

Data Merge to unique names

- » Merge to PDF or InDesign files
- » Uses information from database to create the filenames
- » Creates web-safe filenames
- » Warns for duplicate filenames, missing images or overset text
- » Select one record, a range, or all records in a database



Installation

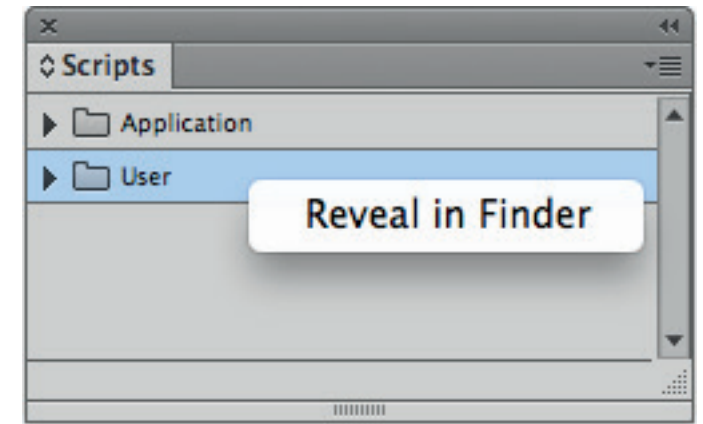
Once the file has been downloaded, launch Adobe InDesign and open the scripts palette. (found under the **Window** menu, then **Utilities**, then **Scripts**).

Once the Scripts Palette is open, right-click (or control-click) the **User** folder and select the prompt **Reveal in Finder** (Mac OS) or **Reveal in Explorer** (Windows). This will open the **User** folder either in Finder or Windows Explorer.

From here, drag and drop the downloaded script into the **User** folder.

Return to Adobe InDesign and unfold the User folder in the Scripts Palette.

The script has now been installed into this folder.



Before using this script

» **This works using single record per page export only.**

That is, the script will not work as intended with Data Merge files prepared using the multiple records per page.

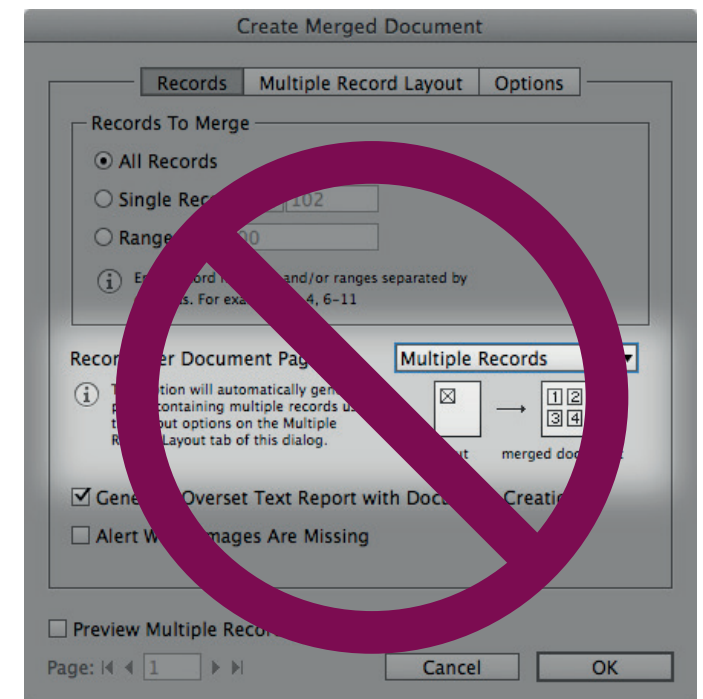
Users do so at their own risk.

» **Users should have a basic understanding of how to use Adobe InDesign, as well as the Data Merge feature.**

This includes how to place not only text, but variable images or QR codes in a Data Merge; how to remove blank lines if empty, etc.

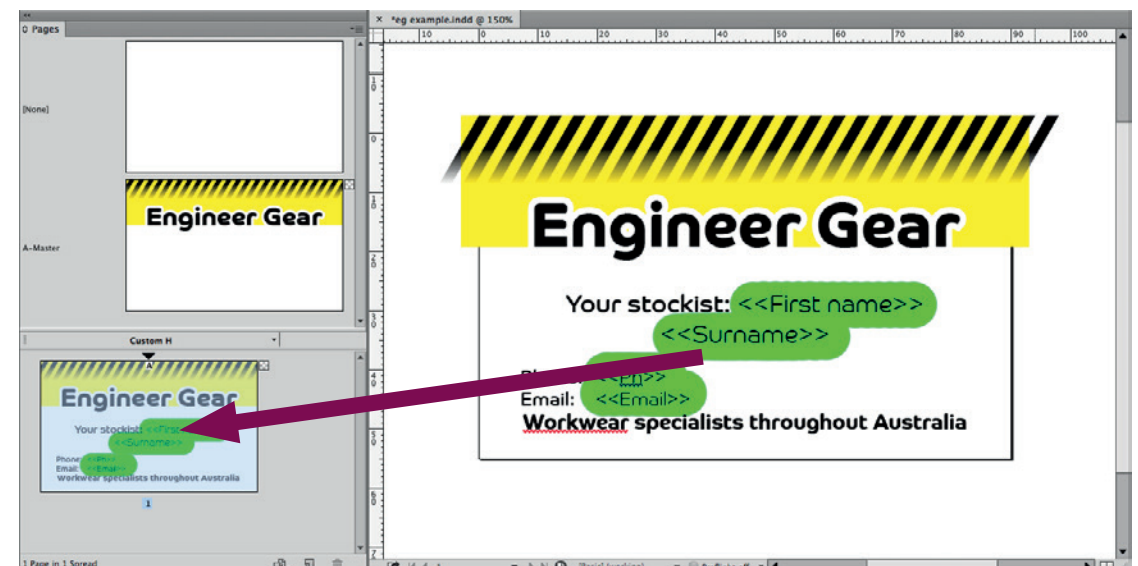
» **Field placeholders don't have to be applied to the master pages. They can be applied to the regular pages.**

» **DO NOT** rely solely on a **Document fonts** folder. Instead, use fonts that are available to the entire operating system



See the script in action

Head over to the [Colecandoo](#) Youtube™ channel to watch the script in action, along with other Data Merge and InDesign content that you may find useful.



How to use the script

- » **Have a Data Merge file already open.**

Create (or open) the Adobe InDesign file containing an appropriate text file in the Data Merge palette.

- » **Navigate to the Scripts Palette and locate the script.**

Double-click on the script to begin.

An alert may appear indicating that the file is being saved.

The user interface

- » **Select a location for the files to be saved to.**

*The script will save all files into a new folder called **results** within the folder that was selected.*

- » **Select the export format – PDF or InDesign.**

*If exporting to PDF, make sure to select a PDF Export Setting from the **Select a PDF Export Preset** dropdown field.*

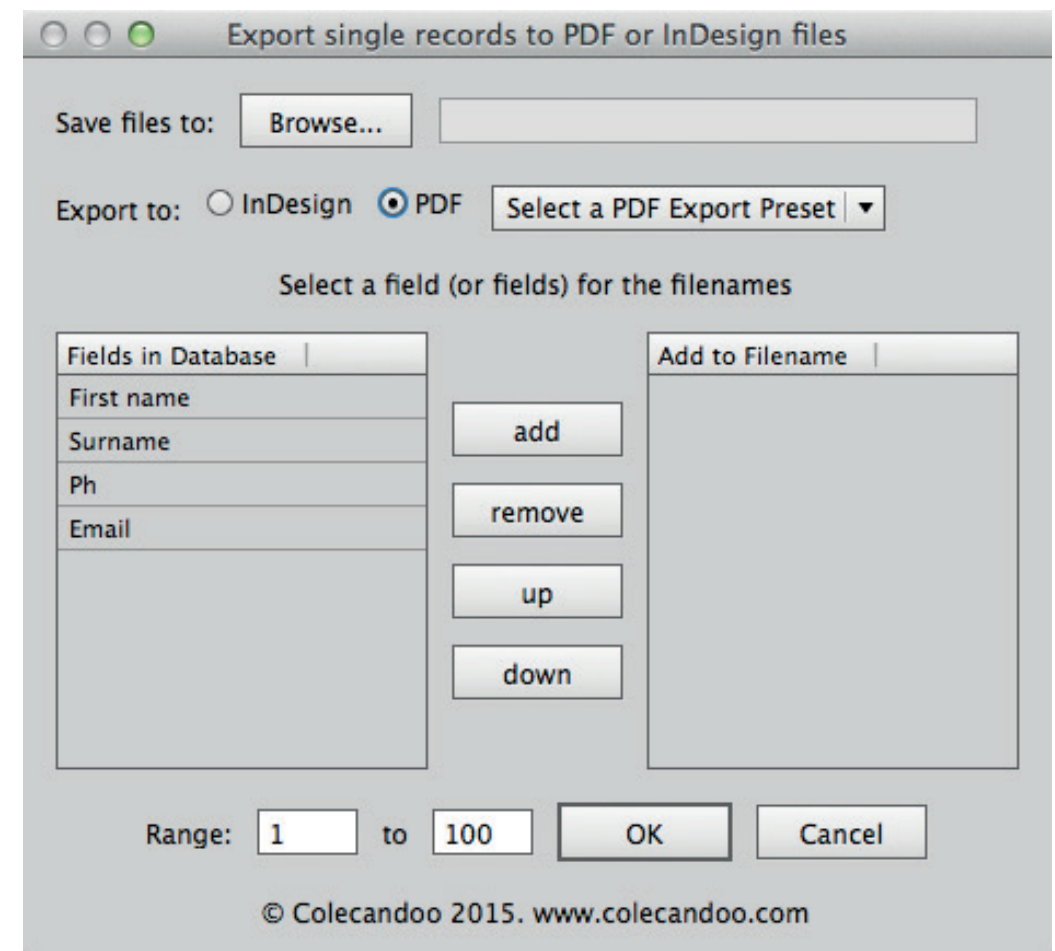
- » **Select the fields to use for the filenames.**

From here, select the **field names** to be used as filenames from the left hand column, and add them using the **add** button. Fields can be removed from the right hand column using the **remove** button, and field positions can be moved using the **up** and **down** buttons.

- » **Select the records to output.**

The default values select the complete record range.

- » **When ready, click **OK**, or click **Cancel** to exit.**

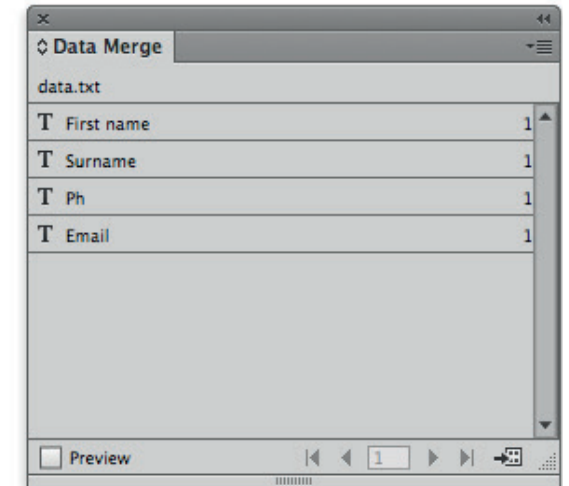


For example

This example features business cards with four fields that are used:

- » **First name**
- » **Surname**
- » **Ph**
- » **Email**

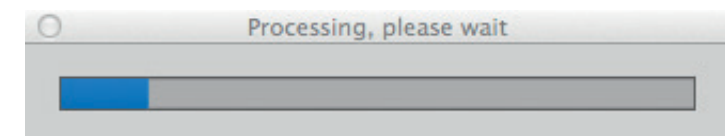
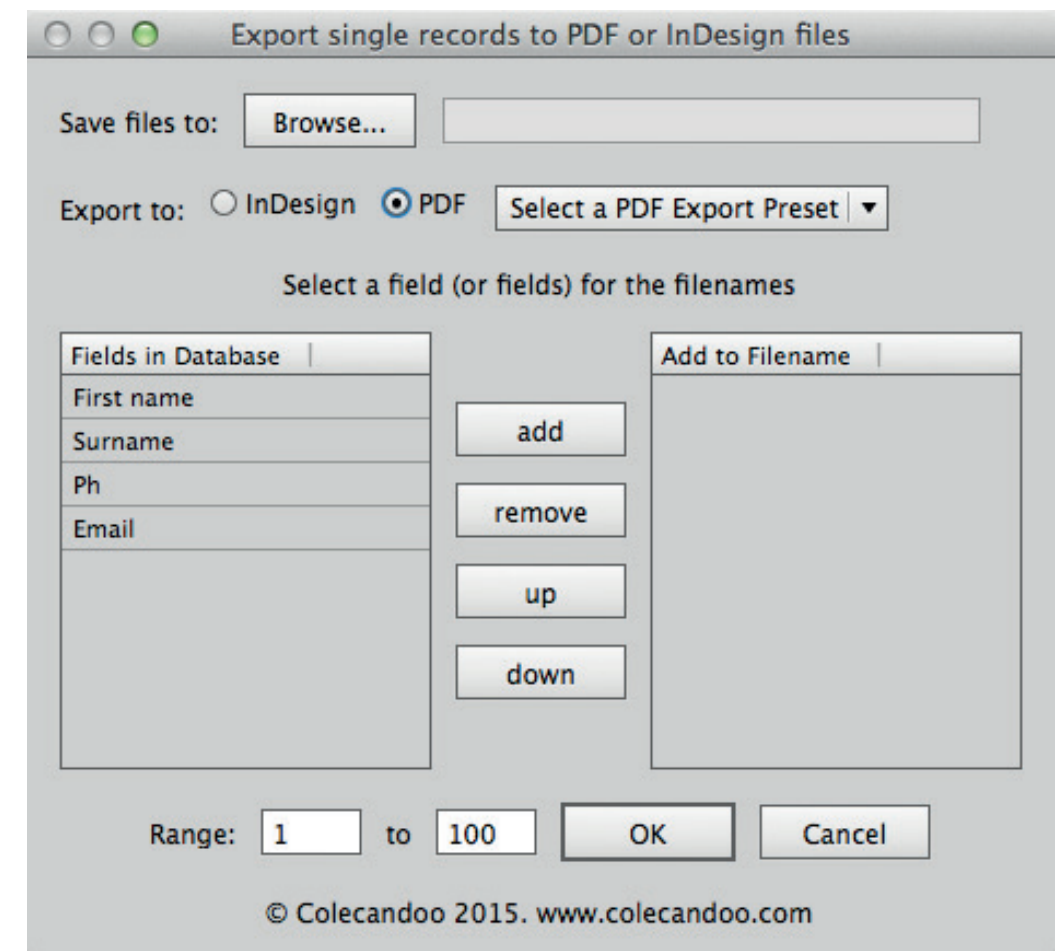
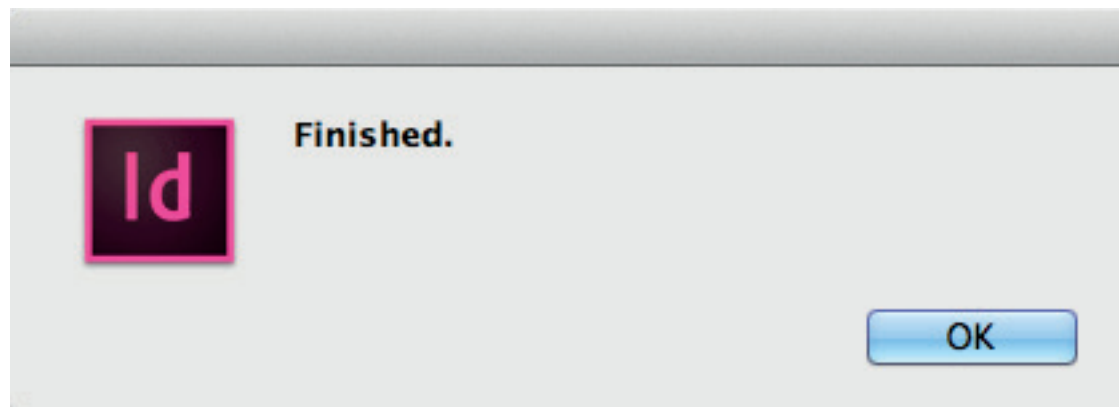
This example will create PDFs of all of the business cards with filenames based on both the First name and Surname fields.



To do this

- » **Run the script from the Scripts Palette.**
- » **Select an appropriate folder from the **Save files to** option.**
- » **Select the **PDF** radio button from the **Export to** option.**
- » **Select **First name** from the left column and then click **add**. Then click **Surname** from the left column and click **add**.**
- » **Leave the range as is and click **OK**.**

The script will now begin exporting the PDFs. If the script runs to completion with no issues, the following confirmation will appear.



The results folder

This folder contains the uniquely-named PDFs from the example.

» Something has happened to my filenames

Because the data within the database can contain characters that cannot be used for filenames, the script replaces these characters with underscores. This ensures the filenames are safe for use in the operating system and over the internet.

Characters that will be replaced with underscores are:

!	\$	@	#	%	^	&	*
()	+		~	=	`	,
{	}	[]	:	;	,	.
"	<	>	?	/	\		

For example, a possible filename **John O'Grady** becomes **John O_Grady**.

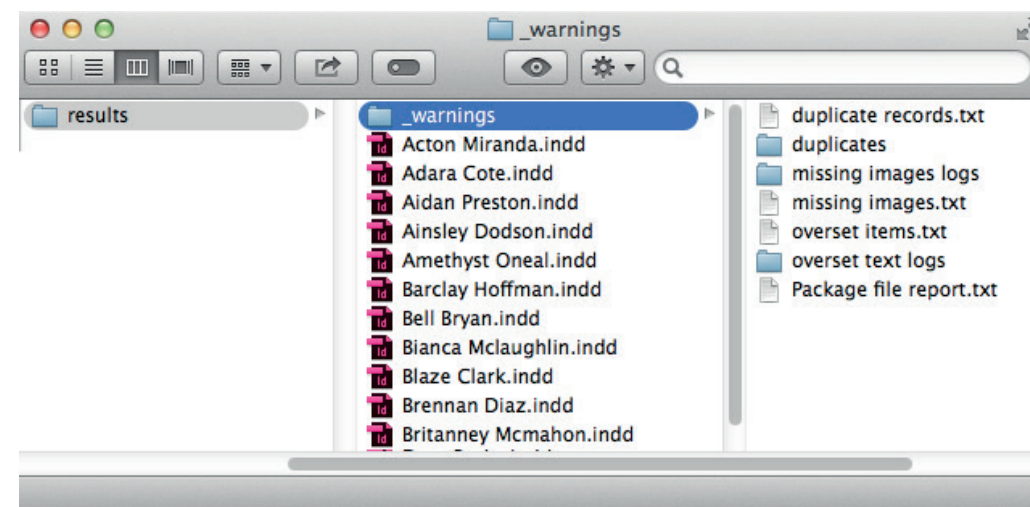
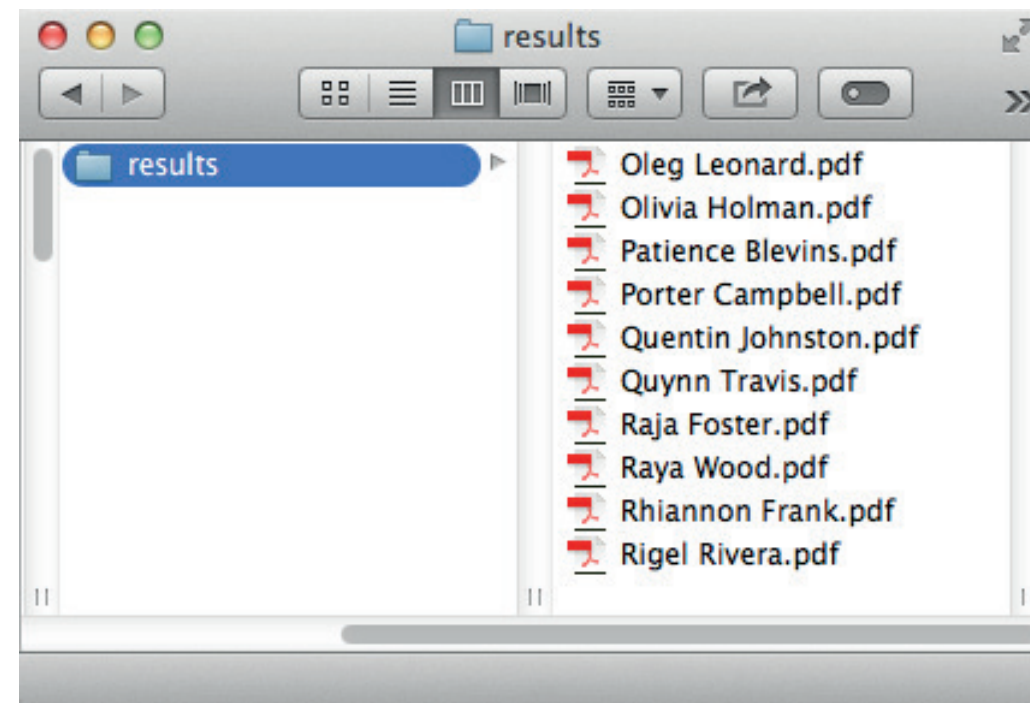
This doesn't affect foreign language characters e.g. **è ç ë ö ø ß š**

Warnings folder

If a Data Merge has issues such as missing images, overset text or duplicate filenames, a warning folder will be created that contains a summary file of the warnings, and individual logs of the affected records.

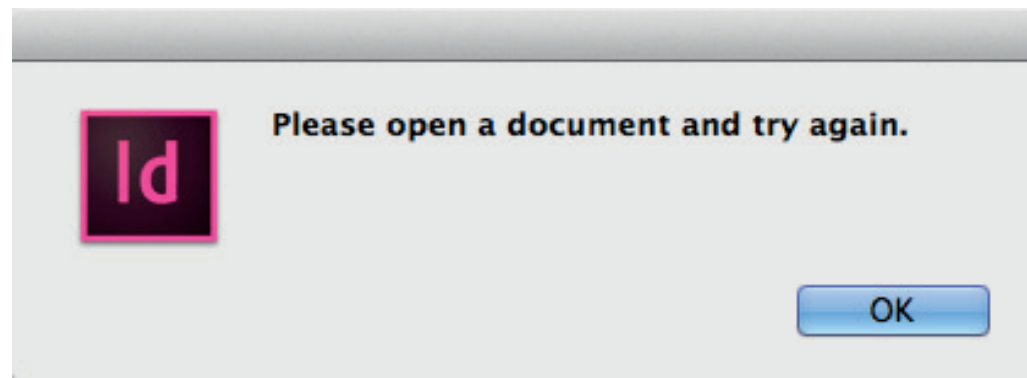
The **_warning** folder may contain these sub-folders:

- » **duplicates**
- » **missing images logs**
- » **overset text logs**

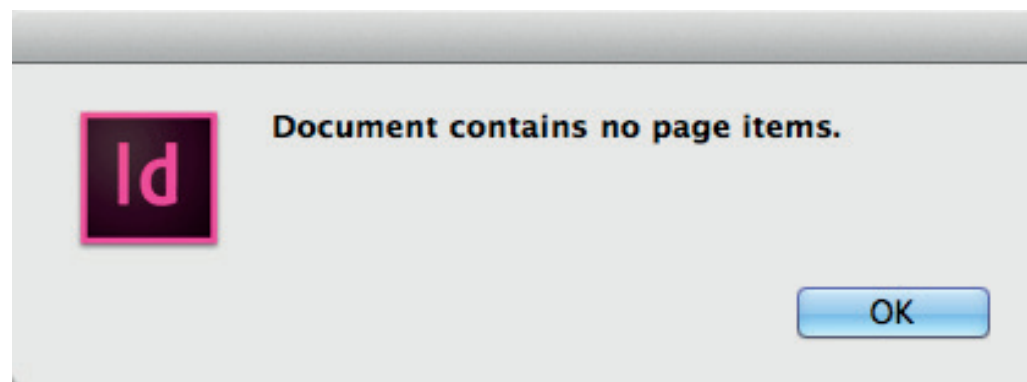


Warnings that may appear

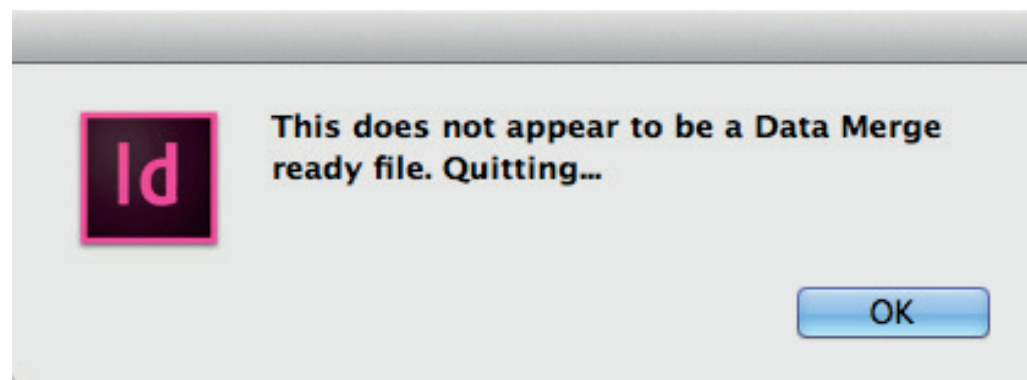
There are instances where the script will display warnings.



No files were open when the script was run.



The script was run while a blank document was open.



The script was run while a document with no Data Merge fields was open.

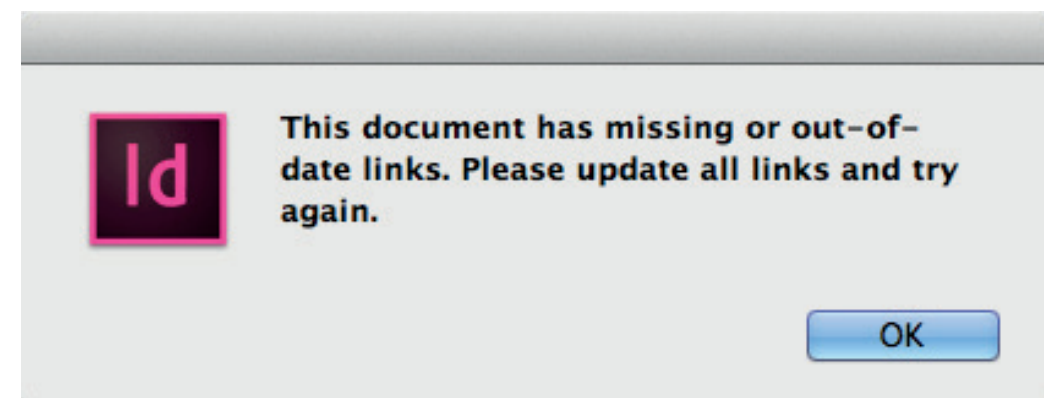


Overset text was present in the main InDesign file. There are known issues when using the Data Merge feature with overset text present in the main file.

*This does **NOT** prevent overset text during the merge.*



Fonts are missing in the main InDesign file.



Missing or out-of-date links are present in the main InDesign file.

There are three errors that can occur if certain options are not selected in the user interface:

Export single records to PDF or InDesign files

Save files to:

Browse...

Export to: ☐ InDesign ☒ PDF

Select a PDF Export Preset ▾

Select a field (or fields) for the filenames

Fields in Database

First name

Surname

Ph

Email

add

remove

up

down

Add to Filename

Range:

1

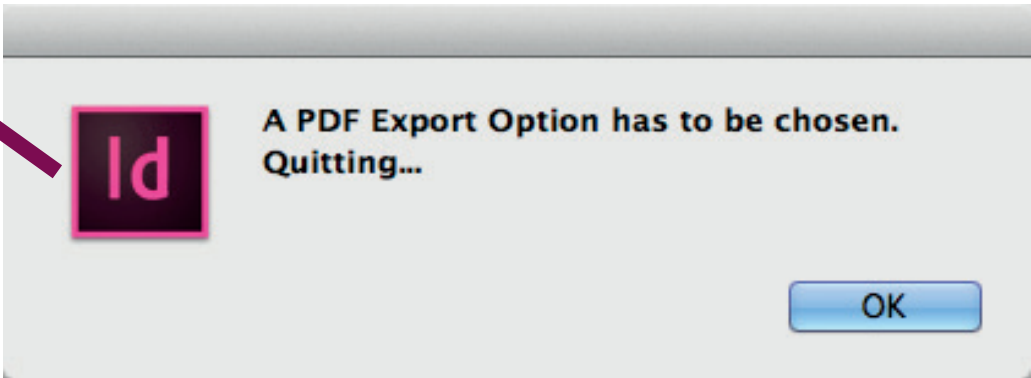
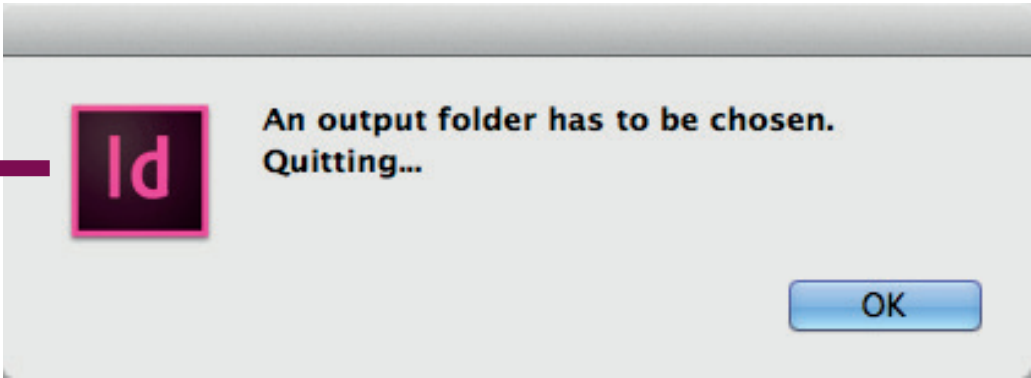
 to

100

OK

Cancel

© Colecandoo 2015. www.colecandoo.com



Important note about Data Merge masters and Document fonts folders

This only affects merging to Adobe InDesign files. It does not affect merging to PDF files.

When merging to Adobe InDesign files, artwork that relies on a **Document fonts** folder for its fonts can have **unexpected and catastrophic results**. For this reason, a warning has been added when merging to Adobe InDesign files if a **Document fonts** folder has been used.

Fonts from a **Document fonts** folder in the same directory as the InDesign file are **not shared** with other InDesign files. Merged files created are in a temporary state with no reference to the original **Document fonts** folder, resulting in a **temporary font substitution** until the merged files are relinked to the original **Document fonts** folder. Once relinked, this can create **unexpected and catastrophic results**, such as:

- » **Overset text warnings; but no overset text in the merged files**
- » **No overset text warnings; but overset text in the merged files**

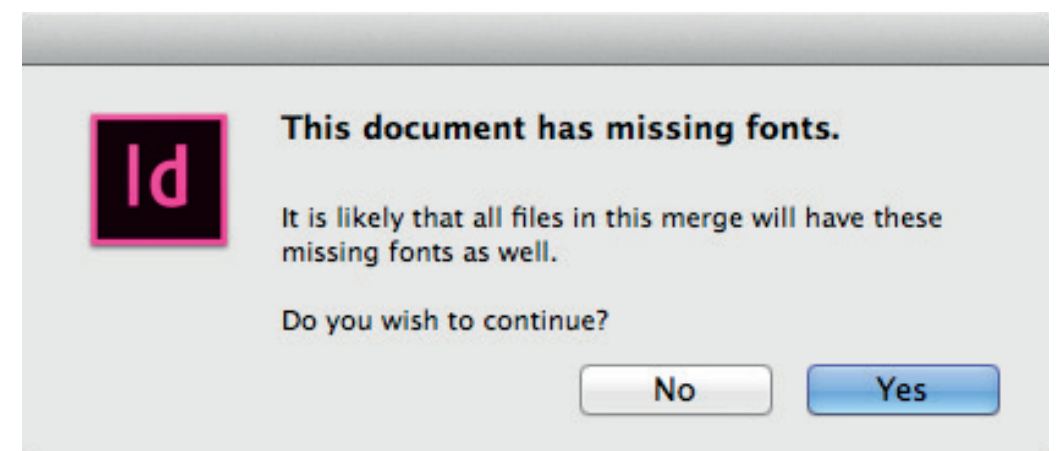
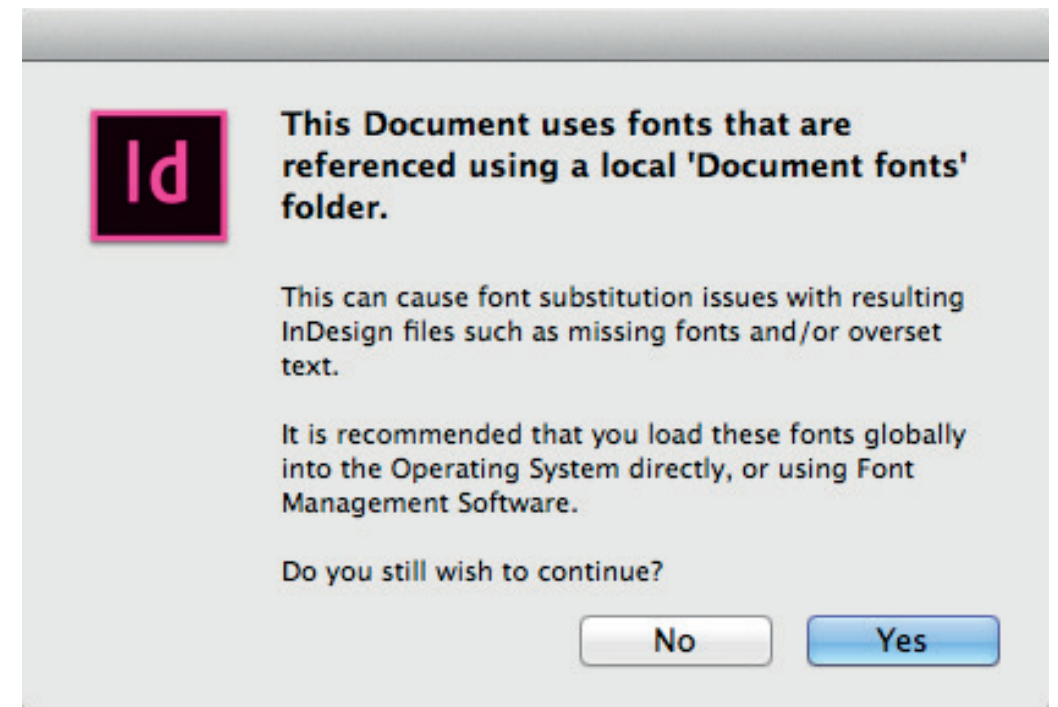
What can be done?

- » **Do not** rely solely on a **Document fonts** folder for the fonts used in the master file. Instead, use fonts that are available across entire operating system

If using font activation software such as Extensis Suitcase or Linotype FontExplorer, make sure that the desired fonts are activated appropriately (i.e. do not rely on the Auto-Activation features of the software). Likewise, if using Adobe's Typekit service, make sure the font is available from Typekit and activated on the machine.

Missing fonts warning

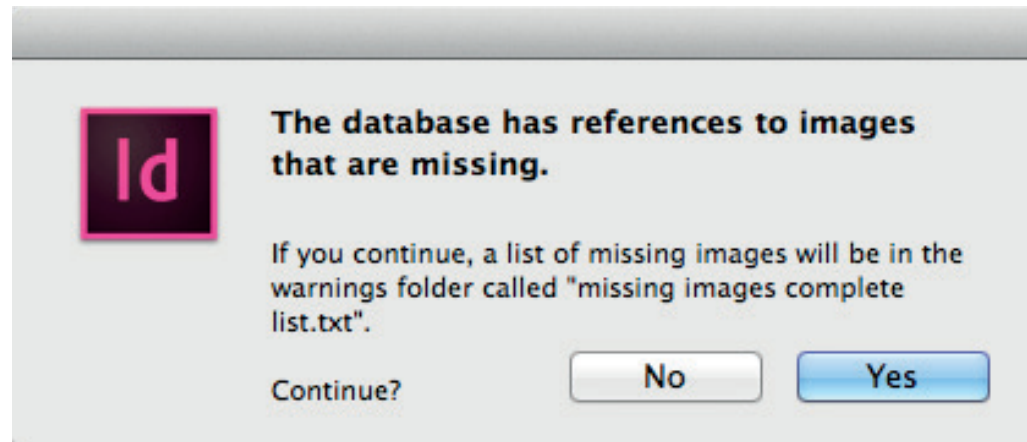
As the merge begins, the script will process the files unless it encounters missing fonts. Once a record that contains missing fonts is detected, the following warning will appear on the affected record. If **No** is clicked, the script will stop on the affected record. If **Yes** is clicked, the script will continue without generating further missing font warnings.



Warnings about missing images, duplicates or overset text

Once **OK** is clicked from the main interface, there may be warnings about missing images or duplicates.

Overset text warnings only appear once the merge is finished.

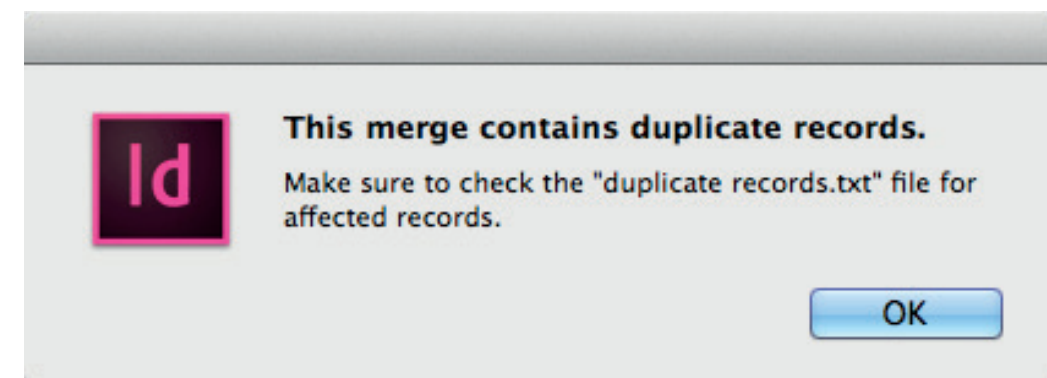
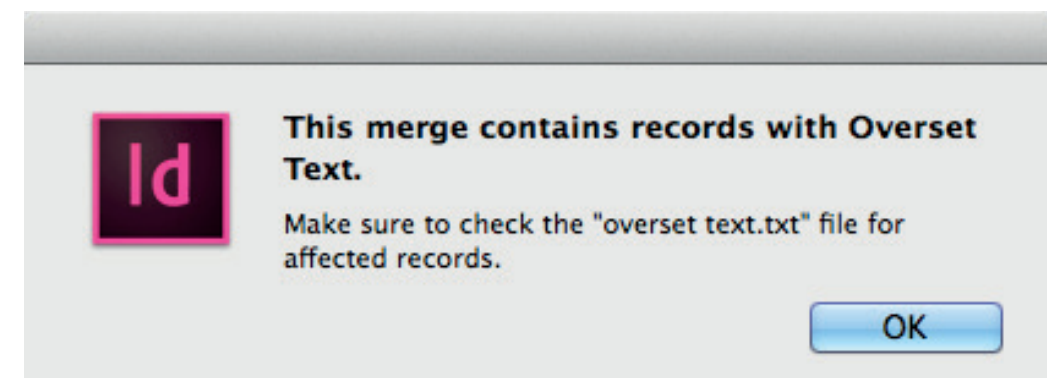
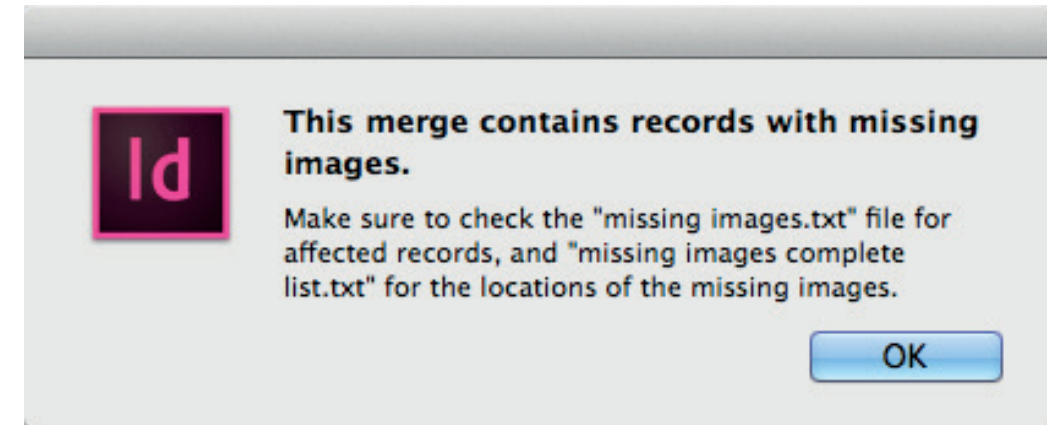


The script has detected that there are references to images in the database that are missing or out-of-date. Clicking **No** cancels the script, clicking **Yes** continues the script, but will display the missing link information in the **_warnings** folder.



The script has detected that certain filenames to be created will have the same name. Clicking **No** cancels the script, clicking **Yes** continues the script, but saves the duplicates in the **_duplicates** folder, and produces a log of all duplicates.

Once the script is run to completion, warning dialog boxes will appear if records were generated with missing images, overset text or duplicate filenames.



Text files of the logs will appear in the **_warnings** folder named **missing images.txt**, **overset text.txt** and **duplicates.txt** respectively. These files list the affected records by their position in the Data Merge. The folders **missing images logs** and **overset text logs** contain text file reports that go into more detail about these specific errors.

What if there are duplicates?

To ensure that the script does not overwrite files with the same filename, there is a feature that segregates duplicate filenames.

If duplicates will be created, a warning appears after the **OK** button in the main dialog box has been clicked.

Click **Yes** to continue, or **No** to stop running the script.

If **Yes** is clicked, the script continues to run.

Once complete, a prompt appears warning that the merge contains duplicate records, and to check the text file **duplicate records.txt** to see any duplicates. Click **OK** to continue.

Other error dialog boxes may appear if records contain overset text or have images missing.

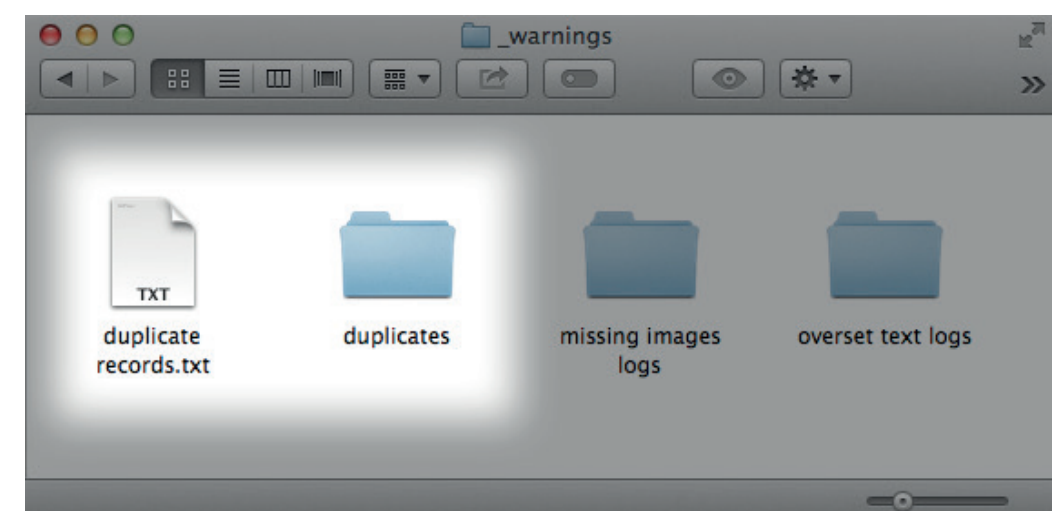
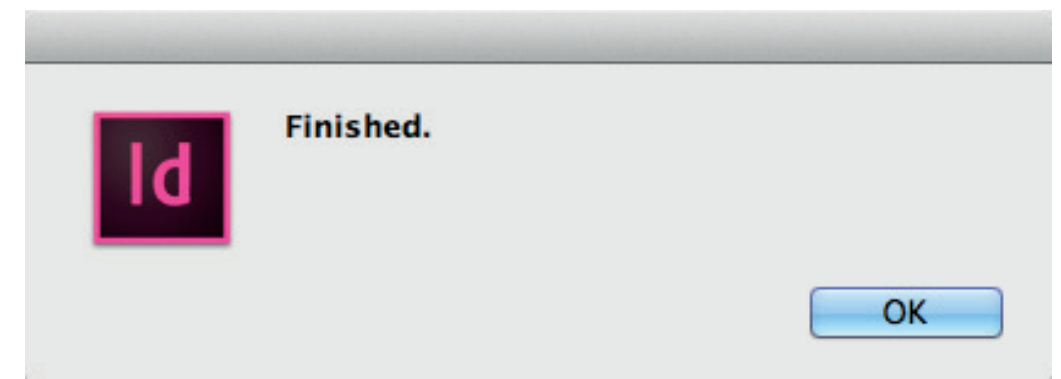
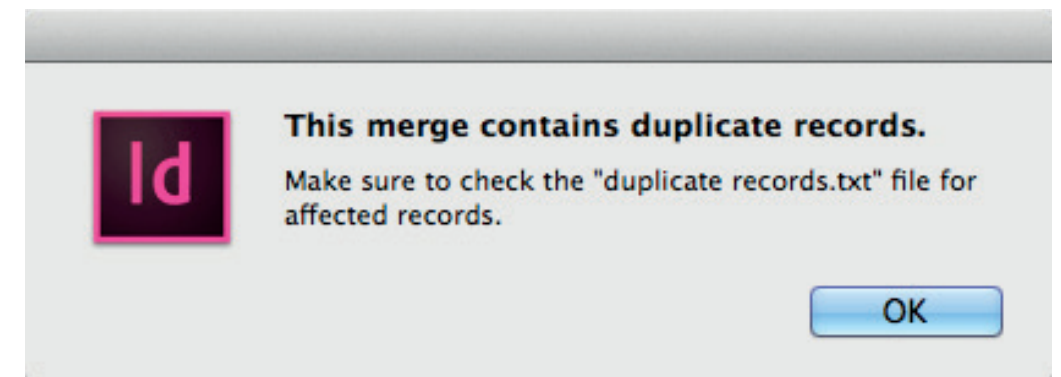
If no other error dialog boxes appear, the **Finished** prompt will appear. Click **OK** to continue.

In this instance, a text file named **duplicate records.txt** now appears in the **_warnings** folder. This file lists the duplicate records by their position in the Data Merge.

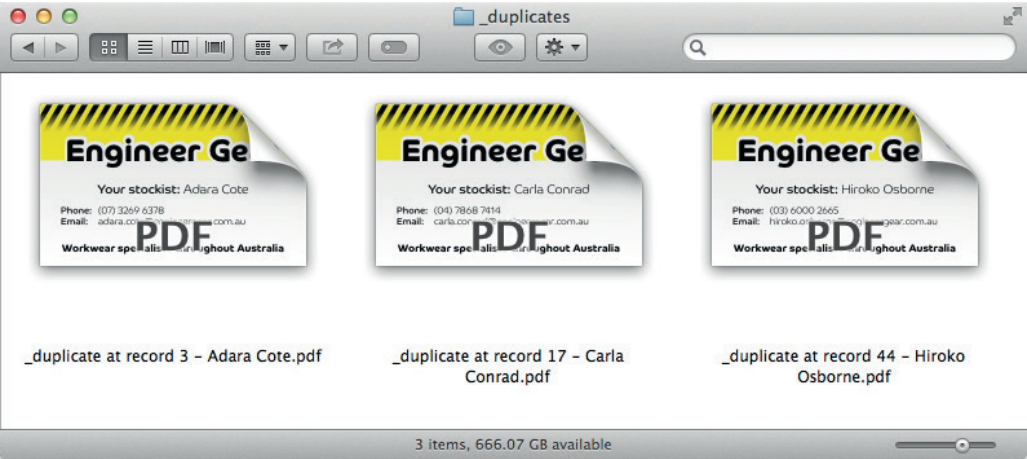
In this example, the results generated are:

record	filename
record no 3	Adara Cote.pdf
record no 17	Carla Conrad.pdf
record no 44	Hiroko Osborne.pdf

A new folder named **_duplicates** contains the duplicate PDFs.



In this example, three duplicates were segregated and detected, namely records 3, 17 and 44.



This is confirmed by returning to the Adobe InDesign file and navigating to the affected record numbers using the preview in the Data Merge palette.



Why are there duplicate records?

» The record was a duplicate in the original database

The reliable way to determine duplicate records using Excel is to use the **remove duplicates** feature.

» The fields used for the filenames did not generate unique filenames

Use the following list for example.

Firstname	Surname	Account
John	Smith	456321
John	Davies	789441
Jim	Smith	111441
Mary	Jones	884413
John	Smith	443322
Veronica	Davies	556959

If the **Firstname** field is the only field used, there are three records containing the name **John**.

The first record will be treated as the original, the remaining two will be considered duplicates.

Firstname	Surname	Account	Resulting filename
John	Smith	456321	John.pdf
John	Davies	789441	John.pdf
Jim	Smith	111441	Jim.pdf
Mary	Jones	884413	Mary.pdf
John	Smith	443322	John.pdf
Veronica	Davies	556959	Veronica.pdf

If the **Surname** field is the only field used, there are three Surnames containing **Smith**, and two surnames containing **Davies**.

Firstname	Surname	Account	Resulting filename
John	Smith	456321	Smith.pdf
John	Davies	789441	Davies.pdf
Jim	Smith	111441	Smith.pdf
Mary	Jones	884413	Jones.pdf
John	Smith	443322	Smith.pdf
Veronica	Davies	556959	Davies.pdf

The first **Smith** record will be treated as the original, the remaining two will be considered duplicates. Likewise, the first **Davies** record will be treated as the original, and the remaining record will be considered a duplicate.

If both First and Surname fields are used, there are two names containing the full name **John Smith**.

Firstname	Surname	Account	Resulting filename
John	Smith	456321	John Smith.pdf
John	Davies	789441	John Davies.pdf
Jim	Smith	111441	Jim Smith.pdf
Mary	Jones	884413	Mary Jones.pdf
John	Smith	443322	John Smith.pdf
Veronica	Davies	556959	Veronica Davies.pdf

To ensure that duplicate names are not produced, try to incorporate a **primary key** as part of the filename.

A primary key is a database term for a unique identifier, such as a driver licence number or account billing number.

Questions & Answers

- » **After looking at the results, I've made a mistake. When I run the script again using the same output folder, this error message appears. If I click OK, the script stops. Why?**

To ensure that the script doesn't blindly over-write existing results, there is a check to make sure that the **results** folder doesn't already exist. If it does exist, then the script warns the user and then stops.

If you want to run the script in the same location and over-write the old data, then the **results** folder has to be removed manually using Finder (MacOS) or Explorer (Windows).

- » **I've just run the script and realised I've made a mistake, and need to stop the script, but there is only a progress bar and no Cancel button. How can I stop the script?**

A future release of the script will feature a cancel button along with the progress bar, but for the moment, it is recommended that once the script begins, let it run through to completion. If the script does have to be stopped, the only option at the time of writing is to Force Quit Adobe InDesign.

- » **I want to add my own text before the new filename. Is this possible?**

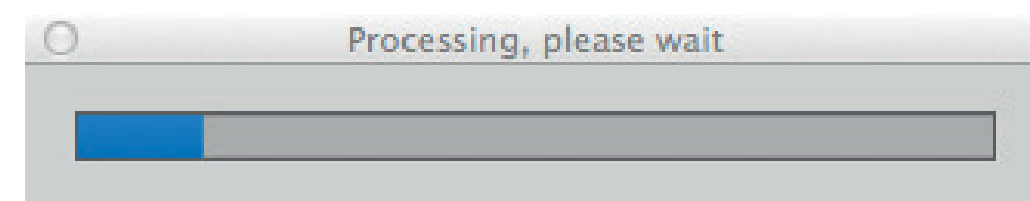
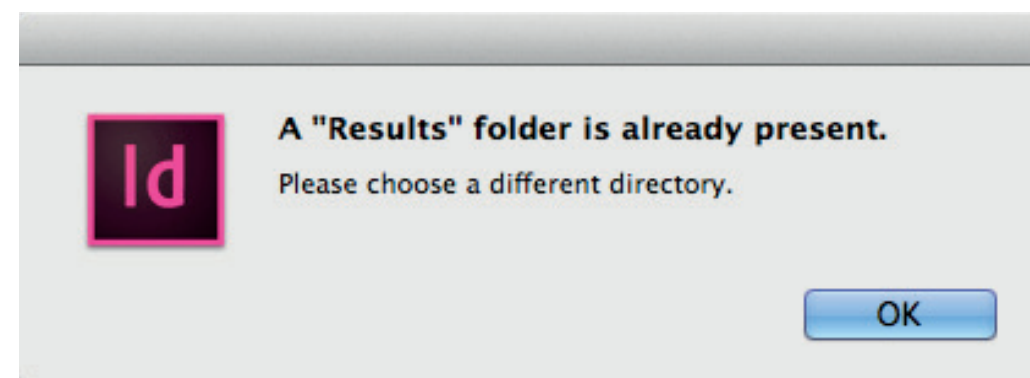
This feature is unavailable in this script but may be added in the Pro release. However, this can be done using the **Batch Rename** feature in **Adobe Bridge**.

- » **Is it possible to merge directly to other formats, such as JPG, PNG, HTML or EPS?**

Again, this feature is unavailable in this script but may be added in the Pro release. However this can be done indirectly. Use the script to merge to unique InDesign files, then close all open files. If there were no issues during the merge, use the [Batch Convert](#) script available from Peter Kahrel's website. This script can convert many InDesign files to various formats at once.

- » **Is it possible to run a javascript to the InDesign files as they are merged?**

Once again, this feature is unavailable in this script but may be added in the Pro release. Once again, this can be accomplished with Peter Kahrel's [Batch Convert](#) script (discussed above).



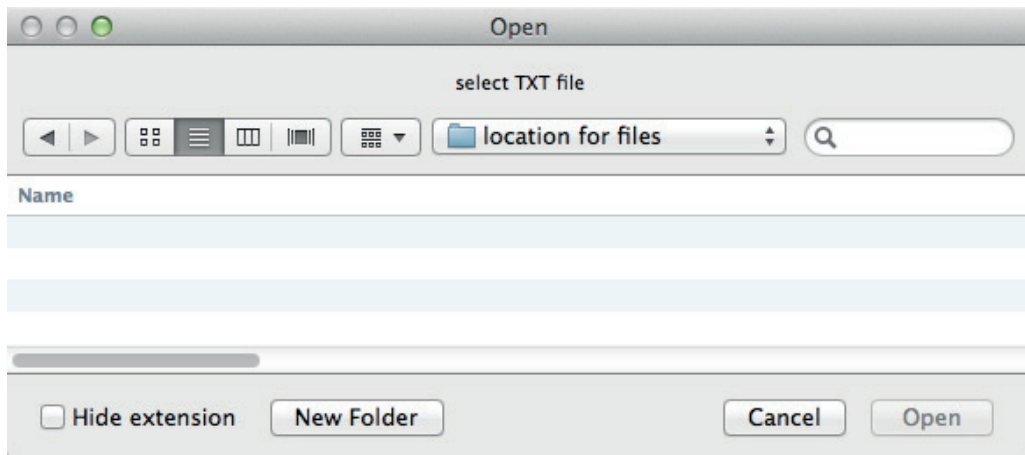
Read the instructions on Peter Kahrel's website before using the Batch Convert script.

» The script is asking me to select a text file for the merge. Why?

The script works by searching the links panel for any files that have a **txt** or **csv** file extension.

However, in rare instances, there may be more than one file with such an extension. This can happen because of a setting in the preferences panel of Adobe InDesign that creates links when placing text or spreadsheets.

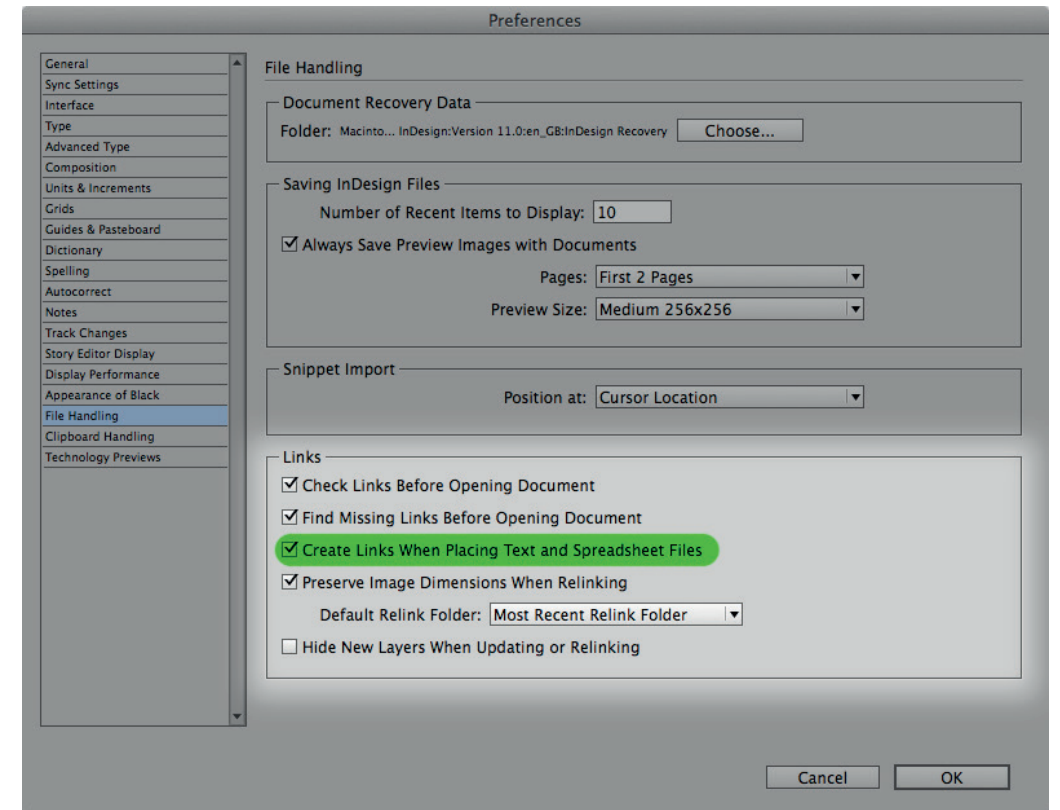
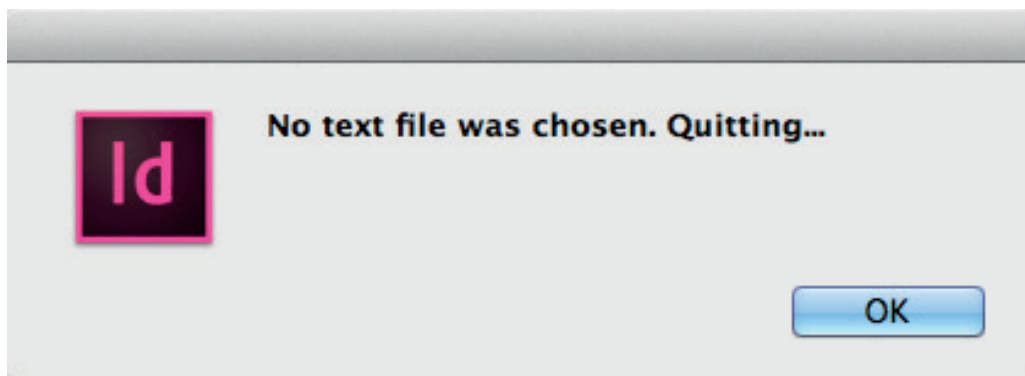
In this situation, the script will open a new dialog box looking for the appropriate text file.



Navigate to the appropriate data merge file and click **Open**. The script will then proceed as normal.

Make sure to select the correct file!

If **Cancel** is clicked, a warning says that no text file was selected, and the script stops.



» **In my PDF export options, I had the spreads radio button on, but the script has output single pages. Why?**

Just as there is a difference between PDF export options for print and interactive outputs, there is also a difference between the options for print and Data Merge, but they are far more subtle.

The screen capture on the right hand side demonstrates the general options available when exporting to PDF via Data Merge, but note that several options are greyed out:

- » **The page range (not the record range)**
- » **Spreads**
- » **Create Tagged PDF**
- » **Create Acrobat Layers**
- » **Hyperlinks**

As the options are greyed out, this means these options **cannot** be chosen for a Data Merge export, whether the script is used or not.

» **Why won't the script run until all overset text, missing links and fonts are fixed in the main document?**

This is a failsafe to ensure that the output files will output as intended.

Similar measures already exist when making PDFs via Adobe InDesign without the script. The distinction is that Adobe InDesign provides an option to proceed despite the error, resulting in outputs that may contain low-resolution graphics, incorrect fonts and missing copy.

Still having issues?

If you are experiencing issues that have not been solved with the troubleshooting, or have thoughts or suggestions about the script, please get in touch with me using the contact form at [Colecandoo](#). Please make sure that you include:

- » **The operating system you are using**
- » **The version of InDesign that you are using and the language version that you are using**
- » **The version of the Data Merge to Unique Names script that you are using**
- » **The steps taken to produce the issue that has occurred.**

Screen captures, video captures and packaged files certainly help the debugging process.

