AUTOMATICALLY CREATING HYPERLINKS AND CROSS-REFERENCES IN YOUR INDESIGN DOCUMENTS

Wouldn't it be great if, each time you published your catalogue, directory, price list ... or other database-based publication, you could automatically build hyperlinks for your contacts, products ... or other information? Well now you can - with CatBase doing all the work for you!

What kinds of hyperlinks can be created?

You can choose among three types of hyperlink: Email, URL, and Cross-Reference. In fact, an Element can have both a Hyperlink and a Cross-Reference!

Hyperlinks to Email Addresses

When you click on an email hyperlink in a PDF document, it opens your default email application, creates a new email, and addresses it to the email address that was referenced in the link.

Hyperlinks Ito URLs

Click on a URL hyperlink in a PDF document and the referenced web page opens up in your default web browser.

Cross-References

Using our special Make xRefs script for InDesign, CatBase can create active cross-references in your InDesign documents. For example, you could create a cross-reference from a product's additional information page to its main listing. For a detailed explanation and Tutorial, see the Creating Cross-References Tutorial.

How to Make the Hyperlinks

It's easy to set them up in CatBase. There are just a couple of steps involved ...
1. Create a Hyperlink Style.
2. Select your options in the **Hyperlinks and Cross-Refs** tab of the element that you want to attach the hyperlink to.
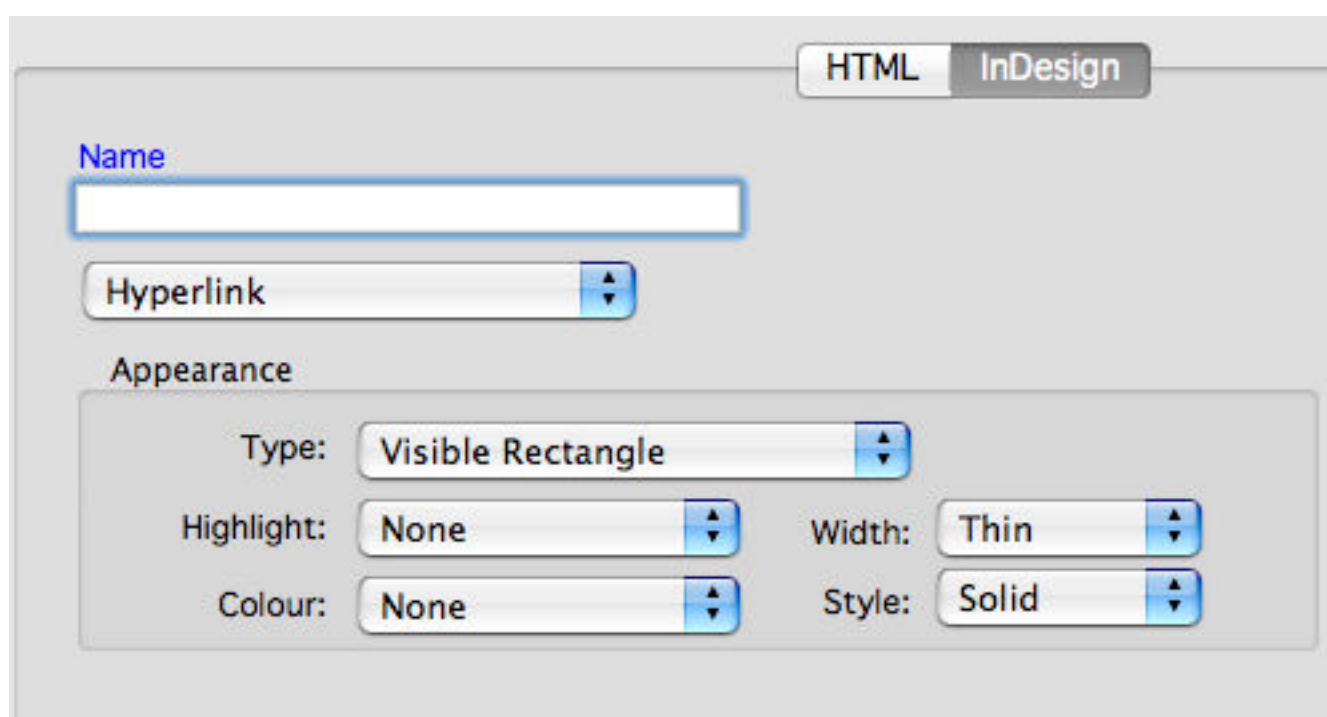
Step One: Create a Hyperlink Style

Hyperlink Styles determine what your hyperlinks will look like in the InDesign and PDF documents. They are the options you set when you create a new hyperlink in your InDesign document. In CatBase you just create the style once and then it can be selected for any of your links. You can have any number of hyperlink styles.

To create a hyperlink style:
1. Select the **Publishing** main tab.
2. Expand the **Hyperlink Styles** topic from the left-hand menu.
3. Click **New Hyperlink Style**.

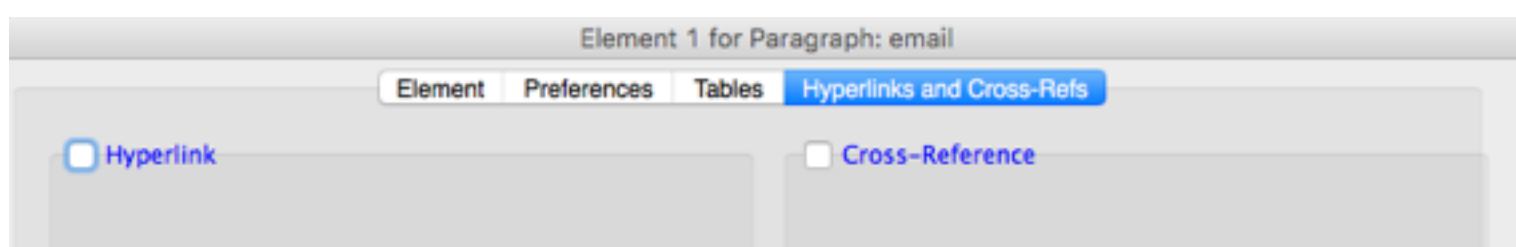A new hyperlink style looks like this:

The InDesign options are the same as the ones you will find in InDesign when you create a new hyperlink. Set up your preferred style and save the Hyperlink Style record.

Step Two: Set up the Hyperlink in your Publishing Stylesheet

Publishing Stylesheets are what tell CatBase which data you want to publish and how you want it all to be formatted.

Open the Element that you want to add a hyperlink to, and click on the **Hyperlinks and Cross-Refs** tab:

Email and URL Hyperlinks

Select the **Hyperlink** checkbox and the Hyperlink area changes:

Hyperlink Type: Choose between **Email** and **URL**.
Hyperlink Style: Select one of the Hyperlink Styles you've defined.
Link is built from: Choose from:
- Same as element text
- Contents of another field
- Static text + field data
- Static text

Same as Element Text

The link will simply be created using the contents of the Element. This usually works well for email addresses and websites.

Contents of Another Field

Select this option and you will then be able to choose the field from which to get the link. For example, suppose you are publishing a directory of members of an organisation. You want to create a link to each company's web site and you want the link to be on the company's name. You would choose the *company name* field for the Element and then select the *Website* field to create the link..

Static Text + Field data

This option lets you build hyperlinks dynamically. When you choose this option, the view changes:

The hyperlinks are built in 3 sections:

> static text+dynamic data+static text

Suppose you are publishing a product catalogue and you want to link each product's name to its page on your online shop. A complete link to that product page might look something like this:

> https://catbase.co.uk/shop/product_info.php?&products_id=31

Most of the pathname will be the same for each product; the only difference is the product id number ("31" in this example). In the example shown, the link includes a database query for the record number (the part after the question mark – "&products_id=31").

Let's say you have a field in your CatBase database called "Shop Record Number" which contains the online database's record number for each product. The hyperlink options might be set up like this:

In this case the "after" static text is blank.
Let's consider another example. Maybe each product has a static page on your website, and each page is named with the product's product name. Your Hyperlink settings might look like this:

As each record is published, CatBase will create the link by joining the static text and the contents of the selected field together.

If you're not sure how to build your hyperlinks, check with your webmaster.

Publishing the Hyperlinks

OK, so you've got your database all set up and ready to publish your catalogue, directory, or whatever it is. All you have to do now is:
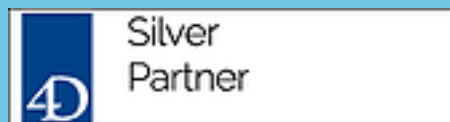
- Publish the data from CatBase using either the InDesign or InDesign with Xtags publishing destination.
- Import the published file into your Adobe InDesign layout.
- The hyperlinks are all created and styled as specified.
- Do whatever you need to finalise the document.
- Export it to PDF. Be sure to select the **Hyperlinks** checkbox in the **Include** area of the **PDF export dialogue**!
- Your hyperlinks will now be active in the PDF document:

Cross-References