This

This module gets you up and running. You will learn how to create a job, define the database you will be using, and assign the variable information. You will also learn how to print your results.

Before you create a Darwin job make sure that you have the following components:

- Job specification — the variable information requirements for the job.



In this tutorial, you are going to learn how to create a mailer job with variable information. You can find the description for the job at: *About the Darwin Tutorial* on page 2

- InDesign® files
- Static image files
- Variable Information (VI) images and text files (trigger files)
- Database with all the necessary data

Lessons in This Module

Lesson 1: Create a New Database

Lesson 2: Create a New Job

Lesson 3: Import Data

Lesson 4: Place Variable Data on a Page

Lesson 5: Print Pages

Lesson 1 Create a New Database



How This Lesson Will Help You

This lesson shows you how to prepare the database for the Darwin Card tutorial. You will learn how to create a new database.



Topics in This Lesson

- Copying the Tutorial Files
- Preparing a Database

Copying the Tutorial Files

The Darwin 1.5 for InDesign CD-ROM contains all the files that you will be needing to complete your project. Copy the **Learning Guide** folder from the CD-ROM onto your computer disk.

Preparing a Database

Before you can do anything in the project, you need to create a database in Darwin. The database holds all the customer information that the Darwin Card mailer will contain.



For more information on how to work with databases, see the *Darwin version 1.5 for InDesign User Guide*, chapter 4, *Working with Databases*.

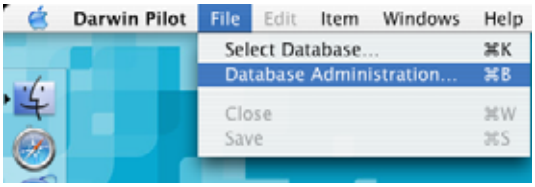
To create a database:

1. Start **Darwin Pilot**: In the InDesign application folder, double-click the **Darwin Pilot** icon.

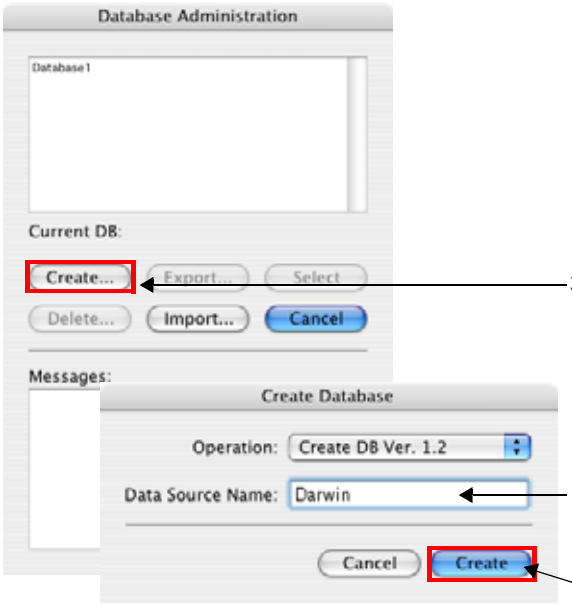


***Darwin Pilot** icon*

2. In the **Darwin Pilot** menu bar, from the **File** menu, select **Database Administration.**



Note: The first time that you open the Database Administration window, you see a default database named **Database1**.

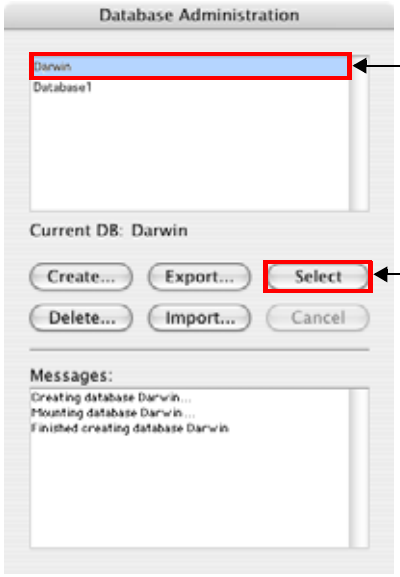


3. Click **Create.**

4. Type a name for the database. The database name for this tutorial is **Darwin**.

5. Click **Create.**

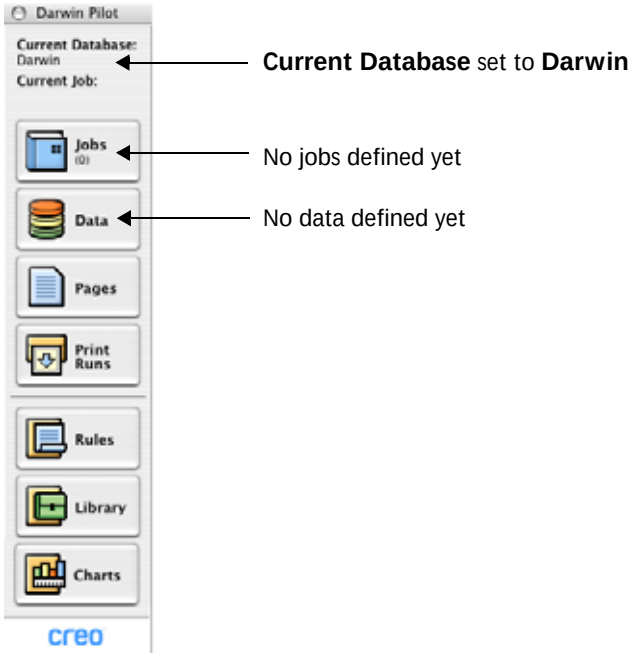
Note: The name that you choose for the database cannot contain any spaces. The name must start with a letter and can contain only letters and numbers.



6. Click the **Darwin** database that you have just created.

7. Click **Select**.

On the **Darwin Pilot** panel, note that the current database is now **Darwin**, but there are neither jobs nor data defined yet.



Current Database set to **Darwin**

No jobs defined yet

No data defined yet

Note: If you cannot see the **Darwin Pilot** panel, then from the **Darwin Pilot** menu bar, select **Windows > Show Navigator**.

Lesson Summary

Having completed this lesson, you should have created a database.

Lesson 2 Create a New Job



How This Lesson Will Help You

Before you create a job with Darwin, the following files should be ready and available:

- Job specification — the description of the job you have to create.
- InDesign® files
- Static image files
- VI images and text files (trigger files)
- Database with all the necessary data

This lesson shows you how to create a Darwin job.



Topics in This Lesson

- Creating a New Job

Creating a New Job



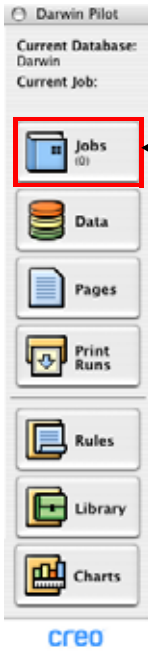
In this tutorial, you are going to learn how to create a mailer job with variable information. You can find the description for the job at: *About the Darwin Tutorial* on page 2

Now that you have created your database, you can start generating the Darwin Card mailer. Since we'll be basing our workflow on the **Darwin Pilot** panel, let's start with **Jobs.**



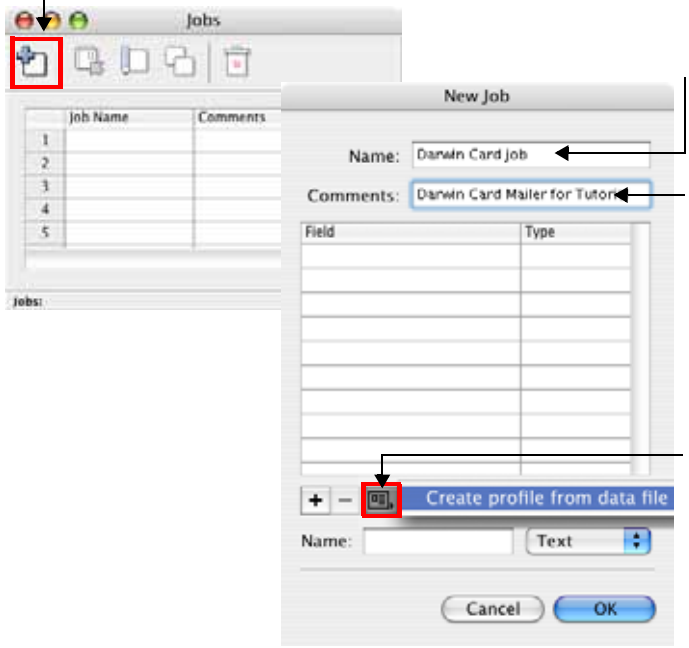
For more information on how to create jobs, see *Darwin version 1.5 for InDesign User Guide*, chapter 5, *Working with Jobs*.

To create a new job:



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

2. Click the **New Job** button.



3. Type the new job's name (you can use spaces here).

4. Type comments that may help you identify this job later.

5. Click the **Apply Profile** button, and select **Create profile from data file.**

Note: A profile contains the list of database fields used in the job. For example, a profile is usually made of the first row of the data file.

6. From the **Data** folder (in the **Learning Guide** folder), select the database file **Darwin Card.dbf** and click **Open**.

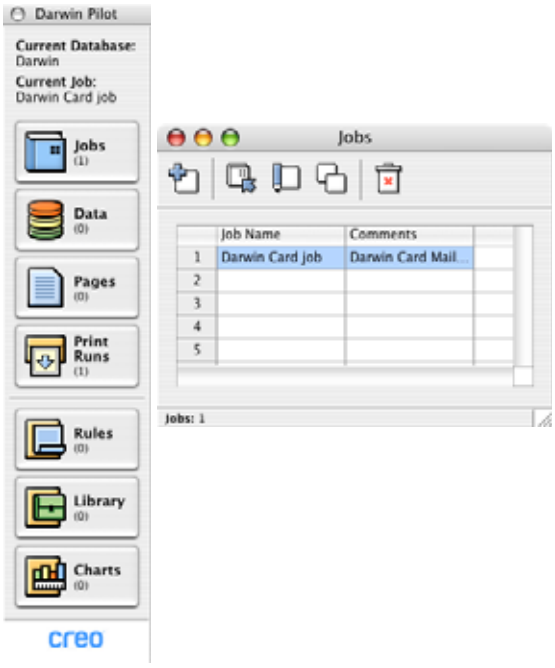
   Now you should be able to see the list of fields:



You can assign a different type to a field by selecting a field in the list and then selecting the desired type.

7. Make sure that the field types are logical. The field type tells Darwin what kind of data will be in that field. For example, a city name consists of text, so we assign **City** the field type **Text**. The customer number is a whole number, so we assign **Customer Number** the field type **Integer**.
8. Click **OK**.

   You have now created a job called **Darwin Card job**. This job name appears under the **Current Job** on the **Darwin Pilot** panel.



Lesson Summary

In this lesson, you created a new job called **Darwin Card job**.

Lesson 3 Import Data



How This Lesson Will Help You

The power of Darwin is in the variable information that it enables you to print. This information is stored in a database. This lesson shows you how to import the customer data into your job. You will also learn how edit a profile to include the Postnet barcode data.



Topics in This Lesson

- Importing Data
- Creating the Postnet Barcode (For US Customers Only)

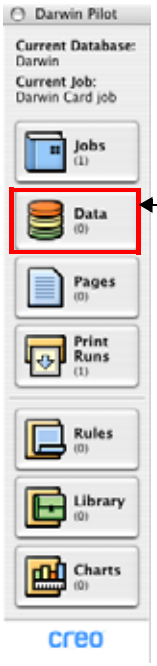
Importing Data

Darwin enables you to send out printed material customized for each person who will receive the Darwin Card mailer. The data is stored in a database. Each person is a record in the database. You need to import that data into the current database that you have already created for this job, **Darwin**.



For more information on how to import data, see *Darwin version 1.5 for InDesign User Guide*, chapter 6, *Working With Data*.

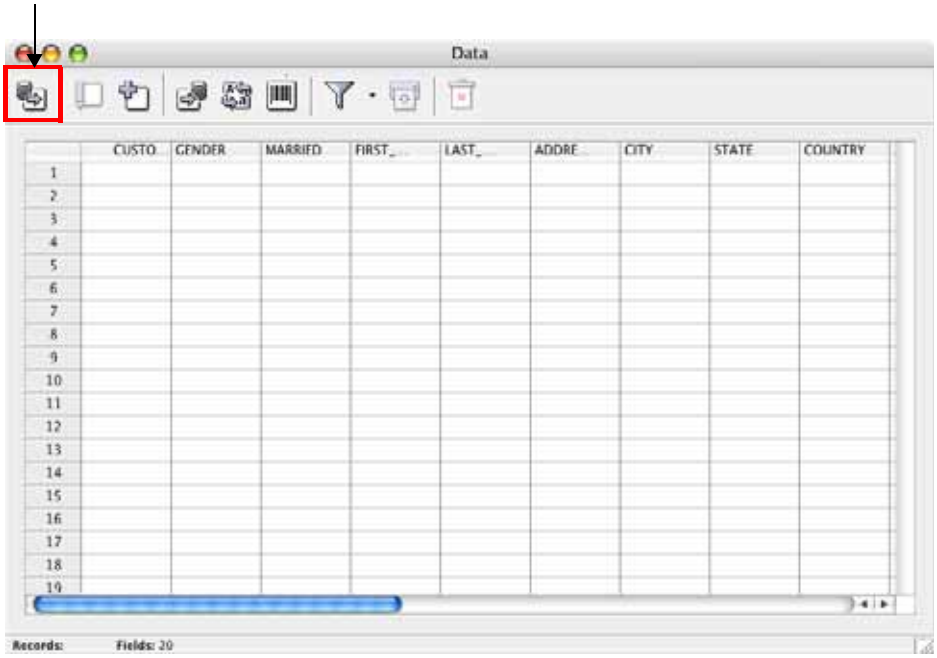
To import data into the current job:



1. On the **Darwin Pilot** panel, click **Data**.
   By default, the previously created database file opens up. In our case, it is the empty database file **Darwin**.

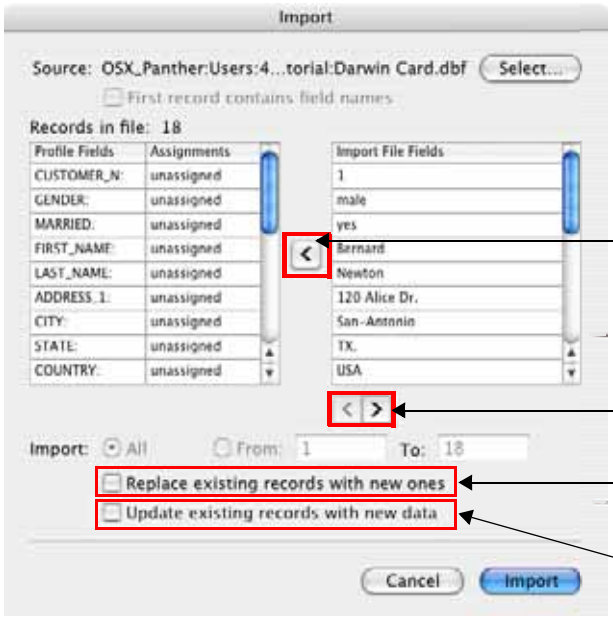
Note: There is no data in the **Darwin** database yet, since you have not yet imported the data records.

2. Click the **Import Records** button to bring records into the database.



The names of the profile fields of the current database appear on the left. The fields of the file that you want to import appear on the right.

In this case, the source is automatically **DarwinCard.dbf**, since we have just created it. If you want to import data from a different database file, click the **Select** button and select the file.



3. Click the **Assign All** button to copy the fields from the import file into the profile fields.

Click here if you want to scroll through the customer data.

Selecting this option replaces all records with new ones.

Selecting this option replaces only the new records.

The new field names appear on the left side, under **Assignments**.



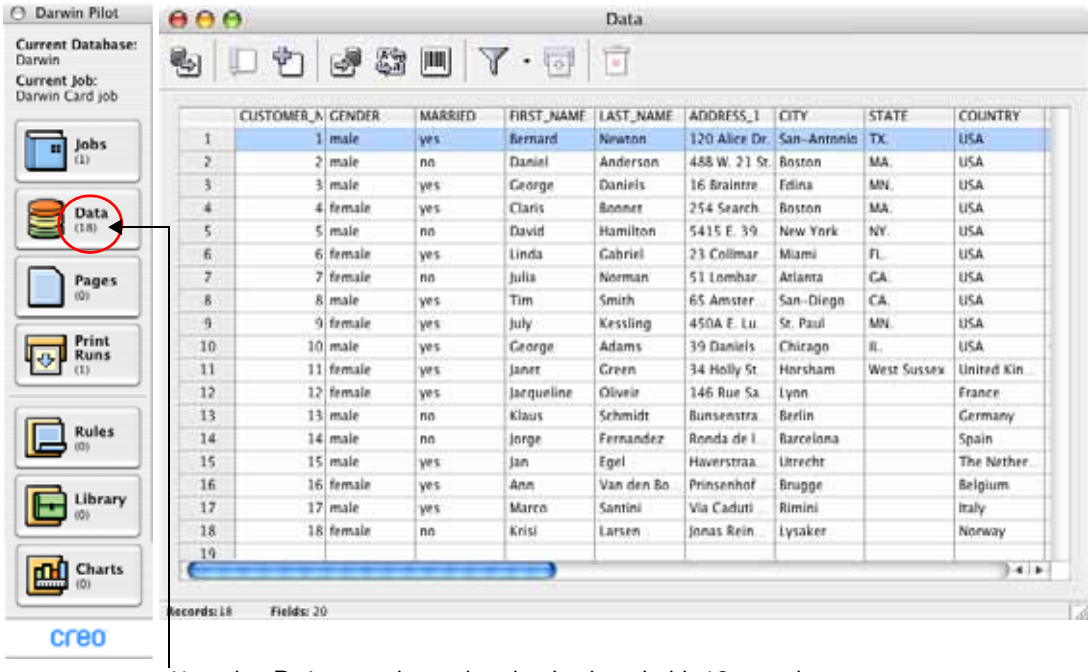
Note: If you want to import only a number of file fields, use the From/To option, to specify the fields that you want.



Note: In the tutorial you are importing all the fields into the database. In other situations, you might want to import only a few of the **File Fields** into the database.

4. When you have transferred the fields that you need, click **Import**.

   The data is imported into your database. You now have the data that you need to continue with the Darwin Card mailer.



Note that **Data** now shows that the database holds 18 records.

Creating the Postnet Barcode (For US Customers Only)

Using a barcode address reduces mailing costs considerably. The Darwin Pro application provides a font that enables you to create the postal numeric encoding technique (Postnet) barcode. To do that, your database must contain a reliable five-digit ZIP code, a 4-code, and an address that follows the United States Postal Service (USPS) regulations. Darwin does not match the validity of this information with the USPS database.

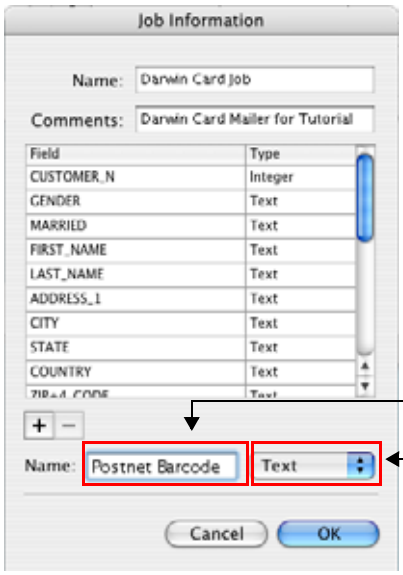
Note: The five-digit ZIP code and 4-code numbers can either be in separate fields or in the same field in the database.

To create the Postnet barcode, the database should include an empty field, in which Darwin creates the address barcode. To create an empty field you have to edit the profile used in your job.

Note: The Postnet feature is available only in Darwin Pro. This feature is relevant only for addresses in the United States.

To add an empty field to a profile:

1. On the **Darwin Pilot** panel, click **Jobs**.
2. Double-click the **Darwin Card Job**.

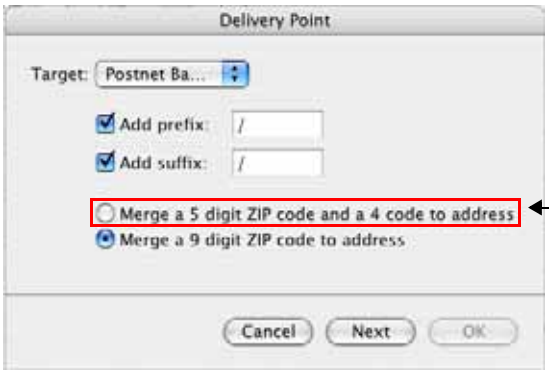


3. In lower **Name** box, type `Postnet Barcode`
4. From the field type list, select **Text**.
5. Click the + (**Add Field**) button.
   The new field is added at the end of the list.
6. Click **OK**.

Now you have to create the Postnet barcode.

To create a Postnet barcode:

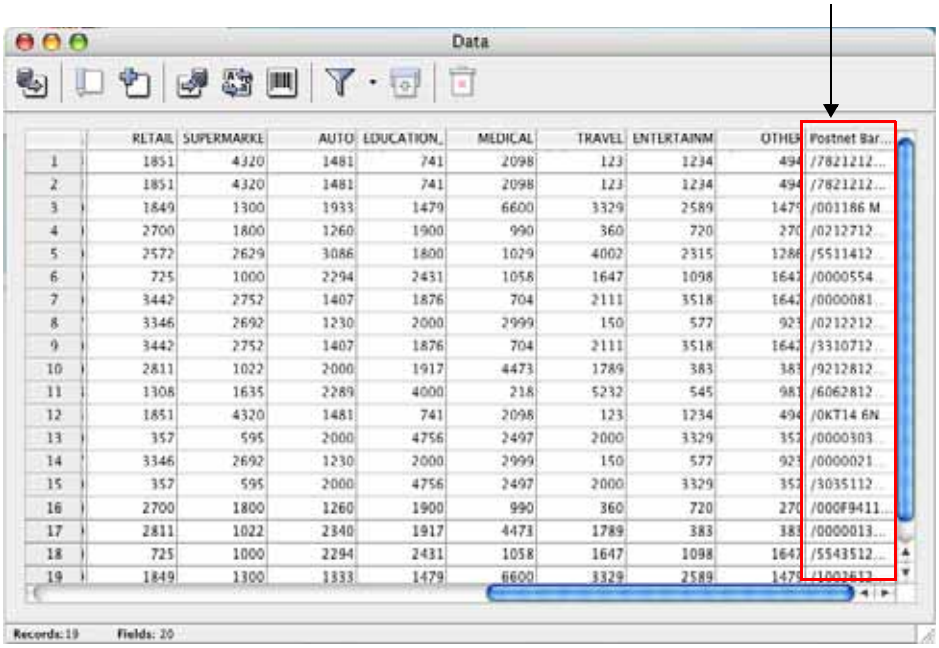
1. On the Darwin Pilot panel, click **Data**.
2. In the Data window, click the **POSTNET Barcode** button.



Select this option if the 5-digit Zip code and the 4-code are in different fields.

3. From the **Target** box, select **Postnet Barcode**.
4. Select **Merge a 9 digit ZIP code to address**.
5. Click **Next**.
6. In the Delivery Point dialog box:
   1. From the **ZIP Code** box, select **ZIP+ 4_Code**.
   2. From the **Street Address** box, select **ADDRESS_1**.
7. Click **OK**.
   The barcode data appears in the field you created.

Postnet barcode data



Lesson Summary

In this lesson, you imported all the customer data that you need to continue with the generation of the Darwin Card mailer. You also edited a profile to include the Postnet Barcode data.

Lesson 4 Place Variable Data on a Page

How This Lesson Will Help You

You have received the InDesign files from the graphic artist. You can now start inserting the variable data into the files. This lesson shows you how to place the variable information fields into the page layout.

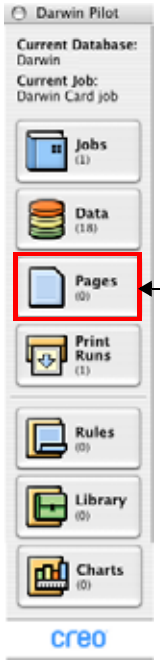
Topics in This Lesson

- Use Darwin™ CoPilot
- Insert variable information into an InDesign file
- Preview information in the layout

Working With Pages

For more information on how to place variable data on a page, see *Darwin 1.5 for InDesign User Guide,* Chapter 12*, Designing Darwin Pages in InDesign CS.*

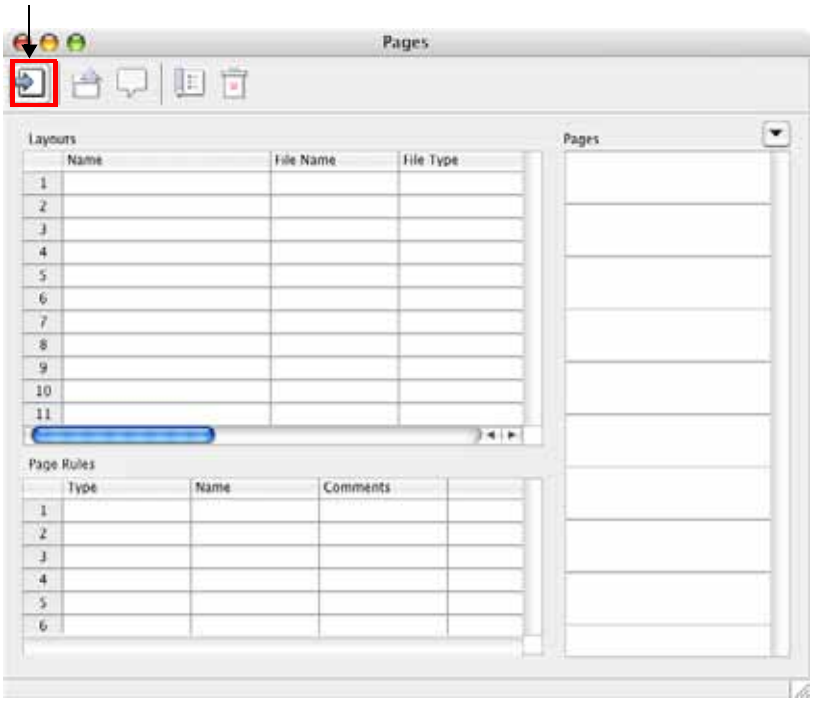
1. Make sure that the InDesign application is running.



2. On the **Darwin Pilot** panel, click **Pages**.

   There are no pages yet, since you have not yet imported them.

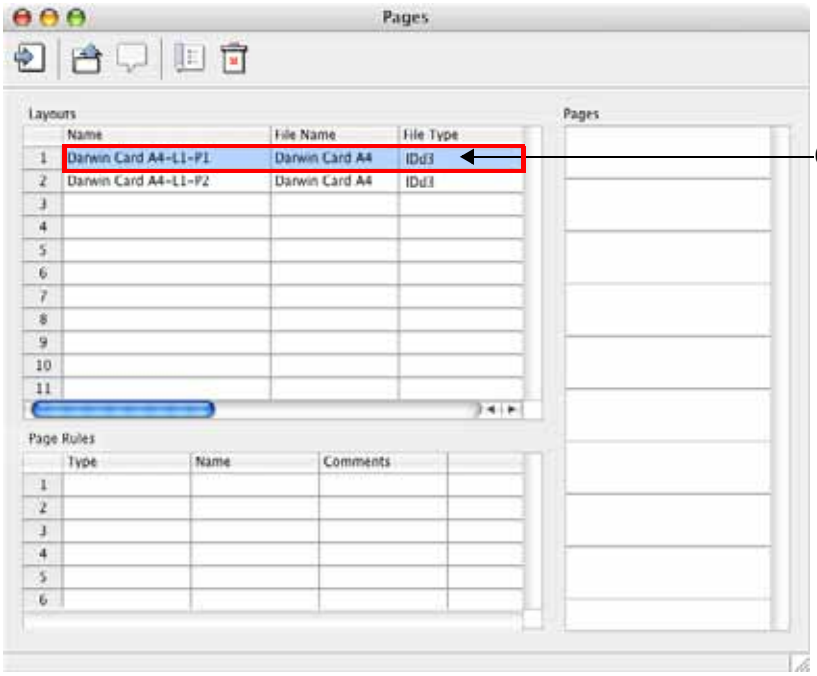
3. Click the **Import Page** button to bring in the InDesign pages.



4. From the **ID Files** folder in the **Learning Guide>Darwin Card** folder, select the file **DarwinCard A4** or the **DarwinCard Letter**, depending on the desired page size.

5. Click **Open**.

Note: We will work with both letter and A4 InDesign files later in the tutorial, when we define page rules (See *Page Rules* on page 75). You can choose which page size you want to work with, but we will show screens with the A4-size page.



6. Double-click this layout to open it in InDesign.

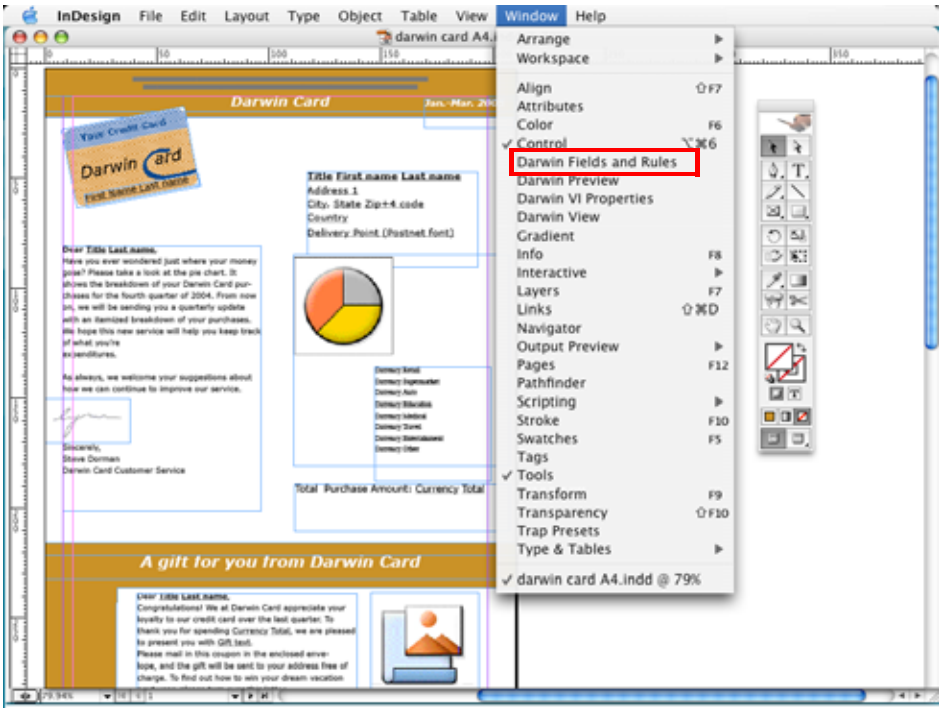
The Darwin Card mailer has 2 page layouts

Opening the Darwin CoPilot Panel

Darwin CoPilot is an plug-in to the InDesign page layout application. We are using InDesign, with **Darwin CoPilot** loaded, to create the pages we need for the Darwin tutorial.

To open the **Darwin CoPilot** panel:

- From the **InDesign** menu bar, select **Window > Darwin Fields and Rules.**





*The **Darwin CoPilot** panel*

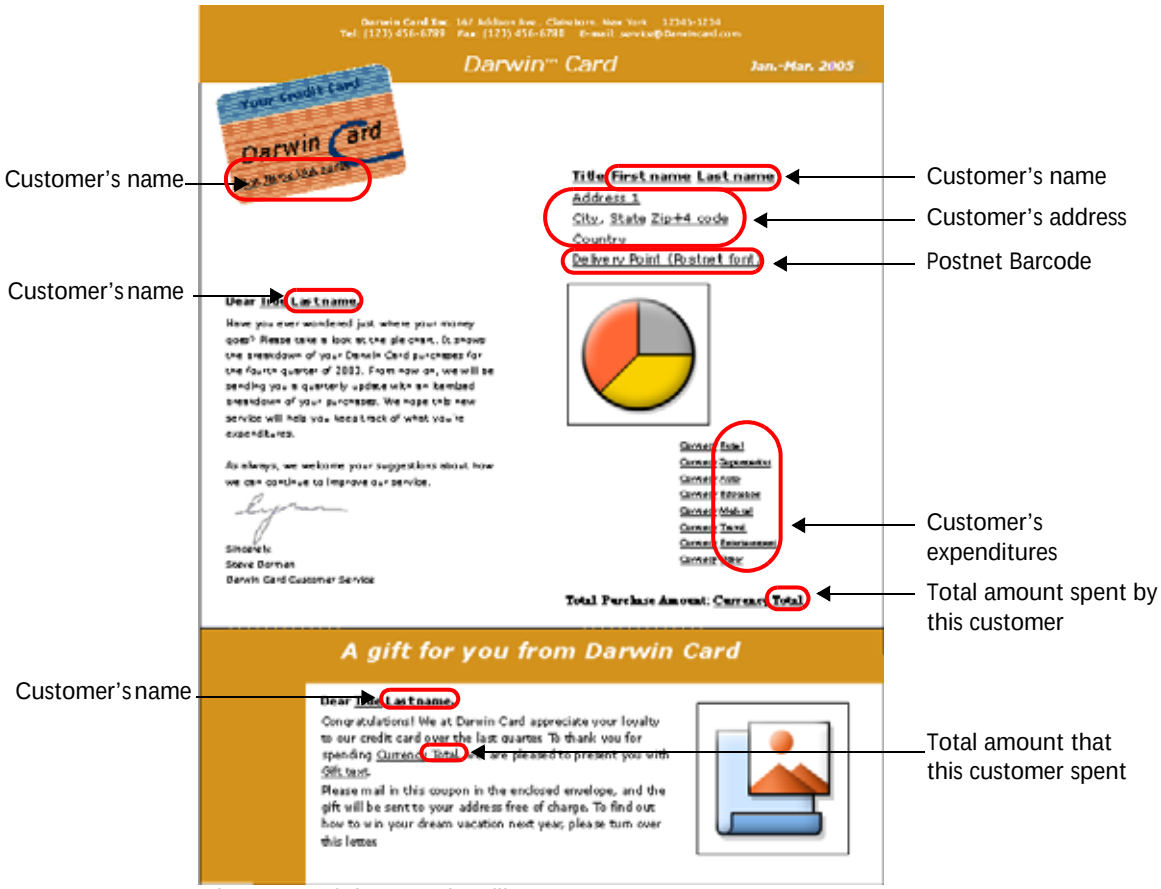
Once you have the Darwin Card mailer page layouts open and the **Darwin CoPilot** panel displayed, you are ready to get to work.

Placing Variable Data in the Layout

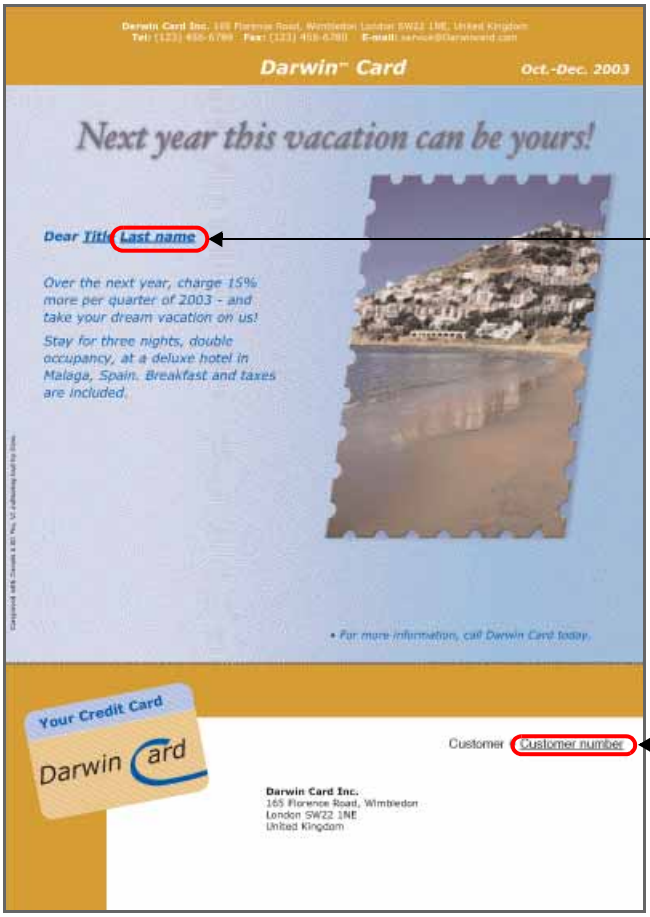
Your first task is to place the variable text data into the Darwin Card mailer so that each mailer is customized according to the customer data. Take a look at the layouts. We have marked the fields that you will be replacing.



See the *Darwin version 1.5 for InDesign User Guide*, chapter 12, *Designing Darwin Pages in InDesign CS*.

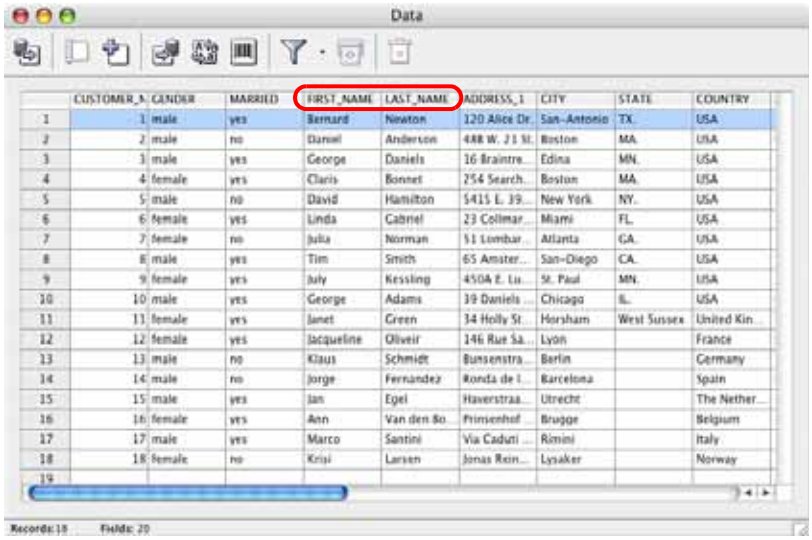


First page of the InDesign file



Second page of the InDesign file - the vacation destination, picture, and return address depend on whether you are working with A4 or letter-size paper

Let's begin by placing the customer's name onto the layout. The fields in the database containing the customer's name are called **FIRST_NAME** and **LAST_NAME**.

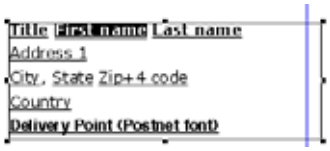


Fields in current database

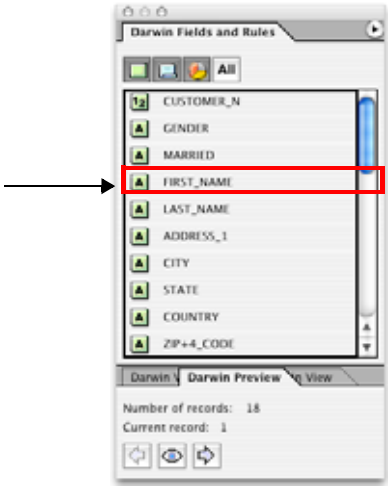
You can see these fields on the **Darwin CoPilot** panel too. On the first page layout, in the address area on the top right-hand side, you can see the words **First name** and **Last name**.

To replace a word in the layout with a variable data field:

1. Delete the words **First name** in the page layout.



2. Double-click the field **FIRST_NAME** on the **Darwin CoPilot** panel.



3. Once the field **FIRST_NAME** has been placed in the layout, it is shown as **<[FIRST_NAME]>**, within VI brackets. Make sure that the original text has been replaced, that is, the word **FIRST_NAME** appears only within the VI brackets.



*The field **FIRST_NAME** is now in VI brackets*

4. Remove the underline style from the inserted field, using the Text palette in InDesign.

You will also notice that if you click the box in the layout that contains the address, the area **VI Properties** on the **Darwin CoPilot** panel will now show the name of the field that you have just inserted into the layout.





Apply What You Know

Activity: Place the Rest of the Text Variable Data in the Layout

So far, you have only replaced one text field in the layout. Follow the same procedure to replace all the other text fields on both pages of the layout:

1. **First name** (you still have to replace it in the Darwin Card graphic)
2. **Last name** (first page: 4 replacements, second page: 1 replacement)
3. **Address 1**
4. **City**
5. **State**
6. **Zip+4 code**
7. **Country**
8. **Postnet Barcode**

Note: Assign the Postnet font, size 18 when you are using the Postnet Barcode field.

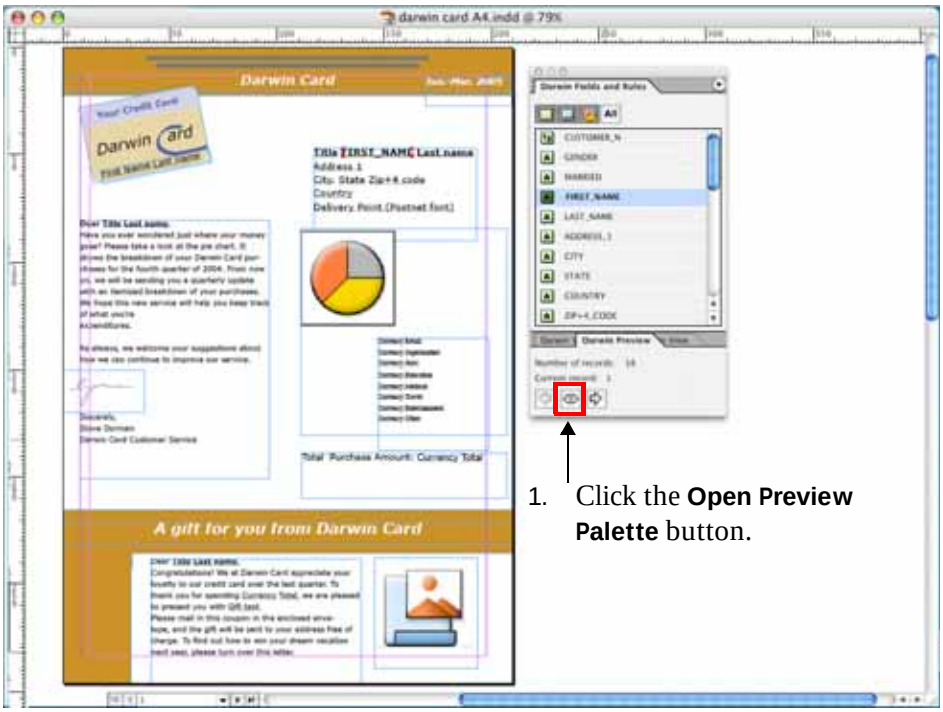
9. **Retail**
10. **Supermarket**
11. **Auto**
12. **Education**
13. **Medical**
14. **Travel**
15. **Entertainment**
16. **Other**
17. **Total** (first page: 2 replacements)

Note: Don't forget to select the **Use Thousands Separator (,)** option in the **VI Properties** area for all the expenses values.

18. **Customer Number**

Previewing your Layout

Once you have placed the fields in the layout, you can preview the file to see how it looks with the data in place.

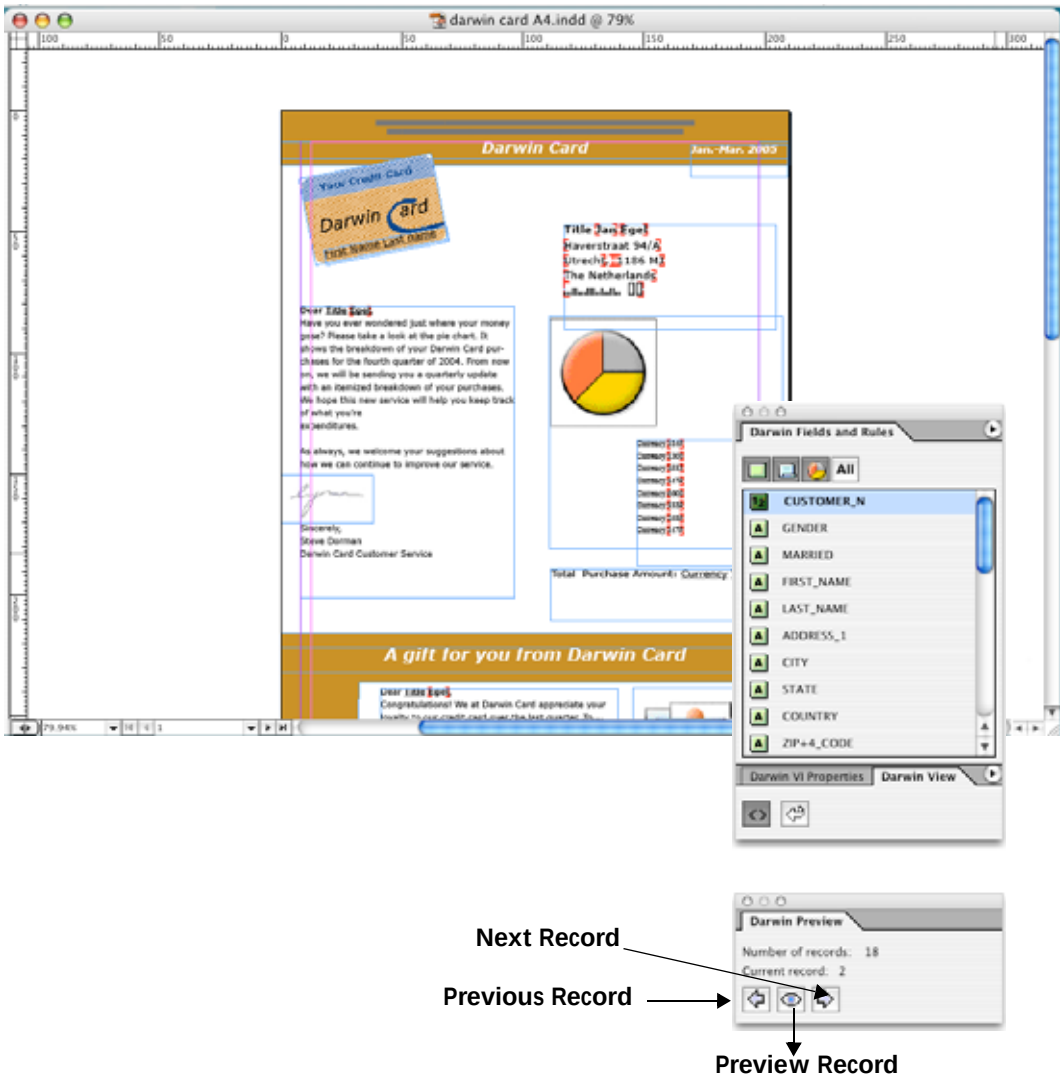


1. Click the **Open Preview Palette** button.

2. Click a record to preview.

3. Click the **Preview Record** button.

Note that the field names in the layout are now replaced with the data from the database.



You can check other records by scrolling though the information with the **Next Record** and **Previous Record** buttons. Remember to click the **Preview Record** button to see the information in the layout.

Lesson Summary

In this lesson, you became familiar with the **Darwin CoPilot** panel, and learnt how to place and preview variable information on the page layout.

Lesson 5 Print Pages



How This Lesson Will Help You

Once you have placed variable data in the layout, you can print it out with the data for each customer. This lesson shows you how to print.



Topics in This Lesson

- Define a PPD
- Define a print run
- Print your layouts

Printing Your Layouts

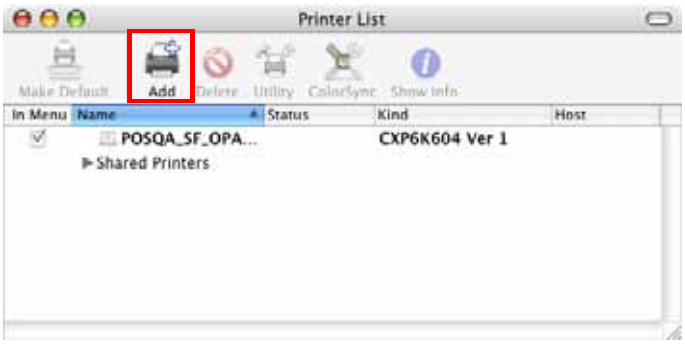


For more information on how to install a printer, see the *Darwin version 1.5 for InDesign User Guide*, chapter 2, *Installation Procedures>Selecting the IP Printing (LPR) Protocol*.

Define the PPD

To define your printer:

1. Click the **Printer Setup Utility**, which should be in the Dock. If not, you can find it at **Applications > Utilities.**
2. If the printer you want to print on is not defined, click the **Add** button, and define the printer.

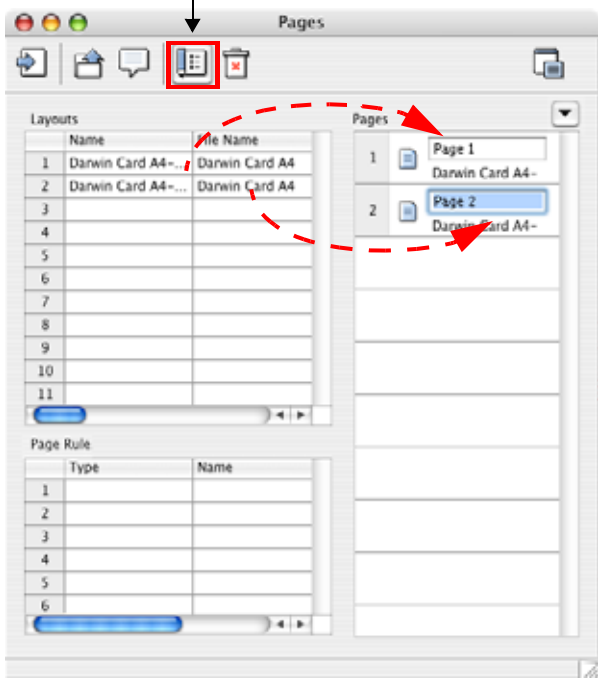


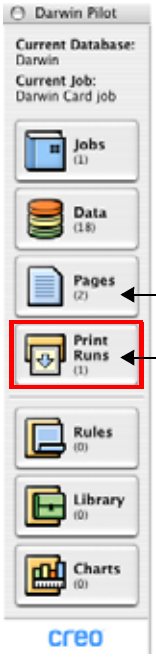
To get the PPD from the printer you are using:

1. Connect to the server where your printer is defined. From the menu bar, click **Go > Connect to Server...**
2. **Browse** the network to the printer you are using.
3. Connect to the Spire as **Guest**.
4. Select **Utilities > PPD.**
5. Drag the PPD file to **Mac OS X/System/Library/Printers/PPDs/Contents/Resources.**

Print the Pages

1. On the **Darwin Pilot** panel, click **Pages**.
2. Drag the layouts you want to print from the **Layouts** area to the **Pages** area.
3. Click the **Save Setup** button.

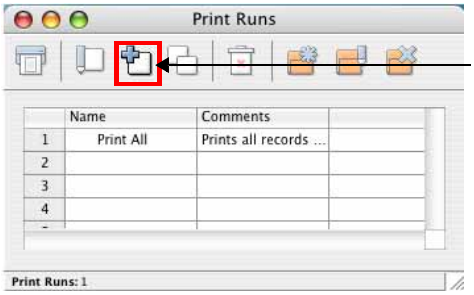




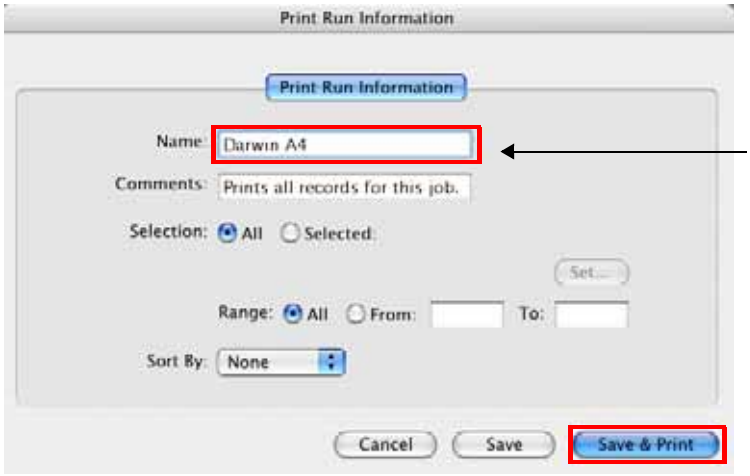
Note that there are now 2 pages

4. Click **Print Runs.**

The Print Runs window opens up with a default print run called **Print All**. You can use this print run, or you can create your own new print run:

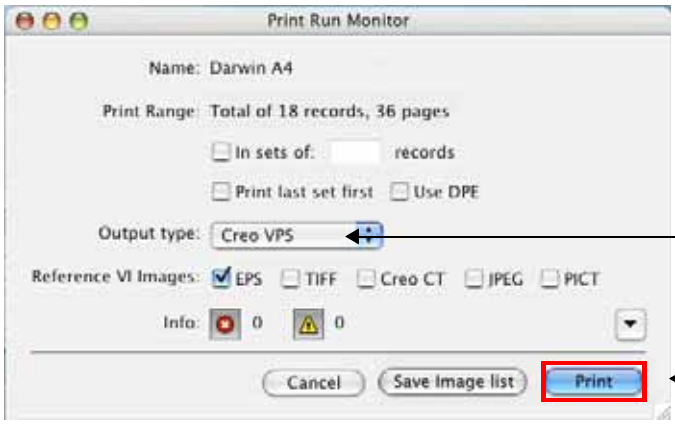


5. Click the **New Print Run** button.



6. Type a name for the print run.

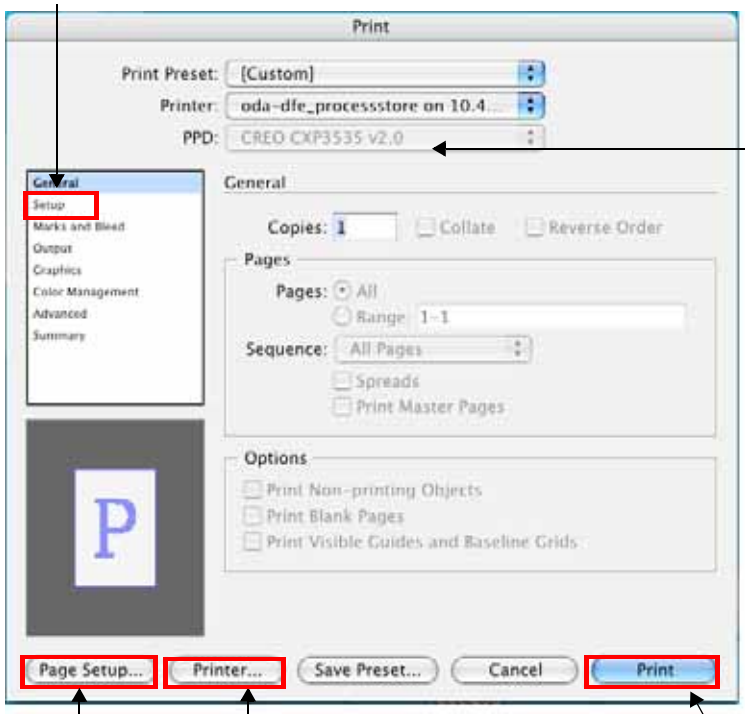
7. Click **Save & Print**



8. Make sure the **Output type** is **Creo VPS.**

9. Click **Print.**

10. Click the **Setup** tab.



11. Select the PPD file that you defined for this printer.

12. Make sure your printing settings are correct.

14. In the Printer Features section, change the PPD parameters to **Duplex>Head to Head**.

15. Click **Print.**

16. Go and collect your printouts!

Lesson Summary

In this lesson, you defined a PPD, defined a print run, and printed the layout with the customer data in place.

Module Wrap-up

Having completed this module, you should be familiar with the basic Darwin workflow. You have learnt how to:

- Create a database
- Create a new job
- Import data for the job
- Create a Postnet barcode
- Use Darwin™ CoPilot
- Insert variable information into an InDesign file
- Preview information in the layout
- Define a print run
- Print the layouts

MODULE 2

Text Rules

Why You Need to Know This

Darwin™ enables you to define what text will appear, based on the information contained on the customer in the database. To do this, you need to define text rules. This module shows you how to define both simple and complex text rules.

Lessons in This Module

Lesson 1: Create a Simple Text Rule

Lesson 2: Create a Complex Text Rule

Lesson 1 Create a Simple Text Rule



How This Lesson Will Help You

Darwin enables you to write a set of rules that define text based on the information that is in each customer's record. The most simple rule is the definition of a text rule. This lesson shows you how to define a text rule.



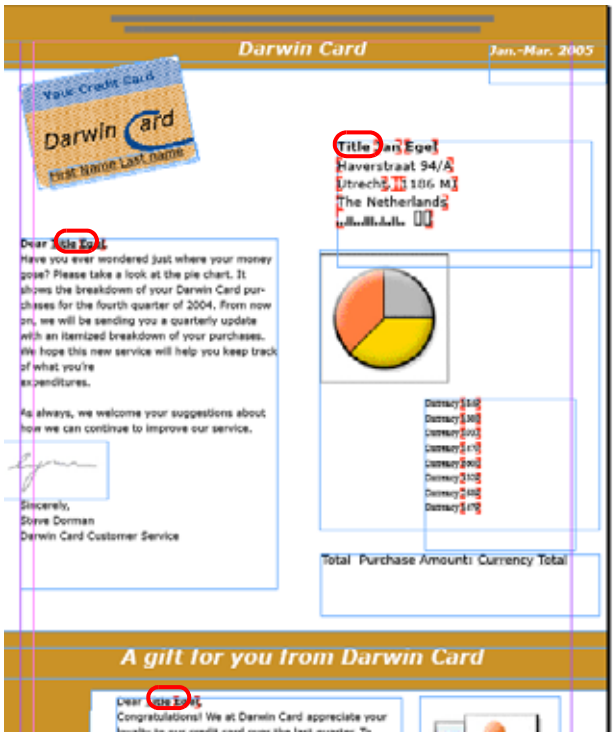
Topics in This Lesson

- Define a simple text rule
- Place a rule in the layout
- Check your text rule

Defining a Simple Text Rule

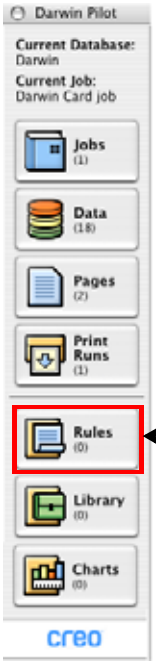
Define the Title Rule

It is very useful to be able to control what text will appear based on information that is in the database. For example, we can make use of the field **Gender** in the **Darwin** database to define how we will greet the customer. This greeting will be defined as a rule, and the result will appear in the text wherever **Title** appears.



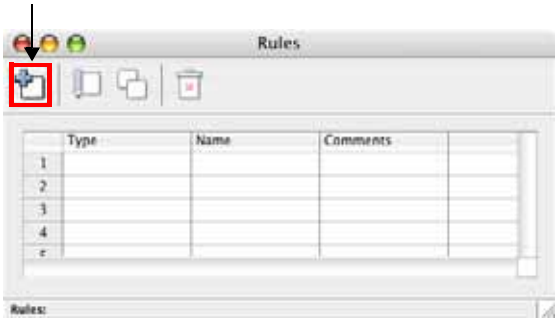
Title is the rule we want to define, based on the following criteria:

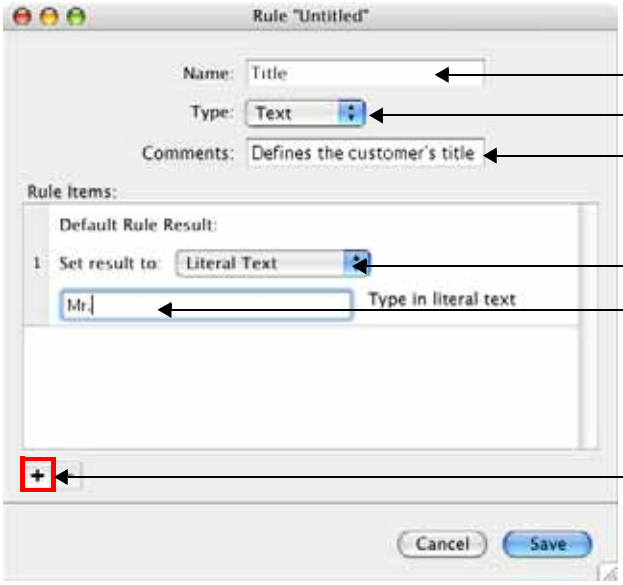
- If the customer is female, the title will be Ms.
- Otherwise, the title will be Mr.



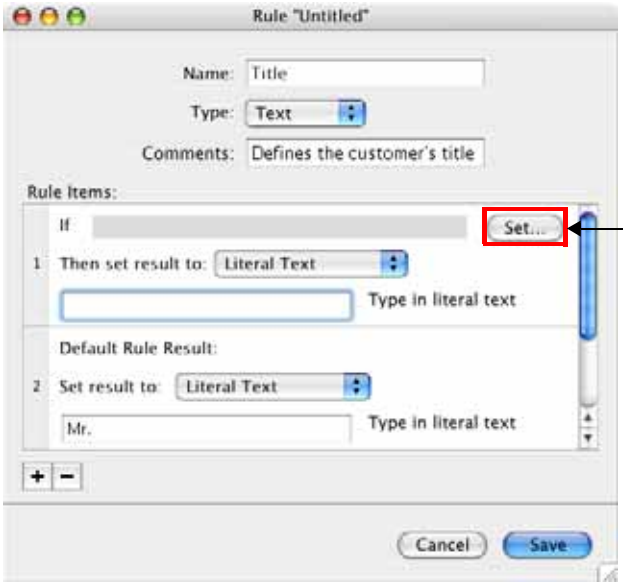
1. On the **Darwin Pilot** panel, click **Rules**.

2. Click the **New Rule** button to define the rule.

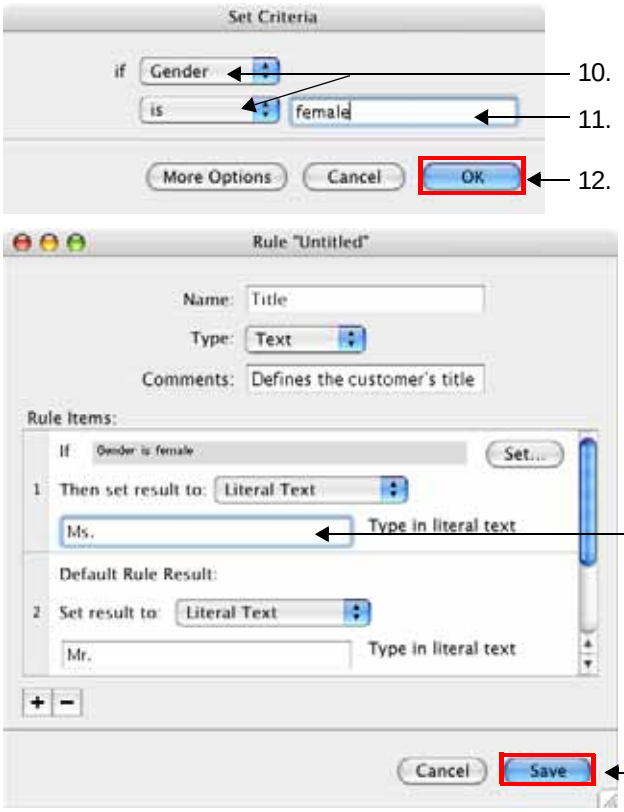




3. Type a rule name.
4. Select **Text.**
5. Type a description.
6. Select **Literal Text.**
7. Type the default title, `Mr` .
8. Click the **Add Rule Item** button to add another rule for females.



9. Click **Set** to define the criteria for the female title.



10. Set the options to **Gender is.**
11. Type the gender `female`.
12. Click **OK.**
13. Type the text of the female title, `Ms`.
14. Click **Save.**

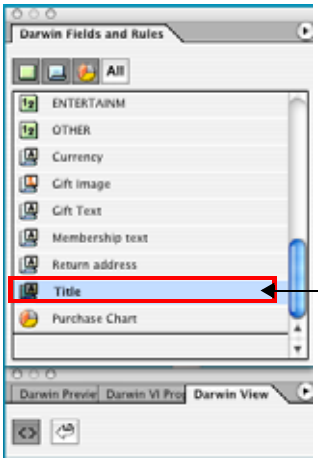
Note: Where you have to type a value, you must type it according to the way it appears in the database. To see how **Gender** is defined, look at the database shown in the Preview window on page 36.

15. Close the window.

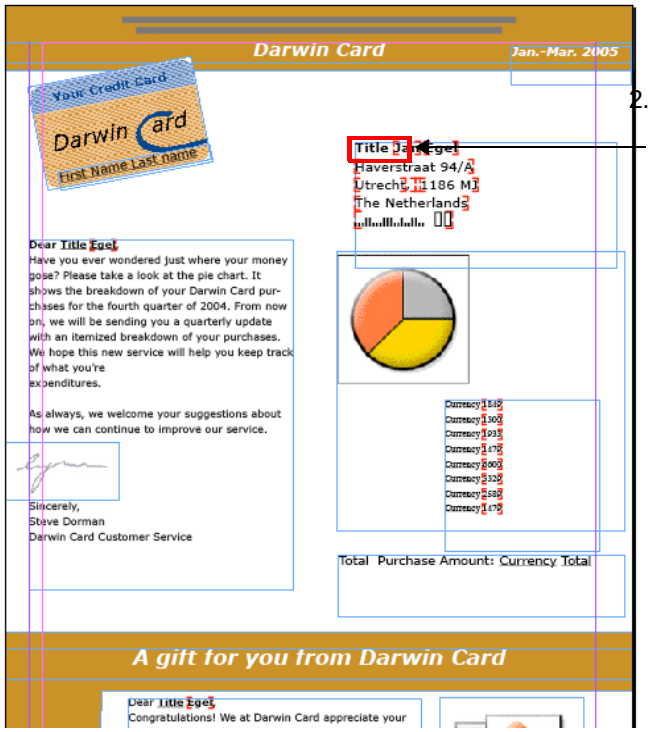
    The **Title** rule has been added to the Rules window.

Placing Your Text Rule in the Layout

You can find the **Title** rule on the **Darwin CoPilot** panel.



1. Scroll down the **Fields & Rules** list until you find the **Title** rule that you have just defined.



2. In the layout, select and delete the word **Title** in the address box.

3. On the **Darwin CoPilot** panel, double-click the **Title** rule.

4. Replace the text **Title** throughout the rest of the layouts. (3 more replacements.)



Apply What You Know

Activity: Preview to Check Your Rule

Once you have defined the **Title** rule as described in the lesson, preview a few records to check that the rule was defined correctly.

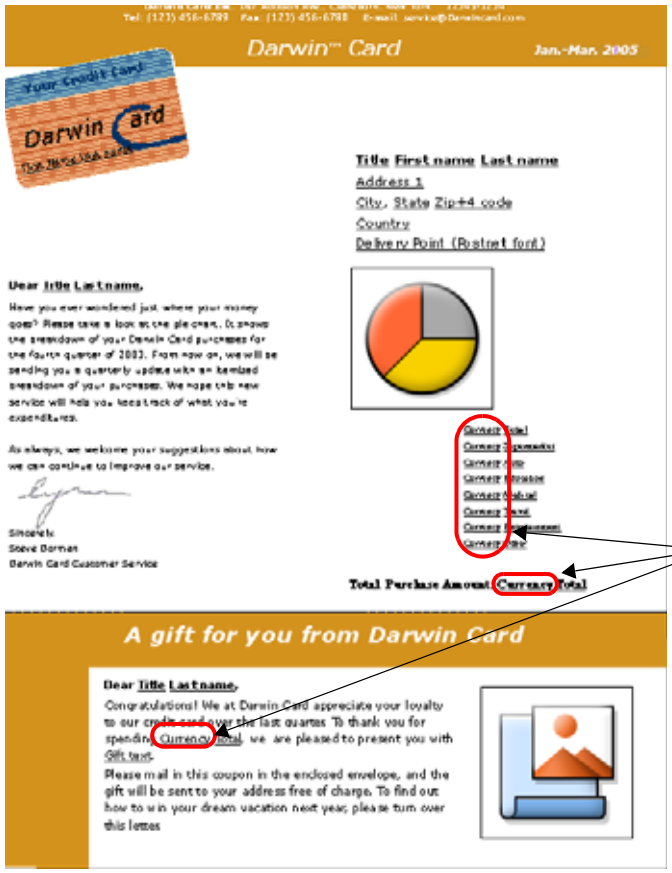
Check for both male and female customers.



To review how to preview data in the layout, see *Previewing your Layout* on page 27.

Defining a Text Rule Based on Part of a Field Value

The mailer contains amounts of money spent for various categories. The currency of these amounts varies according to the country in which the customer resides. We will define the Currency rule based on the value of the customer's address.



The Criteria for the Currency Text Rule

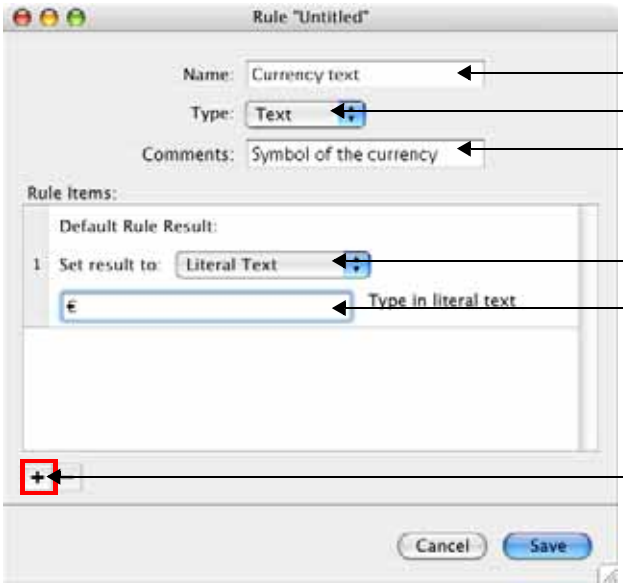
We will define the **Currency text** rule based on the text contained in the **Country** field for each customer.

Criterion	Symbol	Character sequence to insert symbol on Mac
Field **Country** equals "USA"	$	SHIFT+4
Field **Country** contains "Kingdom"	£	ALT+3
Field **Country** is none of the above	€	ALT+SHIFT+2

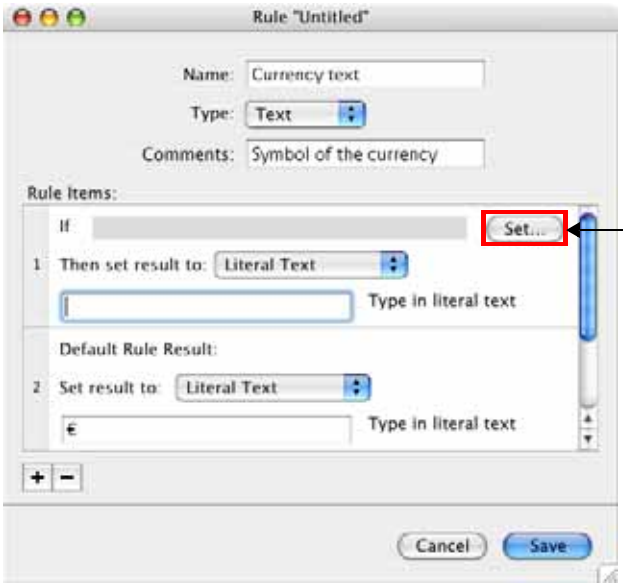
Define the Currency Text Rule

1. On the **Darwin Pilot** panel, click **Rules**.
2. In the Rules window, click the **New Rule** button.

   Define the new text rule:

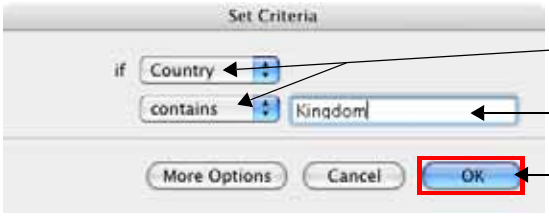


3. Type the rule's **Name.**
4. Select **Text.**
5. Type a description.
6. Select **Literal Text**.
7. Type the Euro symbol (ALT+SHIFT+2).
8. Click the **Add Rule Item** to define another rule.



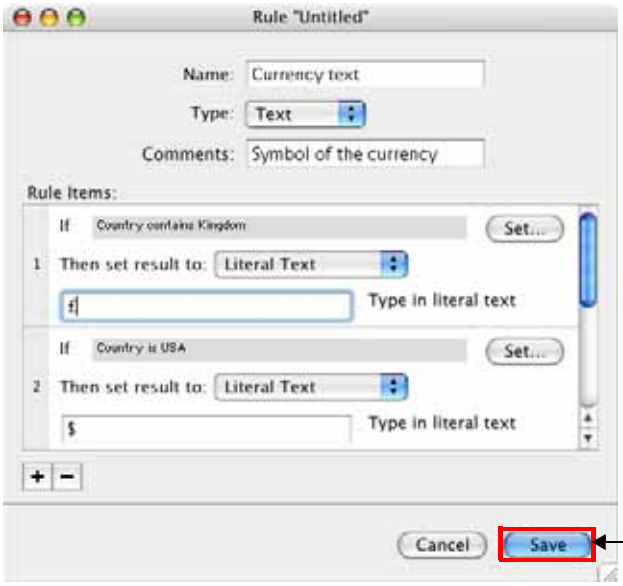
9. Click the **Set** button to define the criteria.

Since customers in the United Kingdom will pay in Pounds Sterling (£), you need to define that the country contains the work “Kingdom” within it.



10. Set the options to **Country contains.**
11. Type the value `Kingdom`.
12. Click **OK.**

13. Type the text for the currency in the United Kingdom, £ (ALT+3).
14. Define the rule: **If country is USA**.



15. Click **Save.**
16. Close the window.

    You have now defined the **Currency text** rule.



Apply What You Know

Activity: Place the Currency Rule in the Layout and Preview the Layout

1. Place the **Currency text** rule in the layout in all the places where the word **Currency** appears. (9 replacements)
2. Preview the layout with customers who live in different countries. Compare the country with the currency.

Lesson Summary

Having completed this lesson, you should be able to define a simple text rule, place it in the layout, and check that it works with various records of the database.

Lesson 2 Create a Complex Text Rule



How This Lesson Will Help You

Darwin enables you to write rules that define text based on several criteria. This is a complex rule. This lesson shows you how to define a complex text rule.



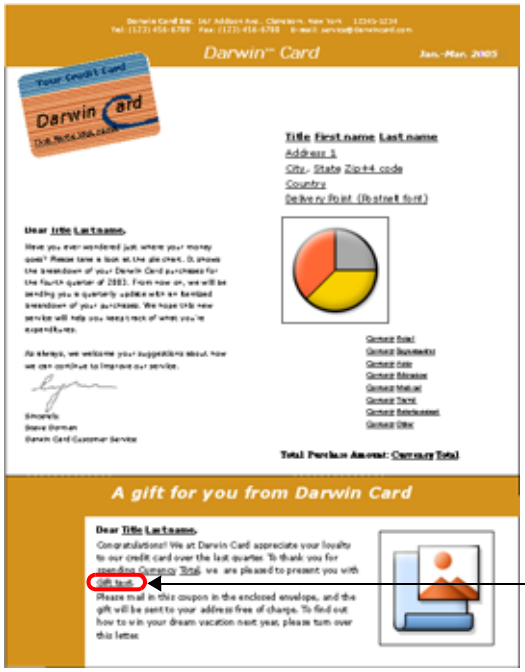
Topics in This Lesson

- Define a complex text rule
- Place the rule in the layout
- Check your text rule

Defining a Complex Text Rule

The Criteria for the Gift Text Rule

We will be using the criteria defined in the table below to define the **Gift text**. The photograph that will be placed according to the same criteria will be defined in the image rule later in the tutorial. (See *Define an Image Rule* on page 54 .)

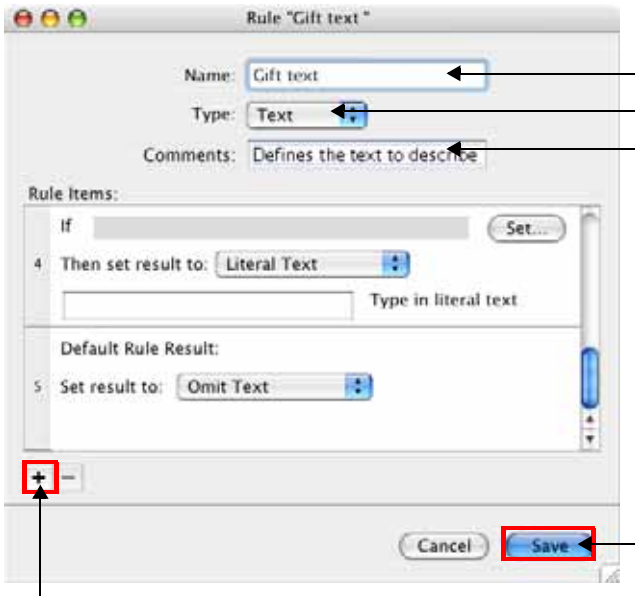


Define the text for the gift coupon, based on the customer's expenditures.

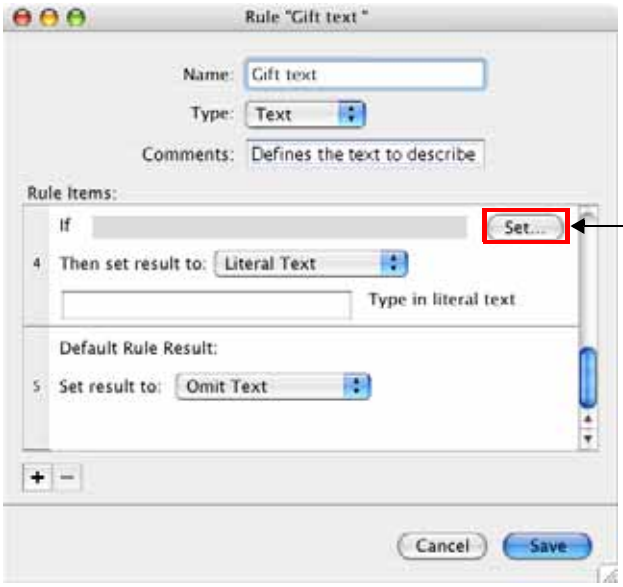
Total Amount Spent	Gift Text
> 20000	a state-of-the-art compact disc
> 17000 and <20001	a sleek digital camera
> 15000 and <17001	the latest coffee maker
> 12000 and <15001	a high quality scientific microscope
<12001	a practical backpack

Define the Gift Text Rule

1. On the **Darwin Pilot** panel, click **Rules**.
2. In the Rules window, click the **New Rule** button to define the rule for the gift text.

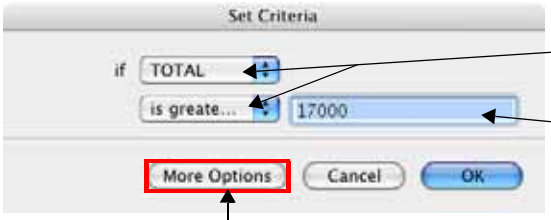


3. Type the rule's **Name.**
4. Select **Text.**
5. Type meaningful **Comments.**
6. Click **Save.**
7. Click the **Add Rule Item** button 3 times to add space to define the 5 gift rules.



8. Click the **Set** button to define the criteria.

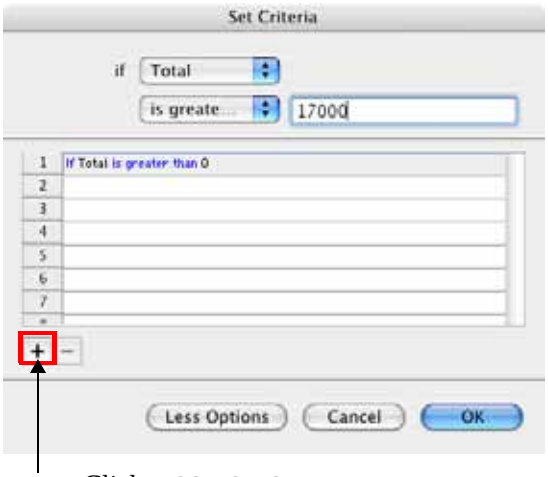
We'll use the second rule, "Total > 17000 and <20001" as an example, since it has two criteria.



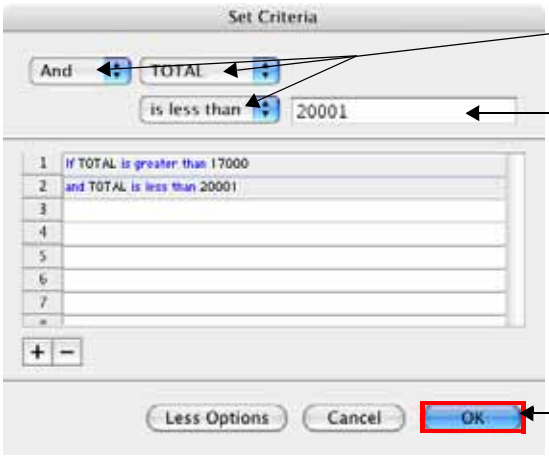
9. Set the options to **Total is greater than.**

10. Type the value 17000.

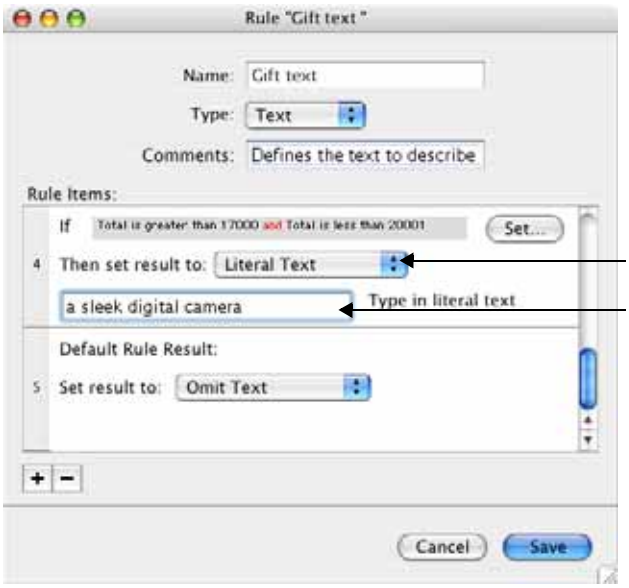
11. Click **More Options** to define the second criterion.



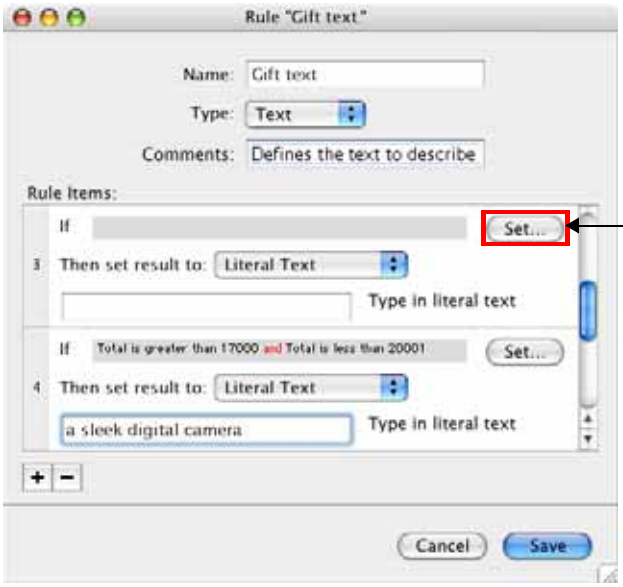
12. Click **Add Criteria.**



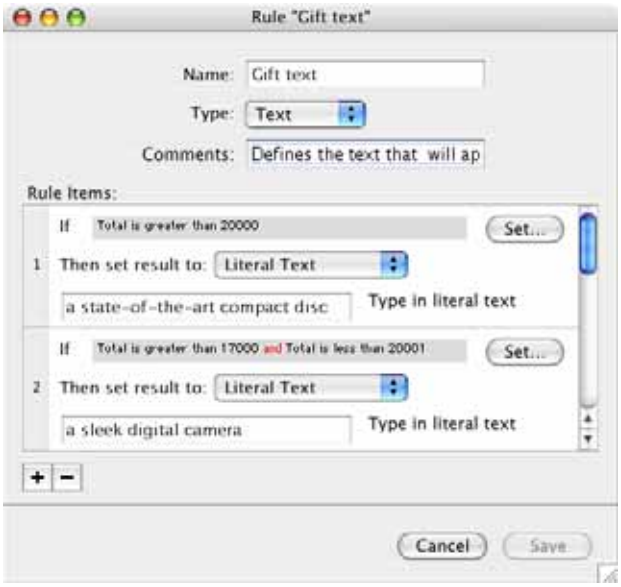
13. Set the options to **And Total is less than**.
14. Type the value `20001`.
15. Click **OK.**



16. Select **Literal Text**.
17. Type in the gift text for this range.



18. Click **Set** in another rule item to define the criteria for that rule.



19. When you have defined the text and criteria for all 5 rules, click **Save**.



Review What You Know

Review Activity: Place the Complex Text Rule into the Layout

1. Place the **Gift text** rule that you have just defined into the InDesign layout.
2. Preview your layout with several customers. Check that the total amount spent and the gift text correspond with the criteria you set.

Lesson Summary

Having completed this lesson, you should be able to define a complex text rule, place it in the layout, and check that it works with various customers.

Module Wrap-up

Having completed this module, you should be familiar with the following aspects of text rules:

- Defining a simple text rule
- Defining a complex text rule
- Placing a text rule in the layout

MODULE 3

Image Rules

Why You Need to Know This

In this module of the tutorial, you will learn how to define more advanced image rules. The image rule will define the graphic that will be displayed in the Darwin™ Card gift coupon area.

Lessons in This Module

Lesson 1: Define an Image Rule

Lesson 1 Define an Image Rule

How This Lesson Will Help You

Darwin enables you to place images in the layout based on the information stored in the database about each customer. In this lesson you will learn how to define the variable image.

Topics in This Lesson

- Import images into the library
- Define rules for placing the image
- Duplicate a rule and use the same set of criteria for other purposes
- Place variable images

Understanding Your Goal



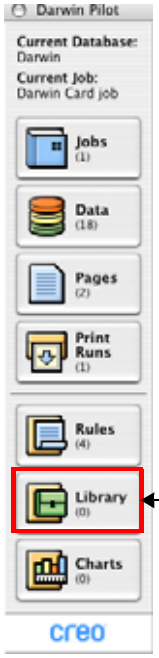
Define the image rule for the graphic that will appear in the layout, based on the customer's expenditures.

Importing Images in to the Darwin Library

For more information on how to import images to the Darwin Library, see *Darwin version 1.5 for InDesign User Guide,* chapter 7*, Using the Library.*

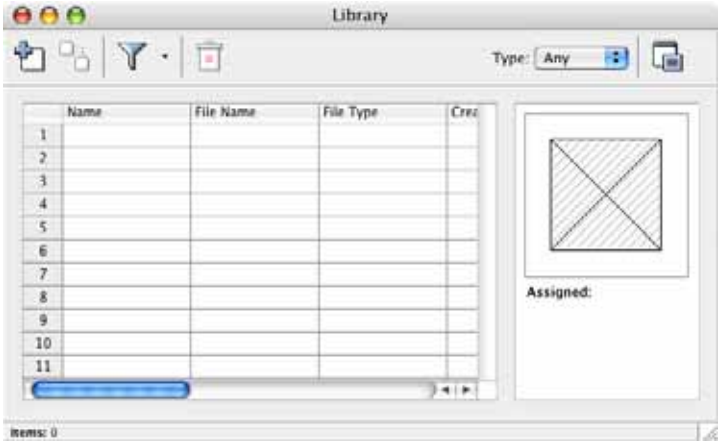
In order to define rules for the images, the images must reside within the Darwin library for this job. Let's import the images into the library.

1. Open up the folder **Learning Guide/VI Images.** Select all the images.



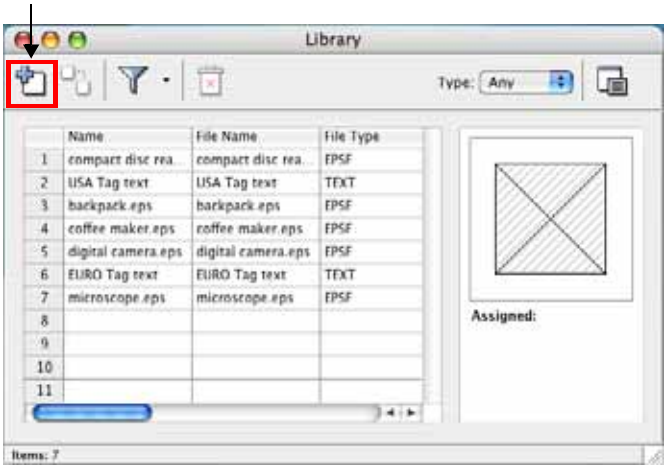
2. On the **Darwin Pilot** panel, click **Library.**

The Library window opens up, but it is empty. You need to import the images for the Darwin Card mailer into the Library.



3. To import the images into the Library window: select all the items in the **VI Images** folder, and drag them from the folder into the Library window.

You can also click the **Add Item** button, and find the images you would like to bring in



Library window showing the imported images

4. Keep the Library window open. You will need it when you define the rules for the variable images.

Duplicating a Rule

You have already defined the rule defining the text that will appear for the description of the gift from Darwin Card. (See *Defining a Complex Text Rule* on page 46 .) The image that will appear will be based on the same set of criteria. That is, the image will match the gift text.

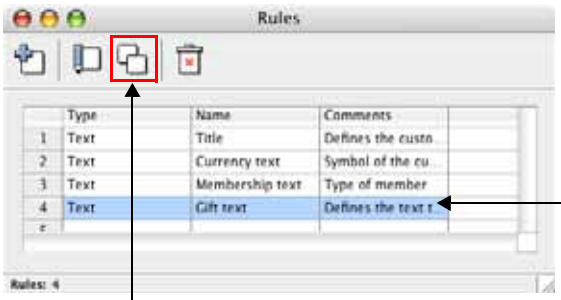


Variable image based on same criteria as the **Gift text** rule

Instead of defining those 5 rules again, we can simply duplicate the rule, and then change it into an image rule, not a text rule.

To duplicate a rule:

1. On the **Darwin Pilot** panel, click **Rules**.



2. Click to select the **Gift text** rule.

3. Click the **Duplicate Rule** button.

You can now give this rule a new name and characteristics.

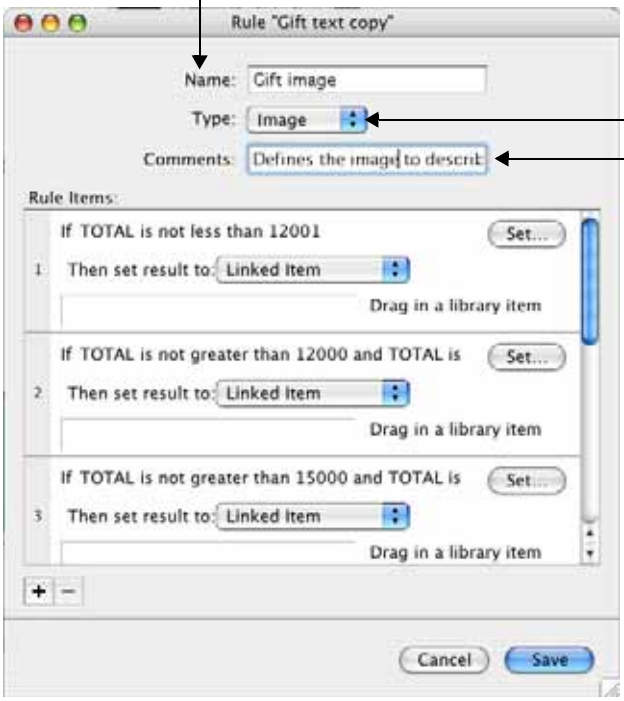
4. Type a new **Name.**

5. Select **Image.**
A message appears saying that the current item result will be reset.



6. Click **Change**.

7. Type your comments.



You are now ready to define the gift image rule.

Defining Image Rules

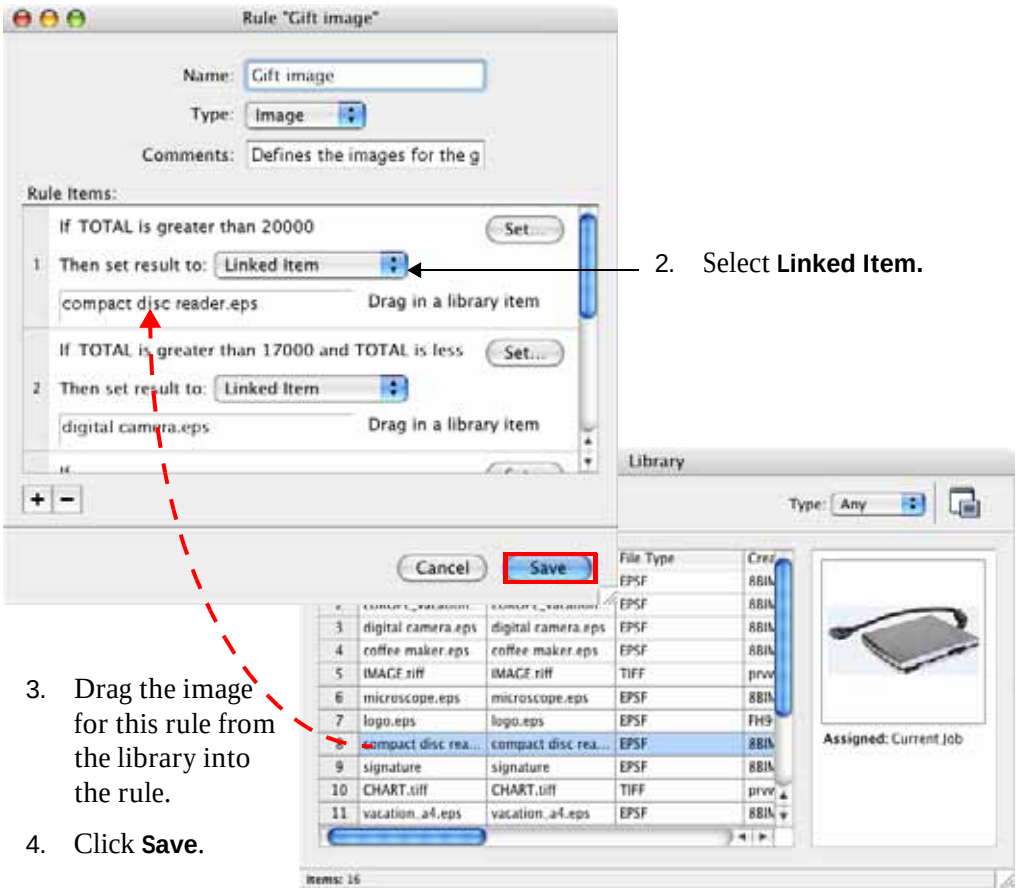
Criteria for the Gift Image Rule

The criteria are the same as those for the gift text. However, now we are defining the images.

Total Amount Spent	Gift Image
> 20000	Compact disc reader
> 17000 and <20001	Digital camera
> 15000 and <17001	Coffee maker
> 12000 and <15001	Microscope
<12001	Backpack

The criteria for the rule are already defined, since we duplicated the **Gift text** rule. All we have to do now is define the associated images.

1. Make sure that the Library window is open.



2. Select **Linked Item.**
3. Drag the image for this rule from the library into the rule.
4. Click **Save.**

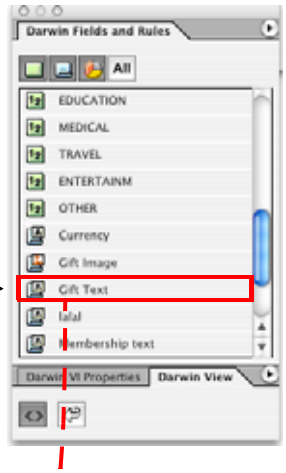
Apply What You Know

Activity: Define the Rest of the Image Rule

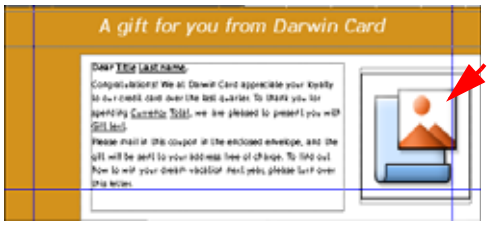
Complete this rule by defining the rest of the images that are listed in the table on page 58.

Placing the Image Rule in the Layout

1. Open the InDesign™ layout of the first page, and open the **Darwin CoPilot** panel.



2. Scroll until you find the **Gift image** rule.
3. Double-click the **Gift image** rule into the image box. Hold down the OPTION key while clicking on the image rule to fit the picture to the box size.



To add a single picture or chart to a picture box, double-click the image

Note: You can check that the rule has been associated with the box by clicking on the box. On the **Darwin CoPilot** panel you can see any rules or VI fields associated with that box. For example, click on the image box that should hold the image of the gift. On the **Darwin CoPilot** panel, you can see that the **Gift Image** rule is associated with this box.





For more information on how to place rules on a layout, see *Darwin version 1.5 for InDesign User Guide,* chapter 12*, Designing Darwin Pages in InDesign CS*.

Review What You Know

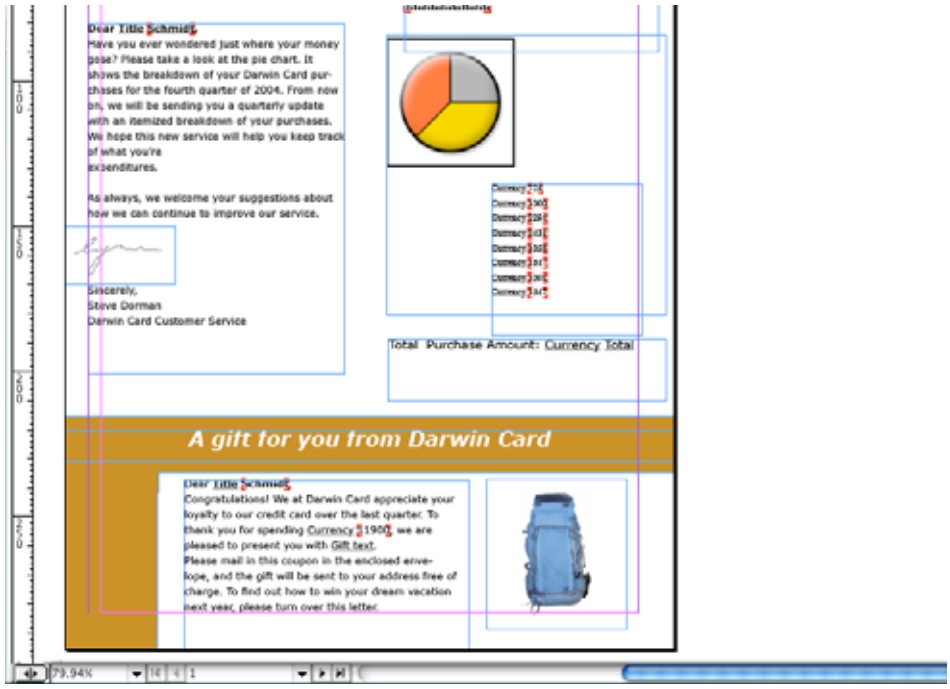
Review Activity: Preview the Layout

Preview the layout. Check at least 3 different customers for the following aspects:

a. The **Gift text** matches the **Gift image.**

b. The gift is correct according to the total amount shown in the text.

For more information, see *Previewing your Layout* on page 27.



*Preview to check that the **Total** amount, the **Gift text**, and the **Gift image** correspond*

Lesson Summary

Having completed this lesson, you should be able to define an image rule and preview the result in the layout.

Module Wrap-up

Having completed this module, you should be familiar with the Darwin image and color rules. You have learnt how to:

- Import images into the library
- Define rules for placing the image
- Duplicate a rule and use the same set of criteria for other purposes
- Place variable images

MODULE 4

Chart Building

Why You Need to Know This

Darwin™ can take information about each customer in the database, and analyze the data. You can build a chart for each customer, based on the individual data.

Lessons in This Module

Lesson 1: Build a Chart With Variable Information

Lesson 1 Build a Chart With Variable Information

How This Lesson Will Help You

This lesson shows you how to define a chart, based on each customer's expenditures.

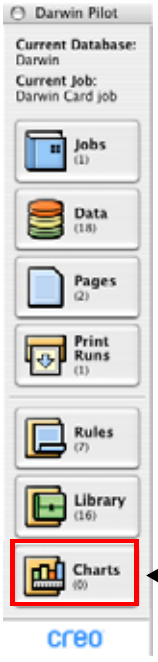
Topics in This Lesson

- Define a chart
- Place the chart in the layout

Defining the Chart

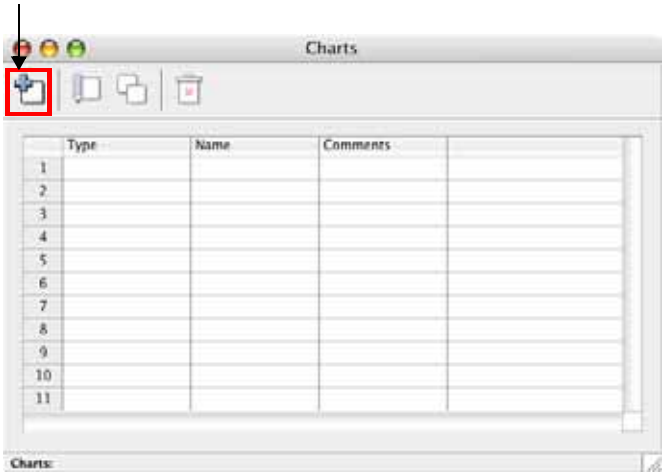
For more information on building charts, see *Darwin version 1.5 for InDesign User Guide*, chapter 9, *Creating Dynamic Charts*.

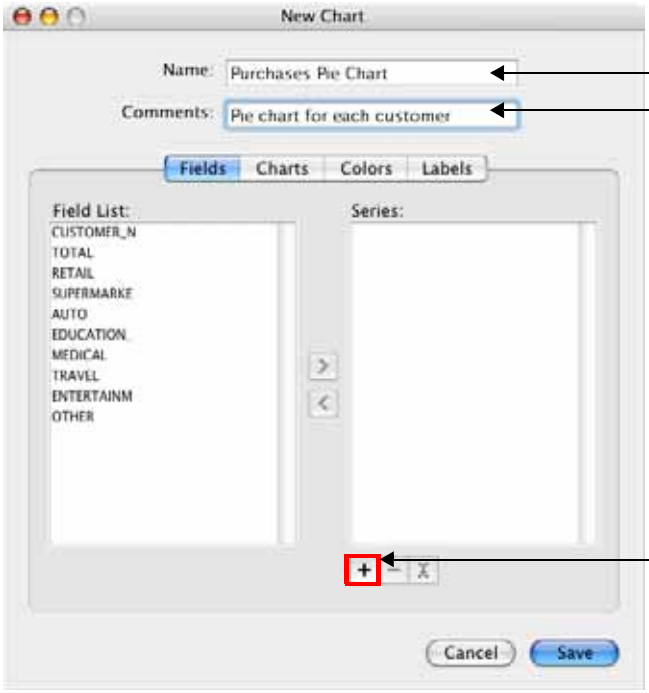
To define a chart in Darwin:



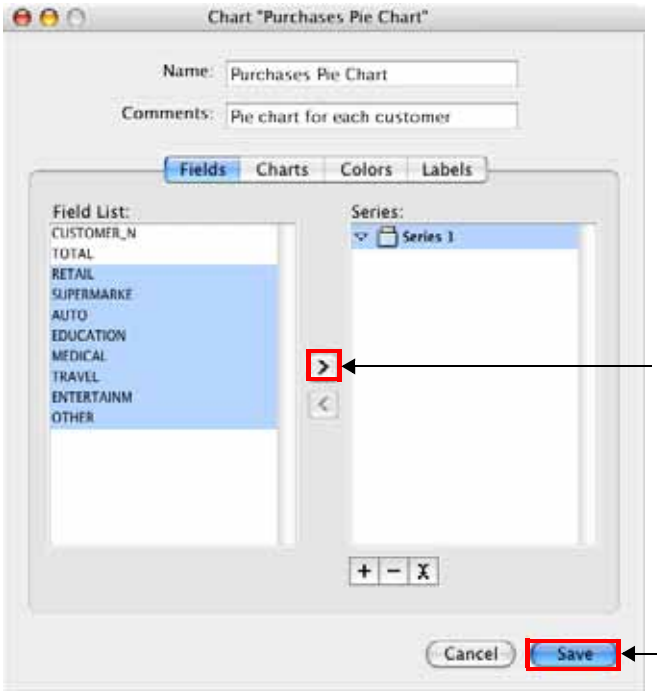
1. On the **Darwin Pilot** panel, click **Charts**.

2. Click the **New Chart** button.





3. Type a **Name**.
4. Type a description.
5. Click to add a series.
6. Select the fields in the **Field List** that you want to show in the chart.
7. Select the **Series 1**.

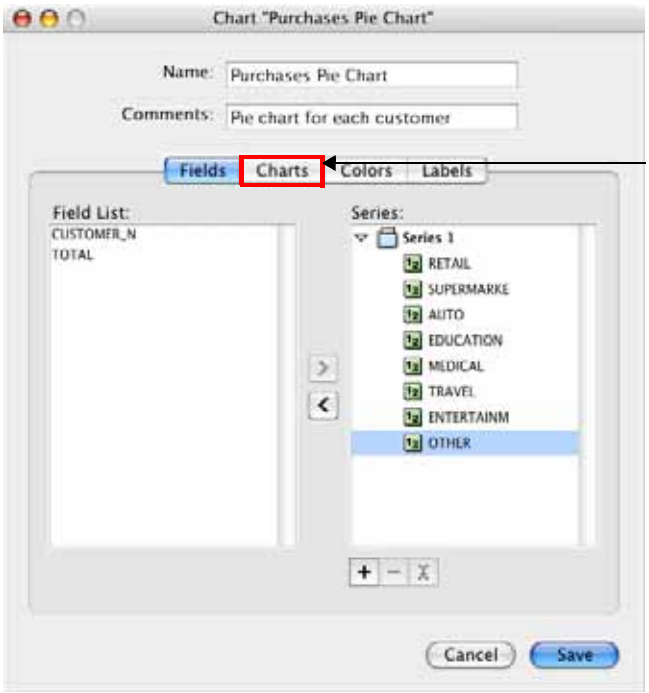


8. Click to assign the fields to the series.

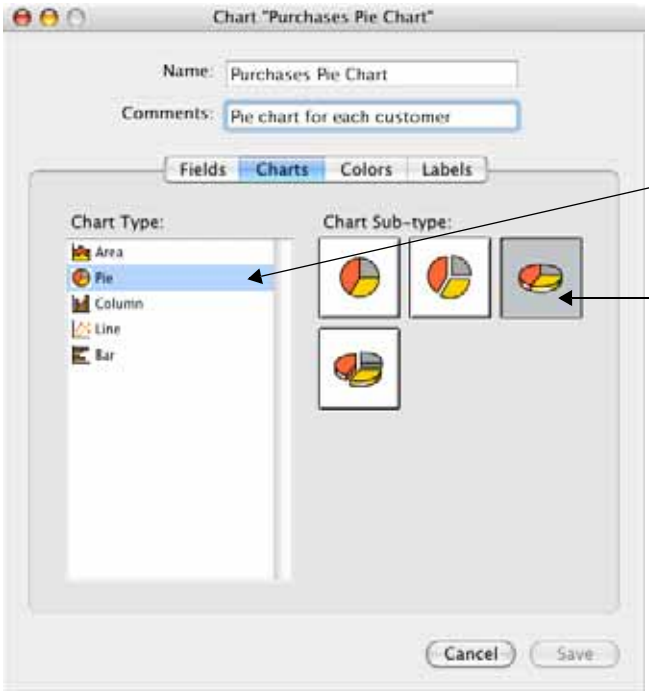
9. Click **Save**.

Note: Since we will be building a pie chart for the tutorial, we only need one series. If you are building other charts, and want to compare values, you can build more than one series.

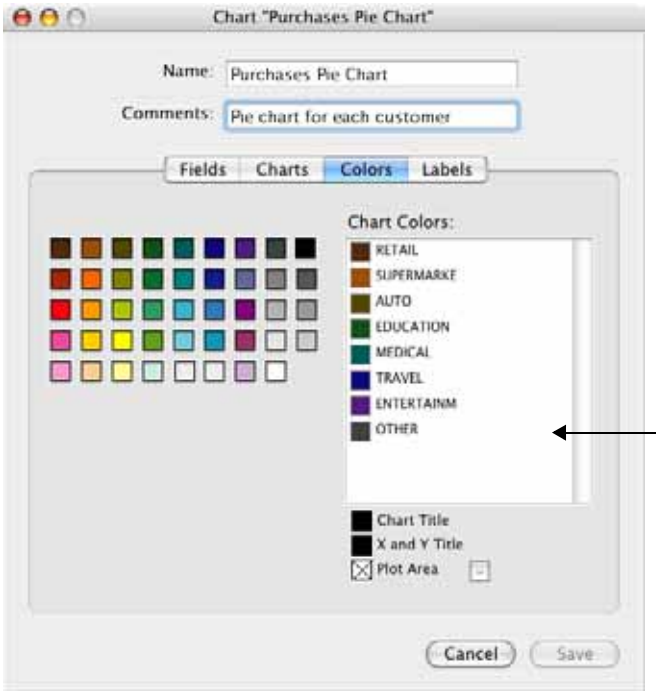
The fields are now assigned to the series.



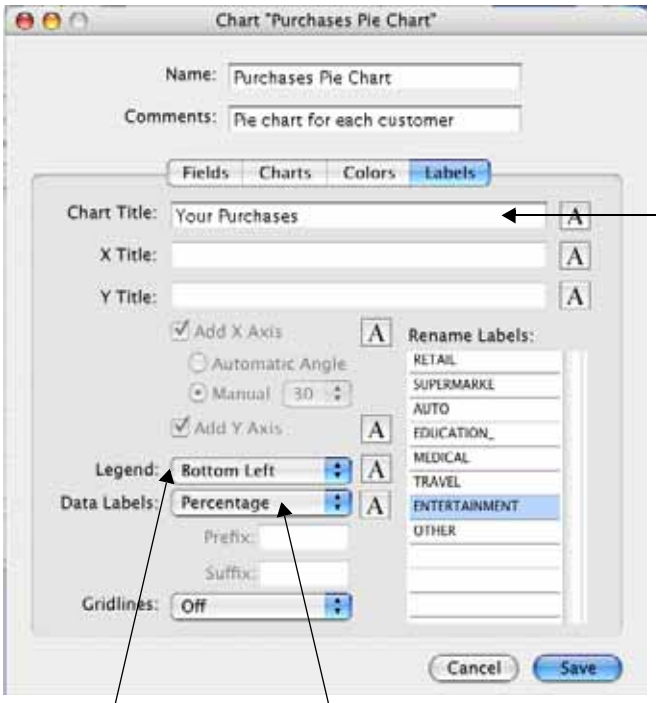
10. Click the **Charts** tab.



11. Select the **Pie** chart.
12. Select the type of pie chart. We chose the 3D option.
13. Click the **Colors** tab.



14. To change a color, select a field and then click the desired color.
15. Click the **Labels** tab.



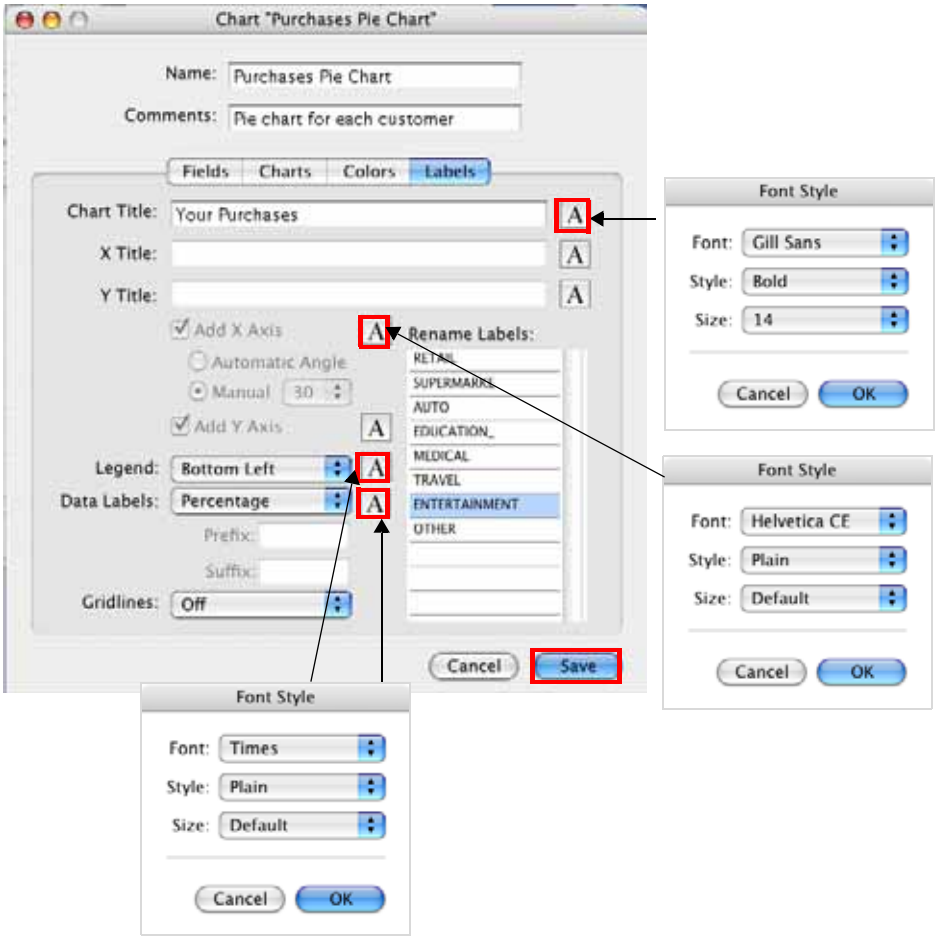
16. Type the **Chart Title**.

17. To rename a label, double-click it and type in the new label.

18. Select **Bottom Left**.

19. Select **Percentage**.

Now, define the fonts. Click the A icon next to each type of label, and define it as shown.

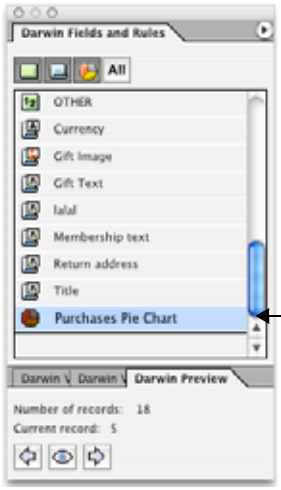


21. Click **Save**.

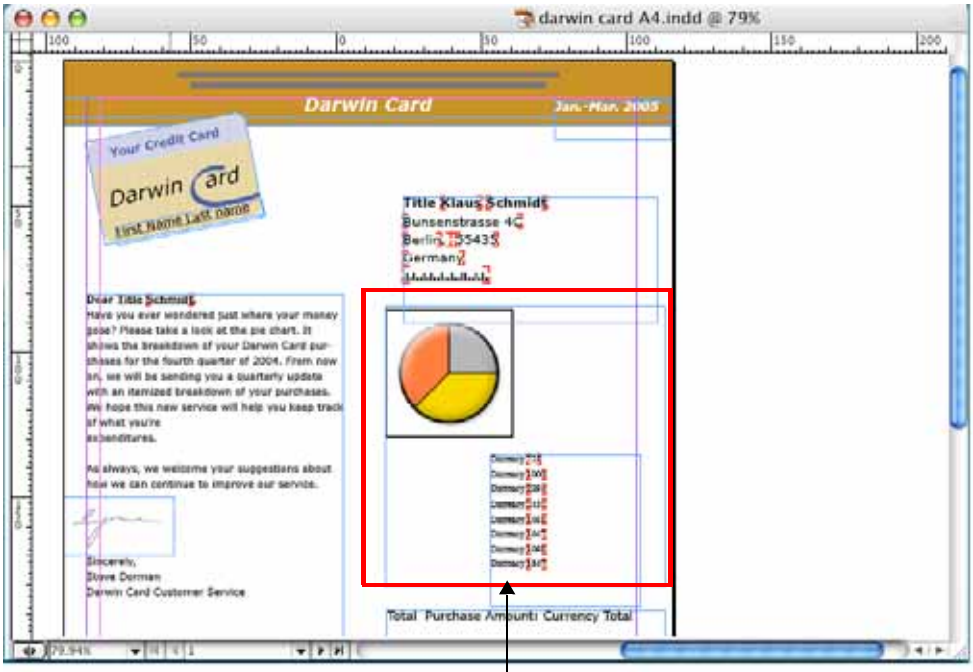
    The **Purchases Pie Chart** is now defined.

Placing the Chart in the Layout

To place the chart in the layout, you will need to erase the chart that is displayed in the file at the moment, and then place the new chart, **Purchases Pie Chart**, into the layout.

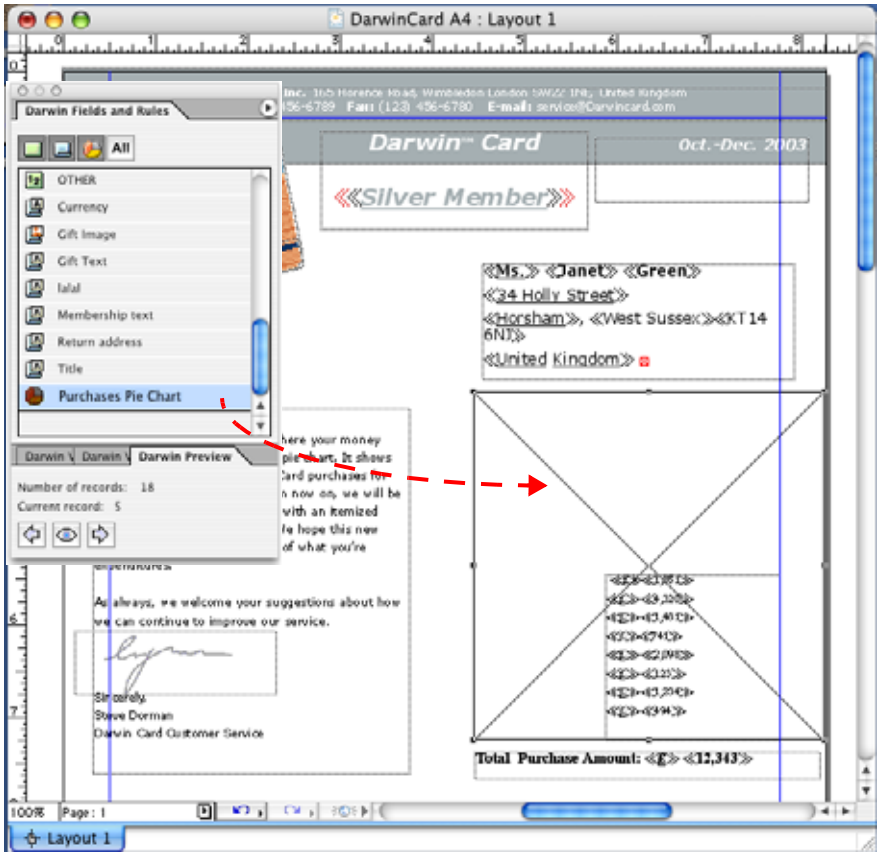


1. On the **Darwin CoPilot** panel, scroll down the list of **Fields & Rules** until you find the **Purchases Pie Chart** that you have defined.



2. In the layout, select the current chart and delete it.

3. Double-click the **Purchases Pie Chart**





Apply What You Know

Activity: Preview the Purchases Pie Chart

1. Preview the pie chart that you have built with data from different customers.
2. You may need to align the amounts with the legend, or change colors.



Preview of a layout with a chart in place. Here, the numbers need to be realigned.

Module Wrap-up

Having completed this module, you should be able to:

- Define a chart
- Place the chart in the layout

MODULE 5

Page Rules

Why You Need to Know This

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, customers who live in the United States will receive Darwin Card mailers on letter-size paper, and customers in Europe will receive A4-size mailers.

Lessons in This Module

Lesson 1: Define Page Rules

Lesson 2: Print Your Darwin Card Mailers

Lesson 1 Define Page Rules



How This Lesson Will Help You

In this lesson you will learn how to define page rules so that customers in the United States will receive letter-size mailers and customers in Europe will receive A4-size mailers.



Topics in This Lesson

- Define a page rule

Preparing the Files for Page Rules

Up until now you have only worked with one size of mailer. In the tutorial, we have only worked with A4 pages. Since the page rule definition applies to both letter and A4 pages, you will have to "Darwinize" the files of the second size too. So, in the tutorial, we will now work on the letter-size mailer.

1. Open the **Learning Guide** folder, and select **ID Files > DarwinCard Letter**.

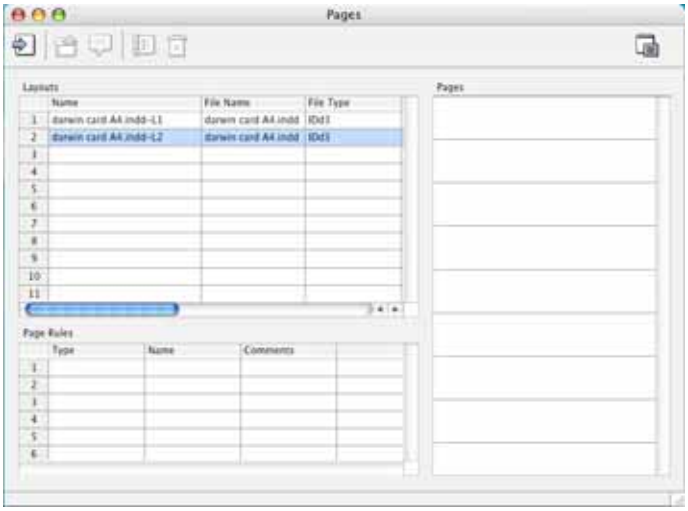


Note: If you have been working on the letter-size pages, then select the file **DarwinCard A4**.

2. In the **Darwin Pilot** panel, click **Pages**.

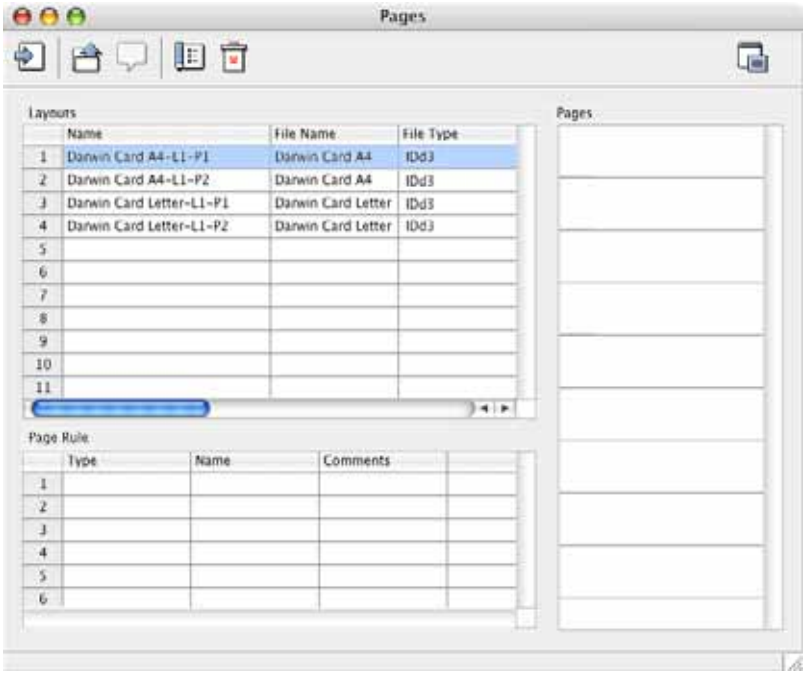
   The 2 pages that we have been working on so far should appear in the **Layouts** and **Pages** areas.

3. Delete pages from the **Pages** area.



4. Drag the file **Learning Guide > ID Files > DarwinCard Letter** into the **Layouts** area in the Pages window.

   You should now have 4 pages in the **Layouts** area.



You can now place all the fields, rules, and the chart that you have already defined into the letter-size mailer.



Apply What You Know

Activity: Place All the Fields, Rules, and the Chart in the Letter-size Mailer

Place all the fields, rules, and chart in both pages just like you did for the A4 pages.

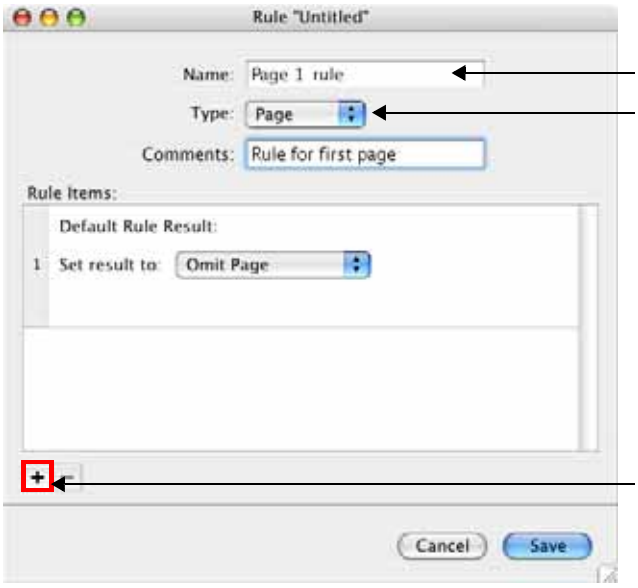
Once you complete the activity, you are ready to define page rules.

Defining the Page Rules

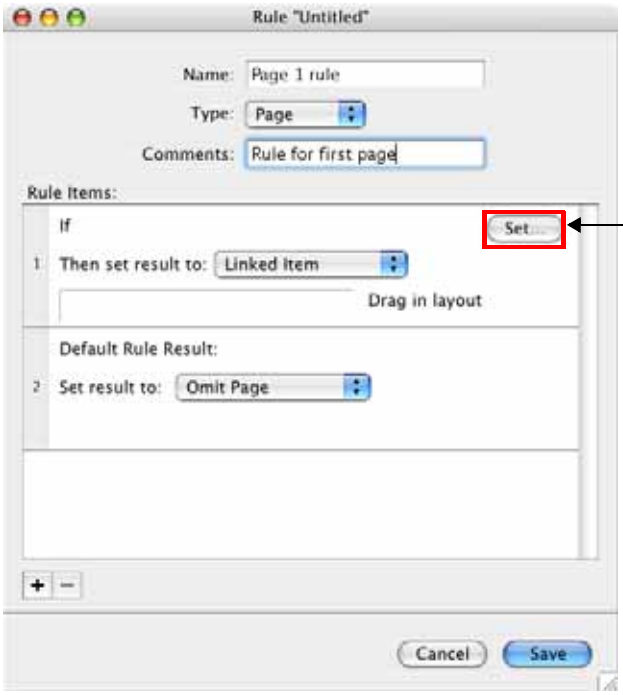
The criteria for the page rules are:

Criteria	Result
Field **Country** in the database is **USA**	Letter-size paper
Field **Country** in the database is not **USA**	A4-size paper

1. On the **Darwin Pilot** panel, click **Rules**.
2. Click the **New Rule** button to define the new rule, the page rule.



3. Type a **Name.**
4. Select **Page.**
5. Click **Add New Item** to add a second rule.

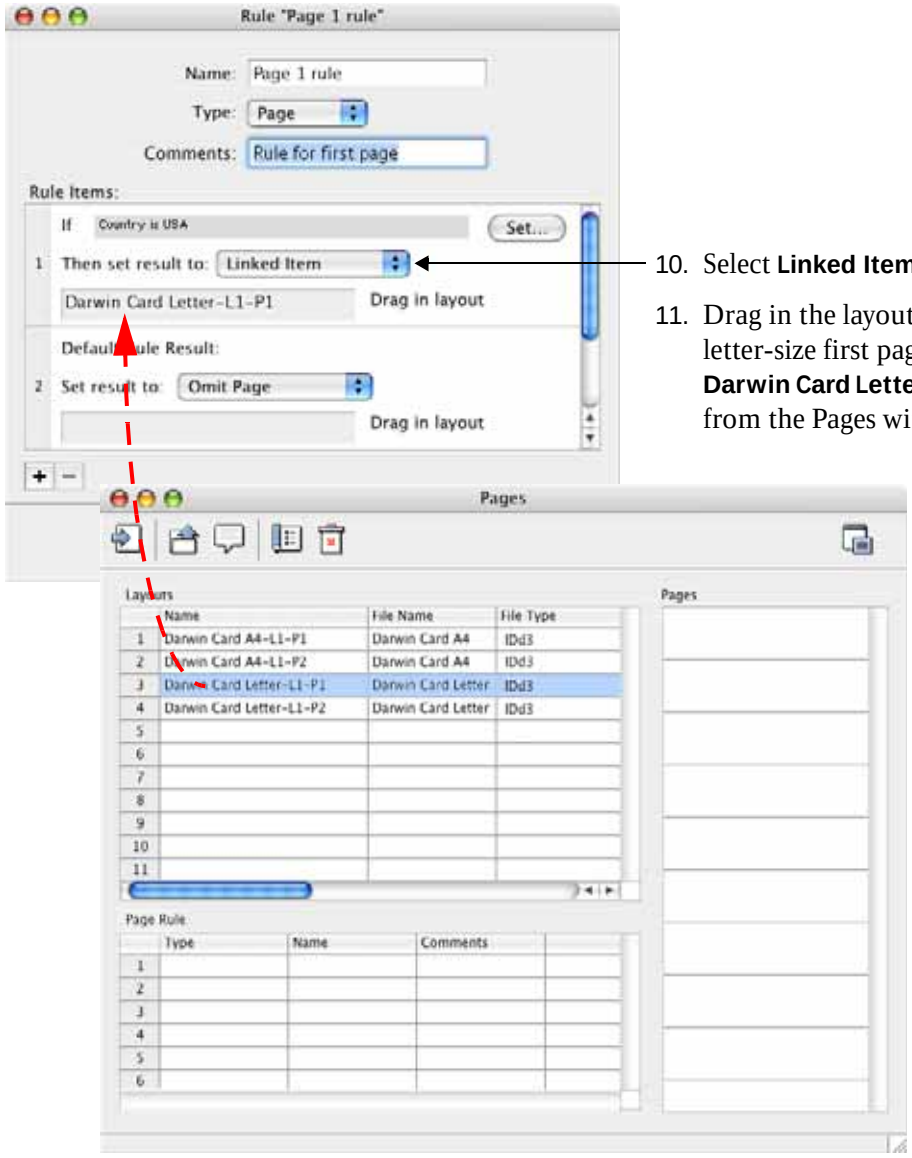


6. Click **Set** to define the criteria for the first rule.



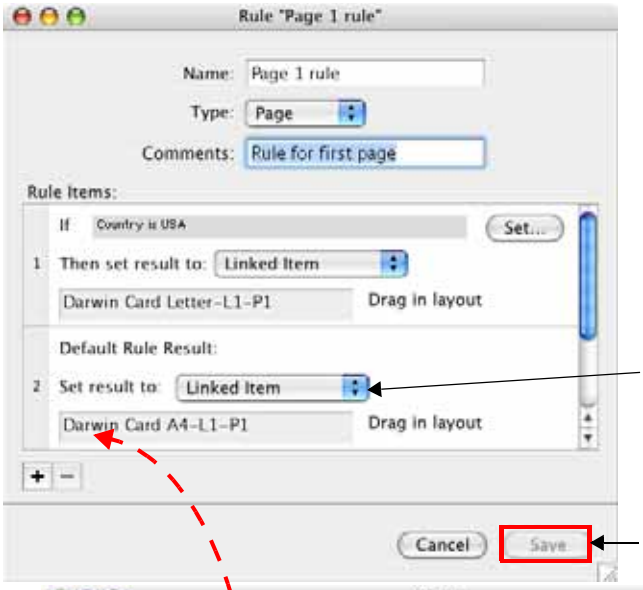
7. Set the options to **Country is.**
8. Type USA**.**
9. Click **OK.**

Complete the definition of the first rule item:

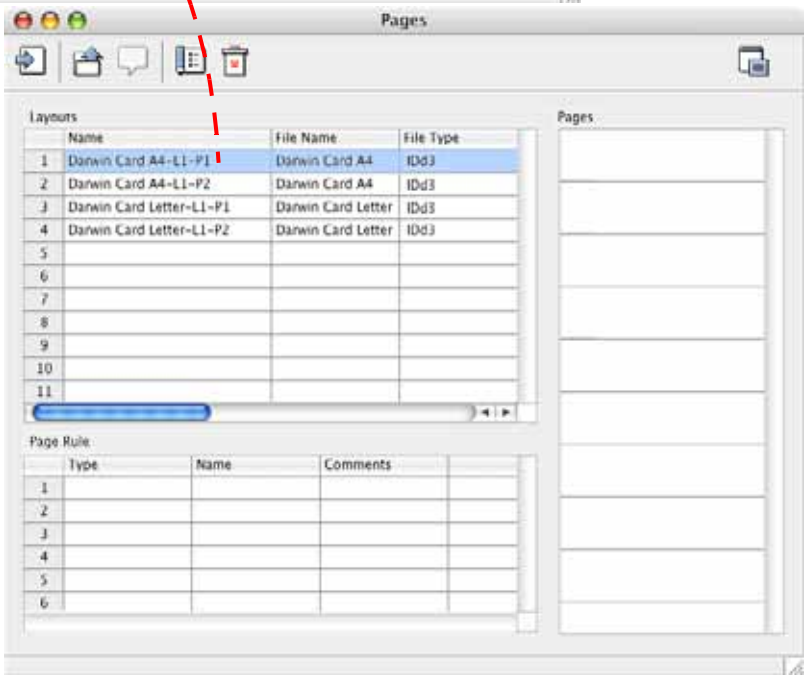


10. Select **Linked Item.**
11. Drag in the layout for letter-size first page, **Darwin Card Letter-L1-P1**, from the Pages window.

Complete the definition of the second item for the first page, which will apply to all countries outside the USA:



12. Select **Linked Item.**
13. Drag in the A4 layout for the first page, **Darwin Card A4-L1-P1**, from the Pages window.
14. Click **Save.**



You have now defined the rule for the first page of the Darwin Card mailer.



Apply What You Know

Activity: Define the Rule for the Second Page

Define the rule for the second page of the Darwin Card mailer. You might want to duplicate the rule. (See *Duplicating a Rule* on page 56 .)

Your final rule should look like this:



Lesson Summary

Having completed this lesson, you should be able to define print rules so that customers in the United States will receive letter-size mailers and customers in Europe will receive A4-size mailers.

Lesson 2 Print Your Darwin Card Mailers

How This Lesson Will Help You

In this lesson you will learn how to check your page rules by printing the Darwin Card mailers for customers in the United States and Europe.

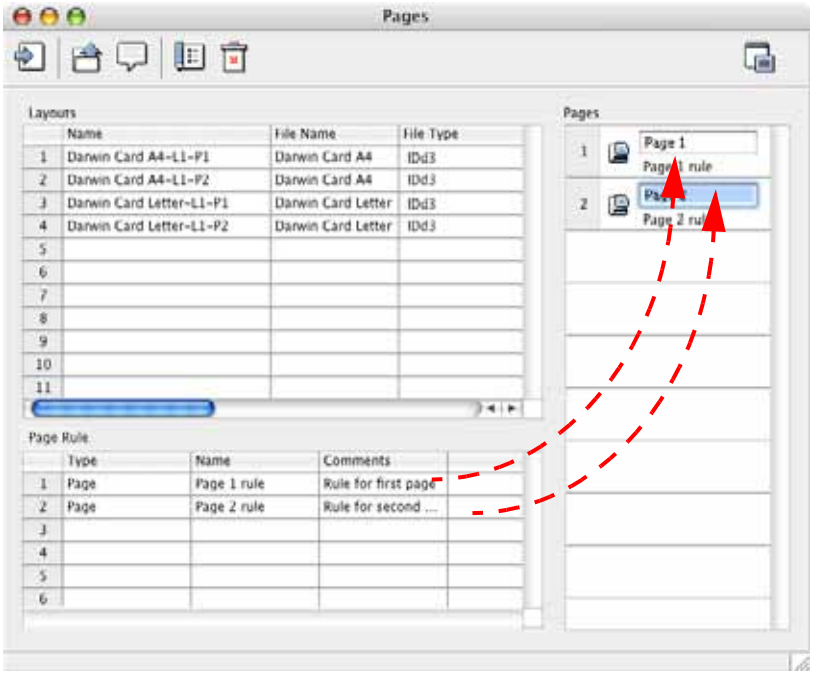
Topics in This Lesson

- Define the print run

Printing the Darwin Card

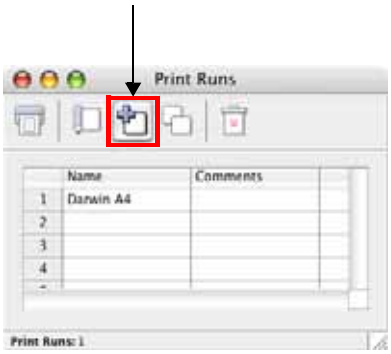
To print the Darwin Card using the print rules, all you have to do is work within the Pages window.

1. Drag the rules from the **Page Rules** area into the **Pages** area:

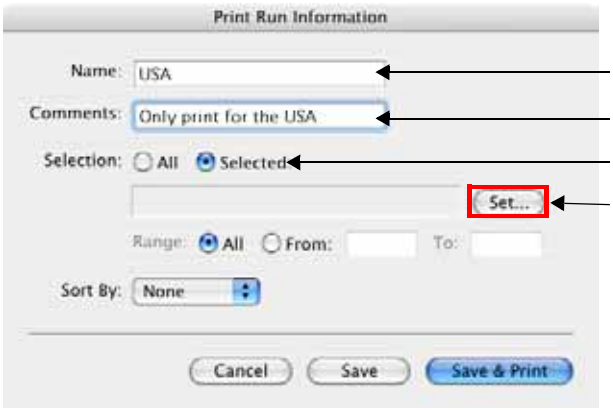


2. On the **Darwin Pilot** panel, click **Print Runs**.

3. Click the **New Print Run** button.



Define the new print run:



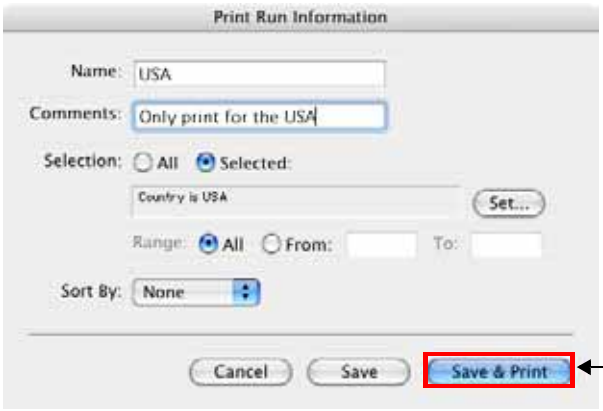
4. Type the **Name.**
5. Type a brief description.
6. Click **Selected**.
7. Click **Set**.

Define the criteria for this print run. In our case, we want to print all the pages for the customers who live in the USA.



8. Select the options **Country is.**
9. Type USA**.**
10. Click **OK.**

Check that your criteria are correct, and print:



11. Click **Save & Print.**

All the pages on letter-size paper addressed to American customers should now be on their way to being printed. Check the addresses on the printouts.

Lesson Summary

Having completed this lesson, you should be able to define the print run for your page rules.

Module Wrap-up

Having completed this module, you should be able to define page rules and the print run to print them out.

MODULE 6

Final Review Activity

About the Lincoln High School Report Card

The activity in this module provides you with the opportunity to practice all the steps for creating a variable information job using the Darwin™ application, and review what you learned up to now.

You can find the main steps to perform the activity at the end of this module, but first try to perform the activity on your own.

Creating the Lincoln High School Report Card

In this hands-on session you will create the annual report card for Lincoln High School 10th grade students. The layout files and the database needed for the job have already been prepared. Each report card contains personal information about one student.

Job Requirements

Your job is to work on the InDesign™ pages and to define and insert all the variable information according to the following criteria:

- The report card's cover displays:
  - Student's first name and last name
  - Student's photograph
- The second page displays:

  - Student's grades in the first and second semesters, and his or her final grade. Grades should be displayed in letters as shown in the table below.

Grade Range	Letter
95 - 100	A
90 - 94	A-
85 - 89	B+
79 - 84	B
73 - 78	B-
67 - 72	C+
61 - 66	C
55 - 60	C-
0 - 54	D

Grade conversion table

  - A note written by the teacher about student's achievements during the year.
  - Information about student's attendance in both semesters. The number of days in which the student was late, absent, or sick.

- The third page displays:
  - A line chart that compares student's grades with school and state's averages. The chart compares only student's final grades. The chart includes:
    - A legend
    - Gridlines
    - A title for the X and Y axis
  - A bar chart that shows student's grades and minimum grades required for entering different types of universities and state college. The bar chart includes:
    - A legend
    - Gridlines
    - Data label

Files Used During the Activity

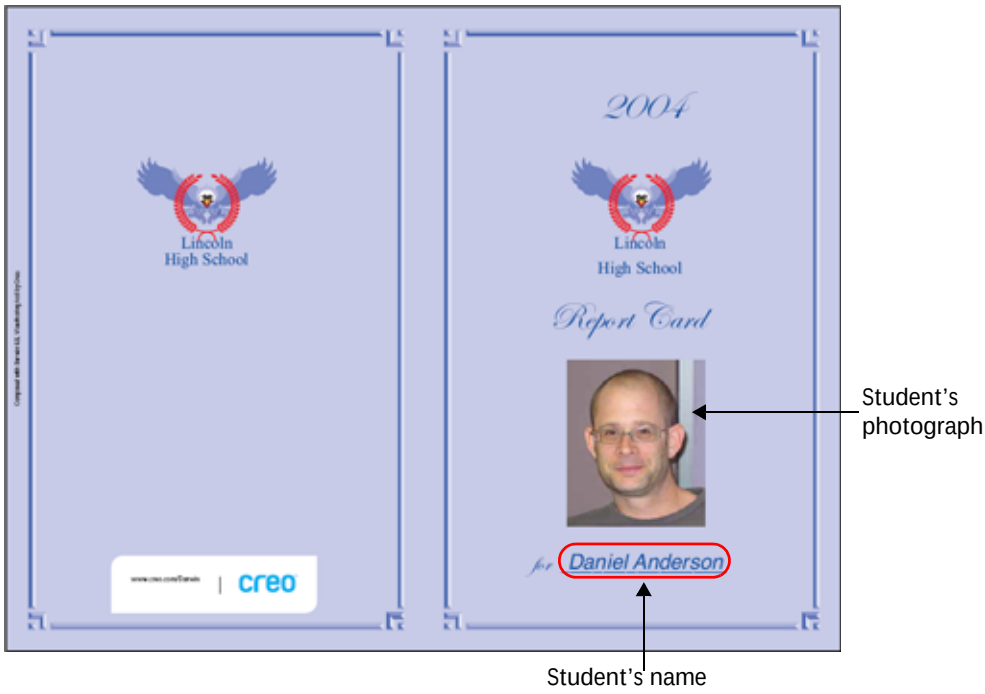
Your CD-ROM contains all the files that you need to perform this activity. Copy the **Certificate** folder from the CD-ROM to your computer disk. This folder contains:

- **Data** folder — Contains the required data about each student.
- **ID Files** folder — Contains all the InDesign layouts used.
- **Images** — Contains the students' photographs.
- **Text** Files — Contains all the teacher's notes.

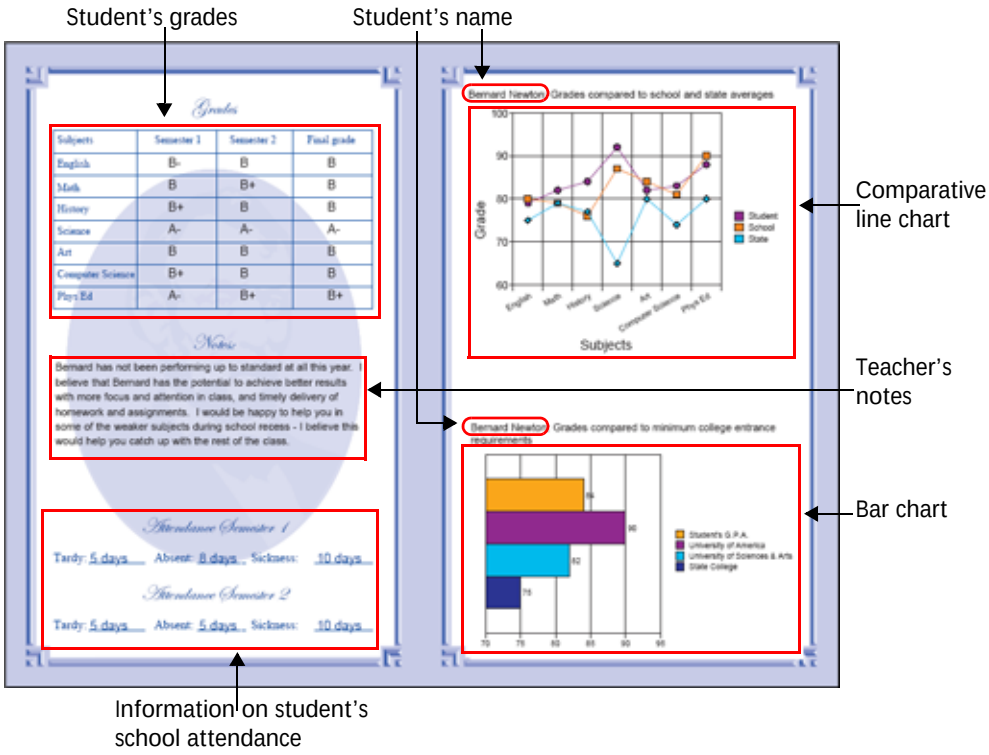
- **VPS&PDF** folder — Contains the VPS and a PDF of the outcome job. You can use these file as a reference.
- **Fonts** — Contains all the fonts used in the layouts, in case you don't have them in your computer.

Lincoln High School Report Card Layout

This is how your report card should look when you finish the activity:



Cover and last page



Second and third pages

Now you are ready to start the activity!

Take advantage of this time to make sure that you clearly understood all that was explained and demonstrated during the course.

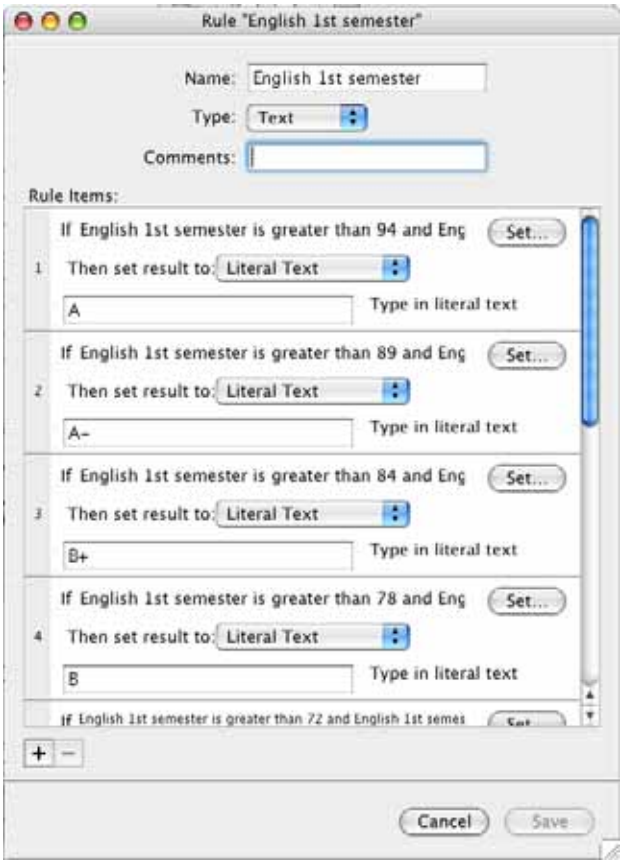
Don't hesitate to ask for your instructor's help.

Main Steps to Perform the Activity

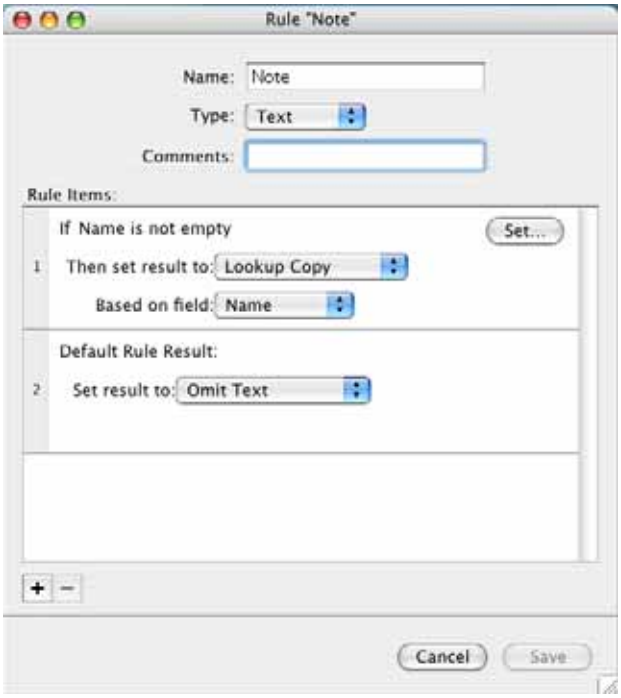
To create the Lincoln High School Report Card:

1. Create a new Darwin database.
2. Create a new job. Import the profile from the database file provided.
3. Change field types as needed.
4. Import the data from the provided database.
5. Import pages from InDesign files.
6. Open the InDesign page from Darwin Pilot.
7. Place the variable data fields in the InDesign layouts: First name, last name, student's photograph, attendance information: tardy, absent, sickness.
8. Create text rule for each grade field.

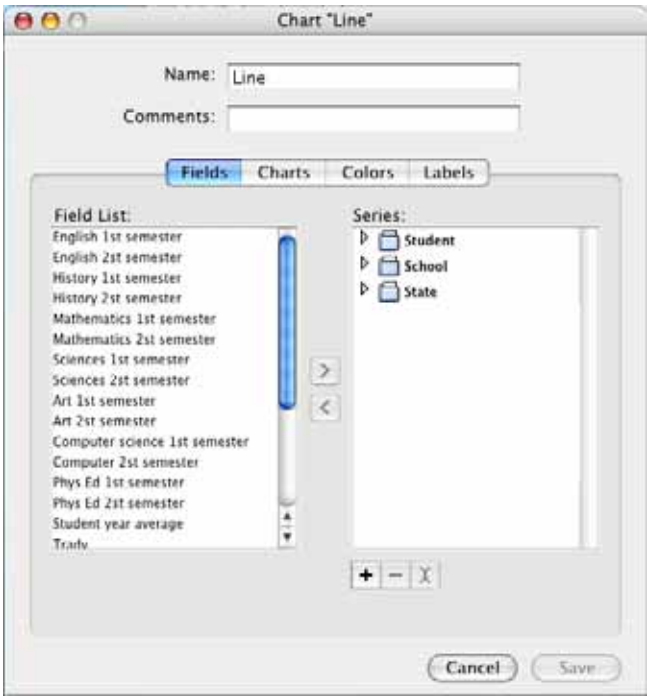
9. Duplicate the rule and change the values.



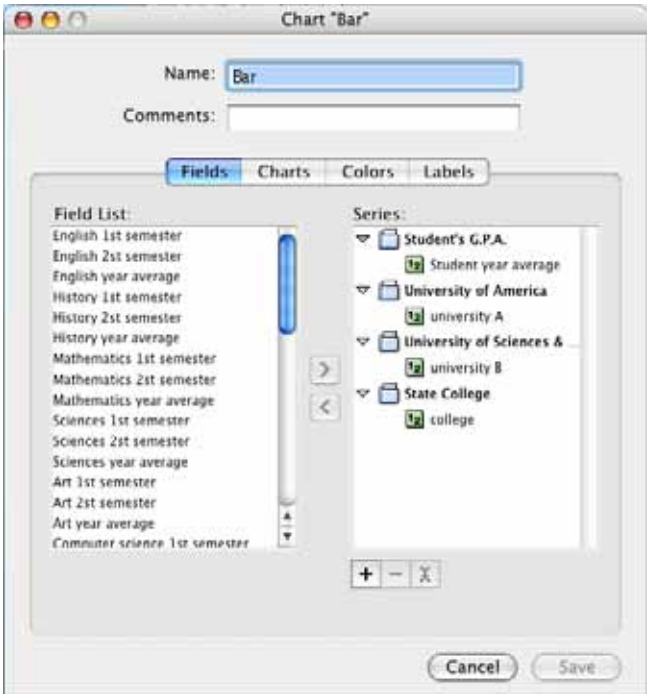
10. Place the rules in the InDesign layout.
11. Import the texts with the teacher's notes into the Darwin Library.
12. Create text rule to assign the relevant note to each student.



13. Place the rules for the notes into the InDesign layout.
14. Create image rule to assign the relevant photograph to each student.
15. Place the rules for the images into the InDesign layout.
16. Create a line chart which contain 3 series:
    - Student final grades
    - School grades
    - State grades



17. Create the legend, gridlines, an X an Y title for the line chart.
18. Create a bar chart with 4 series. Each series has one field.



19. Place the charts into the InDesign layout.
20. Preview the job and check that you placed all variable information fields correctly.
21. Save the InDesign file.
22. In **Darwin Pilot**>Pages window: Drag the pages from the **Layout** area to the **Pages** area.
23. Print the job through the Print Runs window:
    a. Select Print All
    b. In the Print Run Monitor window, select VPS as your output format.
    c. *Optional*: Select **Reference VI Images** to link images instead of embedding them.
24. Select the relevant options in the Print dialog box such as PPD and page size.
25. Print the job.

You can find the complete **Report Card** job in the **Sample Jobs** folder of the Darwin 1.5 for InDesign CD-ROM.

Tutorial Summary

Having completed this tutorial, you should be familiar with the following tasks of the Darwin™ variable information authoring tool:

Basic Darwin workflow

- Create a database
- Create a new job
- Import data for the job
- Use Darwin™ CoPilot
- Insert variable information into a InDesign™ file
- Preview information in the layout
- Define a print run
- Print the layouts

Text rule definition

- Define a simple text rule
- Define a complex text rule
- Place a text rule in the layout

Image rule definition

- Import images into the library
- Define rules for placing the image
- Duplicate a rule and use the same set of criteria for other purposes
- Place variable images

Chart definition

- Define a chart
- Place the chart in the layout

Page rule definition

- Define a page rule
- Define a print run

Hot folder mode

- Create a hot folder
- Reprint an existing job through a hot folder

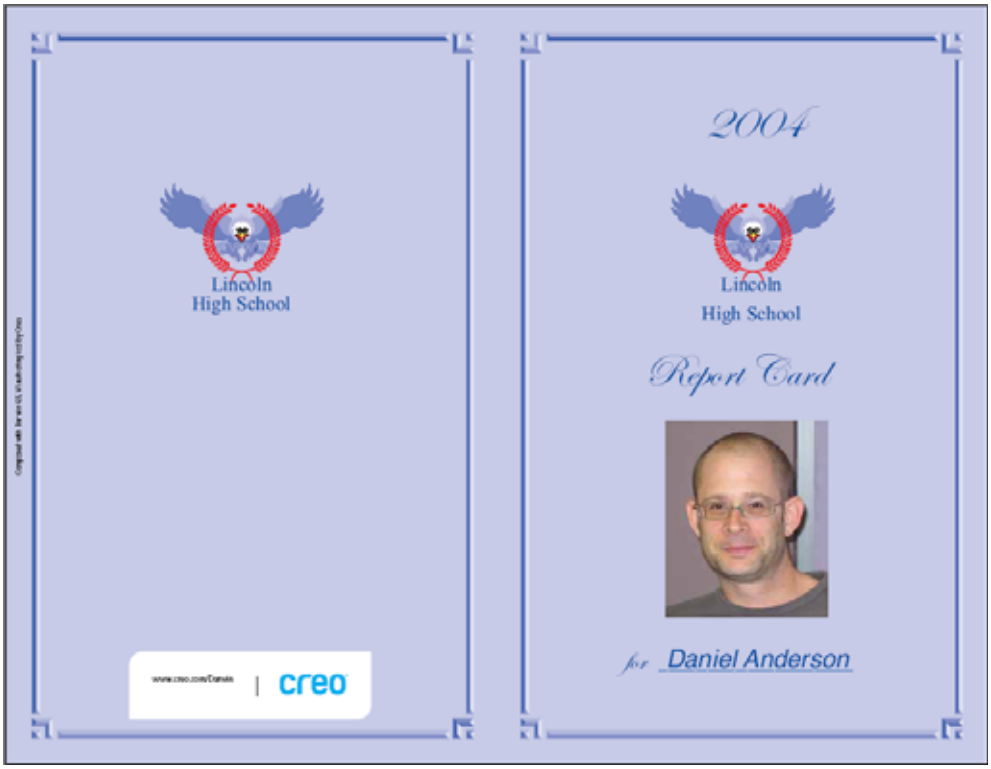
Samples of the Jobs Created in this Tutorial



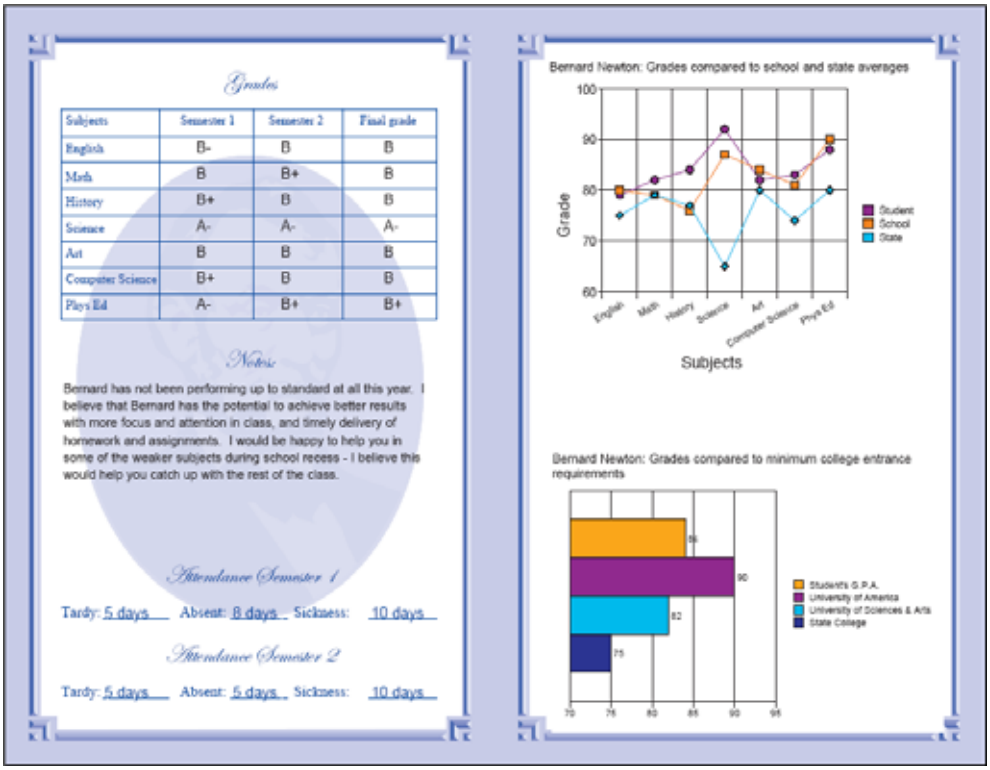
Page 1 of the completed A4-size Darwin Card mailer



Page 2 of the completed A4-size Darwin Card mailer



Front and back cover of the completed letter-size Lincoln High School Report Card



Body pages of the completed letter-size Lincoln High School Report Card

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