Quick Start

Version 11

Contents

What is CatBase?

CatBase is a database publishing application that will save you lots of time when creating publications such as:
- catalogues
- directories
- price lists
- classified ads
- ... or any sort of publication that's data-based.

You can use CatBase as your data management database, or you can import data into CatBase's database from another source such as a spreadsheet, delimited text file, XML file, MySql or SqlServer database.

You can publish your data to:
- A PDF
- A Microsoft Word document
- Adobe InDesign
- QuarkXPress

Why use CatBase to create your publications?

With CatBase you can very quickly produce your publication from your data.

Using a page layout program

You'll need to have a licence (or a trial version) for InDesign or QuarkXPress and to know at least the basics of how to use it.

Publishing Direct to PDF

Instantly create your publication as a PDF! it can comprise various sections, such as:
- A cover page
- Introductory pages (such as "About us ...")
- The dynamically published data
- End matter (such as an order form, Temrs & Conditions, etc.)
- An index

If you have any doubts about which publishing method will work best for you, please contact us for a free evaluation of your project.

Advantages of using CatBase:
- **Save time:** CatBase handles most or all of the data formatting for you, so you don't need to spend hours, days, or even weeks organizing and styling your data.
- **Create various publications from the same data set:** Easily produce publications in different formats or with a subset of your data. For example, create:
  - Sale catalogues
  - Specialty catalogues
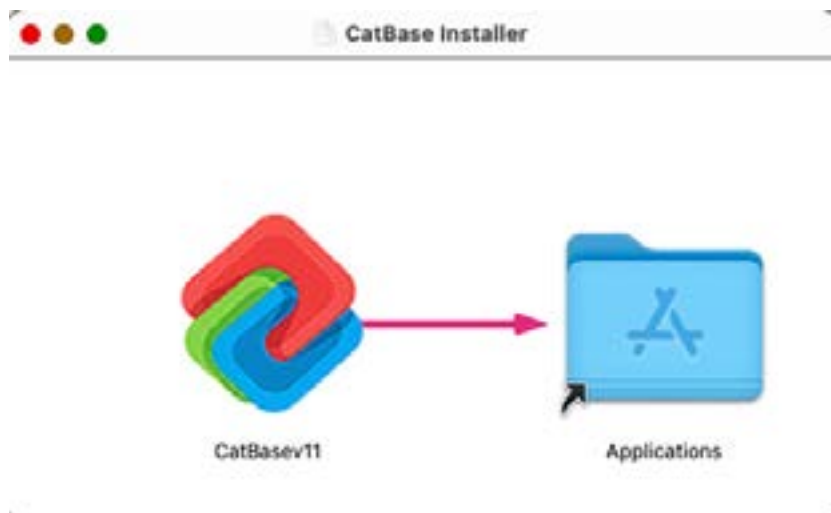 - Customised reseller price lists

- **Conditional formatting:** Set up Rules to tell CatBase how to make decisions about what data to publish and/or how to style it. For example:
  - If a company has paid for an enhanced listing, include their logo
  - If they are a Charter member, set the company name in red
  - If it's a new product, publish a NEW PRODUCT! flash
  - *You can create Rules for all kinds of purposes!*
- Publish any number of **images** or **artwork**
- **Very flexible:** You define the tables, fields, and relationships that are needed for your project
- Manage multiple **Projects** within one database
- Produce personalised emails and letters
- Create labels (eg mailing labels, product labels, price tickets etc.)
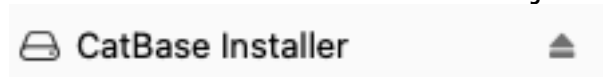- Create and publish bar codes and QR codes

Installing CatBase (Single-user and Trial versions)

Macintosh

1. Double-click on the installer (CatBasev11 Single-User Installer.dmg)

2. Drag the CatBase icon and drop it into the **Applications** folder icon.
3. Close the installer window and eject the disk image:

4. Optionally, select the CatBase program icon in your Applications folder

 then drag and drop it onto your Dock or your Desktop.

Windows

1. Double-click on the installer (CatBaseInstaller.exe)
2. Follow the instructions in the installer.

We have created an example database which contains several different projects, such as a Product Catalogue, Telephone Directory with White and Yellow Pages, a Parts Catalogue, and more. There are notes and other supporting documents for each project. You'll find everything in the **CatBase Examples and Docs** folder, which you can dowload from the Downloads page on our website.

Starting up and Getting to Know CatBase

To start CatBase, double-click on the CatBase program icon. You might see a message like this:

To open the Demo Database or one that has already been set up for your project, click on the **Open an existing database** button. You'll find the CatBase Demo Database in the **CatBase Examples and Docs** folder.

If you want to create a new, empty database from scratch, click the **Create a new database** button. Enter a name for your new database, and then choose a suitable location to save it - eg in your Documents folder, or (we suggest) create a new folder specifically for your CatBase files, and save it in there.

Entering a Licence Number

Next, you might see a dialog asking you for licence registration details:

Licenced Version

If you have purchased a CatBase licence and received a Licence Number, select the **Licenced Version** radio button. The dialog will change and you can enter your licence number and other registration details.
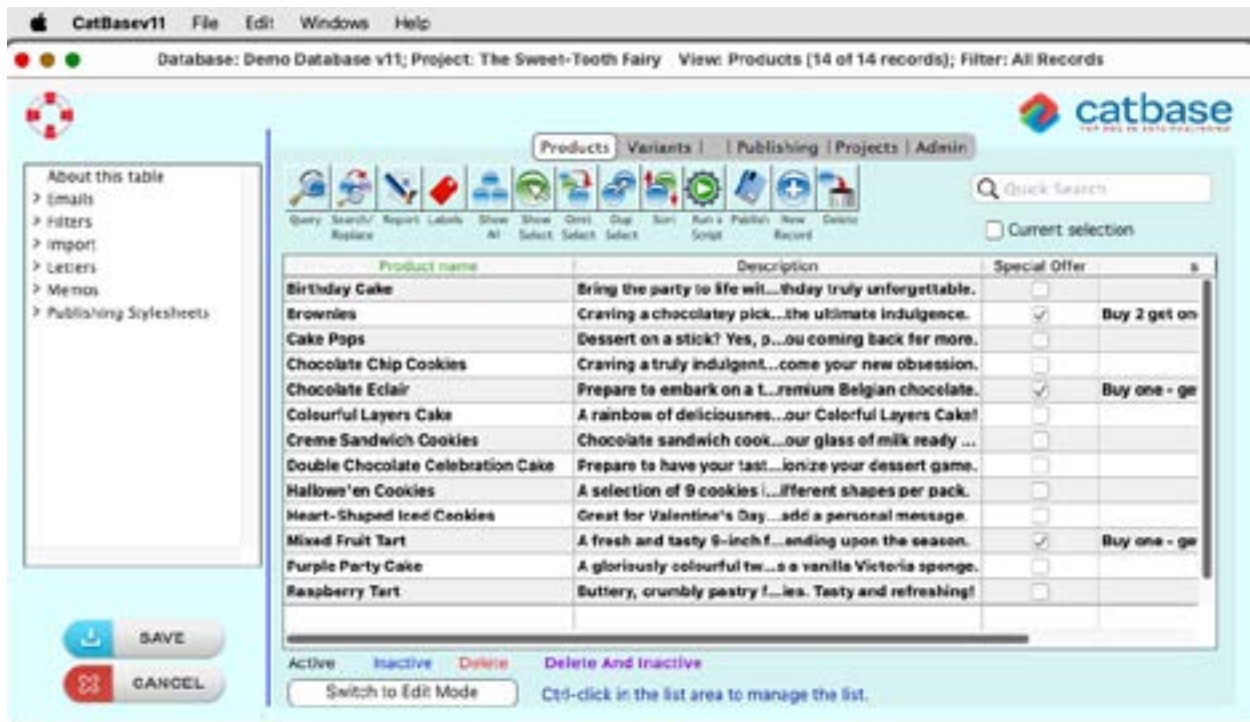
Trial Version

The Trial Version offers all the features of CatBase and has no time limit. It is however limited to 50 records per data table.

If you have received a Trial Licence number, enter it here; if you haven't, click the **Request a Trial Licence Number** button to get one.
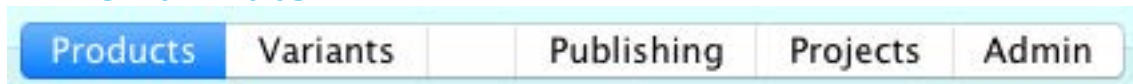
The CatBase Interface

The CatBase window initially shows a list of the data in the default data table - for example, in the Demo Database it looks like this:

The CatBase Main Window

There are four main areas on this window:

1. The Main Tabs

These tabs provide access to the various content and options within the database. The tab bar is divided into two sections:

On the left are the data tables - in this example, there are two data tables named **Products** and **Variants**. These are your customised data tables, and they may be completely different in another database or Project.

On the right are options for managing your **Publishing** projects, other types of **Projects**, and various administration options and settings can be found under the **Admin** tab.
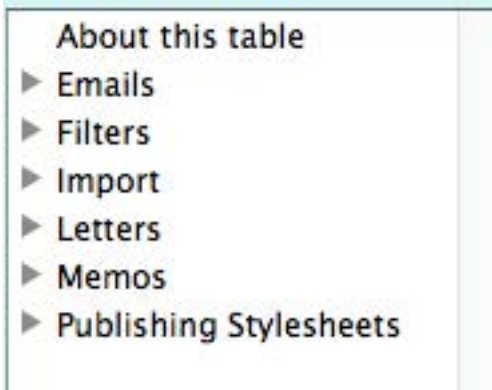
2. The Button Bar

These buttons provide quick access to various database operations.

For detailed information about the Button Bar, see this online Tutorial.

3. The Topics area

About this table
▸ Emails
▸ Filters
▸ Import
▸ Letters
▸ Memos
▸ Publishing Stylesheets

Provides access to data management options for the selected data table.

4. The Data List

Birthday Cake	Birthday Cake	:images:bi...y-cake.jpg	☐	
Brown Brownies	Brown Brownies	:images:brownies.jpg	☑	Buy 2 get one f
Cake Pops	Cake Pops	:images:cake-pops.jpg	☐	
Chocolate Chip Cookies	Chocolate Chip Cookies	:images:c...cookies.jpg	☐	
Chocolate Eclair	Chocolate Eclair	:images:eclair.jpg	☑	Buy one - get o
Colourful Layers Cake	Colourful Layers Cake	:images:c...rs_cake.jpg	☐	
Creme Sandwich Cookies	Creme Sandwich Cookies	:images:oreo.jpg	☐	
Double Chocolate Celebration Cake	Double Chocola...elebration Cake	:images:choc-cake.jpg	☐	
Hallowe'en Cookies	Hallowe'en Cookies	:images:h...cookies.jpg	☐	
Heart-Shaped Iced Cookies	Heart-Shaped Iced Cookies	:images:v...cookies.jpg	☐	
Mixed Fruit Tart	Mixed Fruit Tart	:images:fruit-tart.jpg	☑	Buy one - get o
Purple Party Cake	Purple Party Cake	:images:party-cake.jpg	☐	
Raspberry Tart	Raspberry Tart	:images:ra...rry-tart.jpg	☐	
Strawberry Tart	Strawberry Tart	:images:st...rry-tart.jpg	☐	

The selected table's data displayed in a list view. You can double-click any item to open the editing window and see all of that record's details.

To learn all about the CatBase interface, please see the Interface Tutorial.

Learning Resources

There are plenty of resources to help you learn how to use CatBase.

Demo Database: the Demo Database contains various projects that you can look at to see the different ways that CatBase can publish a variety of types of publication. Find the one that's closest to your own project and modify it, or create a new database and set it up yourself.

To see the various database projects, go to the **Projects** main tab and then expand the **Database Projects** topic on the left of the window. To switch to another Project, choose **Switch Project** from the **File** menu.

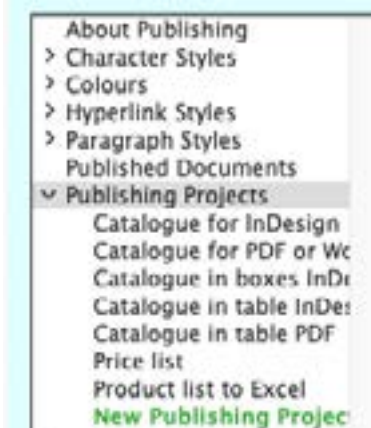You might like to try one of the Publishing Projects to see how it works.

Publishing Project Examples

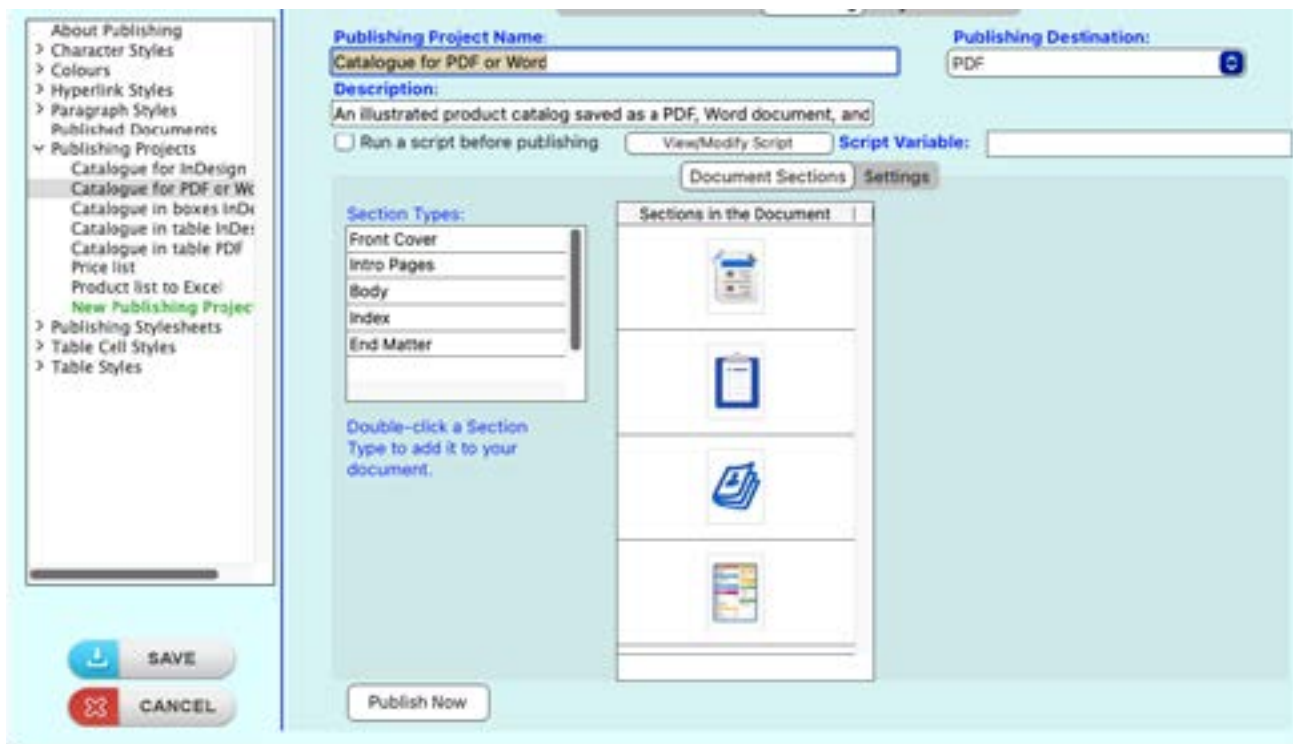To see the publishing examloes we've set up in the Demo Database:

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- Go to the **Publishing** main tab
- Expand the Publishing Projects topic on the left

-

PDF Project Example

If you want to see a project published as a PDF and/or a Word document, select one of the example PDF Publishing Projects - for example:

- Select **Catalogue for PDF or Word**:

This Publishing Project comprises four Sections:
- A cover page
- An introductory page
- The body f the catalogue (the dynamically published data)
- An index

Click the **Publish Now** button.

CatBase creates the document and saves it both as a PDF and a Word .docx document. Find them in the Data Exports folder on your Desktop.

Adobe InDesign Project Example

If you are going to be using InDesign to create your final publications, try one of the InDesign example Publishing Projects - eg:

The **Project Info** text explains how to use this example.

Getting Help

"About ..." Topics: Select one of the **About ...** topics at the top of the topic list under the main tabs for information about the choices under that tab.

Help Button: Click on the Help button   to see context-sensitive help and to search the help topics.

CatBase Academy: Check out our online Tutorials in the CatBase Academy.

Knowledgebase: Search the online Knowledgebase or use the **Search** box at the top of every page on catbase.com to find answers to specific questions.

Videos: Find helpful videos on our YouTube channel.

If you can't find the answer to your question, raise a support ticket.

If you have any questions about CatBase, or if you're not sure whether it is suitable for your project, please contact us! We will be happy to have a chat with you about your project. If you would like to book a free online consultation about your proposed project, or would like a free live online demonstration, please book a time slot here!

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