



UPDATING DATA IN AN INDESIGN OR QUARKXPRESS DOCUMENT

Does this sound familiar?

You've just spent the last three days carefully laying out your catalogue. You've checked that all the pictures are the correct ones; dealt with the widows and orphans; maybe tweaked the layout here and there to make it more aesthetically pleasing.

And then the sales manager calls to tell you that the prices have been changed.

You can:

- Make all the changes manually both in the document AND in the database (that's just asking for trouble!)
- Make the changes in the database and then re-publish the whole catalogue (NO THANKS!)
- Import the modified prices into the database and then tell it to update the catalogue (now THAT makes sense!)

With CatBase, InDesign, and an InDesign plugin called InCatalog, this is easy to accomplish. Or for Quark users, the plugin is called xCatalog.

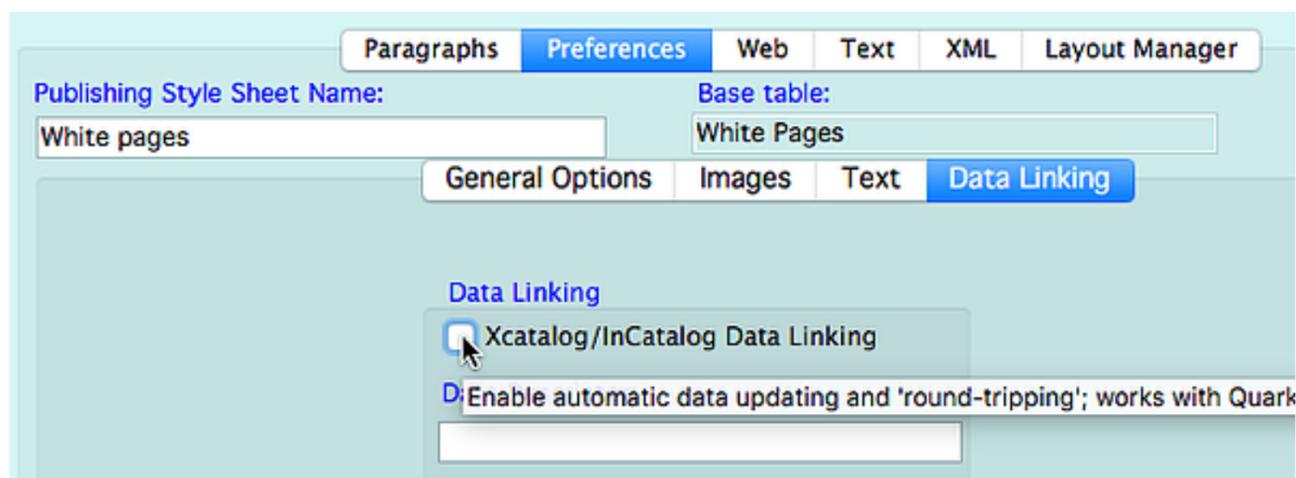
Getting Ready

A little preparation is required. First, you will need to install a copy of the appropriate plug-ins for either QuarkXPress or InDesign: InCatalog for InDesign and Xcatalog for Quark. You will find demo versions of these plugins on [Em Software's website](#).

You will also need a copy of the Xtags plugin for Quark or InDesign. Demo versions of these plugins can also be downloaded from [Em Software's website](#).

Next CatBase needs to know which fields you want to enable for linking up, as it will insert special tags around those fields when you publish the data. There are two steps to take to set this up:

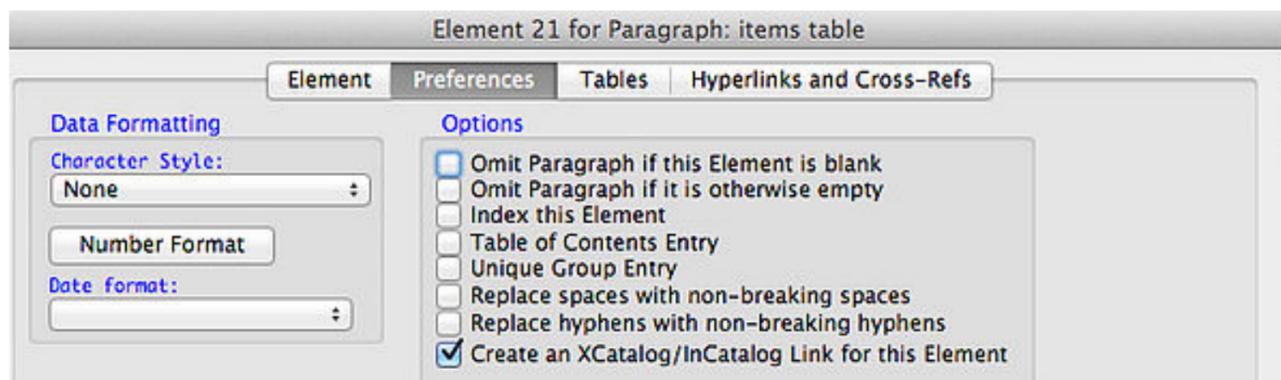
- On the **Preferences** tab of your Publishing Style Sheet, select the **Data Linking** checkbox in the **Data Linking** sub-tab:



Data Descriptor

This is a text file that will be created when the data is published. It describes the linked fields to the page layout program. CatBase supplies a name for this file: you can change it if you want to.

- In the Element for the field that you want to link up, go to the **Preferences** tab and select the **Create an Xcatalog/Incatalog Link for this Element** check box:

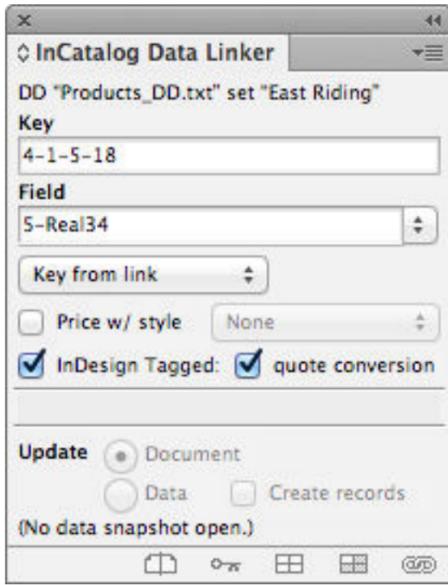


- Do this for each field that you want to link up.

Publishing the Data

- Publish your data from CatBase in the usual way. If your page layout program is InDesign, use the **InDesign with Xtags** publishing destination.
- Import the published data into your page layout template using the **Get Text with Xtags** option (if this isn't available on your **File** menu, then you haven't installed the Xtags plug-in!)
- Choose **Select Data Descriptor** from the **XCatalog/InCatalog** menu
- Locate the Data Descriptor file. This is a text file that CatBase created when you published the data; it will be in the same folder as the published data and it will be named with the Data Descriptor name that is specified in the Publishing Stylesheet (on the **Preferences->Data Linking** tab).

- When the data is in the document, choose **Show Data Linker** from the **Xcatalog/InCatalog** menu if the Xcatalog Data Linker palette is not already displayed. If you don't have an **Xcatalog** or **InCatalog** menu, then you have not installed the Xcatalog/InCatalog plugin. The Data Linker palette looks like this:



If you would like to see which fields are linked, choose **Show Link Markers** from the **InCatalog/XCatalog** menu. Linked fields are shown with grey square brackets around them:



If it doesn't appear like this in your document, choose **Show Link Markers** from the **Xcatalog/InCatalog** menu.

If you select a linked field, its details will be shown in the **Data Linker** palette:



Key

This is a link to the record's table and unique record number in the database.

Field

This is a link to the field that the data item came from in the database.

(You don't need to be concerned with these codes; CatBase manages them for you.)

Updating the data in the document

So you've spent some time finalising the layout of the catalogue: perhaps you have moved a few things around, added or changed some graphics, fixed a few bad page breaks, and so on. And then you find out that some of the prices have changed. No problem!

- Update the prices (or other data) as necessary in the database.
- Select the records that you need to update (for example, the products that have had price changes).
- Click the **Publish** button at the top of the window and select the Publishing Stylesheet that you used to publish the data. **It is vital that you use the same Publishing Stylesheet**, otherwise the update file probably won't include all the necessary data and the update will fail.
- Select the Publishing Destination **InDesign with Xtags** if you are using InDesign, or **QuarkXPress** if you're using Quark.
- Select the **XCatalog Update** check box
- Publish the data.
- Go to your Quark or InDesign document.
- Make sure that it has been saved.
- Make sure that the **Data Linker** palette is displayed.
- Choose **Update Document ...** from the **Xcatalog** or **InCatalog** menu
- Select the update file you just created
- In the **Select File** dialogue, make sure that the **Partial Data snapshot (missing keys OK)** check box is selected
- Click the **Open** button

Watch in amazement as your data is updated!

WHAT'S NEXT?

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