



CatBase Demo Manual for Microsoft Word

(or any program that supports RTF)

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Contents

| | |
|--|----|
| What is CatBase? | 1 |
| Why do I need to use Word as well? | 1 |
| How does Word know what to do with the data? | 1 |
| OK - Let's see what it can do! | 2 |
| The Demo Database | 2 |
| Publishing Examples | 2 |
| Example 1: An Illustrated Catalogue | 2 |
| Customising the document | 6 |
| Columns | 6 |
| Using Templates | 13 |
| How does it work? | 14 |
| Publishing Projects | 14 |
| Publishing Stylesheets | 15 |
| Example 2: A Simple Price List | 18 |
| Example Three: Telephone Directories | 24 |
| White Pages | 25 |
| Yellow Pages | 26 |
| Example Four: Membership Directory | 27 |
| Plain version without pictures | 27 |
| Membership Directory with Pictures | 28 |
| What next? | 29 |

What is CatBase?

It's a data publishing application for creating catalogues, directories, price lists, or any sort of publication that's based on a database or spreadsheet. CatBase automates the tedious, time-consuming, and error-prone process of selecting, sorting, and formatting the data when it is published.

Why do I need to use Word as well?

You use CatBase to manage your data and to prepare it for publishing. When you publish your data from CatBase, it creates a text file that contains your data, sorted and organised the way you want it, with style tags embedded. When this tagged file is opened up with Word, Word handles the actual formatting of the text (and pictures). As you'll see, this gives you an incredible amount of flexibility and control over your publication.

How does Word know what to do with the data?

You set up **Publishing Projects** in CatBase. You can have any number of Publishing Projects, so your data can be published in many different ways. These describe:

- What selection of data you want to publish (e.g.: all the data; just the products on special offer; just the members based in New York, etc.)
- Which **Publishing Stylesheet** to use
 - How you want the data sorted
 - Which fields (parts of the data) you want to include
 - Which **Paragraph Stylesheet** to apply to each paragraph
 - Which pictures to include (optionally)
 - Any rules to apply - for example, you could apply a rule that if a product is new, then include a special **NEW!** flag.
- Which format to save the published data in
- What to name the published file and where to save it

The **Paragraph Stylesheets** are the key to managing the text formatting.

To learn more about Publishing Projects, see [this short video](#).

To learn more about Publishing Stylesheets, please see the [Publishing Stylesheets Tutorial](#).

For now though, let's just jump in and see how easy it is to produce a beautifully formatted illustrated product catalogue.

OK - Let's see what it can do!

The Demo Database

Our Demo Database contains a few different Projects for various types of publishing project. The first Project that opens up when you start the database is a product catalogue for a fictitious bakery, The Sweet Tooth Fairy.

The bakery's proprietor needs to produce several different publications from the database:

- An illustrated catalogue
- A simple price list
- A seasonal products catalogue

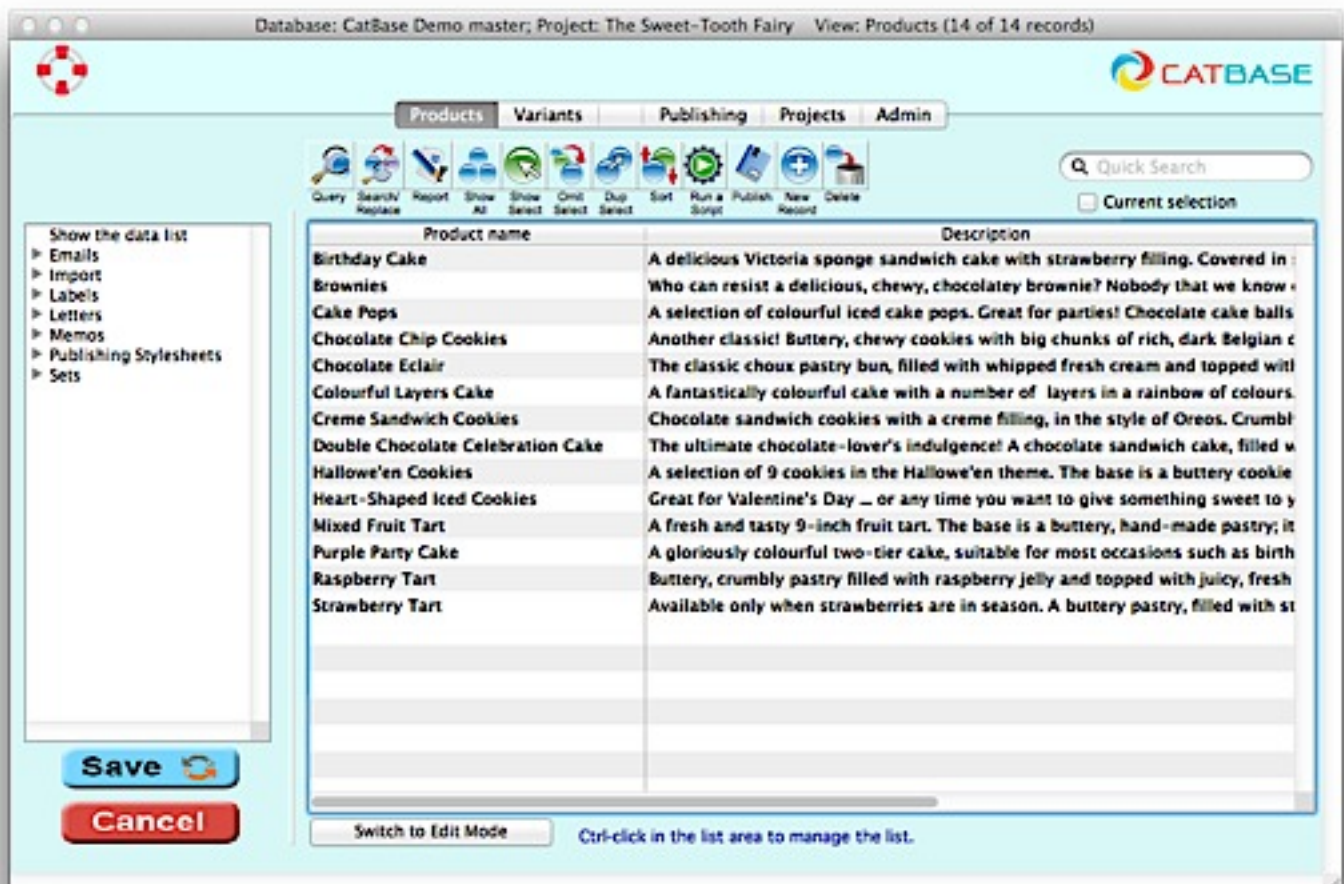
Although your own project probably is not a bakery goods catalogue, these examples will demonstrate how CatBase works and give you some ideas as to the possibilities it offers.

So let's jump in and have a go ...

Publishing Examples

Example 1: An Illustrated Catalogue

1. Start CatBase in the usual way, as described in the Installation manual.
2. You should see a window similar to this:



CatBase Demo Manual for Microsoft Word

- There are two data tables: **Products** and **Variants**. We're looking at the Products table here. The **Variants** are options available for the Products - for example, a cake may be offered in 3 different sizes. This is what we call a **relation**: each Product can have any number of Variants related to it. (for more information about databases and relations, please see the [Database 101 Tutorial](#)).
- Double-click on a Product name to open its record so that you can see what data we have for the Product. For example, if you open the Colourful Layers Cake record:

The screenshot shows a window titled 'Table: Products; Record: Colourful Layers Cake'. It features the CatBase logo and three tabs: 'Details' (selected), 'Categories', and 'Variants'. The 'Details' tab contains the following fields:

- Product name:** Colourful Layers Cake
- Description:** A fantastically colourful cake with a number of layers in a rainbow of colours. Choose the number of layers and colours for your cake. This is the perfect cake to choose for a special celebration!
- Picture:** images:colourful_layers_cake.jpg
- special offer:** An unchecked checkbox.

At the bottom left, there are 'Save' and 'Cancel' buttons. Below the 'special offer' checkbox are four small circular icons.

- Note that there are three “tabs”, or pages, of info: **Details**, **Categories**, and **Variants**.
- Click on the **Variants** tab:

The screenshot shows the 'Variants' tab of the CatBase window. It displays a table with the following data:

| Variant... | size | Pack Qty | SortOrder | Price each |
|------------|------|----------|-----------|------------|
| 6 layers | 6.00 | 0 | 1 | 10.00 |
| 6 layers | 9.00 | 0 | 2 | 15.00 |
| 8 layers | 6.00 | 0 | 3 | 15.00 |
| 8 layers | 9.00 | 0 | 4 | 20.00 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

- This shows a list of the Variants that belong to that Product.

NOTE: You have complete control over the setup of your tables, fields, and data entry windows. You can add/delete fields, place and size them on the window, and create as many Tabs to organise your data as you want.

- Click the **Save** or **Cancel** button to close that window.

9. Now, go to the Publishing main tab:

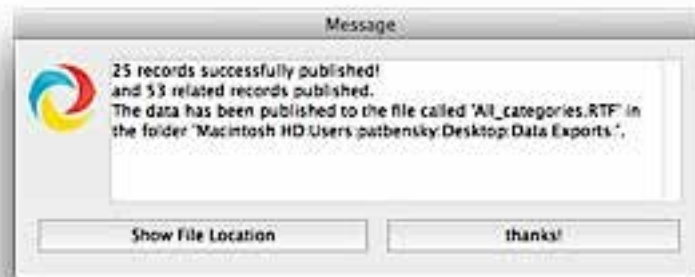


10. Expand the **Publishing Projects** topic on the left-hand side, and select the Publishing Project **Catalog - Word**:



For more info about Publishing Projects, see the [Publishing Projects Tutorial](#).


11. Click the **Publish Now** button.
12. CatBase publishes the data, and saves it into a file called *All categories.rtf* in the Data Exports folder on your Desktop. You'll see a message like this:



13. Click the **Show File Location** button.
14. The Data Exports folder opens, with the published file selected.
15. **Windows users:** Double-click the file.
16. **Mac users:** Ctrl-click, or right-click, on the file and choose **Open with ->Microsoft Word** from the popup menu.
17. It should open up in Word, and should look similar to this:

Cakes


Birthday Cake



A delicious Victoria sponge sandwich cake with strawberry filling. Covered in smooth white icing. "HAPPY BIRTHDAY" candles included.

| Option | Description | Price |
|--------------|------------------|-------|
| 10-inch cake | For 4-6 people | 10.00 |
| 15-inch cake | For 10-15 people | 18.00 |


Brownies



Who can resist a delicious, chewy, chocolatey brownie? Nobody that we know can! We use only fresh, free-range eggs and top-quality Belgian chocolate in our brownies.

| Option | Description | Price |
|----------|---------------------|-------|
| 1 lb box | Approx. 10 brownies | 8.00 |
| 2lb box | Approx. 20 brownies | 18.00 |

Cake Pops



A selection of colourful iced cake pops. Great for parties! Chocolate cake balls coated in variously coloured icing and finished with hundreds and thousands

Pretty cool, yes?

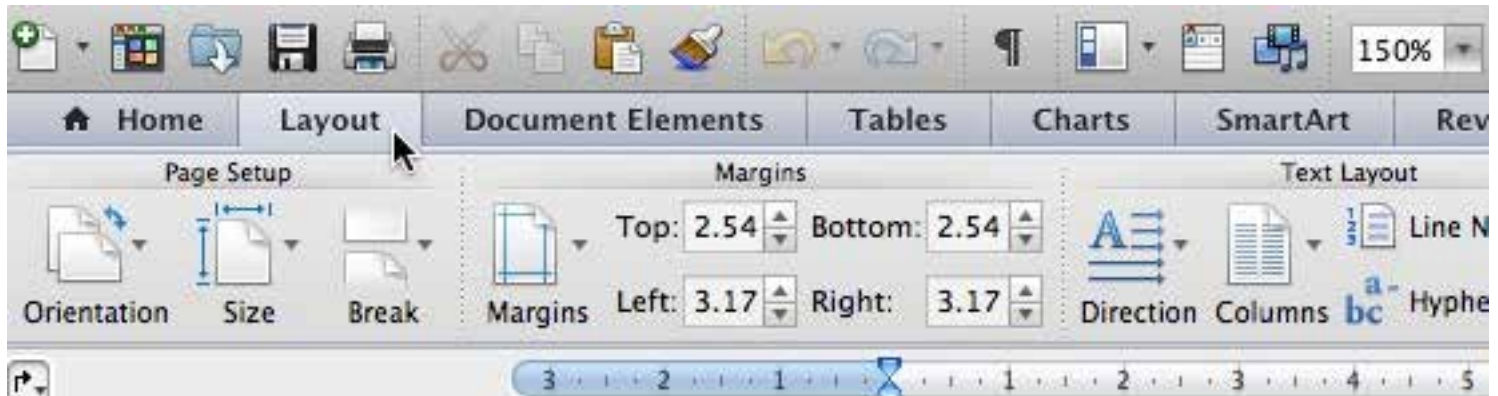
Customising the document

Now that your data is in a Word document, you can make whatever changes you want to the style and formatting of the catalogue. Let's look at a few examples.

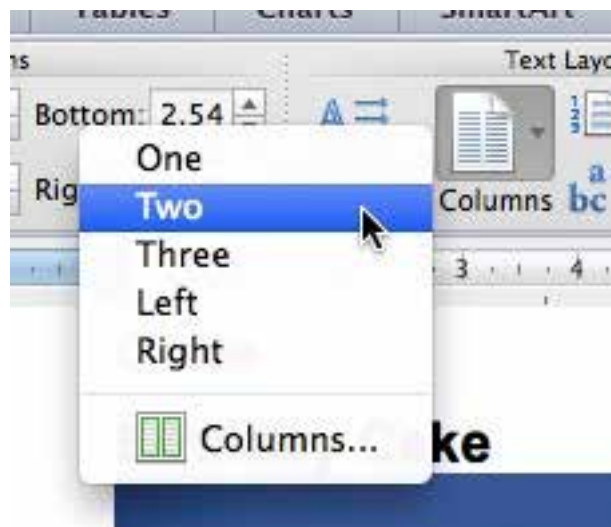
Columns

This catalogue would probably look much better in two columns. It's easy to change:

1. Select the **Layout** tab at the top of the window:



2. Click on the Columns icon and choose Two:



3. The document immediately looks better:

Cakes

Birthday Cake



A delicious Victoria sponge sandwich cake with strawberry filling. Covered in smooth white icing. "HAPPY BIRTHDAY" candles included.

| Option | Description | Price |
|--------------|------------------|-------|
| 10-inch cake | For 4-6 people | 10.00 |
| 15-inch cake | For 10-15 people | 15.00 |

Brownies



Who can resist a delicious, chewy, chocolatey brownie? Nobody that we know can! We use only fresh, free-range eggs and top-quality Belgian chocolate in our brownies.

| Option | Description | Price |
|----------|---------------------|-------|
| 1 lb box | Approx. 10 brownies | 5.00 |
| 2lb box | Approx. 20 brownies | 15.00 |

Cake Pops



A selection of colourful iced cake pops. Great for parties! Chocolate cake balls coated in variously coloured icing and finished with hundreds and thousands.

| Option | Description | Price |
|-----------|-------------|-------|
| Box of 10 | Assorted | 9.50 |
| Box of 20 | Assorted | 15.00 |

Chocolate Eclair



The classic choux pastry bun, filled with whipped fresh cream and topped with delicious Belgian dark chocolate.

| Option | Description | Price |
|------------|--------------------|-------|
| Per eclair | One size fits all! | 0.50 |

one - get one free!

Colourful Layers Cake



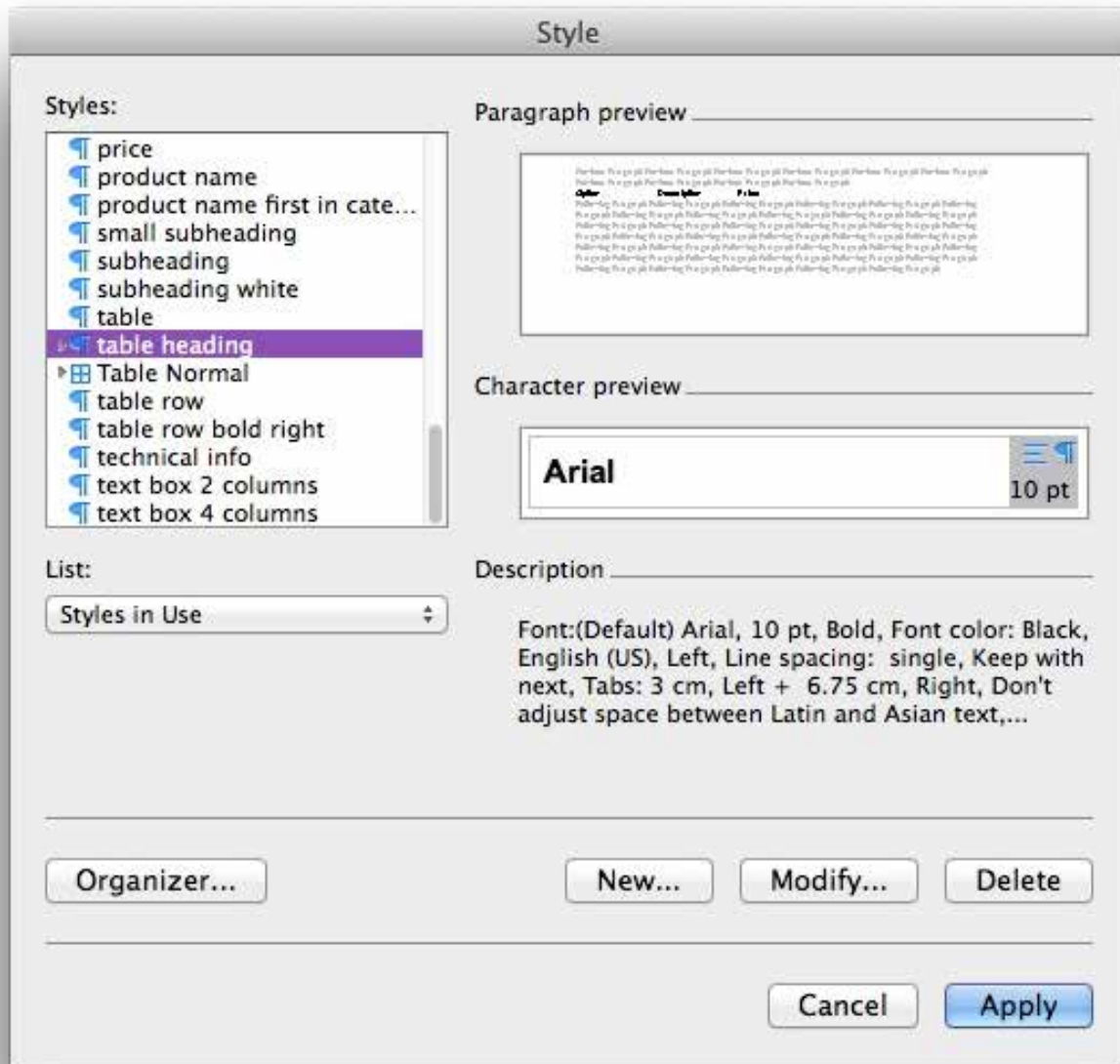
A fantastically colourful cake with a number of layers in a rainbow of colours. Choose the number of layers and colours for your cake. This is the perfect cake to choose for a special celebration!

The Options tables could be better styled: let's add a bit of space above the column headings and add an underline.

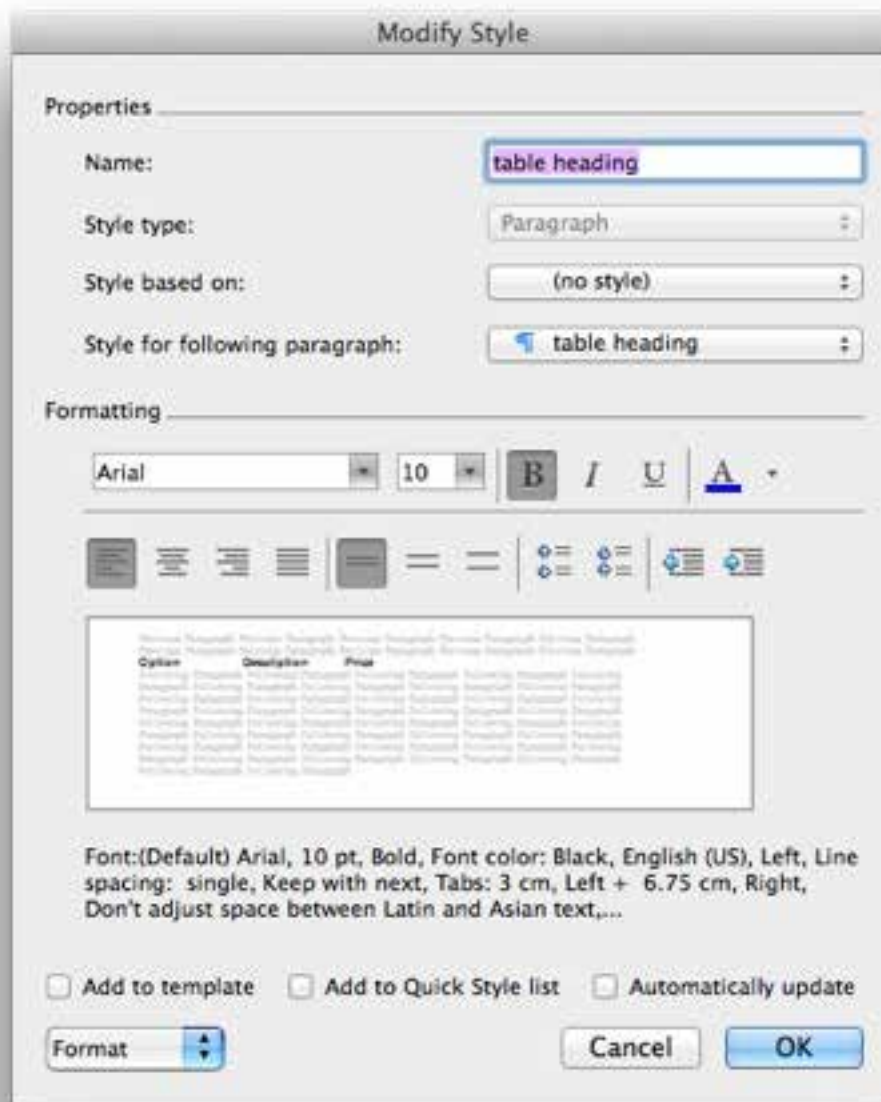
1. Click anywhere within one of the table headers

Option **Description** **Price**

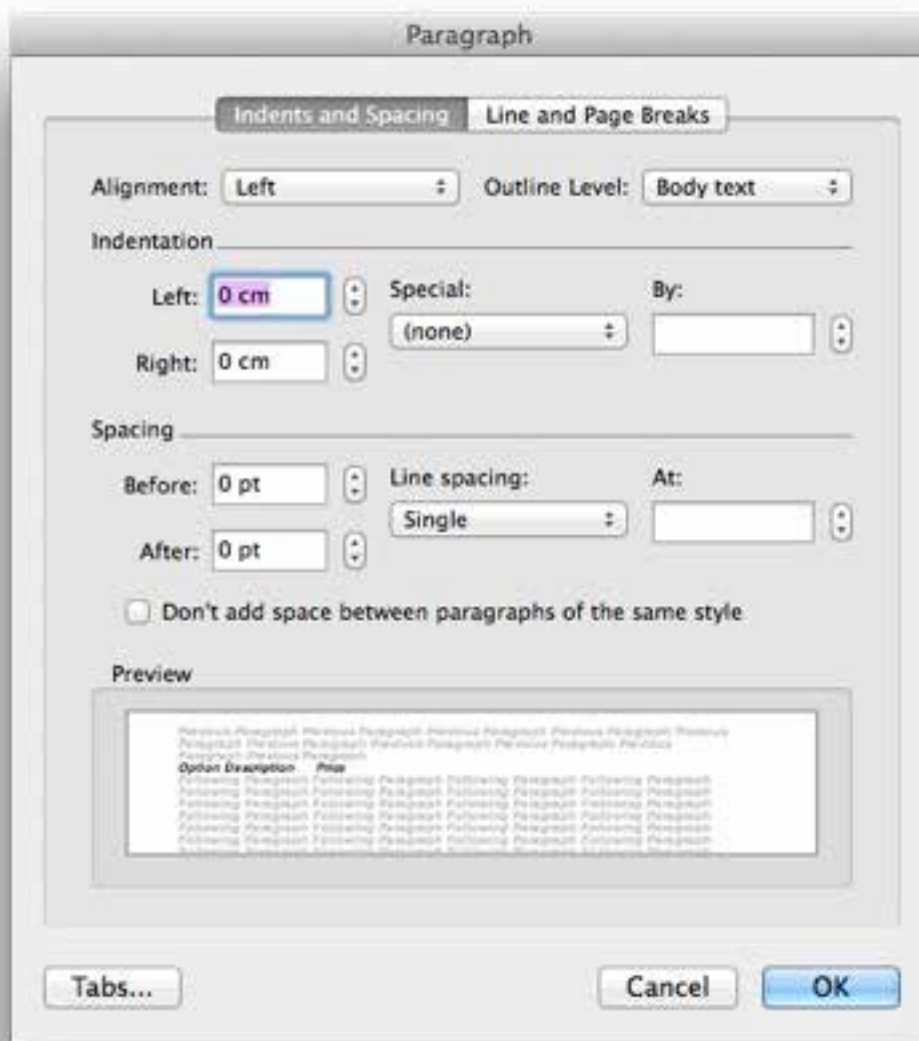
2. Go to the **Format** menu and choose **Style ...**
3. Notice that the **table heading** style is selected:



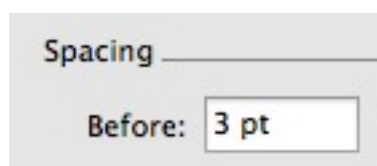
4. Click the **Modify ...** button.



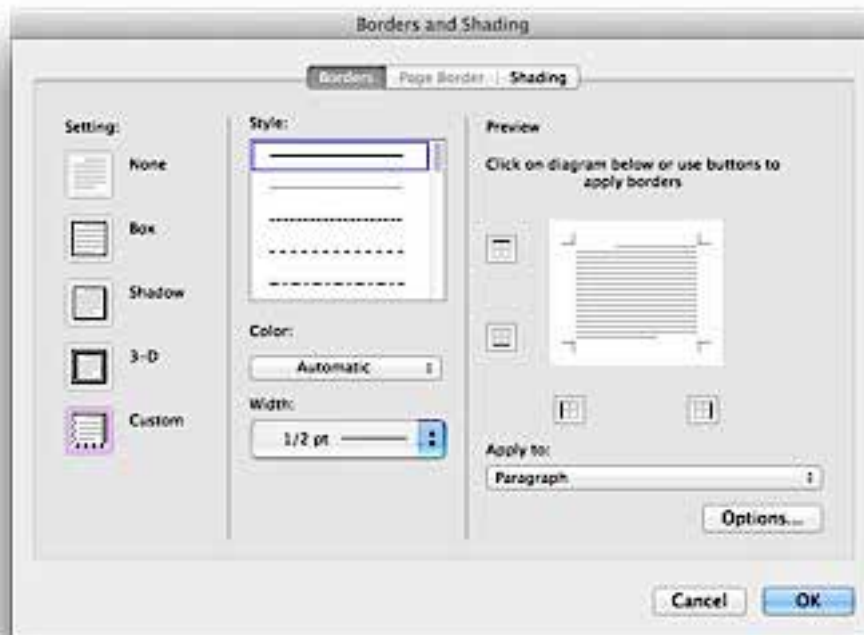
5. Here you can change basic formatting options such as the font, style, size, colour etc.
6. From the little popup at the bottom of the window which currently says **Format**, choose Paragraph:



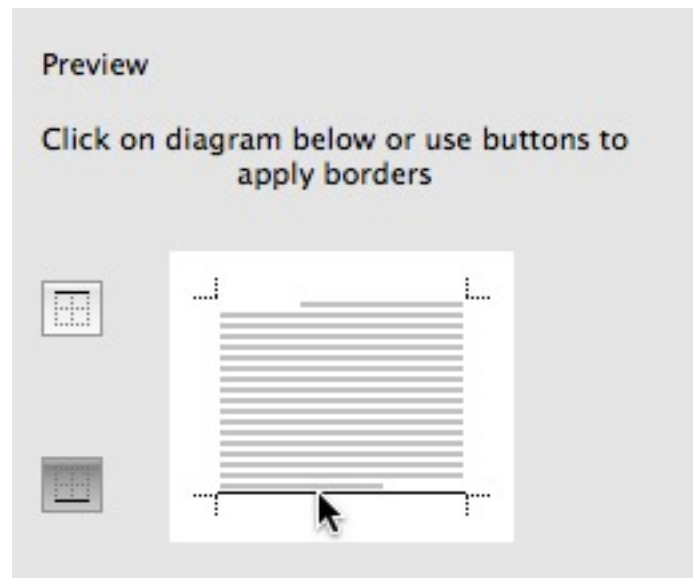
7. In the Spacing area, enter a small figure such as 3 into the Before field:



8. Click **OK**.
9. Now choose **Border** from the little popup at the bottom of the window:



10. In the Preview area, click at the bottom of the image. A Line should appear there:



11. Click **OK**, **OK** again, then **Apply**.
 12. Your tables should not look similar to this:

| Option | Description | Price |
|----------|---------------------|-------|
| 1 lb box | Approx. 10 brownies | 8.00 |
| 2lb box | Approx. 20 brownies | 18.00 |

Much nicer!

Here's something else that could be improved:

chocolate sponge and the top tier is a vanilla Victoria sponge.

| Option | Description | Price |
|---------------|-------------|-------|
| 10-inch caked | 8 servings | 15.95 |
| 16-inch caked | 16 servings | 25.00 |

Chocolate Eclair



The classic choux pastry baguette, filled with whipped fresh cream and topped with delicious Belgian dark chocolate.
Irresistible!

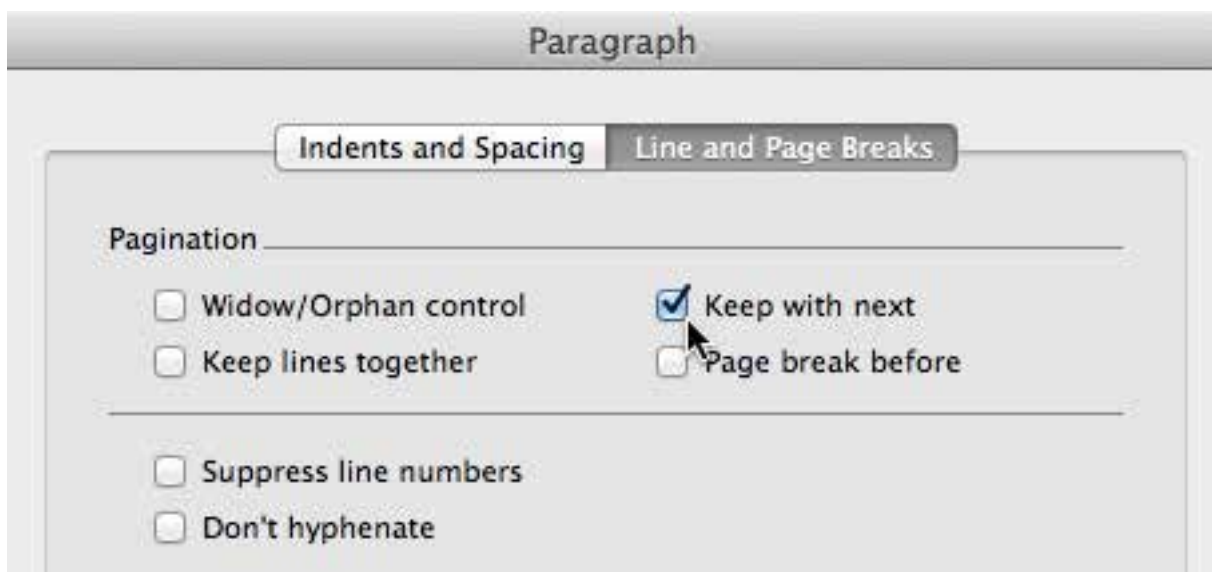
| Option | Description | Price |
|------------------|--------------------|-------|
| Per <u>dozen</u> | One size fits all! | 0.50 |

Hallowe'en Cookies



I don't like the way that the product details can get split across two columns or pages. All the info for one product should "stick together". That's easy to fix:

1. Click in the paragraph that contains one of the pictures, so that your cursor is right next to the picture.
2. Go to the **Format** menu and choose **Style ...**
3. The **inline image** style should be selected.
4. Click the **Modify** button.
5. Choose **Paragraph** from the little popup menu at the bottom of the window.
6. Go to the Line and Page Breaks tab and select the Keep with next check box:



7. Save it.


You can get creative and make your document look the way you want it to. You can add page headers and footers, change the styling of the text, and so on.

This is great, but it could become somewhat tedious if you had to make these changes every time you published a catalogue.

Using Templates

The solution is to use a template document. We've created one that you can try.


1. Launch Word, if it isn't already running.
2. Choose **Open ...** from the **File** menu.
3. Locate the document Sweet Tooth Fairy Catalog.docx. You should find this in the Sample Documents folder within your CatBase Files folder.
4. Now you see the template named **sweet tooth fairy catalog** in the preview panel. It might be the only one there ... or you might see others,, depending on what's on your computer.
5. Double-click on the **sweet tooth fairy Catalog** icon to open it.
6. The template opens. It has headers and footers set up.
7. Go to the **Insert** menu and choose **File ...**
8. Locate the file you published from CatBase. It's called *All_categories.rtf*, and you will find it in the **Data Exports** folder on your Desktop.
9. Double click the *All_categories.rtf* file.
10. The file is imported into the Word template, and all the text is formatted. It should look something like this:



The Sweet Tooth Fairy

Cakes


Birthday Cake



A delicious Victoria sponge sandwich cake with strawberry filling. Covered in smooth white icing. "HAPPY BIRTHDAY" candles included.

| Option | Description | Price |
|--------------|------------------|-------|
| 10-inch cake | For 4-6 people | 10.00 |
| 15-inch cake | For 10-15 people | 18.00 |


Brownies



Who can resist a delicious, chewy, chocolatey brownie? Nobody that we know can! We use only fresh, free-range eggs and top-quality Belgian chocolate in our brownies.

| Option | Description | Price |
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| 1 lb box | Approx. 10 brownies | 8.00 |
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Cake Pops



A selection of colourful iced cake pops. Great for parties! Chocolate cake balls coated in variously coloured icing and finished with hundreds and thousands.


| Option | Description | Price |
|-----------|-------------|-------|
| Box of 10 | Assorted | 9.50 |
| Box of 20 | Assorted | 15.00 |

Chocolate Eclair



The classic choux pastry bun, filled with whipped fresh cream and topped with delicious Belgian dark chocolate. Irresistable!

| Option | Description | Price |
|------------|-------------------|-------|
| Per eclair | One size fits all | 0.50 |

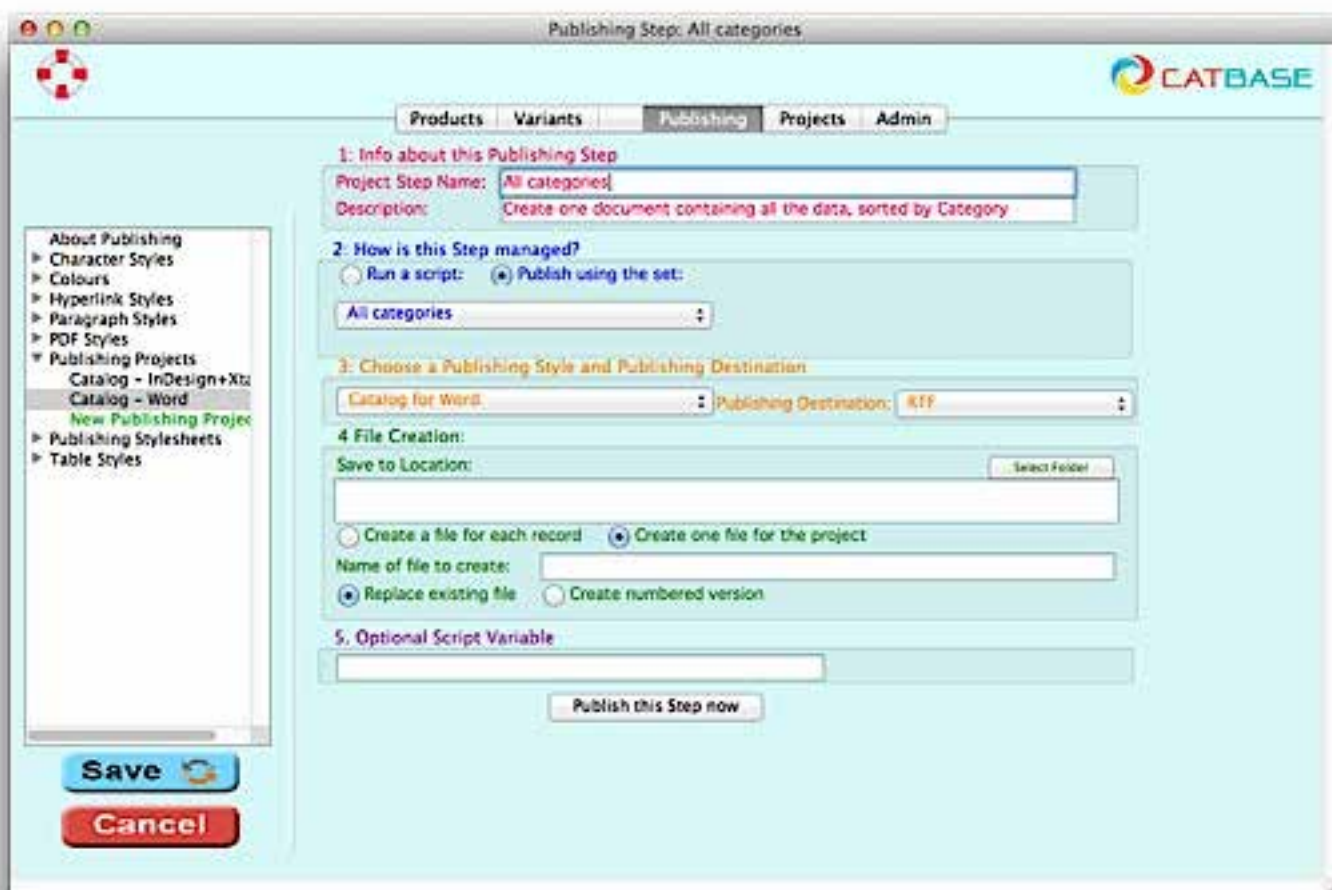
 **Buy one - get one free!**

How does it work?

Publishing Projects

So just how does Word know how to format the catalogue? It's all controlled by the Publishing Projects in CatBase. Let's take a look at the one we used to produce our example catalogue.

1. Go back to CatBase.
2. If it isn't still displayed, select the **Catalog - Word** Publishing Project (go to the main tab **Publishing**, expand the **Publishing Projects** topic on the left, then select **Catalog - Word**).
3. Double-click the **Project Step** "All Categories". The Project Step window opens:



This window is organised into 5 sections:

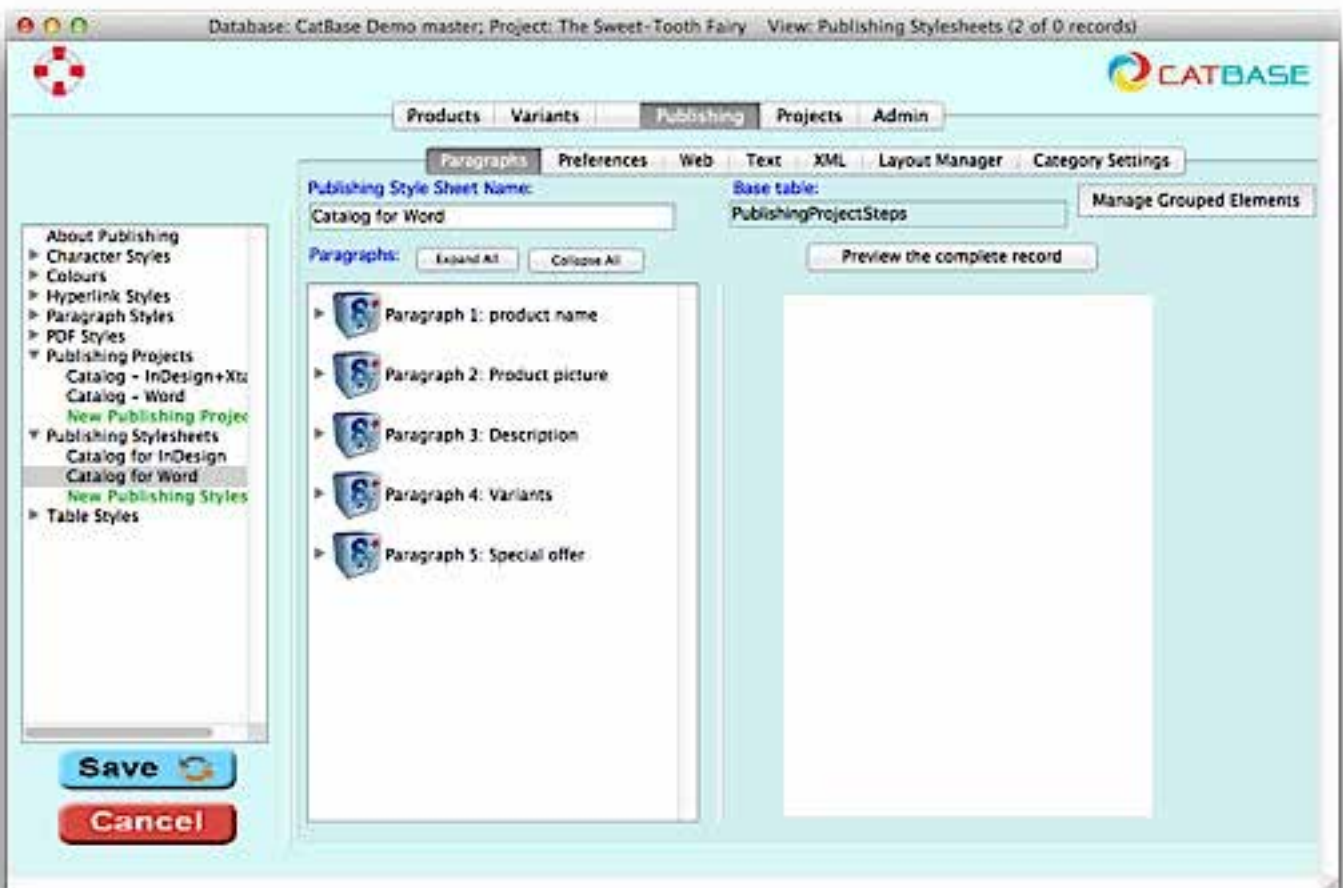
1. **Info about this Publishing Step:** the Step name and description.
2. **How is this Step managed?:** Usually, you'll choose **Publishing Using a Set** here. A Set is a pre-defined selection of records. (For more info about Sets, please see the [Joy of Sets](#) Tutorial). Sometimes, however, the selection of records can sometimes be more complex, and in that case we can write a script to manage them for you. Then you would select the **Run a Script** option instead. In our example, we've selected the Set called **All categories**.
3. **Choose a Publishing Style and Publishing Destination:** Here you select the Publishing Stylesheet to use when publishing this Project Step, and the **Publishing Destination** (this is the software that will be used to actually create the publication). In this example, RTF is selected, which is a format supported by Word.

4. **File Creation:** By default, all files will be saved into a folder called Data Exports on your Desktop. This folder will be created if it doesn't already exist. You can optionally select a different location for the files.
5. **Optional Script Variable:** Variables can be used within Publishing Stylesheets. For example, perhaps each time you publish your catalogue, you include prices in your own currency and also in another currency. CatBase can calculate the foreign currency values "on the fly", but it needs to know what the current exchange rate is. You could enter the exchange rate as a Variable, and then CatBase can use that rate each time the catalogue is published.

Perhaps the most important part of the project is the **Publishing Stylesheet**. Let's take a quick look at it.

Publishing Stylesheets

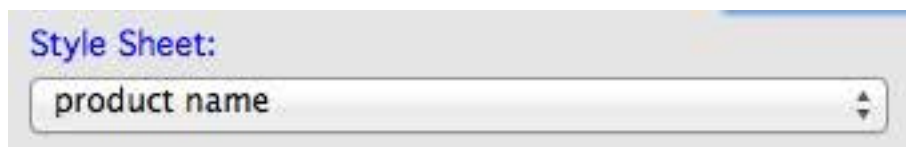
1. With the **Publishing** main tab still selected, expand the **Publishing Stylesheets** topic on the left of the window.
2. Select the Catalog for Word Publishing Stylesheet:



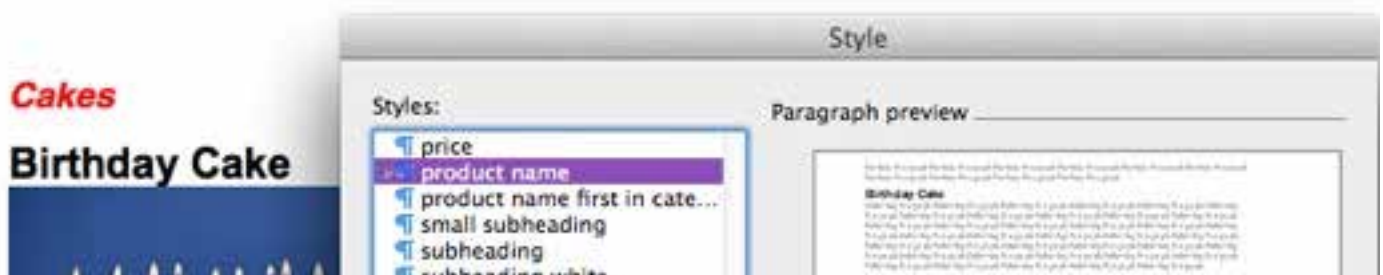
3. There are 5 **Paragraphs**. Double-click on the first Paragraph (product name). The Paragraph info window opens:



4. There are a few options here. The important one is the Style Sheet:



Recall that in the Word document, the Stylesheet “product name” was selected for each product name in the catalogue:



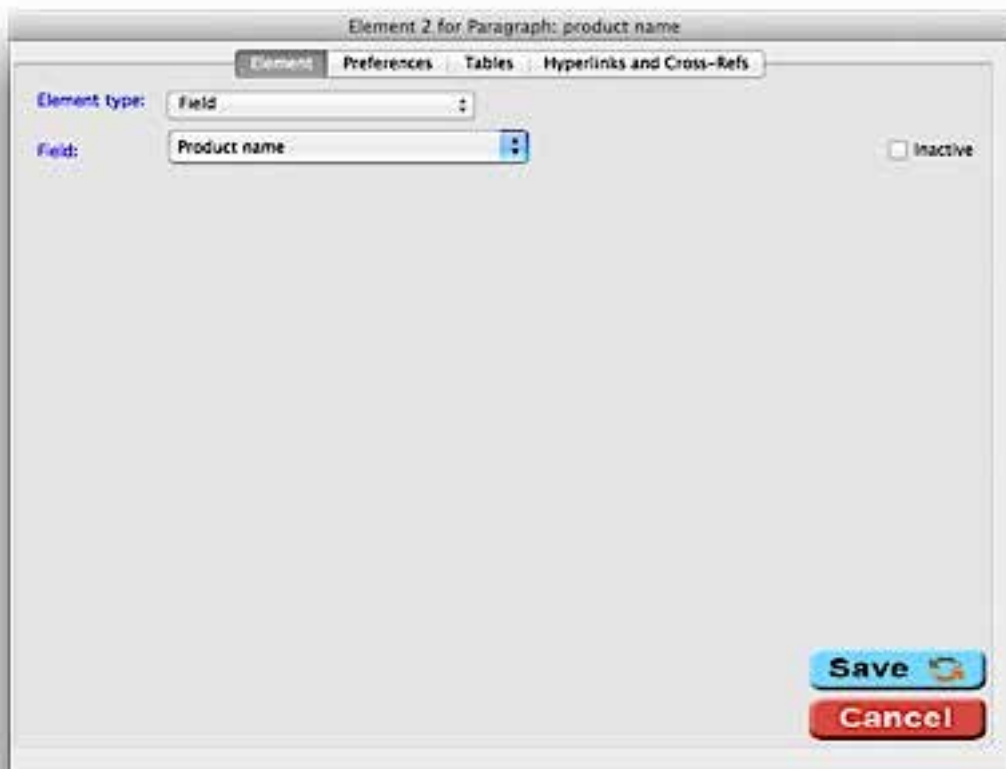
This is how the Stylesheets are assigned to the various Paragraphs of data.

5. Click the **Save** or **Cancel** button to close the Paragraph window.
6. Click the little arrow next to the first Paragraph to expand it:



There's on **Element** in this Paragraph: the field, Product name.

7. Double-click the **Product name** Element:



There are 8 Element types:

- Bar Code
- Calculation
- Field
- Picture
- Punctuation
- Relation
- Rule
- Text

Each Paragraph can contain any number of Elements of various types. For detailed info about Elements, please see the [Element Types Tutorial](#).

Example 2: A Simple Price List

In this example, we're going to create a price list of all our Variants, sorted by SKU.

1. Go to **Publishing->Publishing Projects->Price List by SKU**.
2. Double-click on Step 1. It looks like this:

The screenshot shows the 'Publishing' tab in the CatBase interface. The 'Publishing Projects' list is visible, and 'Price List by SKU' is selected. The configuration window for this step is open, showing five sections:

- 1: Info about this Publishing Step**
 - Project Step Name: Price list
 - Description: Open Me to select your Publishing destination
- 2: How is this Step managed?**
 - ☐ Run a script: ☒ Publish using the set:
 - All Variants
- 3: Choose a Publishing Style and Publishing Destination**
 - Price list by SKU
 - Publishing Destination: RTF
- 4 File Creation:**
 - Save to Location: [Empty text box] [Select Folder]
 - ☐ Create a file for each record ☒ Create one file for the project
 - Name of file to create: [Empty text box]
 - ☒ Replace existing file ☐ Create numbered version
- 5. Optional Script Variable**
 - [Empty text box]

At the bottom, there is a button labeled 'Publish this Step now'.

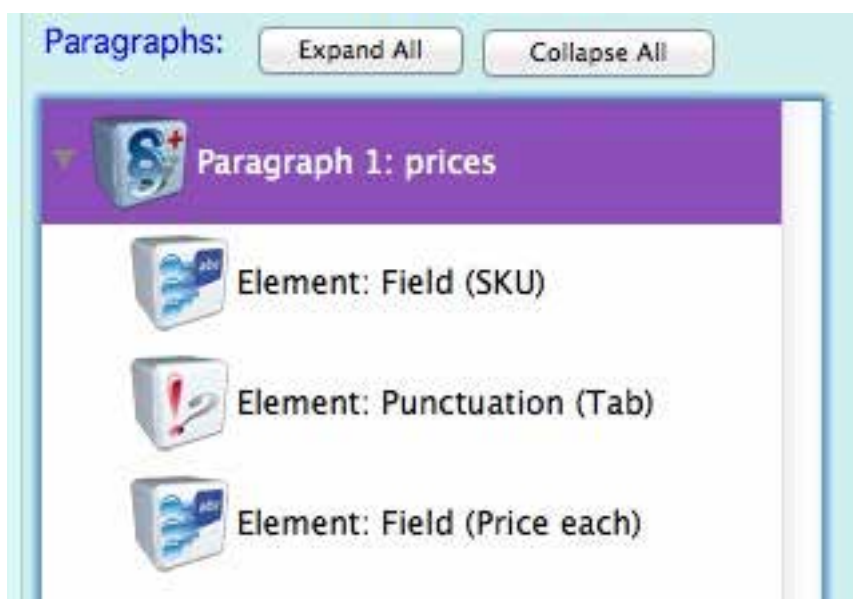
3. Make sure that **RTF** is selected as the **Publishing Destination**.
4. Click the **Save** button.
5. Click the **Publish Now** button.
6. When it's done, click the **Show File Location** button on the alert window.
7. Open the rtf file in Word.
8. It should look similar to this:

| | |
|--------------------|----------------|
| ABC-123 | \$0.40 |
| ABC-1234 | \$8.00 |
| ABC-12345 | \$15.95 |
| ABC-125 | \$10.00 |
| COO-123 | \$21.00 |
| COO-1234 | \$18.00 |
| COO-12345 | \$25.00 |
| COO-12356 | \$18.00 |
| DFT-123 | \$10.00 |
| DFT-1234 | \$15.00 |
| DFT-12345 | \$15.00 |
| DFT-1236 | \$20.00 |
| EEE-3456 | \$0.50 |
| EEE-345667 | \$0.50 |
| XYZ-123 | \$11.00 |
| XYZ-123-10 | \$10.00 |
| XYZ-123-15 | \$15.00 |
| XYZ-123-20 | \$15.00 |
| XYZ-123-20-B | \$20.00 |
| XYZ-123-30 | \$30.00 |
| XYZ-123-40 | \$5.50 |
| XYZ-12333 | \$2.80 |
| XYZ-1234 | \$9.50 |
| XYZ-12345-20 | \$3.00 |
| XYZ-12345-9 | \$4.50 |
| XYZ-12356 | \$9.50 |
| XYZ-12356789 | \$15.00 |
| XYZ-123678 | \$9.50 |

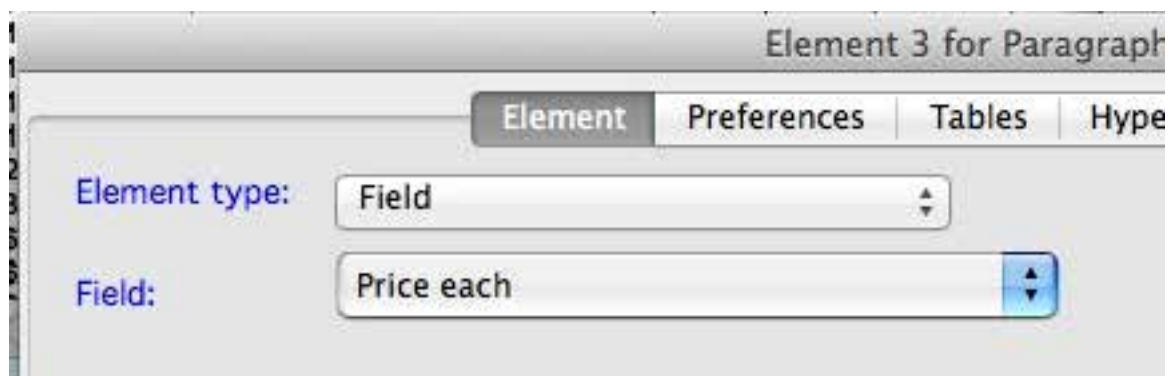
Notice that the prices are in bold, with a \$ sign.

Suppose you want to use a different currency symbol (£ for example), and you want to put the prices in red if they are under 10.00. This is easy to manage with CatBase.

1. In CatBase, go to **Publishing** -> **Publishing Stylesheets** -> **Price list by SKU**
2. Expand the Prices paragraph:



3. Double-click the last Element (Price each).
4. The Element window opens, showing that the selected **Element Type** is Field and the selected Field is Price Each:



5. Click the **Element Type** popup and select **Rule**, then click **Yes**. The window changes:

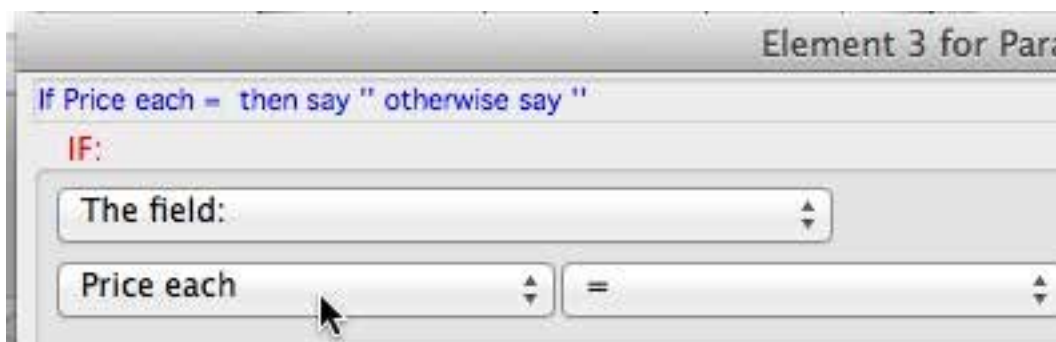


6. Click the **Edit Rule** button. The Rule window opens:

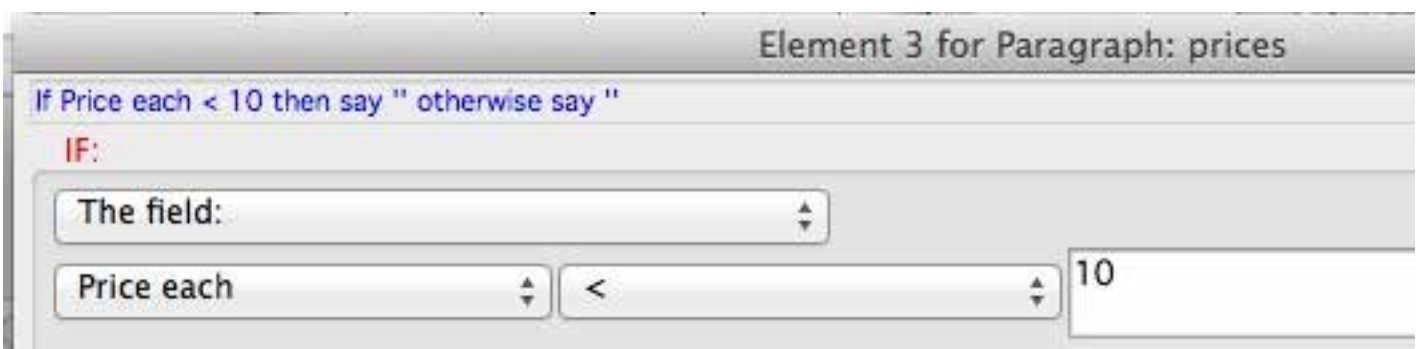


We want to tell CatBase *"If the price each is less than 10, then publish the Price Each and change the character style to "red price", otherwise publish the Price Each without changing the Character Style."*

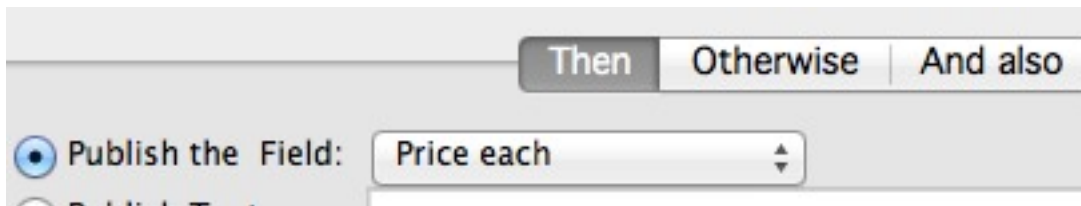
7. Click on the popup list of fields near the top of the window and choose Price Each:



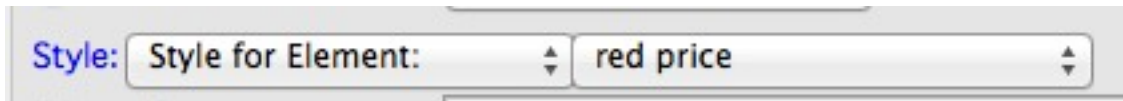
8. Click on the popup next to the field list and choose "<" ("is less than"):
9. Enter "10" into the field next to the popups. It should now look like this:



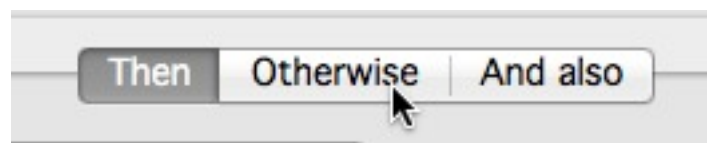
10. In the **Then** section, select the Publish the field radio button, and choose the Price each field from the popup list of fields next to it:



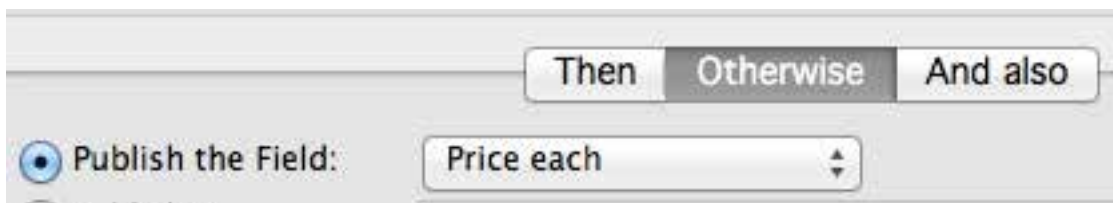
11. Towards the bottom of the window, choose **Style for Element** from the **Style** popup, and choose **red price** from the popup next to it:



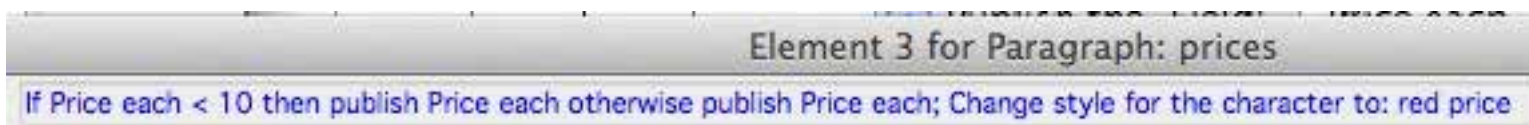
12. Click on the **Otherwise** tab:



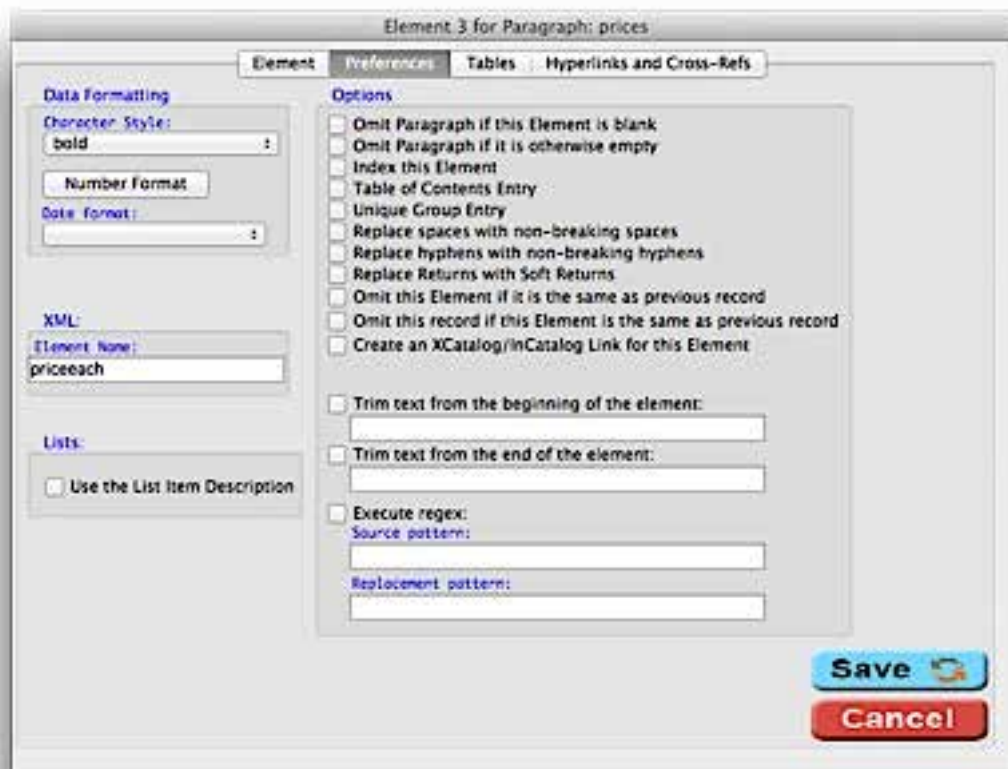
13. Select the Publish the Field radio button and the Price each field form the popup list:



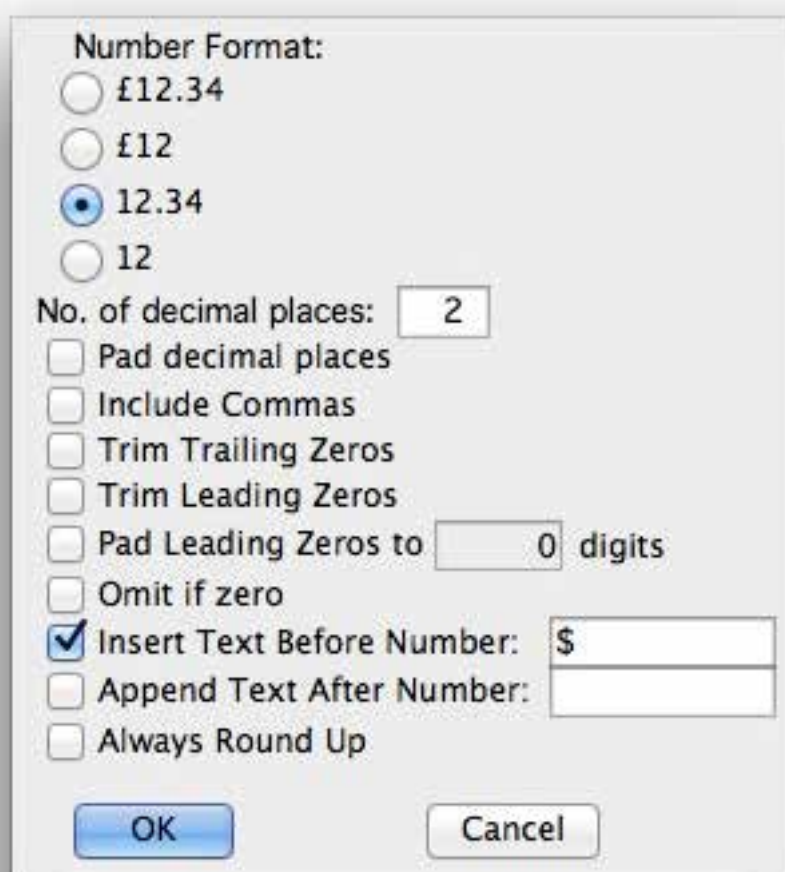
The text at the top of the window should now display your complete rule:



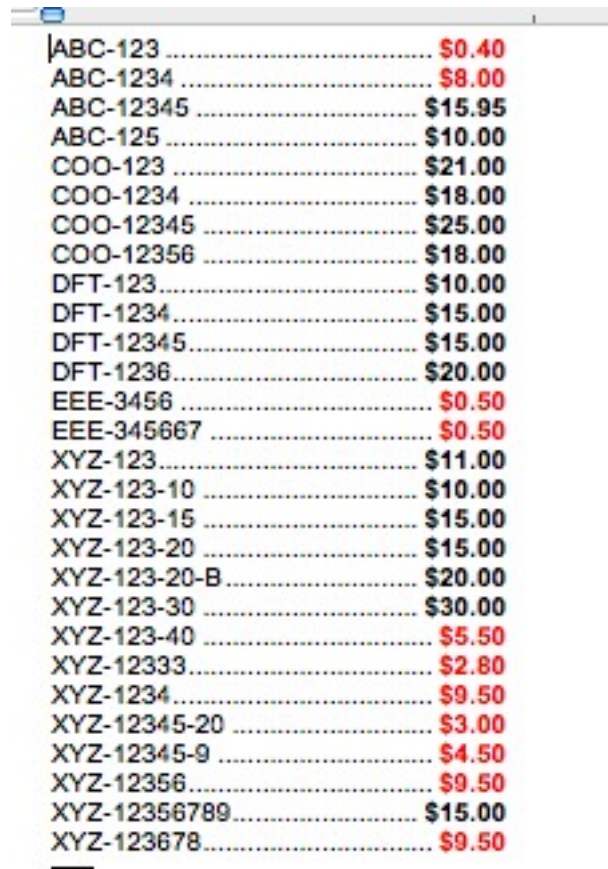
14. Click the **Save** button to close the Rule window.
15. Go to the **Preferences** tab:



16. Click the **Number Format** button in the **Data Formatting** section:



17. In the **Insert Text Before Number** field, replace the \$ sign with a different currency symbol.
18. Click **OK**.
19. Click **Save** to close that Element window.
20. Now republish the project. This time your document should look like this:



| | |
|--------------------|---------|
| ABC-123 | \$0.40 |
| ABC-1234 | \$8.00 |
| ABC-12345 | \$15.95 |
| ABC-125 | \$10.00 |
| COO-123 | \$21.00 |
| COO-1234 | \$18.00 |
| COO-12345 | \$25.00 |
| COO-12356 | \$18.00 |
| DFT-123 | \$10.00 |
| DFT-1234 | \$15.00 |
| DFT-12345 | \$15.00 |
| DFT-1236 | \$20.00 |
| EEE-3456 | \$0.50 |
| EEE-345667 | \$0.50 |
| XYZ-123 | \$11.00 |
| XYZ-123-10 | \$10.00 |
| XYZ-123-15 | \$15.00 |
| XYZ-123-20 | \$15.00 |
| XYZ-123-20-B | \$20.00 |
| XYZ-123-30 | \$30.00 |
| XYZ-123-40 | \$5.50 |
| XYZ-12333 | \$2.80 |
| XYZ-1234 | \$9.50 |
| XYZ-12345-20 | \$3.00 |
| XYZ-12345-9 | \$4.50 |
| XYZ-12356 | \$9.50 |
| XYZ-12356789 | \$15.00 |
| XYZ-123678 | \$9.50 |

Example Three: Telephone Directories

In the Demo Database there are a number of **Database Projects**. We've been looking at the default Project (The Sweet Tooth Fairy) so far. Now let's switch to another Database Project to see some different examples.

To switch Database Projects, go to the File menu and choose **Switch Project**. Select **Telephone Directory** from the list that appears.

The screen changes. The Telephone Directory project has two data tables: White Pages and Yellow Pages:



We've set up a Publishing Project to publish both a White Pages and a Yellow Pages directory in one go.

1. Go to the **Publishing** tab.
2. Expand the **Publishing Projects** topic on the left of the window.
3. Select **White and Yellow Pages - Word**:



4. There are two **Project Steps** in this Publishing Project - one to publish the Yellow Pages and one to publish the White Pages.
5. Click the **Publish Now** button. CatBase creates the two publications and alerts you when it's done.

White Pages

1. Open the example Word document White_Pages.doc, which you'll find in the Sample Documents folder in your CatBase Files folder..
2. Go to the **Insert** menu and choose **File**
3. Locate the White Pages file you just published (white_pages.rtf - you'll find it in the Data Exports folder on your Desktop) and double-click it to open it.
4. Your document should look like this:

THE LOCAL DIRECTORY - WHITE PAGES - 2016 EDITION

| | |
|--|---|
| Albross, Joe 12345 Biggs Highway..... 333-456-7899 | 1234 West Montagu Road 222-123-1234 |
| Arkwright, Kathryn 84 Acacia Highway..... 333-123-1234 | |
| Black, Joe 12345 Biggs Highway..... 333-456-7899 | |
| Biggs , Joe 12345 Biggs Highway..... 333-456-7899 | |
| Blue, Joe 12345 Biggs Highway..... 333-456-7899 | |
| Bugs , Fred A. 1234 Smith St..... 212-123-4567 | |
| Carter, Fred A. 1234 Smith St..... 212-123-4567 | |
| Carter, Fred A. 1234 Smith St..... 212-123-4567 | |
| Cooney, Peter 84 Acacia Drive..... 444-555-6666 | |
| Dies , Fred A. 1234 Smith St..... 212-123-4567 | |
| | 1234 West Montagu Road 222-123-1234 |
| | Parker, Peter 84 Acacia Drive..... 444-555-6666 |
| | Philmore , Joe 12345 Biggs Highway..... 333-456-7899 |
| | Portman, Peter 84 Acacia Drive..... 444-555-6666 |
| | Robbins, Kathryn 84 Acacia Highway..... 333-123-1234 |
| | Robbins, Kathryn 84 Acacia Highway..... 333-123-1234 |
| | Robinson, Michael 1234 West Montagu Road 222-123-1234 |
| | Smith, Fred A. 1234 Smith St..... 212-123-4567 |
| | Smith, Joe 12345 Biggs Highway..... 333-456-7899 |
| | Starr, Kathryn 84 Acacia Highway..... 333-123-1234 |
| | Watson, Michael 1234 West Montagu Road |

Let's see the Yellow Pages ...

Yellow Pages

1. Open the example document **Yellow Pages.doc**, which you'll find in the Sample documents folder.
2. Go to the **Insert** menu and choose **File ...**
3. Locate the file named **Yellow_Pages.rtf**, which you'll find in the Data Exports folder on your Desktop, and double-click it.
4. Your document should look like this:

THE YELLOW PAGES

Accommodation

B & Bs

A Good Rest
1234 West Rest Street 415-123-4567
www.example.com

Hotels

A Good Rest
1234 West Rest Street 415-123-4567
www.example.com

Best Eastern San Francisco
1234 West Rest Street 415-123-4567
www.example.com

Burridges
123 Bendy Uphill Road 415-123-4566
www.example.com



Home from Home
1234 West Rest Street 415-123-4567
www.example.com

Sweet Dreams
123 Bendy Uphill Road 415-123-4566
www.example.com



The Bliton Hotel
123 Bendy Uphill Road 415-123-4566
www.example.com



The East Side Retreat
1234 West Rest Street 415-123-4567
www.example.com

West Side Hotel
123 Bendy Uphill Road 415-123-4566
www.example.com



Automotive

Repairs & Maintenance

Auto House
123 Auto Road 213-456-7899
www.example.com

Fred's Automotive
123 Auto Road 213-456-7899
www.example.com

Pat and Mike's
123 Auto Road 213-456-7899
www.example.com

Speedyfit
123 Auto Road 213-456-7899
www.example.com

Used Cars

Fred's Automotive
123 Auto Road 213-456-7899
www.example.com

Health

Gyms

Blue's Gym
East Hill Industrial Estate 213-111-2222
www.example.com

Fit for Life
East Hill Industrial Estate 213-111-2222
www.example.com



The Health Emporium
East Hill Industrial Estate 213-111-2222
www.example.com

Health Clubs

The East Side Retreat
1234 West Rest Street 415-123-4567
www.example.com

We R fit
East Hill Industrial Estate 213-111-2222
www.example.com



Restaurants

Burger Bars

Bill's Burgers
64 Downtown Road 123-456-7896
www.example.com

Bozo's
64 Downtown Road 123-456-7896
www.example.com

Burger Prince
64 Downtown Road 123-456-7896
www.example.com

Great Burgers
64 Downtown Road 123-456-7896
www.example.com

Mary's Kitchen
64 Downtown Road 123-456-7896
www.example.com

Take a look at the Publishing Stylesheet, **Yellow Pages for Word**, to see how this publication has been set up in CatBase.

Example Four: Membership Directory

For this example we're going to publish a Membership Directory such as you might wish to produce for your club or association.

First of all, switch to the **Membership Directory** project in CatBase:

1. Choose **Switch Project** from the **File** menu.
2. Double-click on Membership Directory.

Plain version without pictures

We'll start with a simple directory.

1. Go to the Publishing main tab.
2. Expand the Publishing Projects topics on the left.
3. Select the Publishing Project **Alpha Listings of all members - Word**.
4. Click the **Publish Now** button.
5. When it's done, open the resulting file (members.rtf) in Word. It should appear like this:

Joe Albatross

12345 Bloggs Highway, Los Angeles CA 91234

Tel: 333 456 7899

test@test.com

Ms Michael Alvarez

1234 West Montagu Road, Smithville, San Francisco CA 91111

Tel: 222 123 1234

test@test.com

Kathryn Arkwright

84 Acacia Highway, San Bernardino CA 90111

Tel: 333 123 1234

test@test.com

Joe Black

12345 Bloggs Highway, Los Angeles CA 91234

Tel: 333 456 7899

test@test.com

Mr. Fred Bloggs

1234 Bloggs St., West Side, Bloggsville CA 30210

Tel: (213) 123 4567

fred@bloggs.com

Joe Bloggs

12345 Bloggs Highway, Los Angeles CA 91234

Tel: 333 456 7899

Joe Blue

12345 Bloggs Highway, Los Angeles CA 91234

Tel: 333 456 7899

6. You can easily jazz the design up a bit ... for example, change it to a four-column layout:

| | | | |
|--|--|--|--|
| <p>Joe Albatross 12345 <u>Bloggs</u> Highway, Los Angeles CA 91234 Tel: 333 456 7899 test@test.com</p> | <p>Fred Carter 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> | <p>Kathryn Jumper 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234</p> | <p>Fred Norris 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> |
| <p>Ms Michael Alvarez 1234 West Montagu Road, Smithville, San Francisco CA 91111 Tel: 222 123 1234 test@test.com</p> | <p>Peter Clooney 64 <u>Neverland</u> Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> | <p>Peter Kellogg 64 <u>Neverland</u> Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> | <p>Fred Ockney 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> |
| <p>Kathryn Arkwright 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234 test@test.com</p> | <p>Fred Drey 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> | <p>Kathryn Lemon 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234 kath@example.com</p> | <p>Ms Michael Orange 1234 West Montagu Road, San Francisco CA 91111 Tel: 222 123 1234 michael.o@example.com</p> |
| <p>Joe Black 12345 <u>Bloggs</u> Highway, Los Angeles CA 91234 Tel: 333 456 7899 test@test.com</p> | <p>Fred Eagle 1234 Smith St., New York NY 12345 Tel: 212 123 4567 fred3@example.com</p> | <p>Kathryn Lennon 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234</p> | <p>Peter Pan 64 <u>Neverland</u> Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> |
| <p>Mr. Fred Bloggs 1234 <u>Bloggs</u> St., West Side, <u>Bloggsville</u> CA 90210</p> | <p>Fred Farringotn-Smythe 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> | <p>Ms Michael Livingston-Taylor 1234 West Montagu Road, San Francisco CA 91111 Tel: 222 123 1234</p> | <p>Ms Michael Parker 1234 West Montagu Road, San Francisco CA 91111 Tel: 222 123 1234</p> |
| <p>Peter Flack 64 <u>Neverland</u> Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> | <p>Joe Martin</p> | <p>Peter Parker 64 <u>Neverland</u> Drive, Apt. 3b, Santa Monica</p> | |

(See the notes earlier in this document for ideas about [customising the Word document](#)).

Membership Directory with Pictures

Would you like to include mug shots in your directory? Try this:

1. Go to **Publishing->Publishing Projects**
2. Select the Publishing Project Alpha Listings with mugshots - Word.
3. Click the Publish Now button.
4. Open the resulting file with Word.
5. Change the number of columns - for example, to 4.
6. It should look like this:



As you can see, CatBase provides many ways to manage the publishing of your data!

What else can CatBase do?

Loads!

- **Barcodes:** Create all kinds of bar codes, including QR codes. [See the Barcodes Tutorial.](#)
- **Emails:** Send customised merged emails to contacts in your database. [Learn more.](#)
- **Letters:** Send customised merged letters to contacts in your database.
- **Labels:** Create customised labels (mailing labels, product labels, name badges etc.). [Learn more.](#)
- **Memos:** Create Memos (reminders) and attach them to any record. [Learn more.](#)
- **Import Data:** You can import data from almost any source⁴, and you can use imported data to update existing data by matching up a key field such as a name, phone number, URN, etc. [Learn more about importing data.](#)
- **Automated Backups:** Set up a Backup schedule to make backups of your database at regular intervals, and maintain a log file of all modifications. [Learn more.](#)
- **Sets:** Create Sets of data to make it easy to find certain groups of data - for example, "all companies in New York" or "all lifetime members" or all members in New York who are life-time members" or "all chocolate products". [Learn more!](#)
- **Quick Reports:** Easily produce reports on your data. [Learn more.](#)
- **Export data to other formats:** You can export your data to various formats in addition to Word, including XML, HTML, Excel, csv, tab-delimited text, or another database such as MySQL or SqlServer ([Data Chameleon Edition](#)).

- **Event Scheduler:** Set up scheduled events to automatically perform certain tasks at designated intervals - for example, import updated data from your SqlServer database every night. [Learn more.](#)
- **Audit Trail:** The Audit Trail Manager optionally keeps track of every change that is made to the database: who made the change, on what date at time, and exactly what was changed. [Learn more.](#)
- **Custom Scripts and Modules:** Do you need to do something special with your data? Perhaps you have a complex pricing calculation that needs to be run whenever a record is saved, or you need to manage distributors and their selected products in a certain way. We can create custom scripts and modules to perform just about any task! For an example of a custom module, [see this case study.](#)

What next?

So, now you have an idea of what CatBase can do, and how it works with Word. If you would like to try it with your own project, we suggest following these steps:

1. If you need to learn about databases, see the [Database 101 Tutorial](#).
2. If your project is similar to one of our example projects, why not start with that and amend it as needed to suit your needs?
3. To find out about setting up a new database project, see this [step-by-step guide](#).
4. Learn about the [CatBase User Interface](#).
5. Find out about [importing data into your database](#).
6. Learn about [Publishing Projects](#).
7. Got a question? Need help or advice setting up your project? [Contact us!](#)
8. Ready to buy? [Go to our online shop](#).