

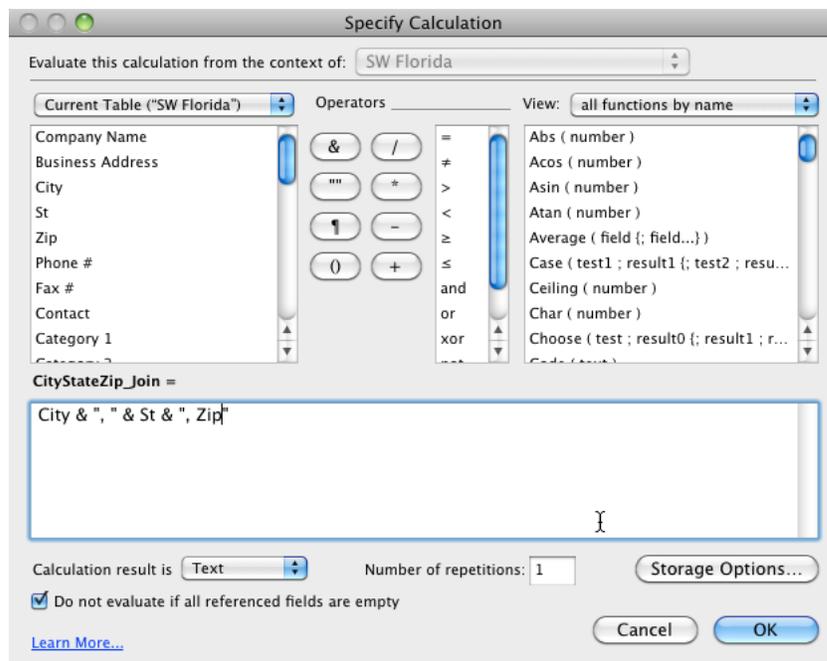
Directory Publishing

By David Creamer

Directories listing name, address, phone numbers, and perhaps email info, have historically been a pain to format. Not that the actual formatting was complex, but just the repetitive formatting of the type styles could take hours, if not days, to complete. In the past, specialized plug-ins could be used if one had the budget for such things, but since the directory is typically a yearly product, it was sometimes hard to justify the cost. Luckily, InDesign can make it much easier...

Part One: Massaging the Data

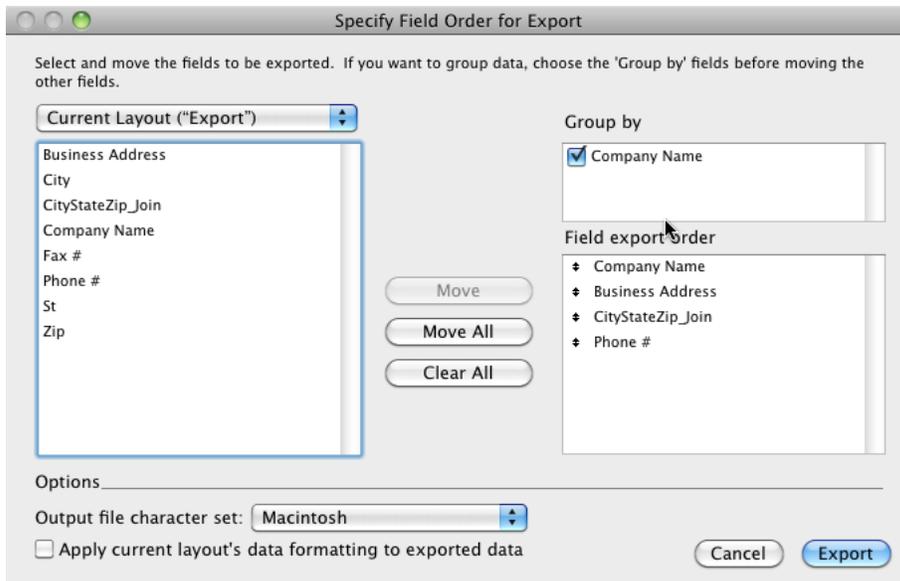
The actual directory data can come from virtually any database, such as FileMaker Pro, Access, Bento—or even Excel. After all the data is input, it will need to be exported (save-as for Excel). The most common format for export is a tab-delimited text file. That means that each field (name, address, city, state, etc.) will have a tab inserted after each field, and a return will be inserted after each new record (listing1, listing2, etc.). For our directory, I want to have the city, state, and zip fields on the same line, so I needed to create a conjoined calculation field that added in the commas and spaces between the fields. Depending on the database used, the process will differ slightly; I used FileMaker Pro and created a text-based calculation field.



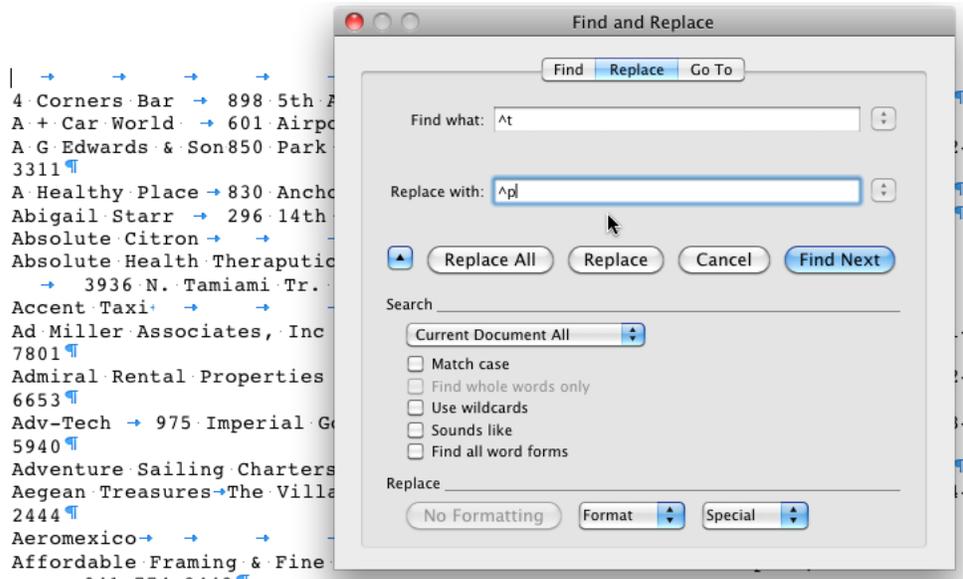
The result of the calculation is shown at the bottom of the separate fields. Data is not entered into the calc field—it is created from the data of the separate city, state, and zip fields.



When we are ready to export, we need to choose what fields are being exported. Note that I am not exporting the separate city, state, and zip fields, but the calculation field instead.



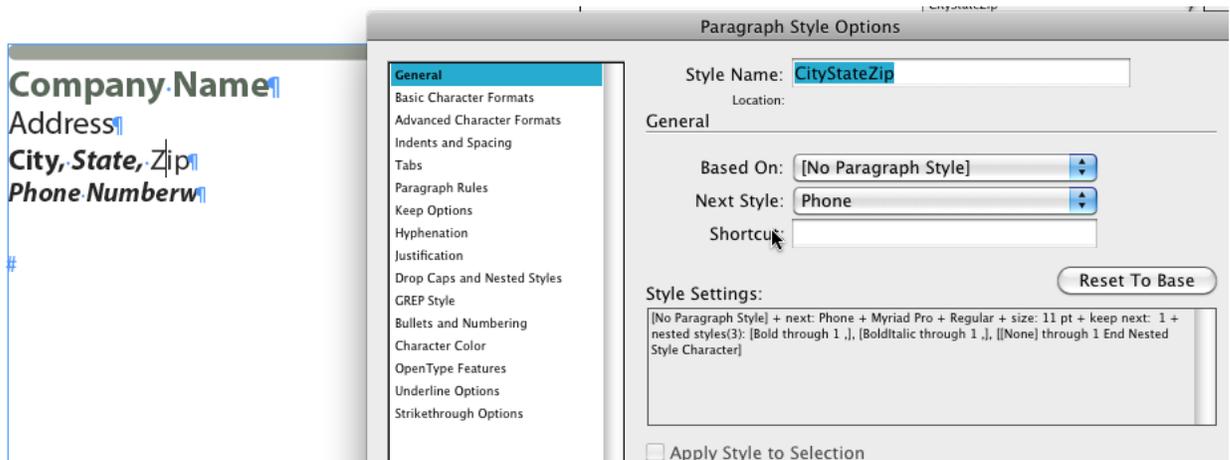
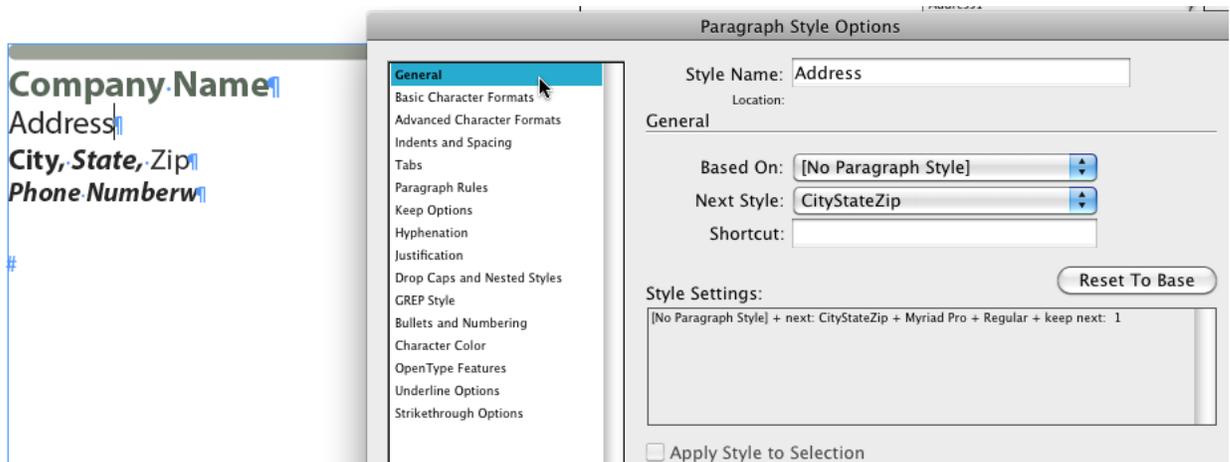
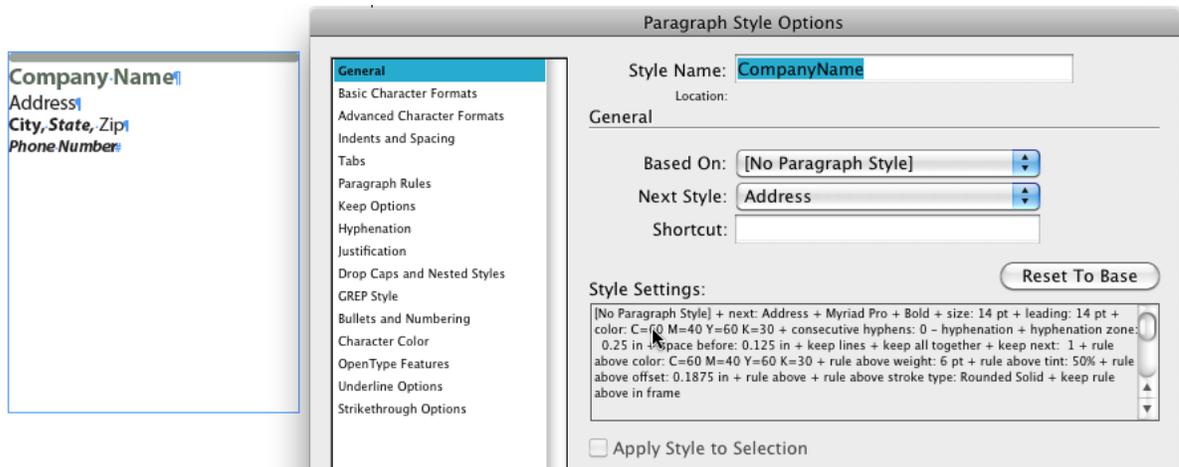
After the file is exported, it needs to be cleaned up in a word processor—Microsoft Word in this example—since we are not using a commercial plug-in or InDesign's Data Merge feature. The tabs that are inserted between the fields (*Company Name*, *Address*, etc.), and a return inserted after each record. It is *very* important not to remove any empty paragraph returns at this time. Each record needs to have the same number of returns even if the data is missing (for example, a listing might be missing a phone number but the empty return needs to be left in). A simple find for the tab characters and a replace with a return does the job. (Technically, I could have done this step in InDesign too, but I would have to export the text back out to place again.)



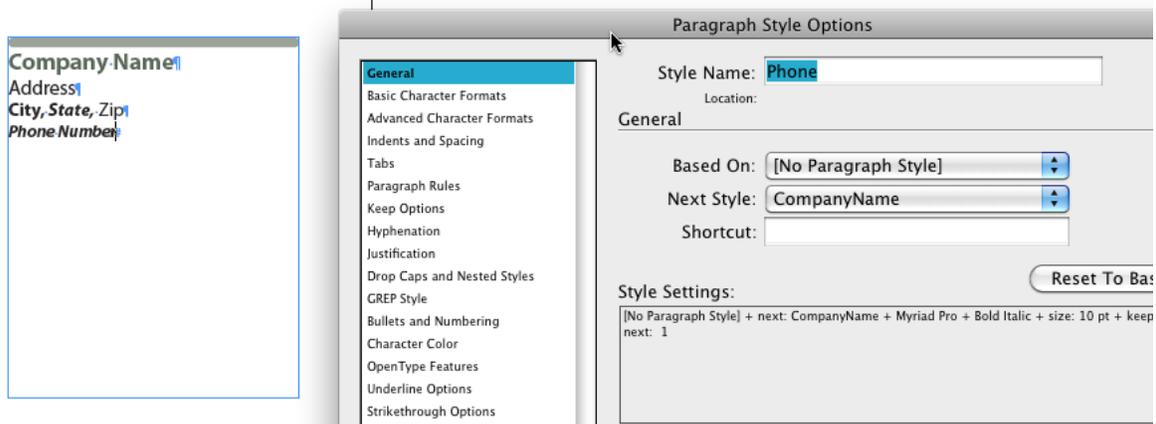
When finished, simply do a save-as as either a text file or a Word file.

Part Two: Designing In InDesign

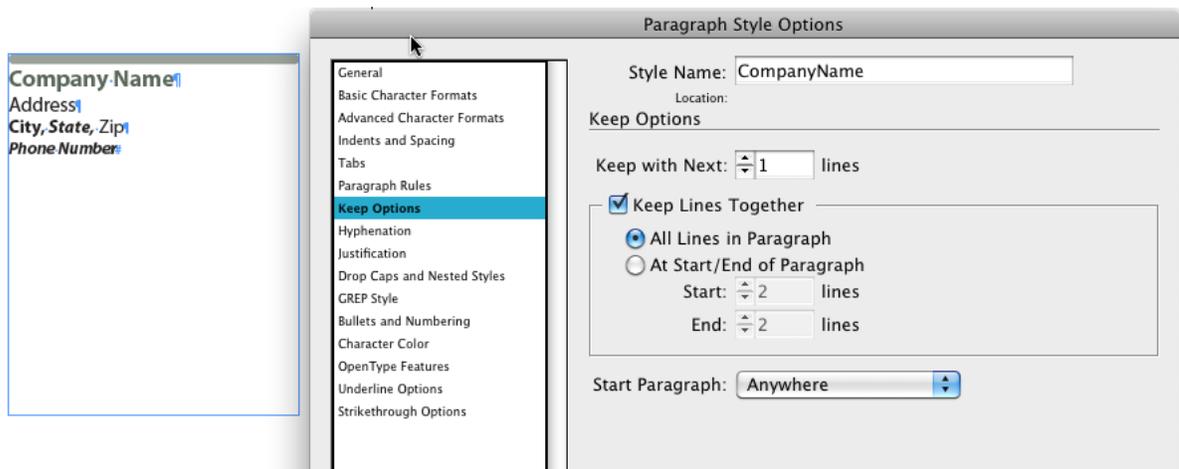
Before we place the database file into InDesign, we need to work on our formatting. We need four paragraph styles—one for the company name, the street address, the city/state/zip join field, and the phone number. The actual appearance of each style is not critical to this exercise, but some important things need to be set up. Create a small text box inside a column and enter in some dummy text (it can be a sample of the actual data or the style names). First simply create the styles and name them without worrying about the actual format. In this example, I created four styles named: *CompanyName*, *Address*, *CityStateZip*, and *Phone*. The styles need to be created first because each style needs to have the **Next Style** set to the paragraph style that follows it; for example, the *CompanyName* style should be set to the *Address* style—the *Address* style set to the *CityStateZip* style—and the *CityStateZip* style set to the *Phone* style. You can't do the next style setting unless the styles already exist.



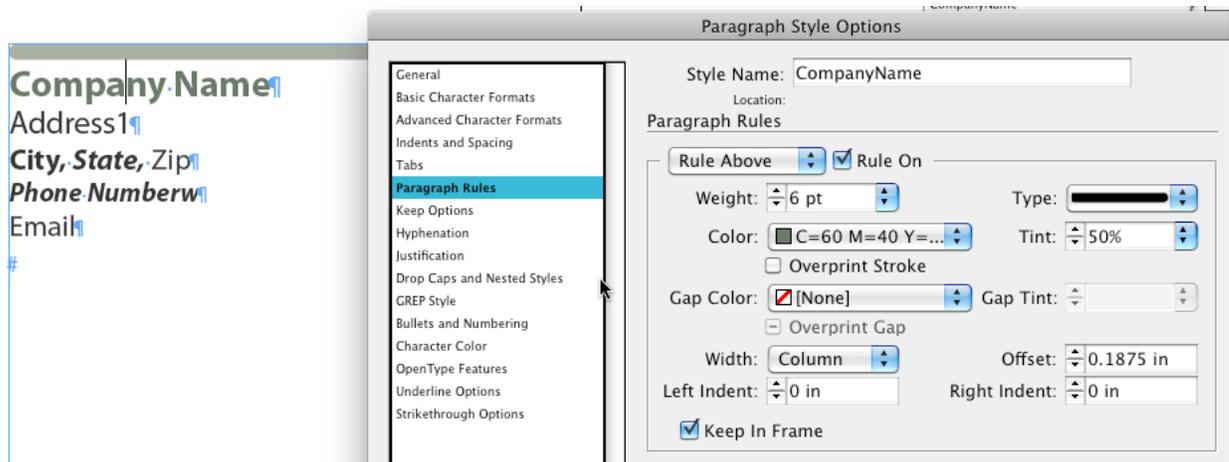
The **most important** setting is the *Phone* style—it needs the **Next Style** set to loop back to the *CompanyName* style. This will create a format loop that will end up cycling throughout the text file.



Although not critical, another important setting is the **Keep Options**. The first three styles (*CompanyName*, *Address*, and *CityStateZip*) should have their **Keep with Next 1 Lines** and **Keep Lines Together: All Lines in Paragraph** settings turned on. The *Phone* style should have the **Keep Lines Together** on, but *not* the Keep with Next lines setting. This will keep every listing locked together and prevent bad breaks; the only breaks allowed will be between the *Phone* style and the next *CompanyName* style (the following listings).



The other formatting settings are somewhat arbitrary—that is, they are dependent on the desired look of the document. The *CompanyName* style was formatted as 14/14 Myriad Pro Bold (14 pt type size on 14 pt leading) with a paragraph rule above. I usually turn hyphenation off for all the styles.

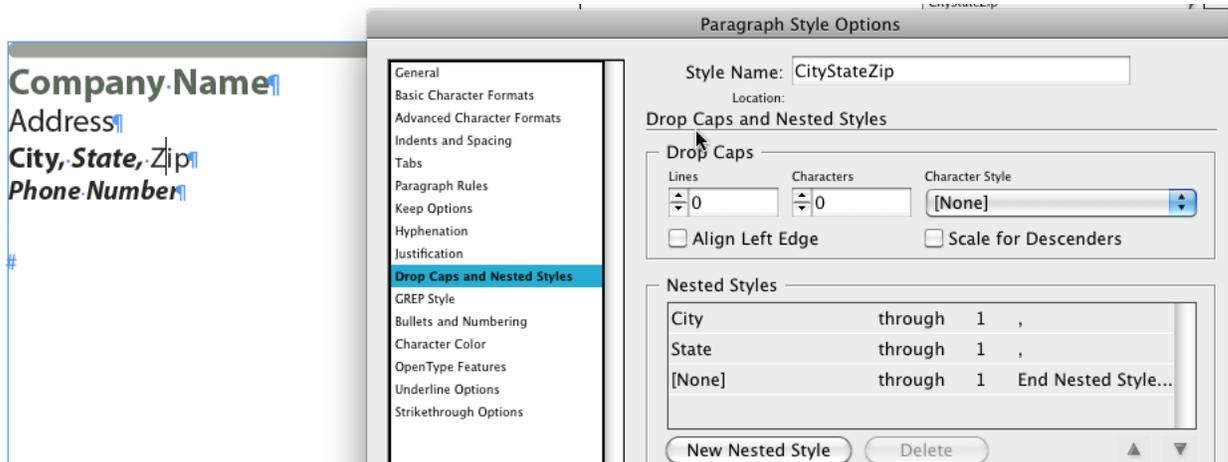


In order to have the city, state, and zip content formatted automatically with unique formats, we need to set up a **Nested Style**. Nested Styles are simply a way to apply character styles automatically based on certain criteria. To set up a nested style, it helps to create the character styles first. The zip code format is the actual paragraph style, so we only need character styles for the *City* and *State*. For this example, I created two character styles—a *City* style set to bold and a *State* style set to bold italic. (Note: In CS4, the character styles can be created directly from the Paragraph style dialog box; in CS3, you must cancel out of the Paragraph style dialog box, create the character styles, and then switch back to the Paragraph style.)

In the Nested Styles section of the Paragraph style, click the **New Nested Style** button, select the *City* character style, select through, enter 1, and then type in a comma.

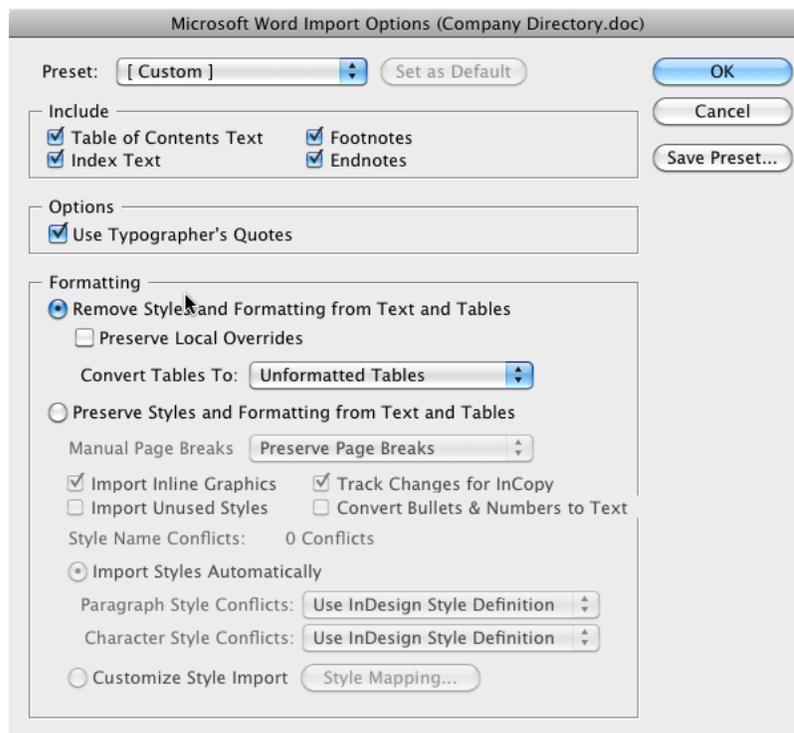
(The last section contains a pop-up menu, but you can also enter in any actual characters to trigger the style change. Tip: if you want more than one trigger, type them in all at once. For example, if you want the style to be triggered by a comma, period, or colon—type in ",.: " without quotes. That means that any *one* of the glyphs will trigger the style change.)

Click the **New Nested Style** button again and set up the *State* character to go through 1 comma too. Then add the last nested style setting to use *[None]*, which will default to the paragraph style rather than apply a character style. The *[None]* style should run until the end of the paragraph, but there isn't an exact setting for "end of paragraph", so select *through 1 End Nested Style* settings. As long as you don't actually enter in a End Nested Style special character, it will effectively do the same thing.



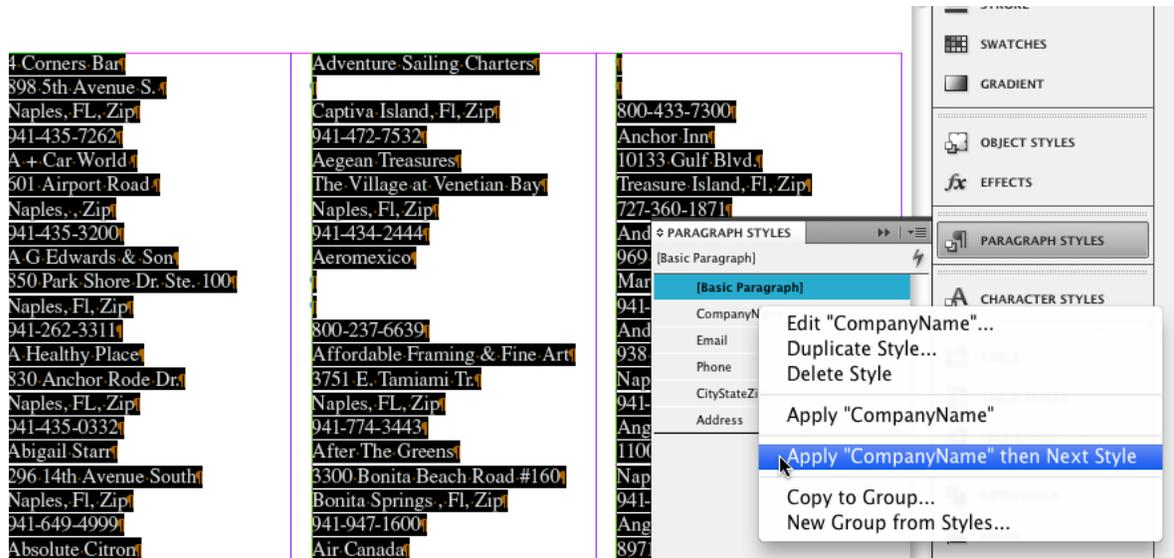
The Address and Phone styles did not have any unique settings other than the Keep Options.

Now, it is finally time for the easy part—it is time to place the text into InDesign. **Place** the text, select exported database file, and check the **Show Import Options** box. Make sure **Remove Style and Formatting and Text and Tables** is selected to make sure any formatting picked up in Word is removed.



When placing the text, hold down the Shift key to auto-flow the text in the document. (InDesign CS4 can automatically flow text if the **Smart Text Reflow** preferences are turned on.)

Select all the text, right-click on the first style (*CompanyName*) in the **Paragraph Styles** panel, and select the **Apply "CompanyName"** and then **Next Style** function.



Now you just have to remove the empty paragraph returns. Luckily, there is a built-in GREP style for this in the **Find/Change** dialog box. Open the Find/Change dialog box, select the query *Multiple Return to Single Return*, make sure the Search is set to Story, and click **Change All**.



If you set everything up right and you lived a good life, the entire document will be magically formatted.

4 Corners Bar
898 5th Avenue S.
Naples, FL, Zip
941-435-7262

A + Car World
601 Airport Road
Naples, FL, Zip
941-435-3200

A.G. Edwards & Son
850 Park Shore Dr. Ste. 100
Naples, FL, Zip
941-262-3317

A Healthy Place
830 Anchor Rode Dr.
Naples, FL, Zip
941-435-0332

Abigail Starr
296 14th Avenue South
Naples, FL, Zip
941-649-4999

**Absolute Health
Theraputic Mass**
3936 N. Tamiami Tr. Suite E
Naples, FL, Zip
941-261-8033

Accent Taxi
941-732-7786

Ad Miller Associates, Inc
305 Fifth Ave. S.
Naples, FL, Zip
941-261-7801

Admiral Rental Properties
589 Fifth Ave. S.
Naples, FL, Zip
941-262-6653

Adv-Tech
975 Imperial Golf Course Blv #118
Naples, FL, Zip
941-353-5940

Adventure Sailing Charters
Captiva Island, FL, Zip

Aegean Treasures
The Village at Venetian Bay
Naples, FL, Zip
941-434-2444

Aeromexico
800-237-6639

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Air Canada
800-776-3000

Air Jamaica
800-523-5585

**All Weather Hurricane
Shutters, Inc.**
4327 Arnold Avenue
Naples, FL, Zip
941-597-9575

Amador's Bistro Italiano
3367 Bayshore Dr
Naples, FL, Zip
941-775-7666

Ambassador Airways
240 Aviations Dr. N.
Naples, FL, Zip
941-263-4200

Ambassador Limousine
Naples, FL, Zip
941-434-9400

American Airlines
800-433-7300

Anchor Inn
10133 Gulf Blvd.
Treasure Island, FL, Zip
727-260-1871

Andre's Steakhouse
969 N. Collier Blvd.
Marco Island, FL, Zip
941-394-0212

Andrew's Nails & Things
938 Third Ave. N.
Naples, FL, Zip
941-435-1113

Angel Emporium
1100 Sixth Avenue South
Naples, FL, Zip
941-434-2604

Angelo's Italian Restaurant
8971 Tamiami Trail North
Naples, FL, Zip
941-598-2222

Angler's Answer
11387 E. Tamiami Tr.
Naples, FL, Zip
941-775-7336

Anita's Salon & Spa
940 5th Ave N.
Naples, FL, Zip
941-261-4333

Anne Klein Factory Stores
7222 Isle of Capri Road
Naples, FL, Zip
941-774-3636

**Anthony's Catering
Division**
4420 Mercantile Ave.
Naples, FL, Zip
941-793-2283

Anthony's Inc.
8965 Tamiami Trail North
Naples, FL, Zip
941-596-1872

**Anthony's Ristorante &
Deli**
4820 Davis Blvd
Naples, FL, Zip
941-793-5553

PARAGRAPH
CompanyName
[Basic Pa
Compan
Email
Phone
CityState
Address