

IBM Infoprint Manager 3.1



Using IBM Infoprint Manager in a Reprographics Environment...

Printing Variable Data

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Printing variable data

There may be times when you will need to include variable data - that is, information that changes from page to page - in a print job. This is similar to printing with an overlay in that data from different sources is merged onto the same page in a document. The difference is that the data in the overlay is fixed - that is, the same image is repeated at the same location on each page. With variable data, the information contained in a specified field or fields changes with each copy of a document. For example, for a form letter you could use an overlay to print the company letterhead, and variable data to personalize each copy of the letter with the recipient's name and address.

Procedures are provided in the following pages that will assist you in:

- **Printing variable data using Adobe PageMaker** on page 3
- **Printing variable data using QuarkXPress** on page 15
- **Printing variable data using Microsoft Word** on page 28

Guidelines for creating variable data jobs with Adobe PageMaker and QuarkXPress

Note: If you use Microsoft Word for Windows to create your document, you can skip this section and go directly to "Printing variable data using Microsoft Word" on page 28.

The variable data input file is a text or database report file that contains the variable data that you want to include in your Adobe PageMaker or QuarkXPress document. The following are some guidelines that will assist you in creating the variable data input file and in designing your document to successfully create jobs that contain variable data. Based on these guidelines, you may need to change the variable data input file or the placement of your variable data boxes in the layout of your documents.

- The variable data input file can contain only the variable data text and/or graphics. All formatting controls, headers, footers, and extra blank lines must be removed.
- Start each record in the variable data input file on a new line or separate records with delimiters. A single record can extend over several lines.
- Add a delimiter characters, such as commas or semi-colons, or a delimiter line such as @@SEP, after each field in the variable data input file or verify that the fields have fixed field lengths. Do not use a character that is also included in your variable text as a delimiter (for example, if your variable data includes addresses that contain commas, do not use a comma as a delimiter).
- Variable data from a particular record may not always fill a variable data box to its boundaries. Be careful not to design a document that requires that the variable data record do this. For example, if you include variable data text in the middle of a paragraph, too much space will be left if there is a partially filled text box. Consider including the entire paragraph in each record of the variable data file.
- Variable data boxes may **not** be rotated or skewed.

- Variable data text **cannot** contain the following type features:
 - hyphenation
 - kerning
 - reverse print
 - small capital letters
 - subscripts
 - superscripts
 - strikethroughs
 - tracking
 - underscores
- Variable data text can only use fonts that are resident in the printer device or on the server system. If the variable data text uses another font, that font must be mapped to a resident font.
 - When you are using the QuarkXPress XTensions, map the font to a font in the **\Xpress\Xtension** directory. The font that you select for text variable data must support the characters in the variable data input file. For example, if the variable data contains any double-byte characters, you must select a double-byte font
 - When you are using the Adobe PageMaker Plug-Ins, map the font to a font in the **ibmvdata.vda** file in the **d:\PMn\RSRC\USEGLISH\PLUGINS** directory (where **d** is the drive and **PMn** is the directory where PageMaker is installed).

For more information, refer to the *IBM Infoprint Manager for AIX: Administrator's Guide*, S544-5595.

Printing variable data using Adobe PageMaker

The following instructions step you through procedures for creating and printing variable data using Adobe PageMaker. In this example, you will use PageMaker to create and include changing names and addresses on each copy of a form letter. Then you will print the resultant letters using IBM Infoprint Submit. You should have been provided with a sample variable data input file named **IPVary1.fil**. If you opened or downloaded this PDF file from the Internet, you can download the sample file from the same web page. If you want to use this file, the file must be available on your system(s) where Adobe PageMaker and IBM Infoprint Submit are installed.

Notes: For you to carry out these procedures, it is assumed that:

- You have general knowledge of computers, Microsoft Windows, and Adobe PageMaker.
- Adobe PageMaker version 6.0 or 6.5 is installed on your computer.
- IBM Infoprint Submit version 3.1 is installed and configured to communicate with the Infoprint server.
- The IBM Adobe PageMaker Plug-Ins from the IBM Infoprint Manager Version 3.1 Client CD-ROM are installed over your Adobe PageMaker program.
- An IBM Infoprint printer driver for the printer you will use to print variable data is installed on the system where you are running Adobe PageMaker with the IBM Adobe PageMaker Plug-Ins.

Important: Once the printer driver is installed, the corresponding PPD must be copied to the directory where Adobe PageMaker stores PPD files. For example, when the driver for the Infoprint 60 is installed, the default directory where you should find the **ibm3160.ppd** file is **C:\WINDOWS\SYSTEM**. For PageMaker version 6.5, the default directory for PPD files is **d:\PM65\RSRC\USEGLISH\PPD4**, where **d:** is the drive where PageMaker is installed. In this case, the **ibm3160.ppd** must be copied from **C:\WINDOWS\SYSTEM** to **d:\PM65\RSRC\USEGLISH\PPD4**.

Using Adobe PageMaker to create a document with variable data

For this example, you will produce and print multiple copies of a simple form letter. Each copy of the letter will be individualized to include a unique name and address.

Note: Along with the sample data input file (**IPVary1.fil**), you may also have been provided with a sample of a PageMaker file like the one you will create with this example. The name of this file is **PMsample.p65**, and it is provided for reference purposes only. When you create your page layout, as instructed in step 2, you need to open a new document with a unique filename. If you open the sample document file, you will not be able to do some of the steps, because they have already been completed in the sample.

To create a variable data document:

Create the page layout

1. Start your **Adobe PageMaker** application.
2. In Adobe PageMaker, create a page layout for the master file. In this layout, include some static text (the body of the letter that will not change) and some sample variable data (such as, the name, address, and city/state). In our example, shown in Figure 1 on page 4, the text within the text boxes is the sample variable data.

Notes:

- When you create sample text variable data, use the appropriate font, font size, leading, and alignment to determine the size of the text box.
- If you have a job with variable data that contains graphics, add an object with a sample of graphic variable data when you create the master file. The bounding box of the graphic will determine the size and shape of the variable data picture object. Variable data graphics will be scaled proportionally to fit in the defined area.

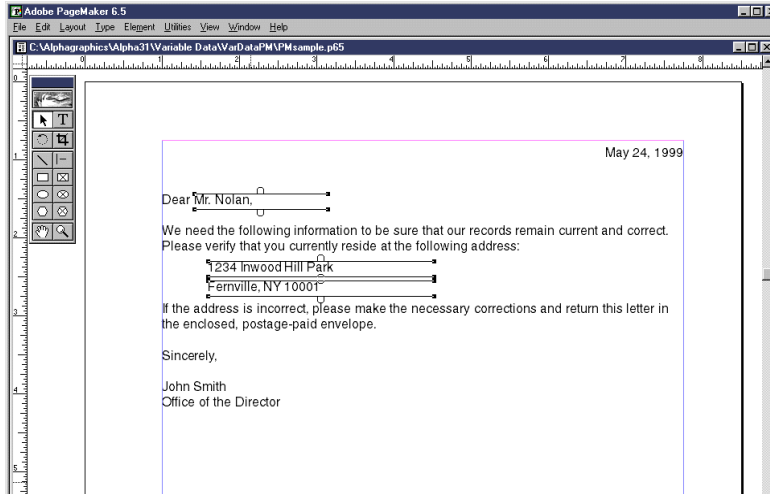
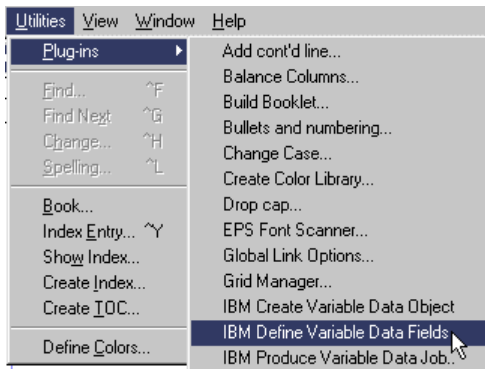


Figure 1. Example form letter page layout

Define variable data fields

After you've created a page layout that includes static elements and variable data samples, define the variable data fields:

1. Click **Utilities** in the menu bar, and then click **Plug-Ins>IBM Define Variable Data Fields**.



- In the IBM Variable Data Input File dialog box, select the input file that contains the variable data for this job and click the **Open** button.
(If you are using our sample file, the filename is **IPVary1.fil**.)

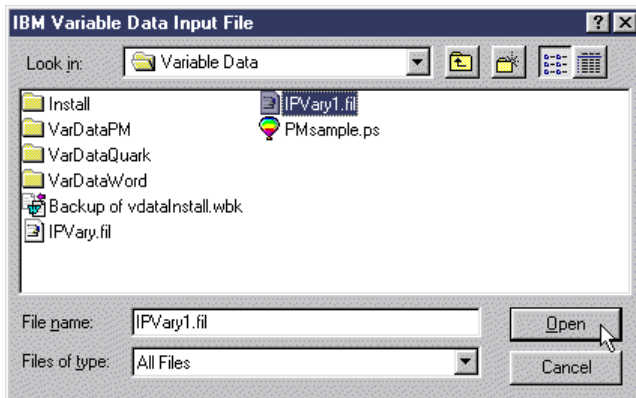


Figure 2. Select the variable data input file

- In the Select Data for One Copy dialog box, select all of the data that you want to include in one copy of the job, including the delimiters. In our sample file, shown in Figure 3, highlight from **Mr. Nolan**, up to, but *not* including, **Ms. O'Mara**.

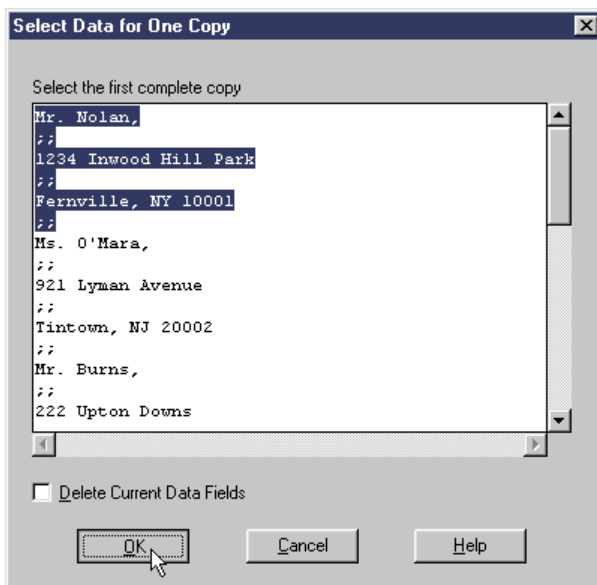


Figure 3. Select the data to include in one copy of the job

- Click the **OK** button.

5. In the Define Variable Data Fields dialog box, select the entire first field, up to, but *not* including the separator field. In our example, shown in Figure 4, the separator field is ;;.

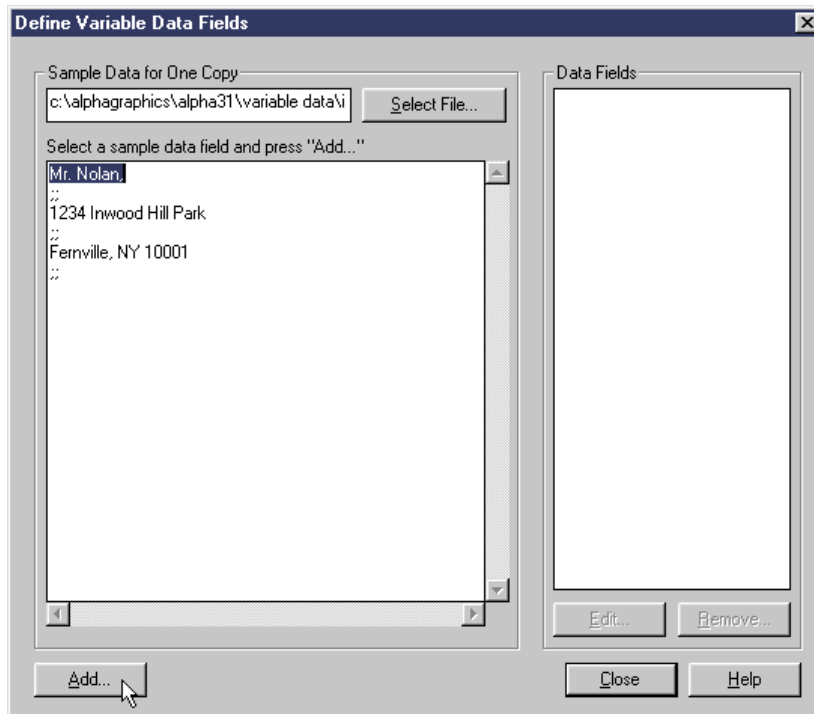


Figure 4. Select the first variable data field

6. Click the **Add...** button.
7. In the Name Variable Data Field dialog box (see Figure 5 on page 7), type a name for the first data field and specify field type information to describe the type of variable data and its length. In our example, as shown in Figure 5, the *Data Field Name* is **MemberName**, the *Field Type* is **Text**, we're using **Lines** for *Units*, and for *Length*, we want the line read **Until** the delimiter (;;) is encountered. (For more information about using the options in this dialog box, click the **Help** button.)

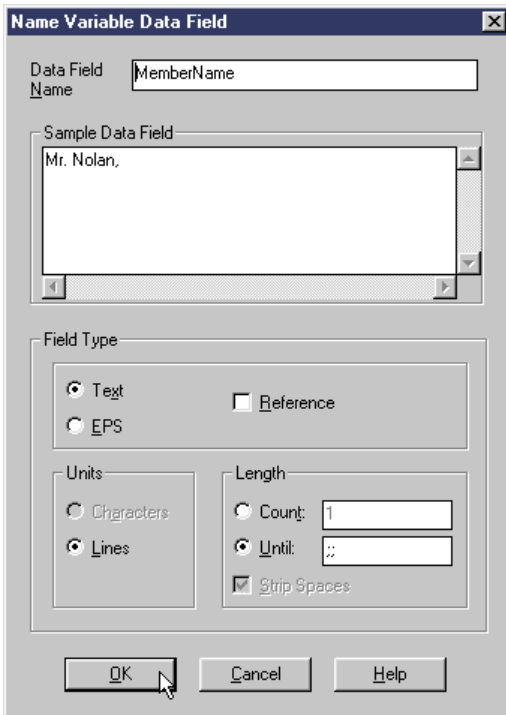


Figure 5. Name and describe the variable data field

8. Click the **OK** button.

In the Define Variable Data Fields dialog box, the name of the first field should now appear in the *Data Fields* list.

9. Repeat steps 5 through 8, beginning on page 6, until you have defined each data field and the names of all of the fields are listed under *Data Fields* in the Define Variable Data Fields dialog box, as shown in Figure 6 on page 8.
10. When you are finished defining the fields, click the **Close** button.

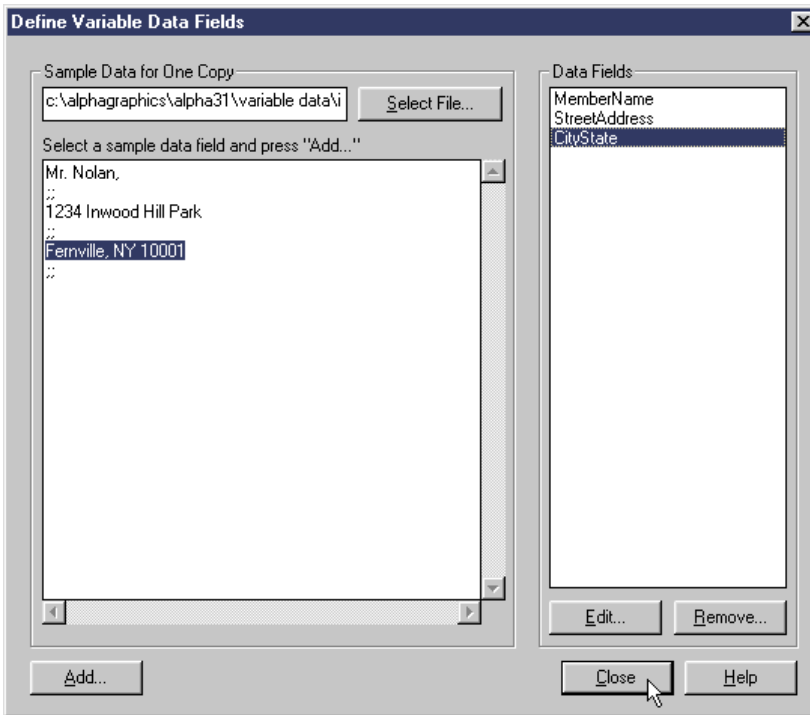


Figure 6. Each data field must be defined

Create variable data objects

After you've defined all of the variable data fields, you need to create the variable data objects with which they are to be associated.

1. Select the first sample of variable data on your page.

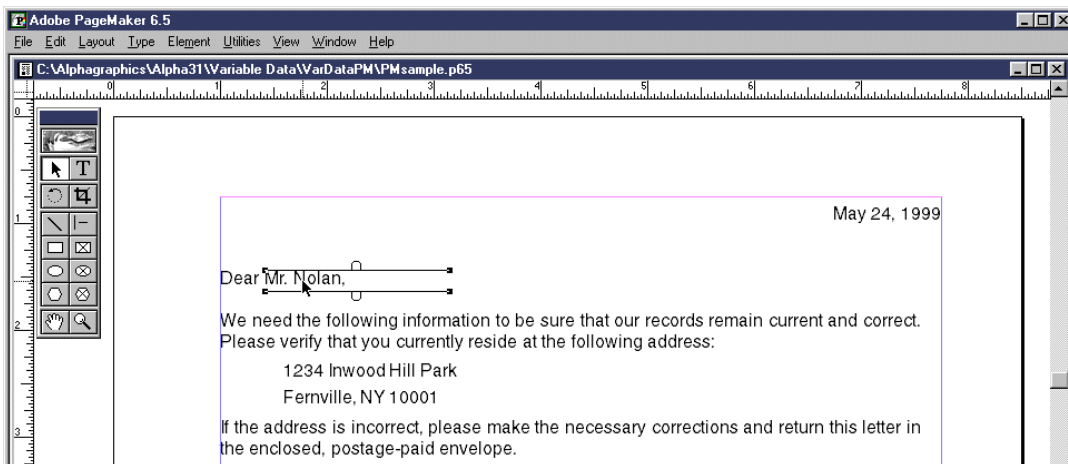
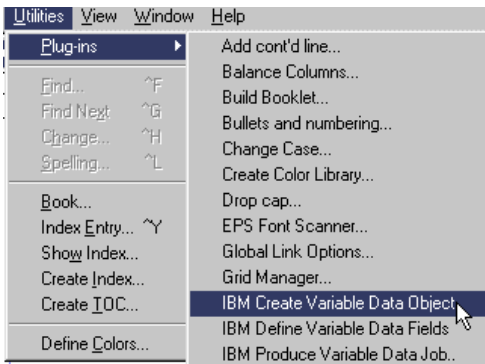


Figure 7. Select the first variable data sample

2. Click **Utilities** in the menu bar, and then click **Plug-Ins>IBM Create Variable Data Objects**.



3. In the Named Object dialog box, enter a *Name* for the object and specify the *Text Attributes* (or *Graphic Attributes*, if applicable) of the variable data.

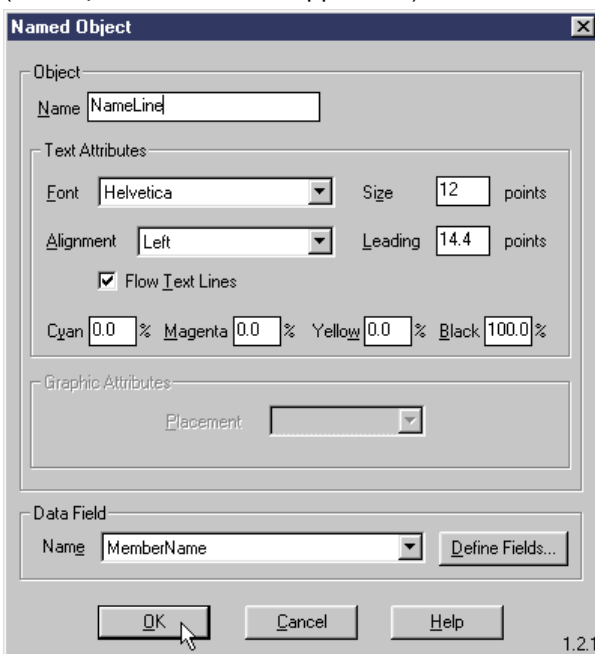


Figure 8. Name and associate the object with a data field

4. In the *Data Field* area, select the name of the data field whose contents will be placed in this object.
5. Click the **OK** button.
On the page, the variable data object will now be gray, as shown in Figure 9 on page 10.
6. Repeat steps 1 through 5, beginning on page 8, for each of the remaining variable data objects in the document.
7. When you have finished creating all of the variable data objects for this document, save the document before you continue with “Produce the variable data job” on page 10.
 - a. Click **File** in the menu bar, and then click **Save**.
 - b. Type a name and select a directory where you want to save this document.

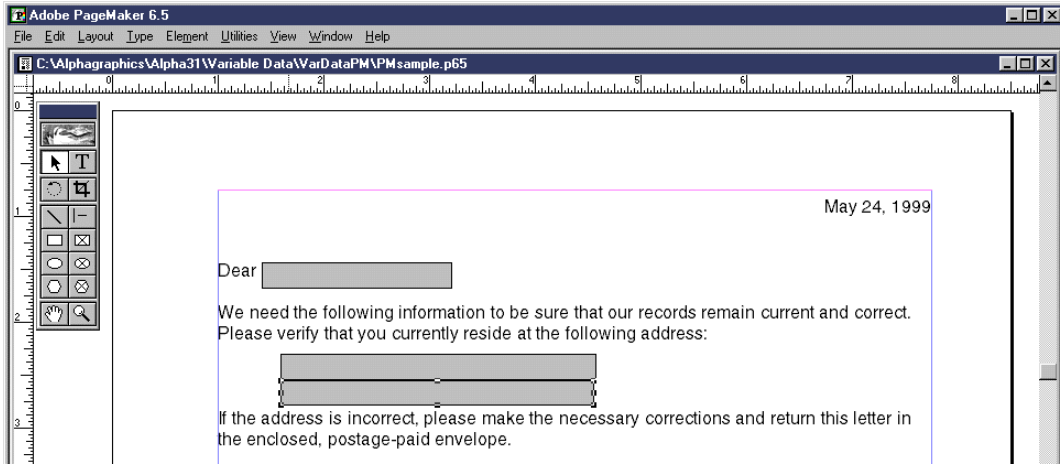


Figure 9. Defined variable data objects appear as gray boxes on the page

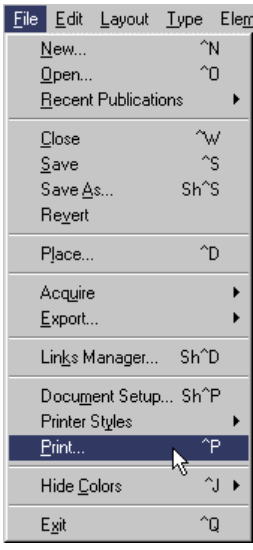
Produce the variable data job


After you have finished creating all of the variable data objects on the page and saved your document, you are ready to produce the variable data job.

Important: Before you produce variable data files, be sure that the printer driver for the printer that will be used to print the jobs is installed on the system where Adobe PageMaker is installed. Once the printer driver is installed, the corresponding PPD must be copied to the directory where PageMaker stores PPD files. See "Important" on page 3 for more information.

To produce the variable data job:

1. With your master page open in the Adobe PageMaker main window, click **File** in the menu bar, and then click **Print....**



- In the Print Document dialog box, select your printer (IBM Infoprint 60 in our example) in both the *Printer* and *PPD* fields, and select the **Portrait** icon  for *Orientation*.

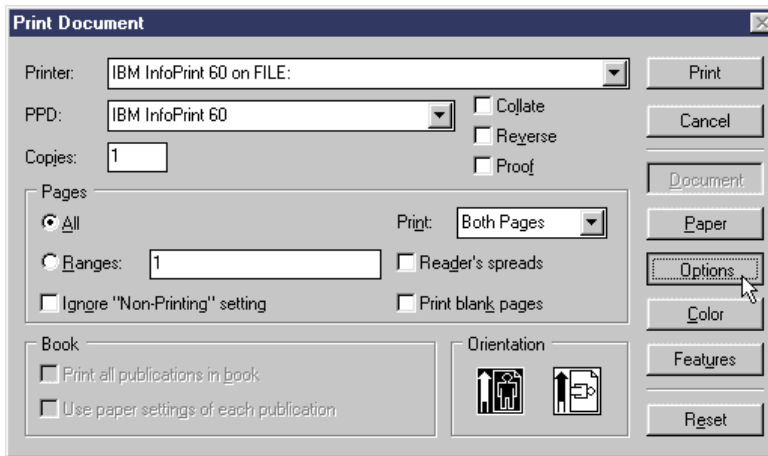


Figure 10. The Print Document dialog box

- Click the **Options** button.
- In the Print Options dialog box, check the **Write PostScript to file** check box.

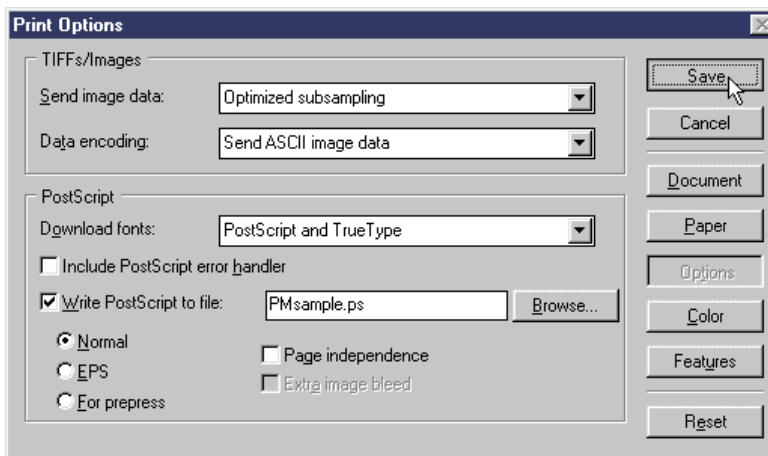
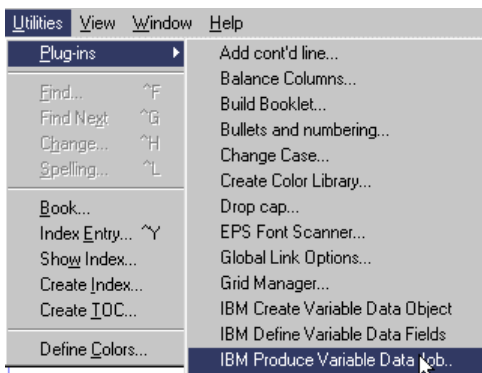


Figure 11. Print options - check Write PostScript to file

- Click the **Save** button to save your settings.
- In the Adobe PageMaker main window, click **Utilities** in the menu bar, and then click **Plug-Ins>IBM Produce Variable Data Job**.



- In the IBM Variable Data dialog box, note the names of the *Document Definition File* and *PostScript file*. These will be created with the same name as your PageMaker file, but with file extensions of **.ddf** and **.ps**.

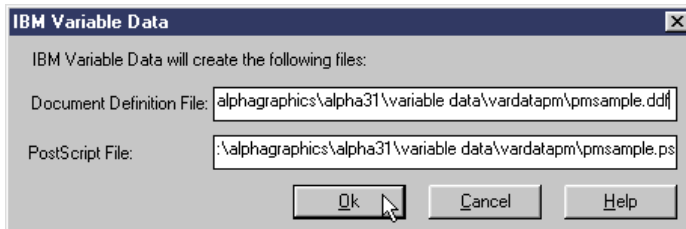


Figure 12. The names and locations of the files that will be generated

- Click the **OK** button to create the files.

Provide the variable data files for printing

If IBM Infoprint Submit is installed on a different system than PageMaker, after the variable data job is produced you need to transfer the files needed to print the job. The following files must be available on the Infoprint Submit system:

- Variable data input file
- Document definition file (file extension **.ddf**)
- Master PostScript file (file extension **.ps**)
- Any text and/or graphic files that may be referenced by the data input file

Create the variable data job ticket in Infoprint Submit

After the files have been generated from PageMaker for a job that will contain variable data, the job is assembled in Infoprint Submit when you create the job ticket.

To create a job ticket that contains variable data :

- Open **Infoprint Submit**.
- In the Infoprint Submit main window, create and enter a name for a new job. (Or, you can open an existing job. If your job has multiple parts, highlight the part that will contain the variable data.)

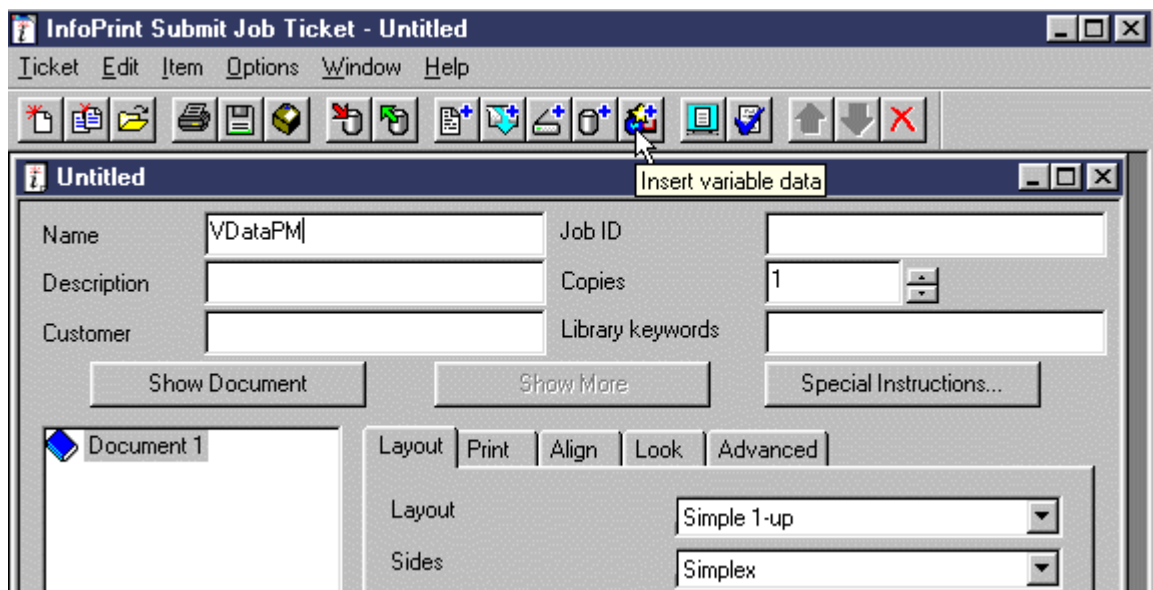
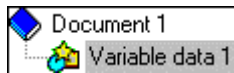


Figure 13. The Infoprint Submit main window

3. Click the **Insert variable data** icon  in the tool bar.

The *Variable Data* and *Referenced Files* tabs are displayed, and a Variable data item is included in the document list, as shown in Figure 14.



4. In the Files tab, complete the fields by adding the appropriate files:
 - **Input file** - This may be the name of a single file that contains the variable data to use with the master PostScript file. This field can also specify a file that lists the names of other files that contain the variable data.
Notes:
 - File types used for the variable input file may vary, but often have an extension of **.fil**.
 - If your variable input file contains the names of other files (graphics or text files), click the **Reference Files** tab to add the files that contain the actual variable data.
 - **Document definition file** – This file contains instructions for mapping the variable data from the variable input file to the master file. This file was created when you produced your variable data job using the Adobe PageMaker Plug-Ins. The file will have a **.ddf** extension.
 - **Master documents** – This is the main document into which variable data will be added when the job prints. This file was created when you produced the variable data job in PageMaker. The file will have a **.ps** extension.

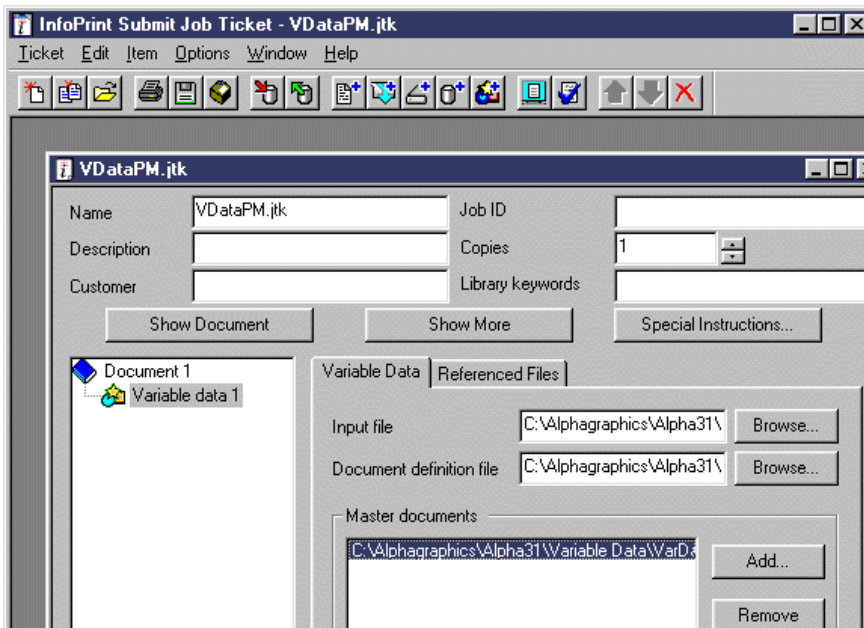
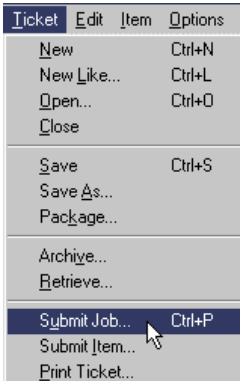


Figure 14. Specify the variable data input, document definition, and master PostScript files

Print a job containing variable data

After you have created a job ticket that contains variable data, you can print it as you would any other job.

1. Click **Ticket** in the menu bar, and then click **Submit Job....**



2. In the Submit dialog box, select the *Printer* where you want to send the variable data job.

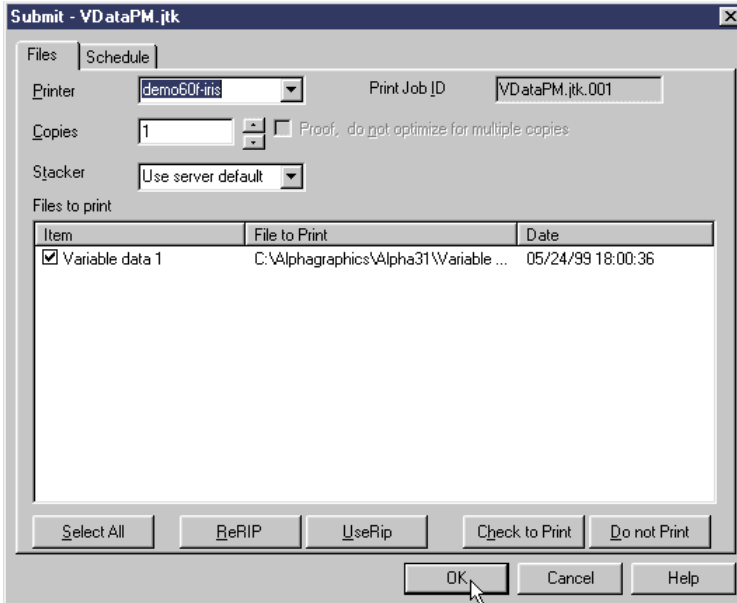


Figure 15. Select the printer and specify the item(s) for printing

3. Be sure the variable data item (and any other items that you want to print) is checked.
 - To check the check box for an item, highlight the item and click the **Check to Print** button.
 - To uncheck the check box for an item you do not want to print, highlight the item and click the **Do not Print** button.
4. Click the **OK** button to submit the job for printing.

Note: If your variable data job is lengthy, you may want to print just a portion of the job to verify that the data is being inserted correctly and uses the correct fonts. You can edit the variable input file to include only a subset of the variables. When you print, only these variables will be inserted into pages for the number of copies you specify. If you create this smaller input file, be sure to include only complete records.

Printing variable data using QuarkXPress

The following instructions step you through procedures for creating and printing variable data using QuarkXPress. In this example, you will use QuarkXPress to create and include changing names and addresses on each copy of a form letter. Then you will print the resultant letters using IBM Infoprint Submit. You should have been provided with a sample variable data input file named **IPVary1.fil**. If you opened or downloaded this PDF file from the Internet, you can also download the sample file from the same web page. If you want to use this file, the file must be available on your system(s) where QuarkXPress and IBM Infoprint Submit are installed.

Notes: For you to carry out these procedures, it is assumed that:

- You have general knowledge of computers, Microsoft Windows, and QuarkXPress.
- QuarkXPress version 3.3.2 release 5 is installed on your computer.
- IBM Infoprint Submit version 3.1 is installed and configured to communicate with the Infoprint server.
- The IBM QuarkXPress XTensions, from the IBM Infoprint Manager Version 3.1 Client CD-ROM are installed over your QuarkXPress program.
- An IBM Infoprint printer driver for the printer you will use to print variable data files is installed on the system where you are running QuarkXPress with the IBM QuarkXPress XTensions.

Using QuarkXPress to create a document with variable data

For this example, you will produce and print multiple copies of a simple form letter. Each copy of the letter will be individualized to include a unique name and address.

Note: Along with the sample data input file (**IPVary1.fil**), you may also have been provided with a sample of a QuarkXPress file like the one you will create with this example. The name of this file is **qxsample.qxd**, and it is provided for reference purposes only. When you create your page layout, as instructed in step 2, you need to open a new document with a unique filename. If you open the sample document file, you will not be able to do some of the steps, because they have already been completed in the sample.

To create a variable data document:

Create the page layout

1. Start your **QuarkXPress** application.
2. In QuarkXPress, create a page layout for the master file. In this layout, include some static text (the body of the letter that will not change) and some sample variable data (such as, the name, address, and city/state). In our example, shown in Figure 1 on page 4, the text within the text boxes is the sample variable data.

Notes:

- When you create sample text variable data, use the appropriate font, font size, leading, and alignment to determine the size of the text box.
- If you have a job with variable data that contains graphics, add a picture box with a sample of graphic variable data when you create the master file. The bounding box of the graphic will determine the size and shape of the variable data picture. Variable data graphics will be scaled proportionally to fit in the defined area.

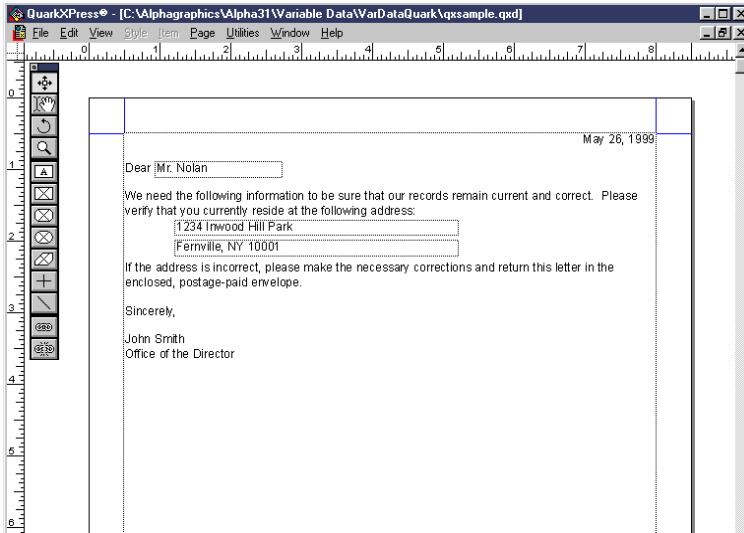
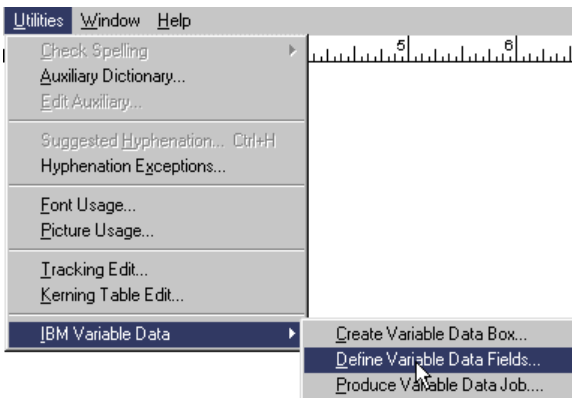


Figure 16. Example form letter page layout

Define variable data fields

After you've created a page layout that includes static elements and variable data samples, define the variable data fields:

1. Click **Utilities** in the menu bar, and then click **IBM Variable Data>Define Variable Data Fields**.



2. In the IBM Variable Data Input File dialog box, select the input file that contains the variable data for this job and click the **Open** button. (If you are using our sample file, the filename is **IPVary1.fil**.)

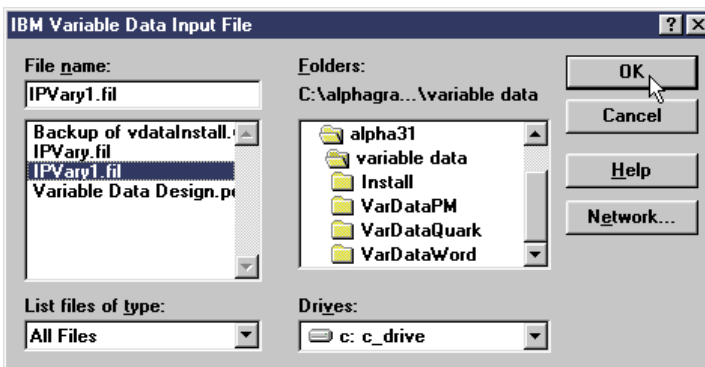


Figure 17. Select the variable data input file

3. In the Select Data for One Copy dialog box, select all of the data that you want to include in one copy of the job, including the delimiters. In our sample file, shown in Figure 3, highlight from **Mr. Nolan**, up to, but *not* including, **Ms. O'Mara**.

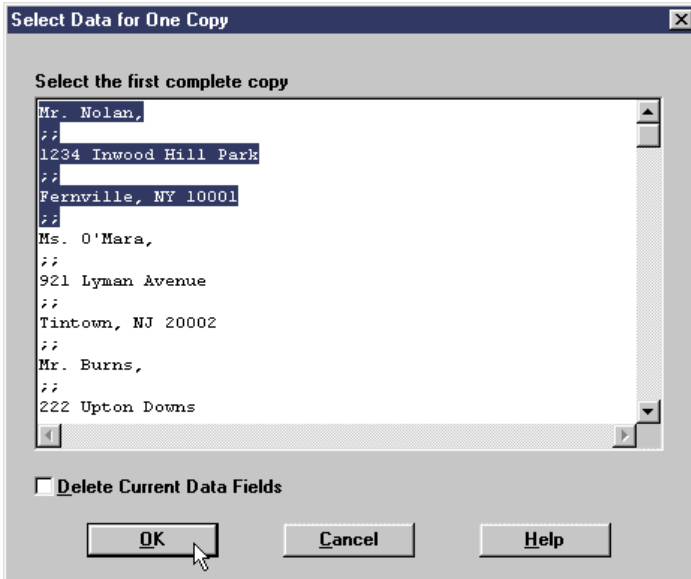


Figure 18. Select the data to include in one copy of the job

4. Click the **OK** button.
5. In the Define Variable Data Fields dialog box, select the entire first field, up to, but *not* including the separator field. In our example, shown in Figure 4, the separator field is ;;.

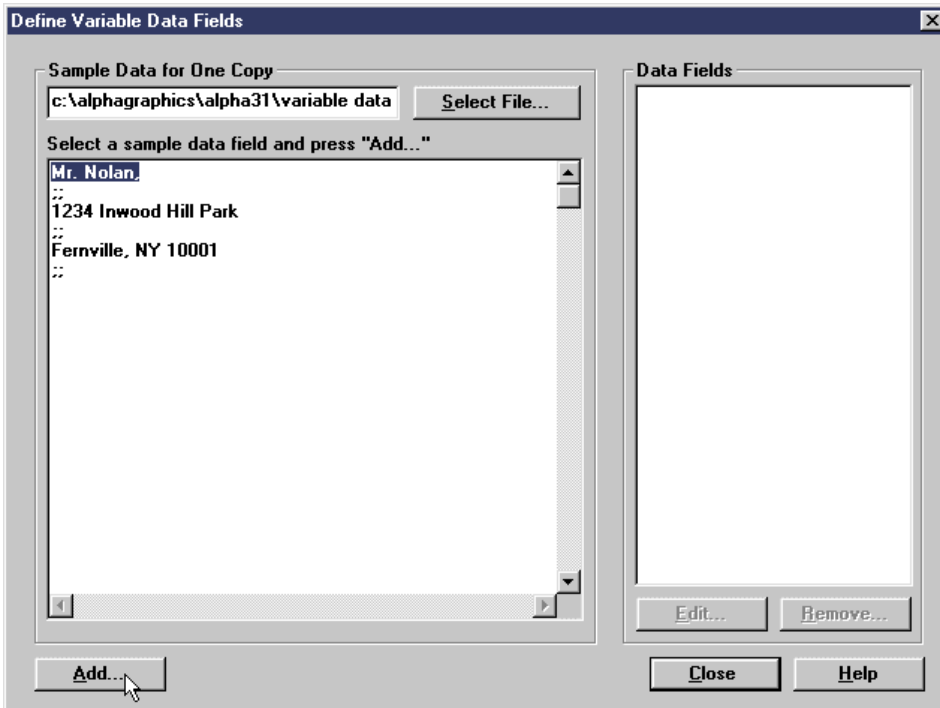


Figure 19. Select the first variable data field

6. Click the **Add...** button.

7. In the Name Variable Data Field dialog box, type a name for the first data field and specify field type information to describe the type of variable data and its length. In our example, as shown in Figure 5, the *Data Field Name* is **MemberName**, the *Field Type* is **Text**, we're using **Lines** for *Units*, and for *Length*, we want the line read **Until** the delimiter (;;) is encountered. (For more information about using the options in this dialog box, click the **Help** button.)

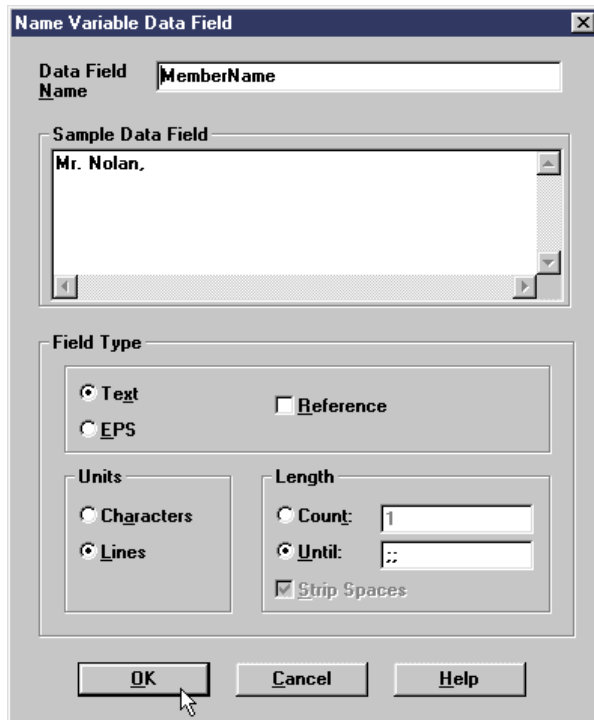


Figure 20. Name and describe the variable data field

8. Click the **OK** button.
In the Define Variable Data Fields dialog box, the name of the first field should now appear in the *Data Fields* list.
9. Repeat steps 5 through 8, beginning on page 17, until you have defined each data field and the names of all of the fields are listed under *Data Fields* in the Define Variable Data Fields dialog box, as shown in Figure 21 on page 19.
10. When you are finished defining the fields, click the **Close** button.

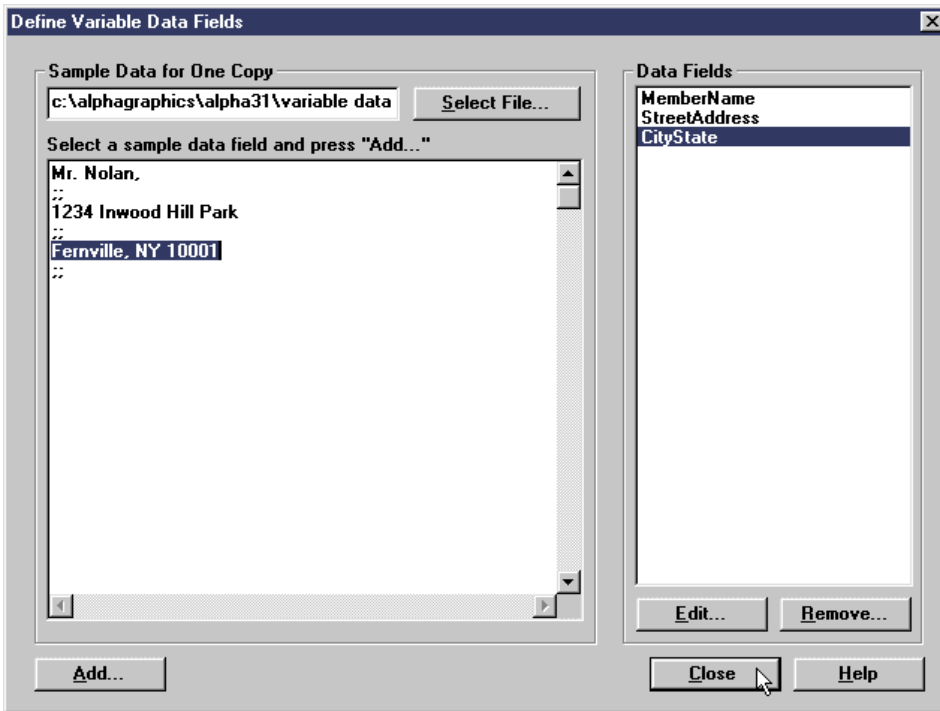


Figure 21. Each data field must be defined

Create variable data boxes

After you've defined all of the variable data fields, you need to create the variable data boxes with which they are to be associated.

1. Select the first sample of variable data on your page.

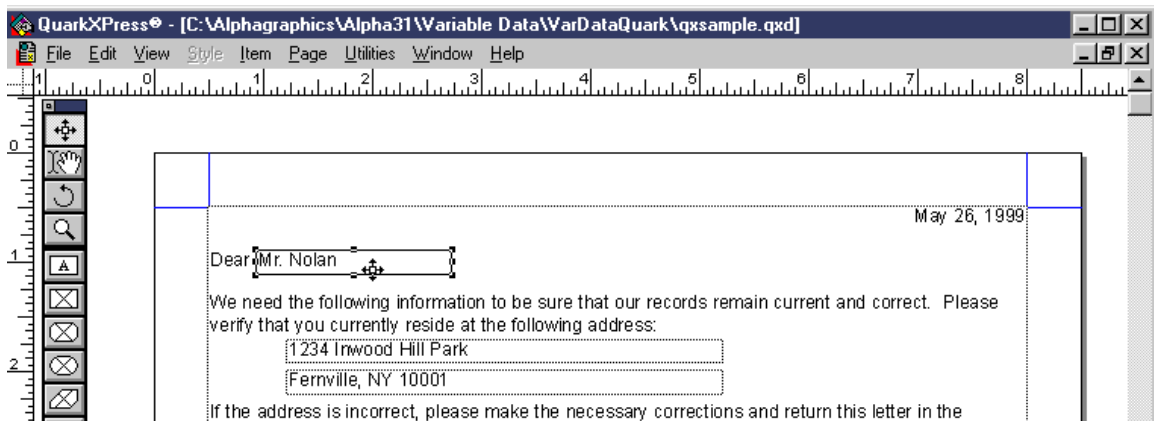
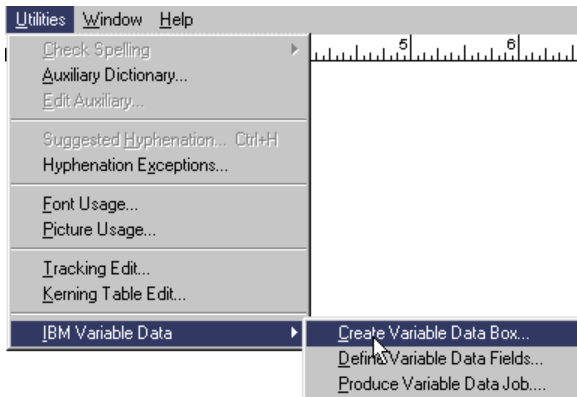


Figure 22. Select the first variable data sample

- Click **Utilities** in the menu bar, and then click **IBM Variable Data>Create Variable Data Box**.



- In the Variable Data Box dialog box, enter a *Name* for the box and specify the *Text Attributes* (or *Graphic Attributes*, if applicable) of the variable data.

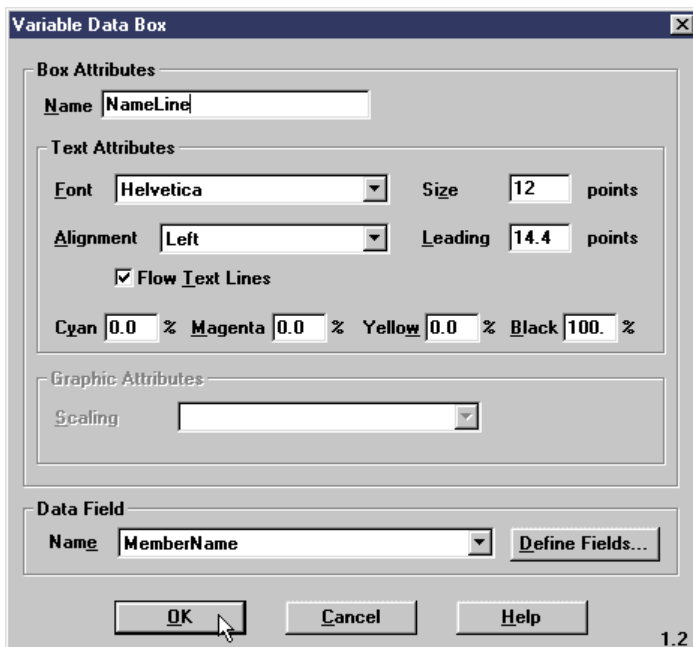


Figure 23. Name and associate the box with a data field

- In the *Data Field* area, select the name of the data field whose contents will be placed in this box.
- Click the **OK** button.

On the page, the variable data box will now be gray and labeled with its name, as shown in Figure 9 on page 10.

- Repeat steps 1 through 5, beginning on page 19, for each of the remaining variable data boxes in the document.
- When you have finished creating all of the variable data boxes for this document, save the document before you continue with “Produce the variable data job” on page 10.
 - Click **File** in the menu bar, and then click **Save**.
 - Type a name and select a directory where you want to save this document.

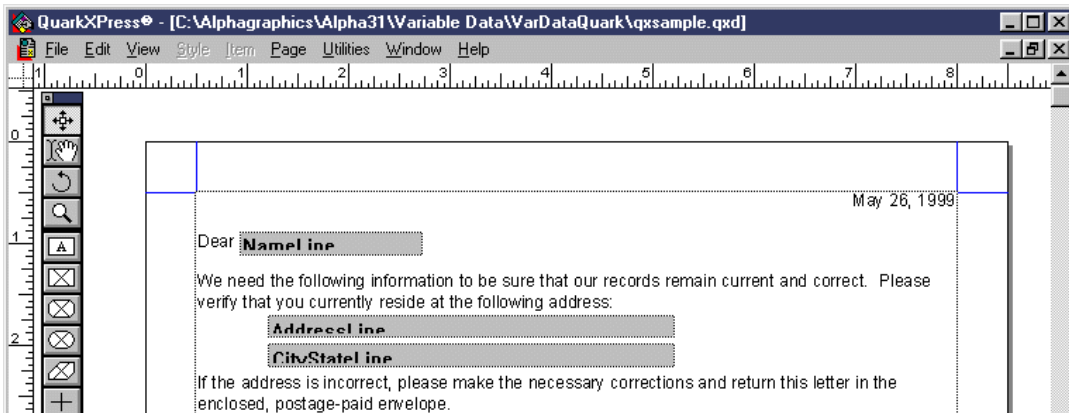


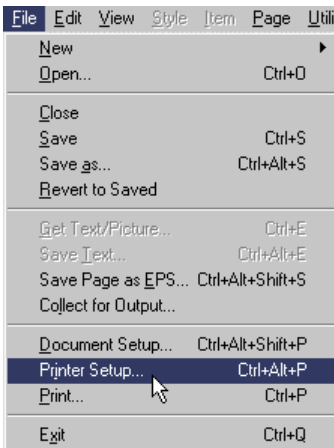
Figure 24. Defined variable data boxes are labeled, and appear gray on the page

Produce the variable data job

After you have finished creating all of the variable data boxes on the page and saved your document, you are ready to produce the variable data job.

To produce the variable data job:

1. With your document open in the QuarkXPress main window, click **File** in the menu bar, and then click **Printer Setup....**



2. In the Printer Setup dialog box (shown in Figure 25 on page 22), set the following values:
 - **Printer** – IBM Infoprint 60 on FILE
 - **Orientation** – Portrait
 - **Use PDF For** – IBM Infoprint 60
 - **Halftone Freq** – 170
 - **Resolution** – 600
 - **Data** – ASCII
 - Note:** ASCII is recommended for Data; however, the file size will be larger than either Binary or PC Binary, and it will take longer to RIP.
 - **Image: Flip Horizontal** – *not checked*
 - **Image: Flip Vertical** – *not checked*
 - **Image: Invert** – *not checked*

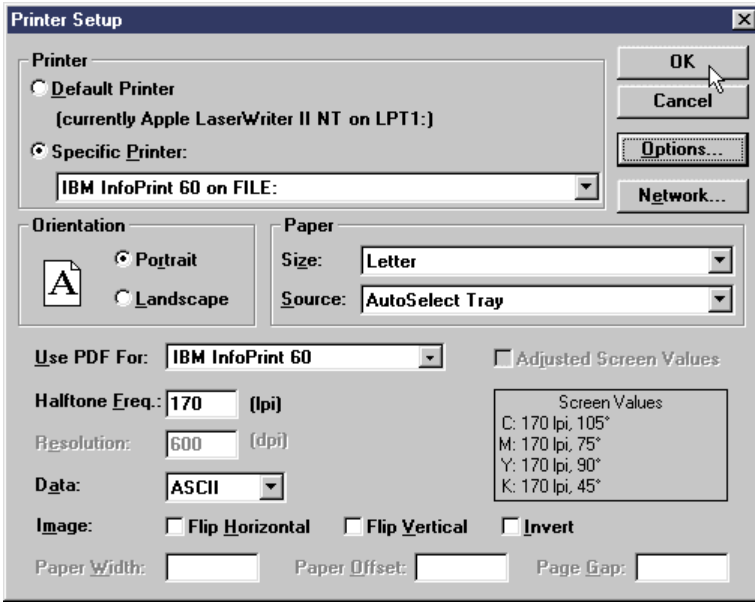
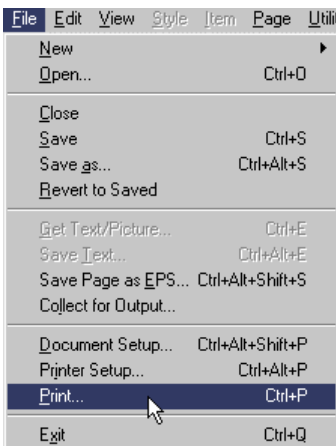


Figure 25. Printer Setup field values

3. Click the **OK** button to save the settings and return to the document.
4. Click **File** in the menu bar, and then click **Print**.



5. In the Print dialog box (shown in Figure 26 on page 23), set the following values:
 - **Copies – 1**
 - **Pages – All**
 - **Cover Page – None**
 - **Page Sequence – All**
 - **Output – Normal**
 - **Tiling – Off**
 - **Separation – Off**
 - **Registration – Off**
 - **Include Blank Pages – checked**
 - **Collate – not checked**
 - **Back to Front – not checked**
 - **Spreads – not checked**
 - **Thumbnails – not checked**
 - **Print Colors as Grays - checked**

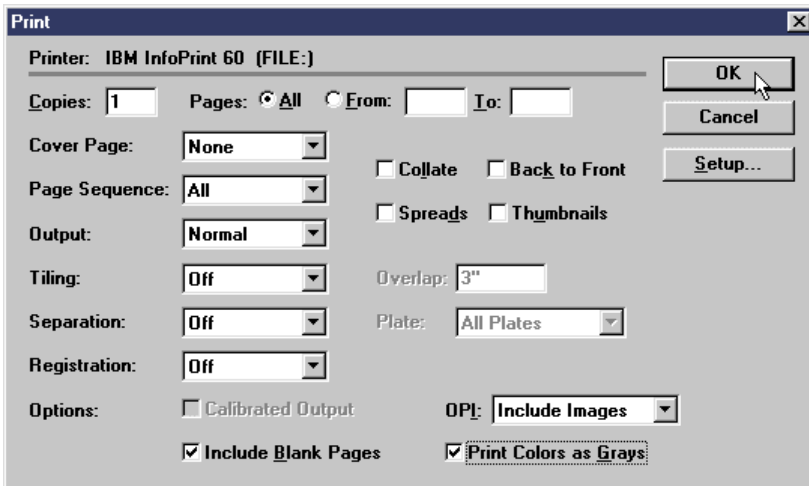


Figure 26. Print options field values

6. Click the **OK** button.
7. In the Print To File dialog box, click **Cancel**, for now.

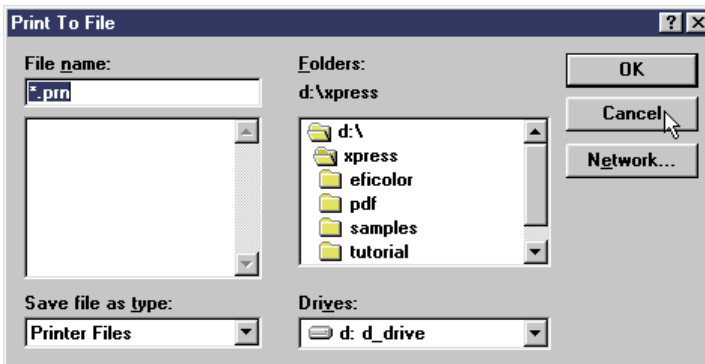
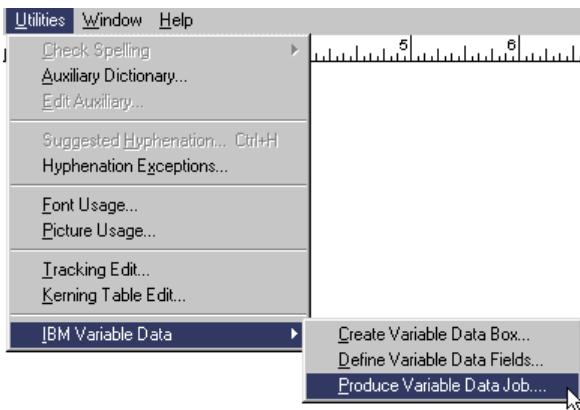


Figure 27. Don't print to file, yet!

8. In the QuarkXPress main window, click **Utilities** in the menu bar, and then click **IBM Variable Data>Produce Variable Data Job**.



9. In the IBM Variable Data dialog box, note the names of the *Document Definition File* and *PostScript file*. These will be created with the same name as your QuarkXPress file, but with file extensions of **.ddf** and **.ps**.
10. Copy the filename of the PostScript file to the clipboard.

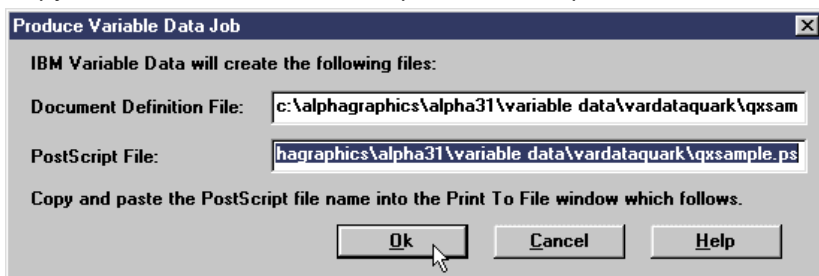


Figure 28. The names and locations of the files that will be generated

11. Click the **OK** button.
12. In the Print To File dialog box, paste the name of the PostScript file from the clipboard to the *File name* field.

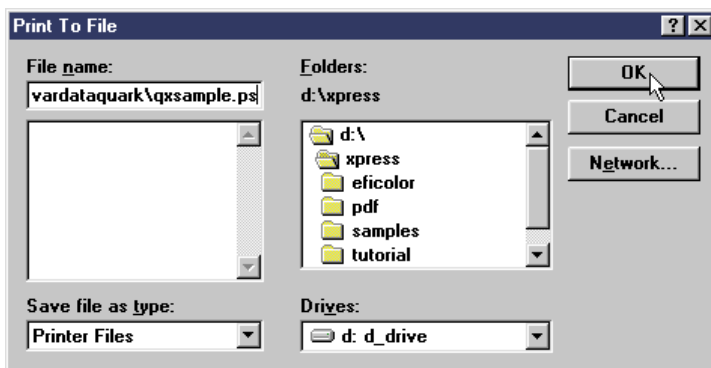


Figure 29. Paste the name and location of the generated PostScript file

13. Click the **OK** button to create the files.

Provide the variable data files for printing

If IBM Infoprint Submit is installed on a different system than QuarkXPress, after the variable data job is produced you need to transfer the files needed to print the job. The following files must be available on the Infoprint Submit system:

- Variable data input file
- Document definition file (file extension **.ddf**)
- Master PostScript file (file extension **.ps**)
- Any text and/or graphic files that may be referenced by the data input file

Create the variable data job ticket in Infoprint Submit

After the files have been generated from QuarkXPress for a job that will contain variable data, the job is assembled in Infoprint Submit when you create the job ticket.

To create a job ticket that contains variable data :

1. Open **Infoprint Submit**.
2. In the Infoprint Submit main window, create and enter a name for a new job. (Or, you can open an existing job. If your job has multiple parts, highlight the part that will contain the variable data.)

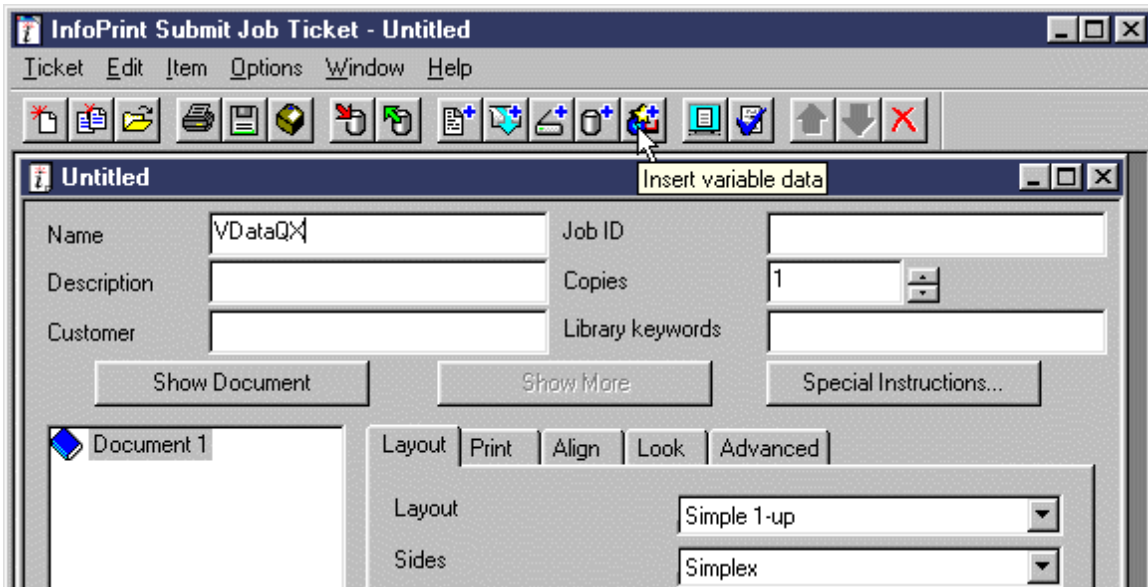
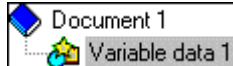


Figure 30. The Infoprint Submit main window

3. Click the **Insert variable data** icon  in the tool bar.

The *Variable Data* and *Referenced Files* tabs are displayed, and a Variable data item is included in the document list, as shown in Figure 31 on page 26.



4. In the Files tab, complete the fields by adding the appropriate files:
 - **Input file** - This may be the name of a single file that contains the variable data to use with the master PostScript file. This field can also specify a file that lists the names of other files that contain the variable data.
Notes:
 - File types used for the variable input file may vary, but often have an extension of **.fil**.
 - If your variable input file contains the names of other files (graphics or text files), click the **Reference Files** tab to add the files that contain the actual variable data.
 - **Document definition file** – This file contains instructions for mapping the variable data from the variable input file to the master file. This file was created when you produced your variable data job using the QuarkXPress XTensions. The file will have a **.ddf** extension.

- **Master documents** – This is the main document into which variable data will be added when the job prints. This file was created when you produced the variable data job in QuarkXPress. The file will have a **.ps** extension.

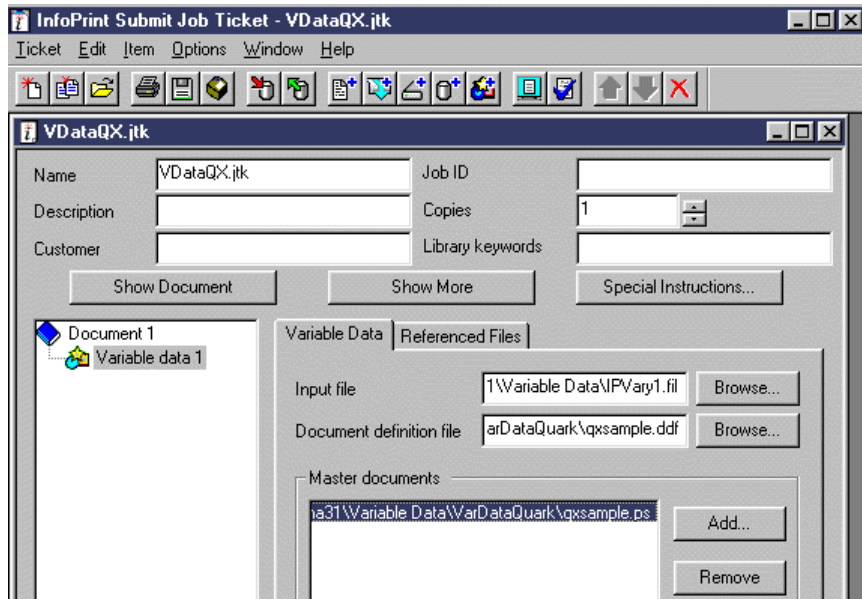
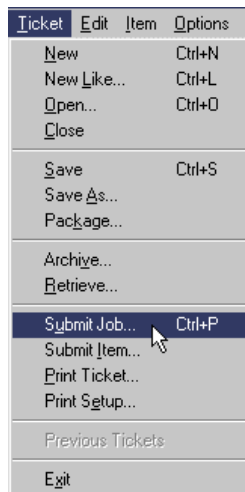


Figure 31. Specify the variable data input, document definition, and master PostScript files

Print a job containing variable data

After you have created a job ticket that contains variable data, you can print it as you would any other job.

1. Click **Ticket** in the menu bar, and then click **Submit Job....**



2. In the Submit dialog box, select the *Printer* where you want to send the variable data job.

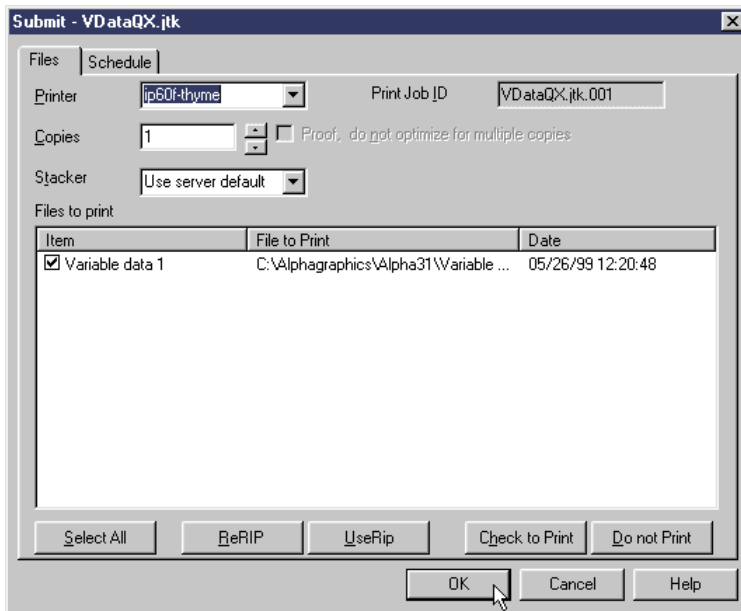


Figure 32. Select the printer and specify the item(s) for printing

3. Be sure the variable data item (and any other items that you want to print) is checked.
 - To check the check box for an item, highlight the item and click the **Check to Print** button.
 - To uncheck the check box for an item you do *not* want to print, highlight the item and click the **Do not Print** button.
4. Click the **OK** button to submit the job for printing.

Note: If your variable data job is lengthy, you may want to print just a portion of the job to verify that the data is being inserted correctly and uses the correct fonts. You can edit the variable input file to include only a subset of the variables. When you print, only these variables will be inserted into pages for the number of copies you specify. If you create this smaller input file, be sure to include only complete records.

Printing variable data using Microsoft Word

The following instructions step you through procedures for creating and printing variable data using Microsoft Word. In this example, you will use Microsoft Word's Mail Merge to create and include changing names and addresses on each copy of a form letter. Then you will print the resultant letters using IBM Infoprint Submit.

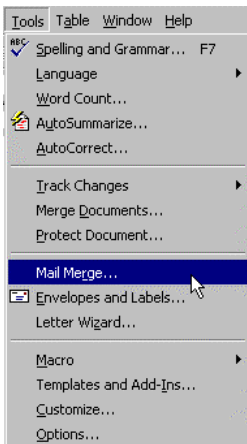
Note: For you to carry out these procedures, it is assumed that:

- You have general knowledge of computers, Microsoft Windows, and Microsoft Word.
- Microsoft Word is installed on your computer.
- An IBM Infoprint print driver is installed on the system where you are running Microsoft Word.
- IBM Infoprint Submit is installed and configured to communicate with the Infoprint server.

Using Microsoft Word to create a document with variable data

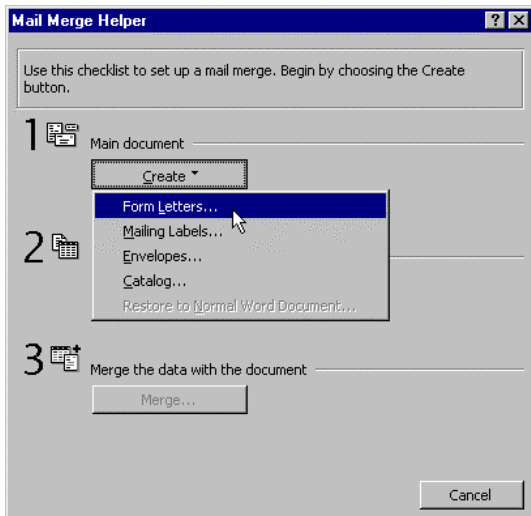
For this example, you will produce and print a file that is made up of multiple copies of a simple form letter. Each copy of the letter will be individualized to include a unique name and address. To create the merged letter:

1. Start your **Word for Windows** application.
2. In the Microsoft Word main window, select **Tools** in the menu bar, and then click **Mail Merge**.

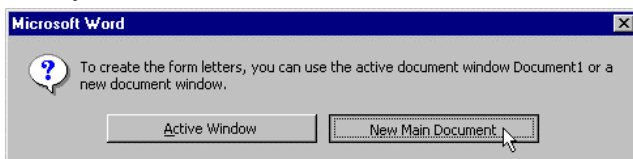


This opens the Mail Merge Helper dialog box, shown on page 29. This dialog box is your main interface into Word's mail merge capabilities. From here you can create form letters and other documents, specify your source data, and merge the data and documents together.

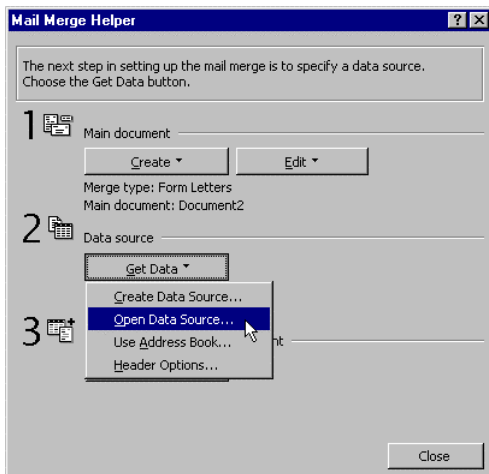
- In the Mail Merge Helper dialog box, click the **Create** button and select **Form Letters** in the pulldown menu.



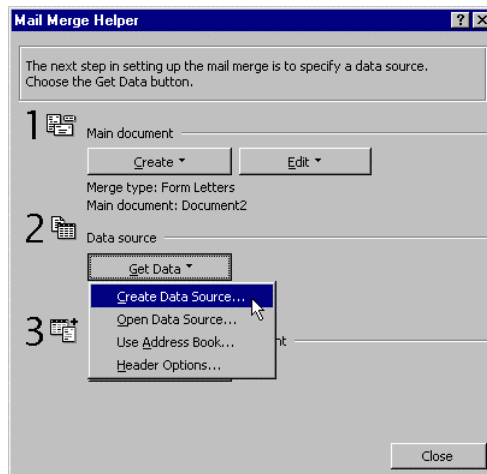
- Click the **New Main Document** button to open a blank Word document window for the form letter you will create.



- Now specify your variable data source.
The variable data can come from a saved file from another application, such as a Microsoft Excel spreadsheet, an ASCII comma-delimited text file, or you can create a new data source here in Word.



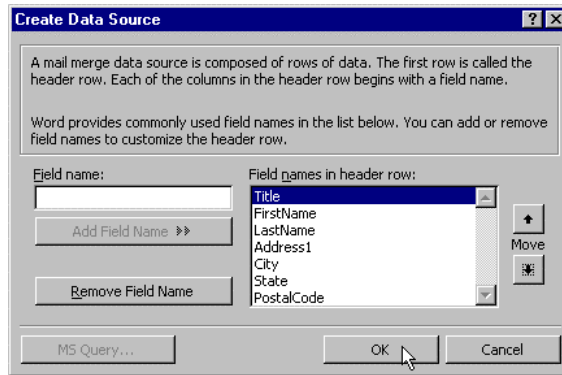
or



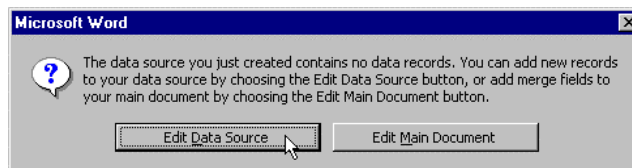
- If your data already exists in a saved file, click the **Get Data** button and select **Open Data Source** from the pulldown menu. Then, in the Open Data Source dialog box, locate and specify the name of the source data file and click the **Open** button.
Or...
- To create a new data source, click the **Get Data** button and select **Create Data Source** from the pulldown menu.

In the Create Data Source dialog box, you can specify the field names you need for your data. The dialog box also provides a brief explanation of how the fields are used.

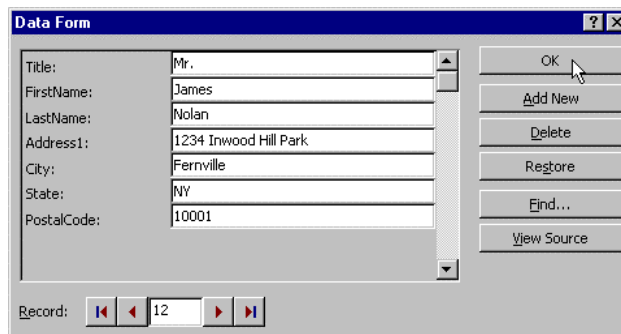
- 1) The Field names in header row list contains the default field names for the variable data. In the list, you can remove fields that aren't needed, and you can use the **Add Field Name** button to add new field names that may be required in your document. In this sample, we've removed all but the Title, FirstName, LastName, Address1, City, State, and PostalCode fields. We didn't define any additional fields for the sample form letter.



- 2) When you have finished specifying all the fields that will be used in your document, click the **OK** button.
- 3) In the Save As dialog box, specify the name and directory under which you want to save your new data source file, and then click the **Save** button.
- 4) In the message box, specify that you want to add records to your data source by clicking the **Edit Data Source** button.

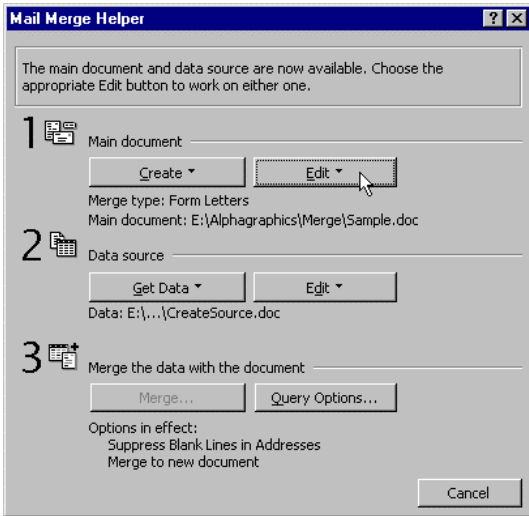


- 5) In the Data Form dialog box, enter the corresponding data for each field. Complete this information for each record that will be merged into the form letter. The *Record:* field, at the bottom of the dialog box, indicates which record is displayed. Click the **Add New** button to bring up and enter the data for each consecutive record.

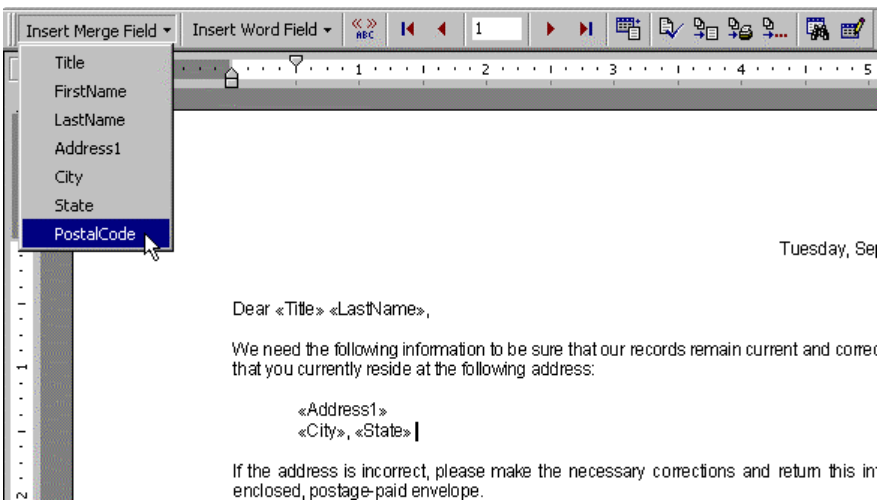


- 6) When you have finished entering all of the source data, click the **OK** button.
6. Now design the form letter. In the Microsoft Word main window again, select **Tools** in the menu bar, and then click **Mail Merge**.
 7. Under Main document in the Mail Merge Helper dialog box, click the **Edit** button and select **Form Letter: Documentn**. Format and compose the form letter with fonts, body, and

message text, so that you end up with a letter similar to the following example. *Do not* enter the variable field names manually. Add the variable fields as instructed in step 8.

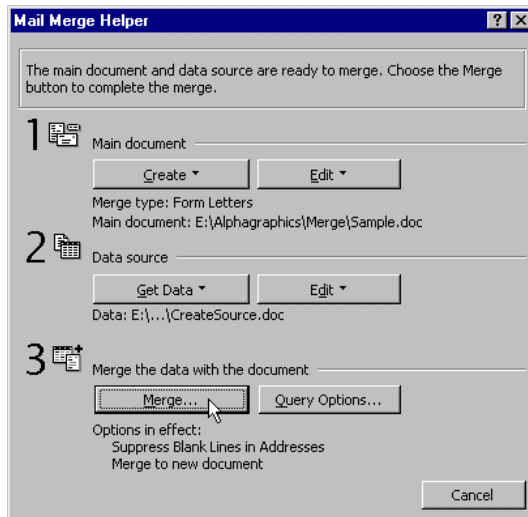


- To add a variable field, move your cursor to the position in the letter where you want the field to be inserted. Then click the **Insert Merge Field** button and select the name of the field to be inserted at that position. The dropdown menu lists all of the fields that were specified in step 5b. Repeat this for the remainder of the fields, inserting each field into its appropriate position in the letter.

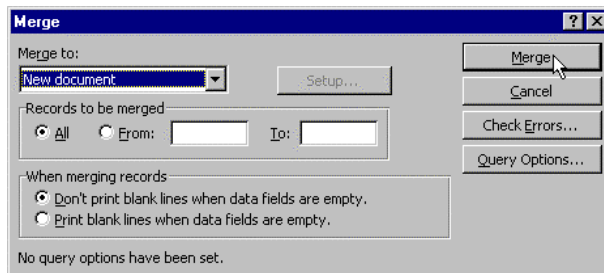


- When you have finished composing the form letter and have added all of the variable fields, click **Tools** in the menu bar, and then click **Mail Merge** to open the Mail Merge Helper dialog box again. You are now going to merge the form letter with the source data.

10. In the Mail Merge Helper dialog box click the **Merge...** button.

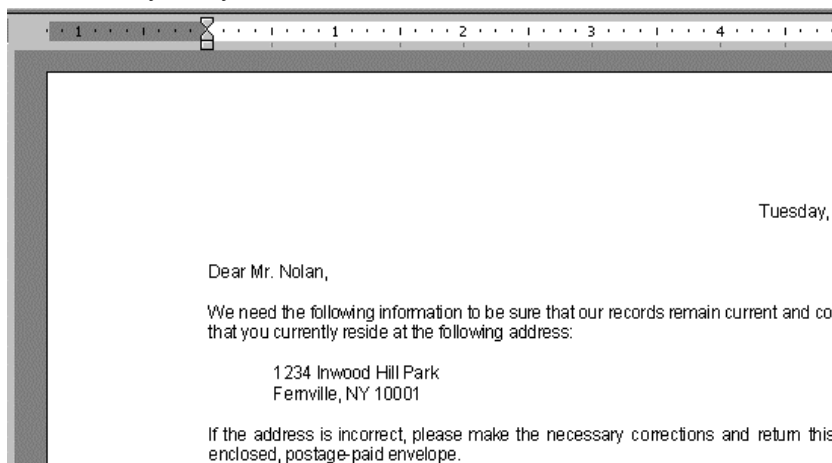


11. In the Merge dialog box, be sure that **New Document** is specified in the *Merge to:* field, and then click the **Merge** button.



When the merge is completed, a new Word document will be displayed, including all of your merged data. The document will contain the same number of pages (in this case, individual form letters) as records you entered in step 5b.

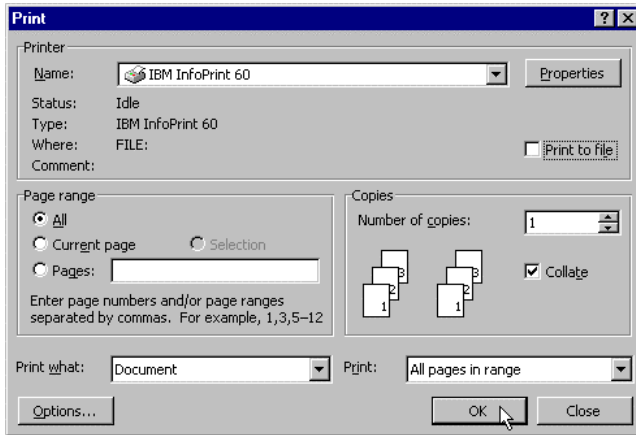
12. Click **File** in the menu bar, and then click **Save As...** to save the merged file under the name and directory that you want.



13. To create the PostScript file needed to print this document using your Infoprint system, click **File** in the menu bar, and then click **Print....**

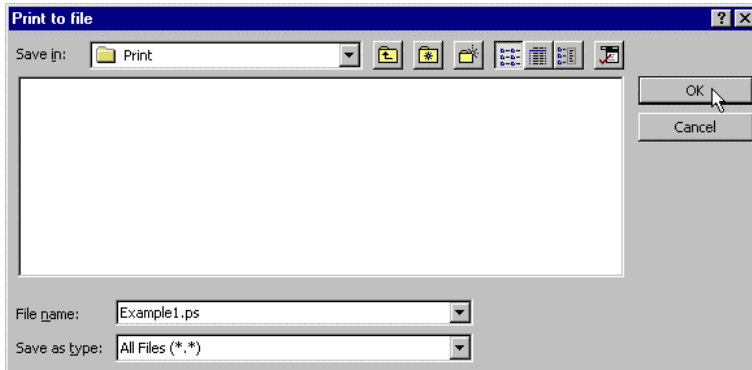
14. In the Print dialog box:

- Specify the name of your IBM Infoprint 60 printer
- Click the **OK** button.



15. In the Print to File dialog box:

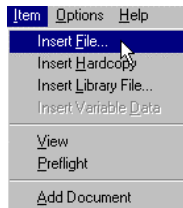
- In the *Save in:* field, specify a location for the output PostScript file. The file needs to be stored in a location where it can be accessed from Infoprint Submit.
- In the *File name:* field, specify a name for the PostScript file, giving it a file type or extension of **ps**.
- In the *Save as type:* field, specify **All Files (*.*)**.
- Click the **OK** button.



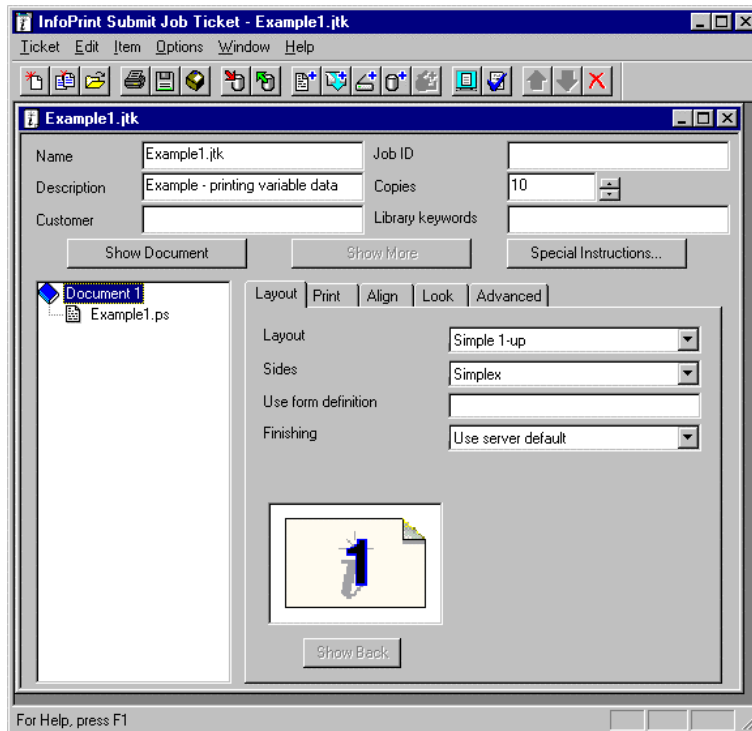
Printing the form letters

To print the merged form letters:

1. Open **Infoprint Submit**.
2. In the main Infoprint Submit window:
 - Click **Item** in the menu bar, and then click **Insert File....**
In the Select Files dialog box, locate and specify the PostScript file for the form letters you just created.

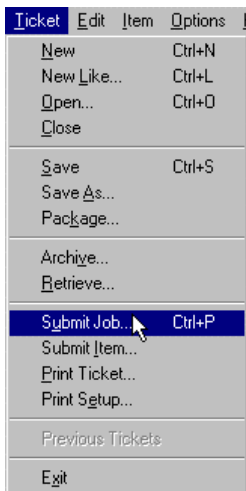


- Enter a name and Job ID for this print job, and specify the number of copies you want printed.

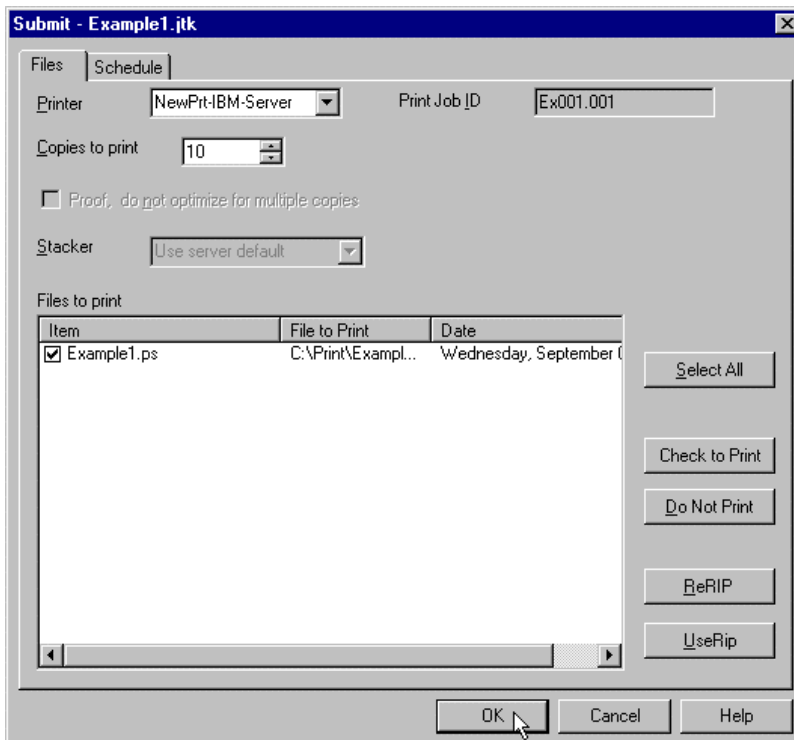


- Specify any of the Layout, Print, Align, Look, and Advanced options that you want to use for this job. For this example, since we're only printing a few copies of a letter, we specified a Simple 1-up layout, and printed it Simplex. We accepted the default for all other options.

3. Click **Ticket** in the menu bar, and then click **Submit Job....**



4. In the Submit dialog box, specify the printer where you want to output the form letters, and any other options you want to use for Files or Schedule.



5. Click the **OK** button to submit the job for printing.