

## **User Guide**

# **GALLEYMASTER MM 1.0**

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# INTRODUCTION

**W**elcome to GalleyMaster MM – a powerful new tool to add mail merge and variable data publishing features to Adobe PageMaker. With GalleyMaster MM, you can take information from a database and output it as a part of your PageMaker document.

GalleyMaster MM is a PageMaker plug-in. Plug-ins add functionality and features to PageMaker. Plug-ins fall into two categories, loadable plug-ins and IAC applications. An example of a loadable plug-in would be the Running Headers & Footers plug-in available from the Utilities -> Plug-ins menu in PageMaker. To start that plug-in you select it from the menu in PageMaker. GalleyMaster MM is an IAC (Inter-Application Communication) application, the second type of plug-in. It is not started from the Utilities -> Plug-ins menu. It is a standalone application that you start like any other application, but it requires PageMaker to perform many of its functions. You need to have PageMaker installed and running on your computer to use GalleyMaster MM. GalleyMaster MM allows you to take your database information and integrate into a PageMaker document. In GalleyMaster MM you insert the field names of your database into your PageMaker document, and the contents of those fields are inserted with all of the formatting intact. With PageMaker and GalleyMaster MM, the options for publishing your database are almost limitless.

## **ABOUT THIS MANUAL**

Before using this user guide, you will need to install GalleyMaster MM following the instructions given in the GalleyMaster MM 1.0 Getting Started book. You will also need to have PageMaker installed on your computer. GalleyMaster MM will not operate without PageMaker installed.

The GalleyMaster MM user guide provides detailed information about GalleyMaster MM features and commands, as well as a hands on tutorial to give you some familiarity with GalleyMaster MM features. This book is designed to be a reference tool with your everyday work with GalleyMaster MM.

Chapter 1 reviews fundamental techniques you'll use in your work with GalleyMaster MM, as well as an orientation to the program interface.

Chapter 2 is a hands on tutorial that introduces you to the basic features that will allow you to create a form letter, student ID cards and a business cards from your database.

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# CHAPTER 1: BASIC CONCEPTS

**T**his chapter describes the fundamental techniques you need to know in order to work with GalleyMaster MM once it is installed: tasks like how to open, name and save mail merge sets created with GalleyMaster MM. It also provides an orientation to the GalleyMaster MM interface and defines the terminology used in GalleyMaster MM.

## DATABASES

A database is a collection of information organized in a useful and meaningful way. For the purpose of our discussion we will define some terms. In database programs, data is broken down into distinct parts or containers of data. The largest of these containers is called a database. A database is a collection of tables or database files. Tables or database files are a collection of records. Records are a collection of fields. The fields are what actually contain the data. The data contained in a field can be a name, address, phone number, part number, picture, text file or anything else that can be entered into a computer. With a database program however, you are very limited in how you can output your data. You can create reports that contain all of the the data in your database, but your tools for formatting that data are limited.

## PAGEMAKER

PageMaker is a page layout program. It gives you all the tools you need to make your documents look exactly the way you want. With PageMaker you can format your text with the highest degree of typographical accuracy possible. You can import high resolution graphics and combine the graphics with text. With PageMaker you have freedom with the formatting of your document, but making documents with large amounts of varying data is difficult. You pretty much have to type all of this in by hand, or import data that has been entered into another program. Then you have format the data manually to make it look the way you want. You can use paragraph styles to make it easier to format your data, but you cannot have more than one type style or size in a paragraph style. This is good enough for most documents, but data intensive publications tend to use different type styles in the same paragraph to make each element of information stand out for better readability.

## GALLEYMASTER MM

GalleyMaster MM allows you to merge data from a database into your PageMaker documents. It also allows you to include the file name of a graphic in your database, and have that graphic inserted into your PageMaker document. After you have created your document with GalleyMaster MM you can automatically export each of the pages of the final document to EPS, TIFF, GIF or JPEG.

## GALLEYMASTER MM INTERFACE

All of the features of GalleyMaster MM are accessed through the Main GalleyMaster MM screen that appears when you start GalleyMaster MM. We now take a look at the Main screen, and explain what all those buttons are about.

### MERGE DATA FILE

To merge data into PageMaker with GalleyMaster MM you first need to create and load a merge data file. A merge data file is a file that you set up in GalleyMaster MM from data you have exported from a database.

#### Create Merge Data File

To create a merge data file, you first export the data from your database program in tab delimited or comma delimited format. You then press the “Create” button, tell GalleyMaster MM how the data is delimited, choose the tab or comma

delimited data file to import and then you name the fields ( see figure 3). These field names are what you will insert into your PageMaker document between the merge delimiters <<fieldname>> like that. The field names are limited to 8 alpha-numeric characters. After you have named all the fields, press the “Create Merge Set” button, and then choose a location to save the merge data file to. All merge data file for GalleyMaster MM have a file extension of MST.

#### Load Merge Data File

After you have created a merge data file you can load it by pressing the “Load” button in the main GalleyMaster MM screen. This will load the merge data file and display the name of the merge file and the number of records in the file.

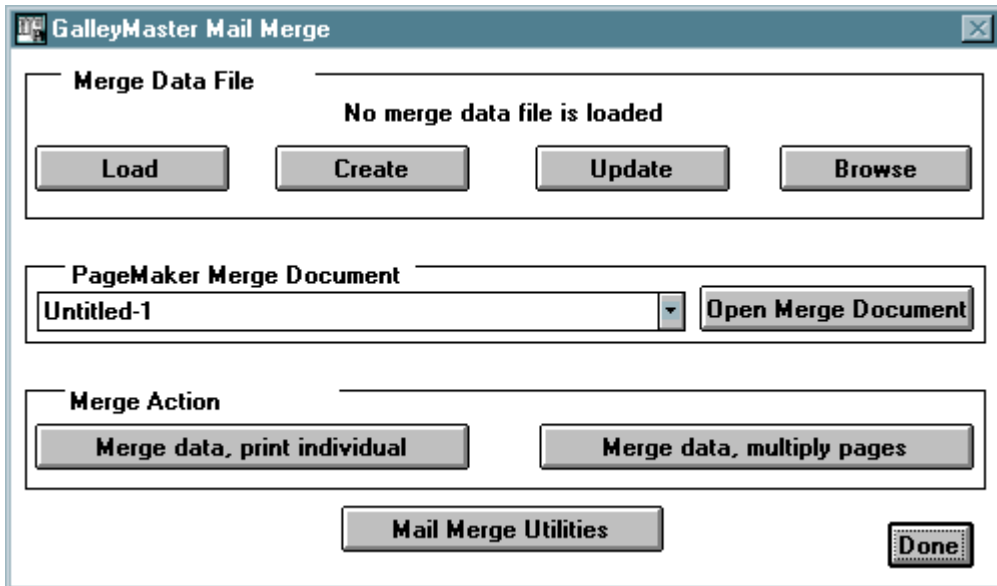


Figure 1: The Main GalleyMaster MM Screen. This appears when you start GalleyMaster MM.

### Update Merge Data File

You can update a merge data set you have created in the past by pressing the update button in the main screen of GalleyMaster MM. This will allow you to either replace the contents of the merge set with data from a new tab or comma delimited text file, or append the contents of that file to the current merge set.

### Browse Merge Data File

After you have created a merge data file, you can examine and modify the contents of the file by pressing the browse button.

### PAGEMAKER MERGE DOCUMENT

To use GalleyMaster MM to merge data into your PageMaker document, you need to create the document and then choose it in GalleyMaster MM. GalleyMaster MM provides a pop-up menu with a list of all of the open PageMaker documents, and also allows you to open the document from within GalleyMaster MM by pressing the “Open Merge Document” button.

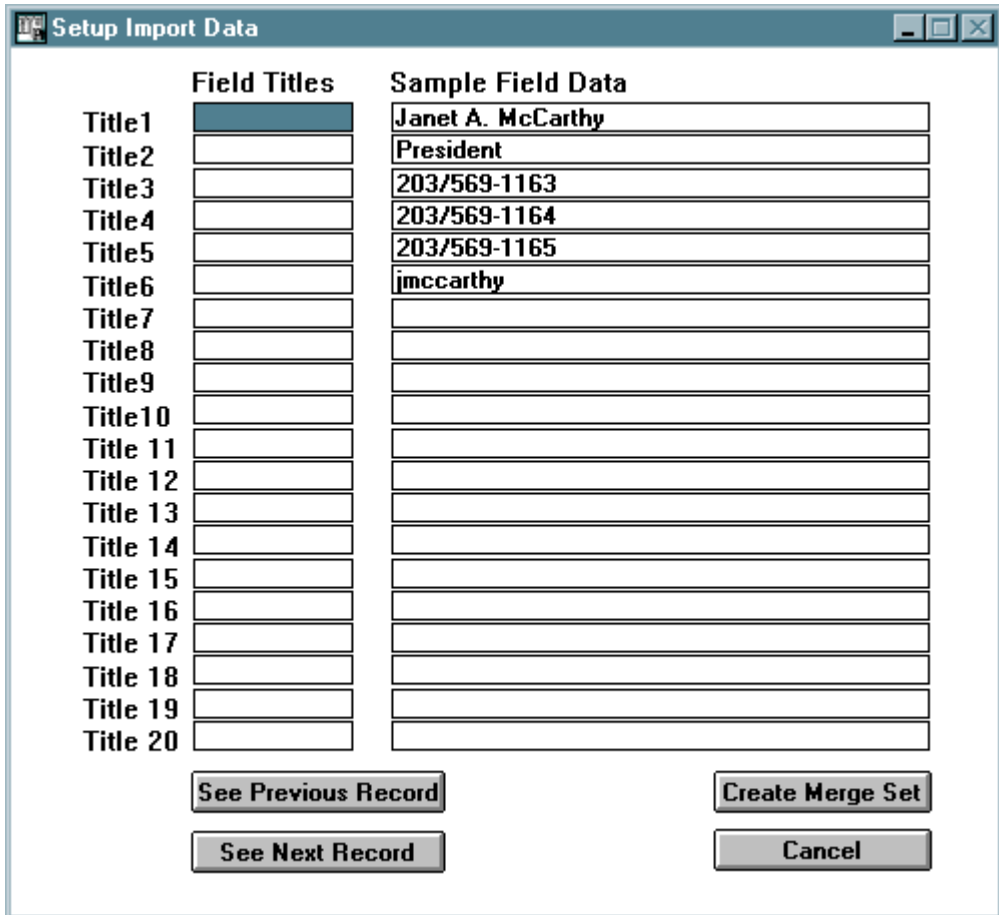


Figure 2: The Mail Merge Data setup Screen. This appears when you press the “Create” button.

**Creating the PageMaker Merge document.**

To set up a PageMaker document to have data merged into it with GalleyMaster MM, all you need to do is include the field name from the merge file inside the merge delimiters. For text information, you would use delimiters like these << >> and put the field name inside the delimiters like this <<fieldname>>. The text in the field will be inserted into the PageMaker document. If it is a graphic file name in the field you would use delimiters like these [[ ]] and put the field name inside the delimiters like this [[fieldname]]. The graphic will be inserted as an inline graphic.

**MERGING THE DATA:**

After you set up the merge data file, and prepare your PageMaker merge document, you are ready to merge the data. There are two different ways to merge the data. You can merge the data and print the pages individually as they are merged, or you can merge the data and multiply the pages.

**Merge Data, Print individual:**

To merge the data and print the pages individually, you just press the “Merge Data, Print Individual” button in the main GalleyMaster MM screen. This will merge one record from the merge data file, print and then merge the next record, print, etc.

**Merge Data, Multiply Pages**

Merging the data and multiplying the pages allows you to merge the data and multiply the pages into one or more PageMaker documents. Since PageMaker has a 999 page limit (and it’s a bad idea to make documents over a few hundred pages anyway) , and your merge data file may have thousands of records, you can split up the final document into as many separate documents as you like by setting the maximum number of pages for each multiplied document. See figure 3 for the the dialog screen.

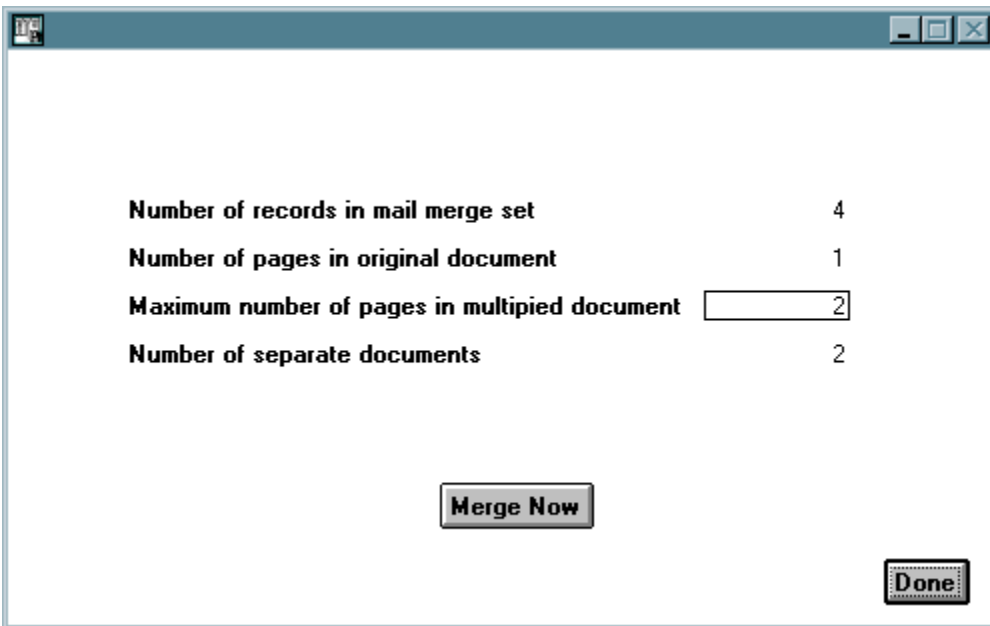


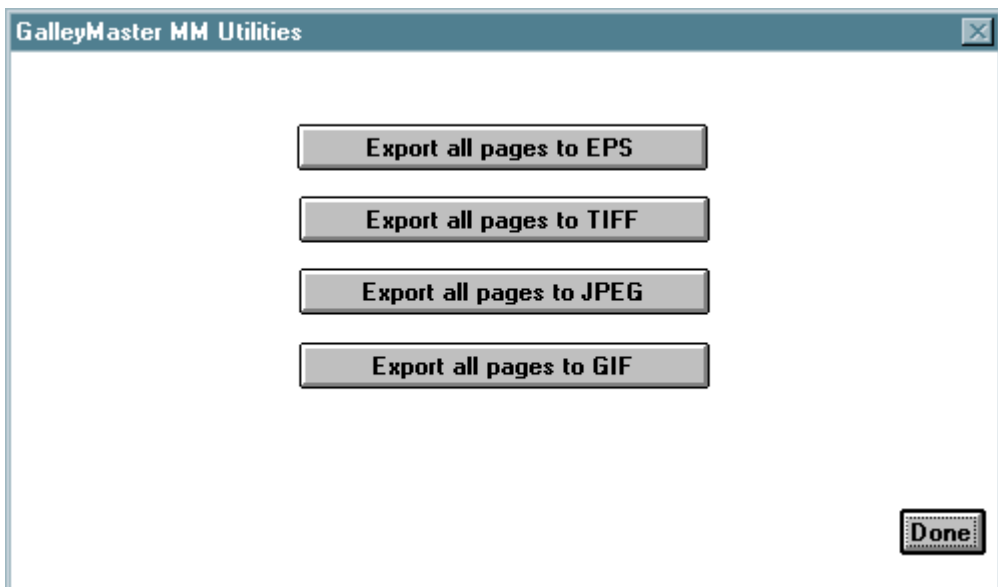
Figure 3: Multiplied document setup screen. This appears when you press the “Merge Data, Multiply Pages” Button in the main GalleyMaster XD Screen. (See figure 1).

## MAIL MERGE UTILITIES

Galley Master MM has some utilities to convert pages to several different graphic formats. You can convert PageMaker pages to EPS, TIFF, JPEG and GIF. You can reach these functions by pressing the “Mail Merge Utilities” button. These utilities would be useful if you needed to create a bunch of graphics that contained variable text, like graphical classification headings for classified ads, catalogs, or directories. You would do a mail merge from your list of classifications into a PageMaker document that had a nice border or something, run the graphic converter, and you would have a whole bunch of little EPS's, TIFF's, JPEG's or GIF files. You could then use a tool like GalleyMaster XD, and have all of these headings flow into your document as inline graphics.

## Export all pages to EPS

To export all of your pages to EPS, press the “Export all pages to EPS” button in the Mail Merge Utilities Screen. Make sure your PageMaker document is open, choose a PostScript printer in the pop-up menu and then choose a location for the files to be stored and a filename for the graphics. The filename will be incremented for each page that is printed to EPS. For example, if the filename you chose was “Thefile” the filenames for each graphic, beginning with page 1 would be Thefile1.eps, Thefile2.eps, Thefile3.eps, etc.



*Figure 4: Mail Merge Utilities screen. This appears when you press the “Mail Merge Utilities” Button in the main GalleyMaster XD Screen. (See figure 1).*

**Export all pages to TIFF**

To export all of your pages to TIFF, press the “Export all pages to TIFF” button in the Mail Merge Utilities screen. Make sure your PageMaker document is open, choose a PostScript printer in the pop-up menu. Then choose a location for the files to be stored and a filename for the graphics. The filename will be incremented for each page that is printed to TIFF. For example, if the filename you chose was “Thefile” the filenames for each graphic, beginning with page 1 would be Thefile1.tif, Thefile2.tif, Thefile3.tif, etc. You can then choose the TIFF options from the pop-up lists at the bottom of the screen. Press the the “Export Individual pages to TIFF files” button and the pages will be converted to TIFF files.

**Export all pages to JPEG**

To export all of your pages to JPEG, press the “Export all pages to JPEG” button in the Mail Merge Utilities screen. Make sure your PageMaker document is open, choose a PostScript printer in the pop-up menu. Then choose a location for the files to be stored and a filename for the graphics. The filename will be incremented for each page that is printed to JPEG. For example, if the filename you chose was “Thefile” the filenames for each graphic, beginning with page 1 would be Thefile1.jpg, Thefile2.jpg, Thefile3.jpg, etc. You can then choose the JPEG options from the pop-up lists at the bottom of the screen. Press the the “Export Individual pages to JPEG files” button and the pages will be converted to JPEG files.

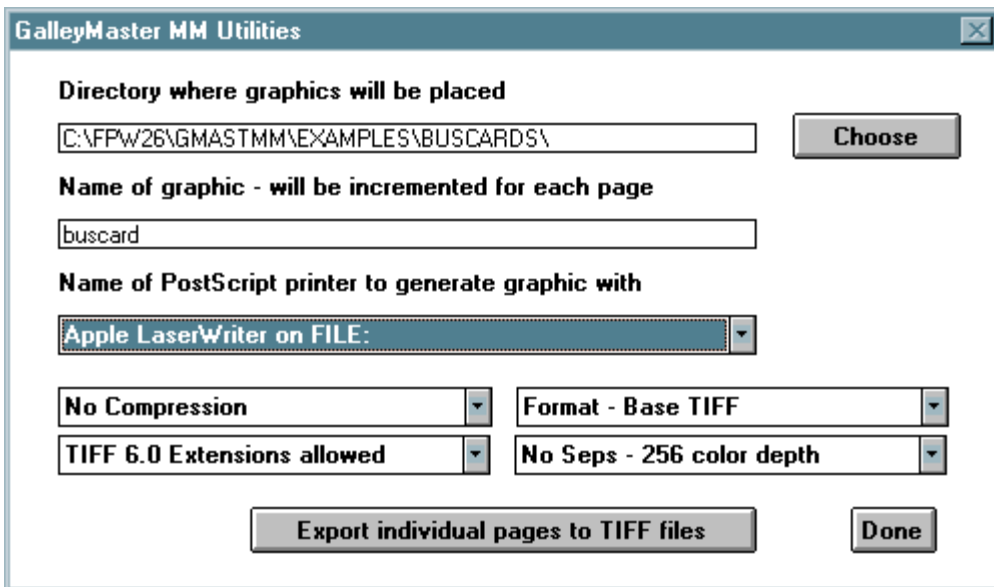


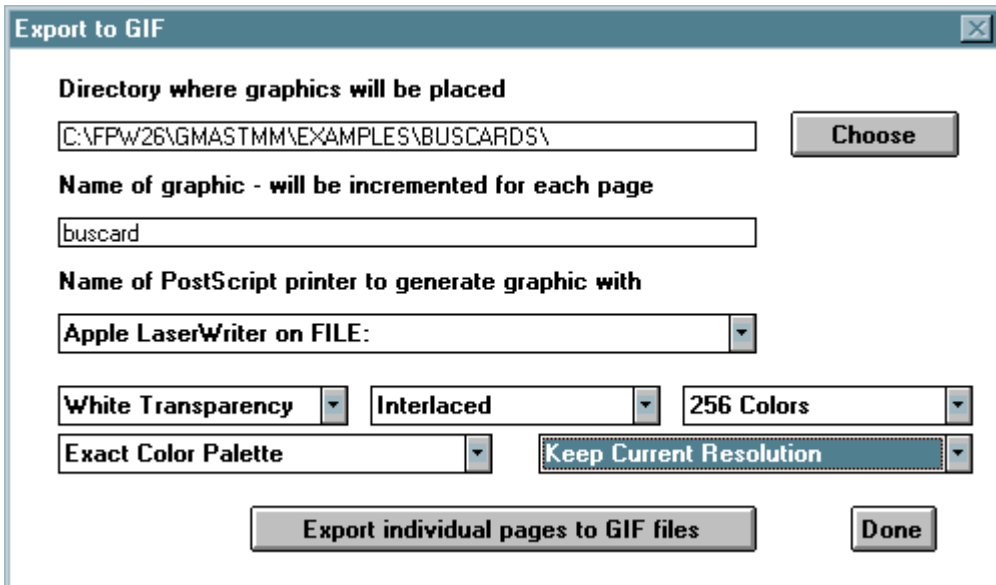
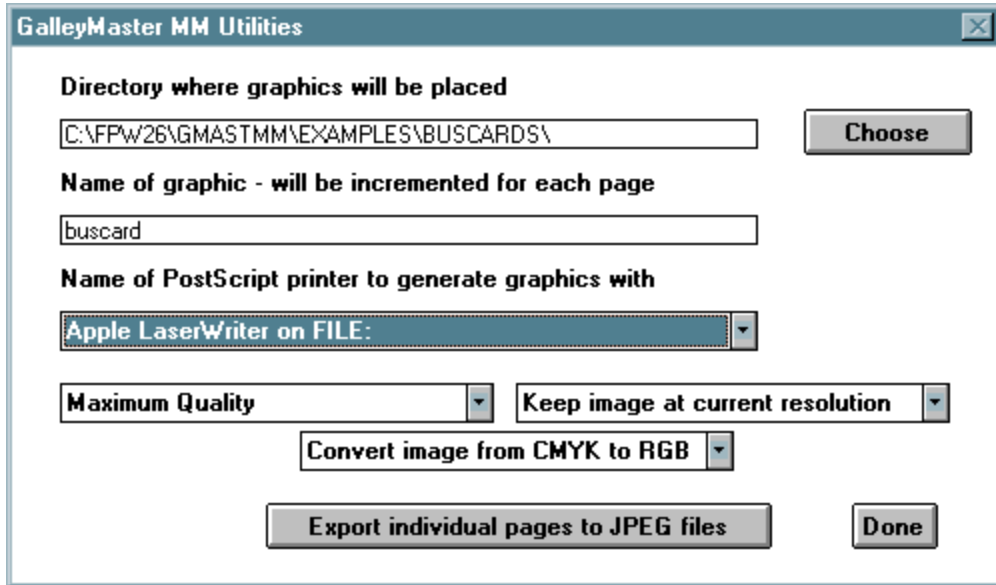
Figure 5: Export all pages to TIFF screen. This screen appears when you press the “Export all pages to TIFF” button in the Mail Merge Utility screen.

Figures 6 and 7: (Next Page) Export all pages to JPEG and Export all pages to GIF screens. These screens appear when you press the “Export all pages to JPEG” or “Export all pages to GIF” buttons in the Mail Merge Utility screen.

## Export all pages to GIF

To export all of your pages to GIF, press the “Export all pages to GIF” button in the Mail Merge Utilities screen. Make sure your PageMaker document is open, choose a PostScript printer in the pop-up menu. Then choose a location for the files to be stored and a filename for the graphics. The filename will be incremented

for each page that is printed to GIF. For example, if the filename you chose was “Thefile” the filenames for each graphic, beginning with page 1 would be Thefile1.gif, Thefile2.gif, Thefile3.gif, etc. You can then choose the GIF options from the pop-up lists at the bottom of the screen. Press the the “Export Individual pages to GIF files” button and the pages will be converted to GIF files.



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# CHAPTER 2: TUTORIAL

The best way to learn GalleyMaster MM is to try it yourself. This chapter is a tutorial that guides you through some basic skills as you create several different types of documents with GalleyMaster MM.

You will learn how to:

- Create form letter with merged name and address info from a database.
- Create student ID cards with photos and address info from a database.
- Create multiple business card layouts from a template with all of the contact info coming from a database.

If you did a full installation of GalleyMaster MM a folder named “Examples” was created in the GMASTMM folder that contains sample tab and comma delimited text files and PageMaker document templates. There is a separate folder for each of the examples. We will use those files as we go through these tutorials.

## EXAMPLE 1: FORM LETTER

This is the simplest example of doing a mail merge with GalleyMaster MM. You can see the beginning document in PDF format by viewing `formstrt.pdf` and you can see the final result by viewing `formletr.pdf`. We will go step by step through the procedures of setting up this document. You should follow along, click for click, as this will make it easier for you to learn the program.

### STEP 1: CREATE MERGE DATA FILE

The first thing you need to do is start GalleyMaster MM. If PageMaker is not running, GalleyMaster XD will ask you to locate it. The first screen that appears is the GalleyMaster MM Main screen. Click the “Create” button in the Merge Data File

section of the screen. You will then see a screen that asks for the field delimiter for the data that was exported from the database. The sample data was exported from the database in tab delimited format, so choose “Tab” in the popup menu next to “Import Data delimited with:”. The text file that was exported from the database is in the “Formletr” folder and is called “Formletr.txt”. After you have selected the field delimiter, press the “OK” button. After you do that, a dialog box will appear asking for the data file that you want to set up. Navigate to the “Formletr” folder and select the data file “Formletr.txt”. After you select this file the “Setup Import Data” screen will appear. In this screen you need to label the fields because you will be using these field names in your PageMaker merge template. The database this came from had six fields. The field names were `firstnam`, `lastnam`, `address`, `city`, `state`, and `zip`. The field labels have to be 8 characters or less, so our original field names will be OK. After you have labeled the fields, press the “Create Merge Set” button. A dialog box will appear asking you where you want to save the merge data file and what you want to call it. It should already have “Formletr” chosen for the name, and you should navigate to the “Formletr” folder and save the merge data file there.

### STEP 2: LOAD THE MERGE DATA FILE

After you have created your merge data file, you need to load it before you can perform any merge functions. To load a merge data file, press the “Load” button in the Merge Data File section of the screen. This will pull up a dialog box asking for the location of the merge file. Navigate to the “Formletr” folder and open the file “Formletr.mst”. Then you will see in the Merge Data File section of the screen the name of the merge data file and the number of records in it.

### STEP 3: CREATE AND LOAD PAGEMAKER MERGE DOCUMENT.

After you have loaded the merge data file you need to create and load the PageMaker merge document. This is simply a PageMaker document that has all of the data field names from the merge data file inserted inside the appropriate delimiters so the data from the merge data file will be merged into the PageMaker document. The delimiters used in GalleyMaster XD are << >> and [[ ]]. The << >> delimiters are used for fields in the merge data file that contain text, like a name, address, phone number, etc. The [[ ]] delimiters are used for fields that contain the file name for a graphic. For graphics, you can either include just the file name, like “thefile.eps” if the file is in the same directory as the PageMaker merge document, or the full path to the file like “C:\mergproj\graphics\thefile.eps”. In this first example, we are only using text fields. You should now open the example PageMaker Merge document. It is called Formletr.P65 if you are using PageMaker 6.5, or Formletr.PM6 if you are using PageMaker 6.0. Press the “Open Merge Document” button on the main screen, navigate to the “c:\gmastmm\examples\formletr” directory and open the appropriate document. It will then appear in the pop-up list and will be loaded and available for merging the data from the merge data file.

### STEP 4: MERGE THE DATA

After you have loaded the merge data file and the PageMaker merge document, you are ready to merge the data. There are two different ways to merge the data. You can merge the data and print the pages individually as they are merged, or you can merge the data and multiply the pages for printing later. For this example we are going to merge the data and multiply the pages. Press the “Merge data, multiply pages” button and you will get a dialog that allows you to split up the merged document into smaller documents as it is merged. This merge data file only contains 4 records, so we do not need to do that. Press the “Merge Now” button and the data will be merged. You will see a progress bar showing the status of the merge, and a

pop-up notice when it is done. Switch to PageMaker, and you will see the data has been merged.

### EXAMPLE 2: STUDENT ID CARDS

This example will create student ID cards from a database file. You can see the beginning document in PDF format by viewing idstart.pdf and you can see the final result by viewing idcards.pdf. This example will show how to include a picture file in your merge data file and PageMaker merge document.

### STEP 1: CREATE MERGE DATA FILE

The first thing you need to do is start GalleyMaster MM. If PageMaker is not running, GalleyMaster XD will ask you to locate it. The first screen that appears is the GalleyMaster MM Main screen. Click the “Create” button in the Merge Data File section of the screen. You will then see a screen that asks for the field delimiter for the data that was exported from the database. The sample data was exported from the database in tab delimited format, so choose “Tab” in the popup menu next to “Import Data delimited with:”. The text file that was exported from the database is in the “Idcards” folder and is called “Idcards.txt”. After you have selected the field delimiter, press the “OK” button. After you do that, a dialog box will appear asking for the data file that you want to set up. Navigate to the “Idcards” folder and select the data file “Idcards.txt”. After you select this file the “Setup Import Data” screen will appear. In this screen you need to label the fields because you will be using these field names in your PageMaker merge template. The database this came from had six fields. The field names were firstnam, lastnam, address, city, state, zip and photo. The field labels have to be 8 characters or less, so our original field names will be OK. After you have labeled the fields, press the “Create Merge Set” button. A dialog box will appear asking you where you want to save the merge data file and what you want to call it. It should already have “Idcards” chosen for the name, and you should navigate to the “Idcards”

folder and save the merge data file there.

## **STEP 2: LOAD THE MERGE DATA FILE**

After you have created your merge data file, you need to load it before you can perform any merge functions. To load a merge data file, press the “Load” button in the Merge Data File section of the screen. This will pull up a dialog box asking for the location of the merge file. Navigate to the “Idcards” folder and open the file “Idcards.mst”. Then you will see in the Merge Data File section of the screen the name of the merge data file and the number of records in it.

## **STEP 3: CREATE AND LOAD PAGEMAKER MERGE DOCUMENT.**

After you have loaded the merge data file you need to create and load the PageMaker merge document. This is simply a PageMaker document that has all of the data field names from the merge data file inserted inside the appropriate delimiters so the data from the merge data file will be merged into the PageMaker document. The delimiters used in GalleyMaster XD are << >> and [[ ]]. The << >> delimiters are used for fields in the merge data file that contain text, like a name, address, phone number, etc. The [[ ]] delimiters are used for fields that contain the file name for a graphic. For graphics, you can either include just the file name, like “thefile.eps” if the file is in the same directory as the PageMaker merge document, or the full path to the file like “C:\mergproj\graphics\thefile.eps”. In this first example, we are using text fields and graphic fields. You should now open the example PageMaker Merge document. It is called Idcards.P65 if you are using PageMaker 6.5, or Idcards.PM6 if you are using PageMaker 6.0. Press the “Open Merge Document” button on the main screen, navigate to the “c:\gmastmm\examples\Icards” directory and open the appropriate document. It will then appear in the pop-up list and will be loaded and available for merging the data from the merge data file.

## **STEP 4: MERGE THE DATA**

After you have loaded the merge data file and the PageMaker merge document, you are ready to merge the data. There are two different ways to merge the data. You can merge the data and print the pages individually as they are merged, or you can merge the data and multiply the pages for printing later. For this example we are going to merge the data and multiply the pages. Press the “Merge data, multiply pages” button and you will get a dialog that allows you to split up the merged document into smaller documents as it is merged. This merge data file only contains 4 records, so we do not need to do that. Press the “Merge Now” button and the data will be merged. You will see a progress bar showing the status of the merge, and a pop-up notice when it is done. Switch to PageMaker, and you will see the data has been merged.

## **EXAMPLE 3: MULTIPLE BUSINESS CARD LAYOUTS FROM DATABASE**

This example will create multiple business card layouts from a database file. This would be useful if you had to create business card layouts for many people in the same company. You can see the beginning document in PDF format by viewing busstart.pdf and you can see the final result by viewing buscards.pdf. This example will show how to include a picture file in your merge data file and PageMaker merge document.

### **STEP 1: CREATE MERGE DATA FILE**

The first thing you need to do is start GalleyMaster MM. If PageMaker is not running, GalleyMaster XD will ask you to locate it. The first screen that appears is the GalleyMaster MM Main screen. Click the “Create” button in the Merge Data File section of the screen. You will then see a screen that asks for the field delimiter for the data that was exported from the database. The sample data was exported from the database in tab delimited format, so choose “Tab” in the popup menu next to “Import Data delimited with:”. The text file that was exported from the database is in the “Buscards”

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folder and is called “Buscards.txt”. After you have selected the field delimiter, press the “OK” button. After you do that, a dialog box will appear asking for the data file that you want to set up. Navigate to the “Buscards” folder and select the data file “Buscards.txt”. After you select this file the “Setup Import Data” screen will appear. In this screen you need to label the fields because you will be using these field names in your PageMaker merge template. The database this came from had six fields. The field names were name, title, phone, fax, mobile, email. The field labels have to be 8 characters or less, so our original field names will be OK. After you have labeled the fields, press the “Create Merge Set” button. A dialog box will appear asking you where you want to save the merge data file and what you want to call it. It should already have “Buscards” chosen for the name, and you should navigate to the “Buscards” folder and save the merge data file there.

### STEP 2: LOAD THE MERGE DATA FILE

After you have created your merge data file, you need to load it before you can perform any merge functions. To load a merge data file, press the “Load” button in the Merge Data File section of the screen. This will pull up a dialog box asking for the location of the merge file. Navigate to the “Buscards” folder and open the file “Buscards.mst”. Then you will see in the Merge Data File section of the screen the name of the merge data file and the number of records in it.

### STEP 3: CREATE AND LOAD PAGEMAKER MERGE DOCUMENT.

After you have loaded the merge data file you need to create and load the PageMaker merge document. This is simply a PageMaker document that has all of the data field names from the merge data file inserted inside the appropriate delimiters so the data from the merge data file will be merged into the PageMaker document. The delimiters used in GalleyMaster XD are << >> and [[ ]]. The << >> delimiters are used for fields in the merge data file

that contain text, like a name, address, phone number, etc. The [[ ]] delimiters are used for fields that contain the file name for a graphic. For graphics, you can either include just the file name, like “thefile.eps” if the file is in the same directory as the PageMaker merge document, or the full path to the file like “C:\mergproj\graphics\thefile.eps”. In this first example, we are using only text fields. You should now open the example PageMaker Merge document. It is called Buscards.P65 if you are using PageMaker 6.5, or Buscards.PM6 if you are using PageMaker 6.0. Press the “Open Merge Document” button on the main screen, navigate to the “c:\gmastmm\examples\Buscards” directory and open the appropriate document. It will then appear in the pop-up list and will be loaded and available for merging the data from the merge data file.

### STEP 4: MERGE THE DATA

After you have loaded the merge data file and the PageMaker merge document, you are ready to merge the data. There are two different ways to merge the data. You can merge the data and print the pages individually as they are merged, or you can merge the data and multiply the pages for printing later. For this example we are going to merge the data and multiply the pages. Press the “Merge data, multiply pages” button and you will get a dialog that allows you to split up the merged document into smaller documents as it is merged. This merge data file only contains 4 records, so we do not need to do that. Press the “Merge Now” button and the data will be merged. You will see a progress bar showing the status of the merge, and a pop-up notice when it is done. Switch to PageMaker, and you will see the data has been merged.

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