



Trial Manual

The push-button way to publish your:

- Catalogues
 - Directories
 - Price Lists
 - Membership Lists
- ... or just about any data

in lots of different ways:

- QuarkXPress
- InDesign
- FrameMaker
- Web Pages
- XML
- Text Files
- ODBC

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What is CatBase and How Can it Help Me?

CatBase is a data publishing solution which automates the process of publishing your data in print or electronically. It:

- Saves you time (and money!) by taking away the most time-consuming aspect of publishing data: formatting it in the publishing destination
- Ensures accuracy: Automatically format each item as required - no manual intervention!
- Provides tremendous flexibility: You can design any number of publications using different data sets, different formatting options, and different publishing destinations, all from the same database
- Provides numerous reporting options such as a report generator, label wizard, and mailmerge facility.
- Provides lots of communications options: send and receive emails to/from contacts in the database; send letters; print labels; create Memos with followup reminders
- Is available in both single- and multi-user configurations
- Available for both Windows and Macintosh

OK, enough chatter, let's see what it can do!

Starting CatBase

We assume that you have installed the Trial version of the program (if not, now would be a good time to do so!)

Mac

Double-click on the CatBase program icon.

Windows

There are a number of files and folders that comprise the application, and these are in a folder called CatBase Program. To simplify things, we suggest that you do the following:

1. Open up the **CatBase Program** folder
2. Right-click on the Application icon CatBase 6_60.exe) and choose **Create Shortcut**
3. Copy the new shortcut
4. Go back up a level to the CatBase Demo folder and paste the Shortcut.
5. To start the program, double-click on the Shortcut.

The following things should happen only once - the first time that you use the program.

If you see an **Open Data File** dialogue, locate the file called **Demo Data.4dd**, which you will find in the CatBase folder, and double-click it.

You may then see an Alert telling you that the link between the data file and the log file is not valid. Click **OK**. (It is looking for the backup log file.)

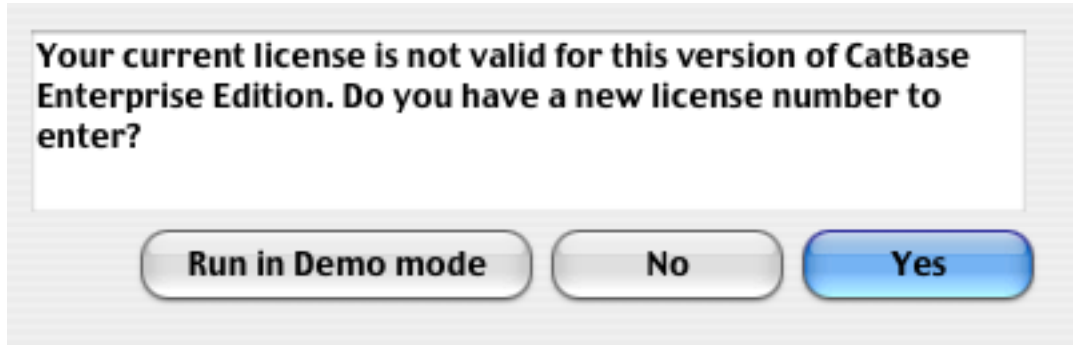
Next comes a **Log File Name:** dialogue. Click on the **New** button.

In the **Save** dialogue, make sure that it is going to be saved into an appropriate place. For the purposes of the Demo, you can save the log file into the CatBase folder; for your production database, you'll choose a location on another volume.

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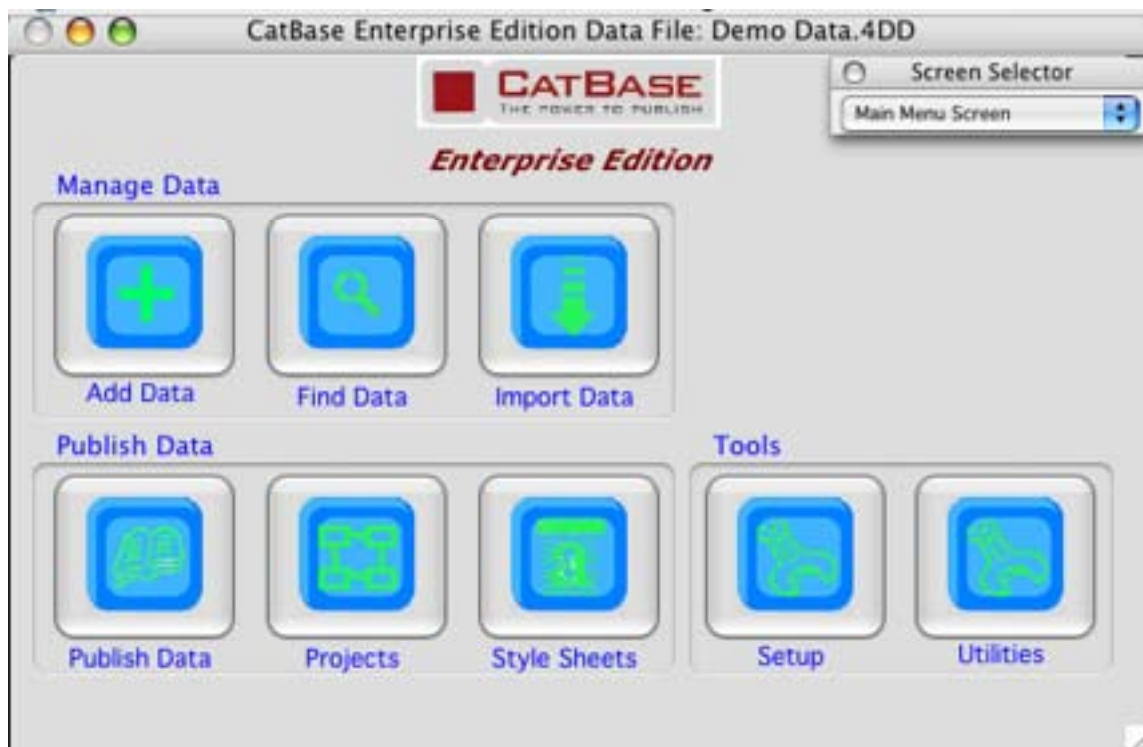
You may then see a **Warning** about making a backup. Click **OK**.
A progress meter is displayed as the backup is made.

Next you may see a licence number warning:



Click on **Run in Demo Mode**.

Shortly you'll see the main window:



You're ready to go!

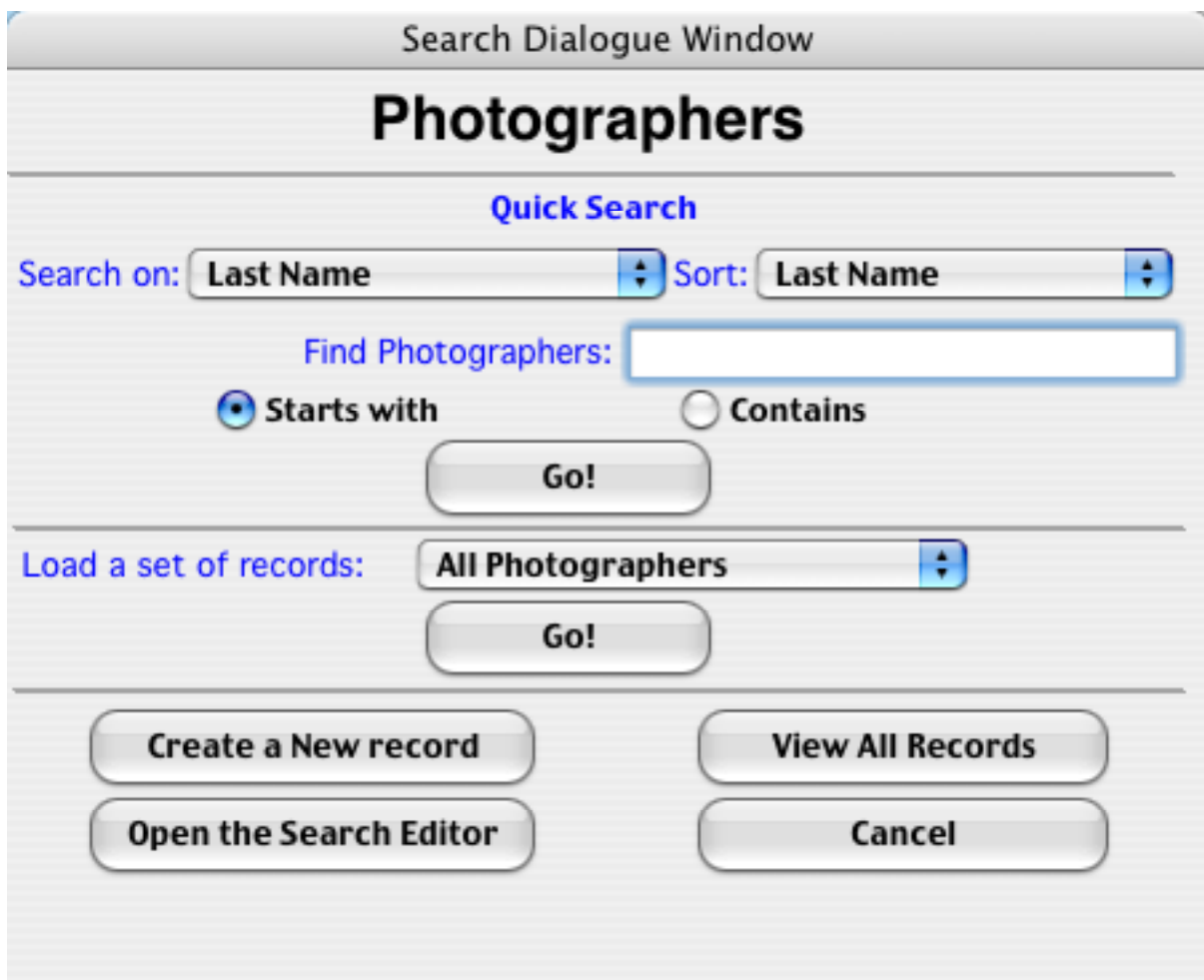
Note: If your screen doesn't look like this (no blue buttons) you will need to install the Quicktime plugin for your OS. This is easy and takes only a few minutes. Go to apple.com/quicktime to get it.

Our Demo database contains two main tables: Photographers and Pictures. The Photographers table contains details of a few fictitious photographers who are represented by our fictitious stock photo agency, and the Pictures table contains details of some images which our photographers have offered for sale. Take a few moments now to familiarise yourself with the essentials of the interface:

Click on the **Find Data** button. When you let go, a pop-up menu appears, listing the tables:

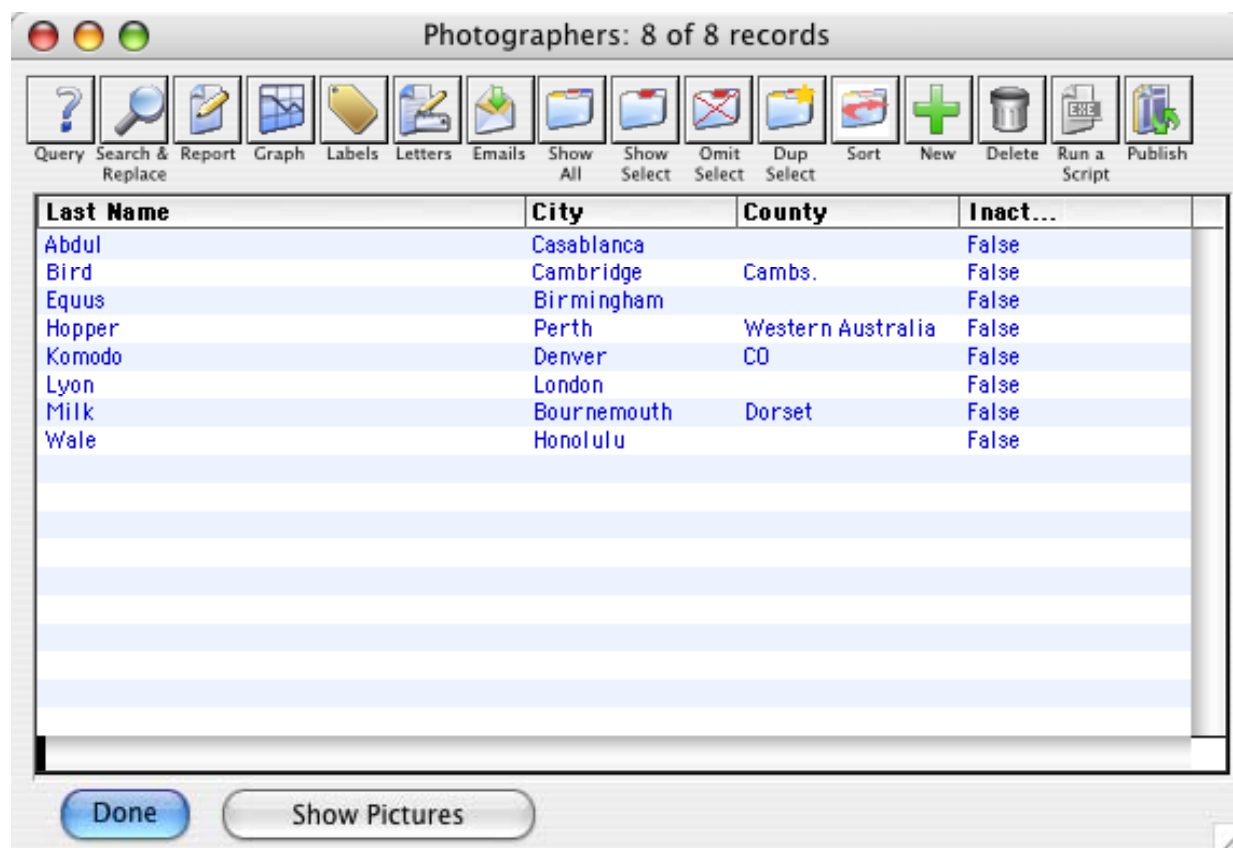


Choose one of the tables. Next, the Search Dialogue Window opens:



This is Command Central for managing your data. Here you can search for existing data or add new records. For now, click on the **View All Records** button. You'll then see a list of all the records in the selected table:

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Double-click on a row to open the record and view its contents. For example:

The screenshot shows the 'Komodo' record form in CATBASE. The form has tabs for 'Address', 'Notes', 'Memos', and 'Pictures'. The 'Address' tab is active, showing the following fields:



Solution	First Name	Initials	Last Name	Record Number
Mr	John		Komodo	12

Below the header, there are several sections of fields:

- Address Line 1:** 6523 Yucca Trail
- Address Line 2:**
- City:** Denver
- County:** CO
- Post Code:** 80345
- Country:** USA
- Web Site:** www.castlephotos.com
- Telephone:** 303 123 4567
- Email:** john.komodo@castlephotos.com
- Listing Level:** Bold
- Speciality:** Reptiles

At the bottom right of the form are four navigation buttons: '<< Back', '< Previous', 'Next >', and '>> Forward', along with a 'Save' button (green checkmark) and a 'Cancel' button (red X).

Note that you are in control with regards to the naming and setup of the tables: you define the fields for each table and how they are displayed in the data entry window. This is described in detail in the Reference Manual, Chapter Two: Setting up Your Database (note, however, that these options are limited in the Standard Edition of CatBase).

To close the record, click on either the Save  or Cancel  button, or press the Enter key on your keyboard to save a record or cmd-dot (Mac) or ctrl-dot (Windows) to cancel it.

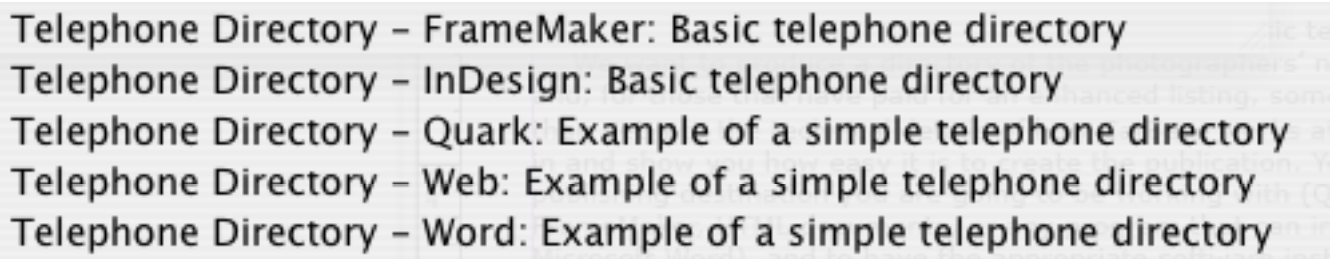
You don't need to get bogged down with the details of how CatBase works at this point – you just want to see what it can do! So we'll jump right in and show you how easy it is to publish your data.

Publishing Example 1: a Telephone Directory

We'll start with quite a simple example: a fairly basic telephone directory.

We want to produce a directory of the photographers' names and phone numbers and, for those who have paid for an enhanced listing, some additional details. You'll need to know which publishing destination you are going to be working with (QuarkXPress, InDesign CS, FrameMaker, HTML documents, or any program that can interpret RTF codes, such as Microsoft Word), and to have the appropriate software installed on your computer.

1. On the main window, click on the **Publish Data** button. The pop-up menu contains a few **Telephone Directory** options:



2. Choose the option appropriate for your chosen publishing destination.
3. You'll see a progress thermometer as CatBase publishes the data. When it's finished, it tells you where it created the published data file and what it's called. It will most likely have been saved into a folder called Data Exports on your desktop:



Your next step is to import that file into your publishing destination.

First, launch your publishing program (Quark, InDesign, a web browser, etc.) if it isn't already running.

Destination	How to Import
FrameMaker	<ol style="list-style-type: none">1. Choose Open ... from the File menu2. Locate the file you just published and double-click on it
InDesign	<ol style="list-style-type: none">1. Create a new document2. Choose Place ... from the File menu3. Locate the file you just published and double-click on it4. When the cursor is loaded, click on the document to place the text
QuarkXPress	<ol style="list-style-type: none">1. Create a new document with an automatic text box2. Click in the text box3. Choose Get Text ... from the File menu4. Make sure that the Include Style Sheets check box is selected5. Locate the file you just published and double-click on it
Web	<ol style="list-style-type: none">1. Choose Open ... or Open file ... from the File menu2. Locate the file you just published and double-click on it
Word (or any program that supports the RTF format)	<ol style="list-style-type: none">1. Choose Open ... or Open file ... from the File menu2. Locate the file you just published and double-click on it

You should then have a formatted document something like this:

Mohammed Abdul.....123 45678
Ferdinand Equus 0161 111-2222
 Specialty: Horses
Sheila Hopper 4567 895654
Kate Lyon 020 111 2222
 Specialty: Big cats
 Email: kate.lyon@castlephotos.com
Mike Milk..... 01223 111 2222
Jenny Wale 123 876-0987

Let's see what we've got here ...

Each photographer can select from various "Listing Levels": Basic, Bold, or Enhanced. Their listing has been formatted according to their selected Listing Level: Mohammed, Sheila, and Jenny have a Basic listing: just their name and phone number in a plain font.

Mike has a Bold listing: just his name and phone number, set in bold.

Ferdinand and Kate have an Enhanced listing: in addition to their basic details they also have their Specialty and Email Address (if they have one) listed.

Note that:

- We have mixed formatting on the **Specialty** and **Email** lines
- If some data is absent, we don't end up with a blank or partially completed line (for example, Ferdinand doesn't have an email address)

For our next example we will create something a little more interesting: an illustrated catalogue.

Publishing Example 2: an Illustrated Product Catalogue

Xtags plug-in

If your publishing destination is QuarkXPress or InDesign, you will need a special plugin called **Xtags** to import the pictures into your document, because these programs do not natively support the automatic placement of pictures (actually, InDesign does in its XML import format, but the formatting options are very limited). You'll find demo versions of Xtags in the Third Party Demos folder within your CatBase folder: un-zip the appropriate version (for Quark or InDesign) and copy the Xtags plug-in into the Xtension folder for Quark or the Plugins folder for InDesign (you'll find these folders inside the application folder).

Publishing the Catalogue

1. Click on the **Publish Data** button on the main window. There are a few options for publishing the Picture Catalogue:



Picture Catalogue – FrameMaker: Illustrated catalogue
Picture Catalogue – InDesign: Illustrated catalogue
Picture Catalogue – Quark: Illustrated catalogue
Picture Catalogue – Web: Creates web pages

2. Choose the option appropriate to your publishing destination

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3. When it's done, locate the file that it created (it will probably be in a folder called Data Exports on your Desktop) and move it into your CatBase folder (if you don't move it, it may not be able to find the pictures). In the case of the Web option, you will find a folder called photos in your Data Exports folder. Copy the Pictures folder from your CatBase folder into the photos folder.
4. Start up your publishing application if it isn't already running (note: if you are using Quark or InDesign and you have just installed the Xtags plug-in, you'll need to restart the application.)
5. Now follow the following instructions, according to your publishing destination:

Destination	How to Import
FrameMaker	<ol style="list-style-type: none">1. Choose Open ... from the File menu2. Locate the file you just published and double-click on it
InDesign	<ol style="list-style-type: none">1. Create a new document with a two-column Master Text Frame.2. Save it into your CatBase folder (but don't close it)3. Click in the text box (you may need to shift-command-click) - you should see the cursor flashing in the text box4. Choose Get Text with Xtags ... or Import Text with Xtags ... (depending on which version of InDesign you are using) from the File menu. (If this option isn't available, you have not installed the Xtags plug-in in the InDesign Plugins folder!)5. Locate the file you just published and double-click on it
QuarkXPress	<ol style="list-style-type: none">1. Create a new document with an automatic, two-column text box2. Save it into your CatBase folder (but don't close it)3. Click in the text box4. Choose Get Text with Xtags ... from the File menu (If this option isn't available, you have not installed the Xtags plug-in in your Quark XTensions folder!)5. Locate the file you just published and double-click on it
Web	<ol style="list-style-type: none">1. Choose Open ... or Open file ... from the File menu2. Locate the file called index.html in the photos folder and open it. The Index page consists of a list of Categories; click on a Category to "drill down" and see the individual pages.

Your catalogue should look something like this:

Animals

Bears



Polar Bear



A large white **bear**, *Ursus maritimus*, formerly *Thalarctos maritimus*, of the coasts of arctic North America. Polar bears usually live on drifting pack ice, but sometimes wander long distances inland. They are powerful swimmers and may cross 20 to 30 mi of water at a time. The polar bear's body is long and streamlined, with a long neck and small head. Adult males are 7 to 9 1/2 ft (210-290 cm) long, stand 4 to 4 1/2 ft (122-137 cm) at the shoulder, and weigh 700 to 1600 lbs (320-730 kg). Females are somewhat smaller.

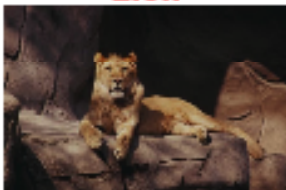
Photographer: Mike Milk

Price, framed: £95.00 Price, unframed: £65.00

Big Cats



Lion



The **lion** is a large carnivore of the cat family, *Panthera leo*, found in open country in Africa, with a few surviving in India. Lions have short-haired coats of tawny brown, with the tail ending in a dark tuft. Most males have black or tawny manes of varying length growing from the head, neck, and shoulders. The mane may be quite long and

Birds



Butterfly



The term **butterfly** refers to any of a large group of insects found throughout most of the world; with the moths, they comprise the order *Lepidoptera*. There are about 12 families of butterflies. Most adult moths and butterflies feed on nectar sucked from flowers. In the process they may transfer pollen from one flower to another, and many plants depend on moths or butterflies for pollination.

Photographer: John Bird

Price, framed: £200.00 Price, unframed: £120.00

Eagle



Eagle is the common name for large predatory birds of the family Falconidae (hawk family), found in all parts of the world. Eagles are similar to the buteos, or buzzard hawks, but are larger both in length and in wingspread (up to 7 1/2 ft/228 cm) and have beaks nearly as long as their heads. They are solitary birds, said to mate for life.

Photographer: John Bird

Price, framed: £150.00 Price, unframed: £65.00

Well, OK, we're not going to win any design awards with this, but it does demonstrate some of the program's data formatting features:

1. The correct picture has been included for each Picture record.
2. Various Style Sheets have been created and applied to the different elements of the catalogue
3. There is mixed formatting in some of the paragraphs. For example:

Price, framed: £95.00 Price, unframed: £65.00

The paragraph is styled with the stylesheet **Prices**, but the static text ("Price, framed" and "Price, unframed") has the Character Style "italic" applied to it.

4. Note the special formatting of some words within the Description text:

*A large white **bear**, *Ursus maritimus*, formerly
Thalarctos maritimus, of the coasts of arctic North*

"**bear**" is in bold and *Ursus maritimus* is in italics. This is a particularly useful and unique feature of CatBase: you can specify formatting for individual words or phrases within text.

These formatting options are controlled by the Publishing Style Sheet. If you would like to take a look at how it is set up now, click on the **Style Sheets** button on the main window, choose **Publishing Style Sheets** from the pop-up menu, click on **View All Records**, and double-click on Picture Catalogue. Please see the Reference Manual, Chapter 6, for more information on Publishing Style Sheets.

Other Features

This has given you a quick overview of how easy it is to publish data with CatBase. There are many more options available than those we've just seen here!

- Create text boxes and fill them with data - for example, to create semi-display ads or product boxes (for an example, see the [Items in Boxes tutorial on our web site](#).)
- Publish data in lots of different formats: delimited text files, XML, and most page layout programs.
- Add fields to your tables and select various properties for them, such as:
 - Force to uppercase or lowercase
 - Check spelling
 - Mandatory
 - Must be selected from a Choice List
 - Can only be modified by an Administrator
- Design your own data entry forms (not available in the Standard Edition)
- Give each person their own User account with their own password, level of access, and options
- Choose which fields will appear in the list views
- Create Memos to keep track of events and set reminders
- Send emails to contacts in the database. You can merge data into the emails, include attachments, and automatically create a Memo for each contact
- Receive emails sent to a designated mailbox and store them in the database
- Send letters to contacts in the database
- Create Sets of data to make it easy to re-load a group of records without having to search for them again - for example, all contacts in the UK, or all products priced less than \$10, or whatever!

- Create Scheduled Events to automatically run processes at a designated interval - publish data, import data, send/receive emails, update Sets
- The built-in Backup module automatically makes backups of your data and can optionally maintain a log file of all modifications. In the event of a crash which damages the data file, the Backup module can automatically restore the last backup and apply the log to it.
- Run Scripts to accomplish special tasks (we will write scripts for you)
- Use the built-in multi-language spelling checker on fields that you designate (e.g., Description fields).

and many other features!

What to do next

View On-line Tutorials

We've created a number of brief Tutorials that show you how various parts of the program work. [See them here.](#)

Video Demos and Tutorials

Our online videos are a good way to see demonstrations of how the program works and how to use specific features. [See them here.](#)

Quick Start Manual

To find out more information about how CatBase works, we suggest that you download the Quick Start Manual [from our web site.](#)

Reference Manual

The Reference Manual consists of nine chapters plus a global index. [Download this](#) if you want to really delve into the program's workings.

Ask us a question

Our helpful and friendly Technical Support team will be happy to answer your questions about CatBase, and will help you to set up a test database for your specific requirements. Please contact us [by email](#), providing as much detail as possible, or by telephone on:

From UK phones - 01462 454522

From outside the UK: +44 1462 454522

Thanks for looking at CatBase!

The Development Team