



CatBase Demo Manual for Adobe InDesign

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Contents

What is CatBase?	1
Why do I need to use InDesign as well?	1
How does InDesign know what to do with the data?	1
OK - Let's see what it can do!.....	2
Xtags plugin for InDesign.....	2
The Demo Database.....	2
Publishing Examples	2
Example 1: An Illustrated Catalogue.....	2
Running Header	7
Hyperlinks	7
Special Offers.....	8
QR Codes	8
Variants Tables.....	8
Publishing Projects	15
Publishing Stylesheets.....	16
Rules	20
Example 2: A Simple Price List.....	23
Example 3: Telephone Directories	29
White Pages.....	30
Yellow Pages.....	31
Example 4: Membership Directory.....	34
Plain version without pictures	34
Membership Directory with Pictures	36
What else can CatBase do?	37
What next?	38

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.

It's based on a full-featured user-configurable relational database, so you can use CatBase to manage and publish your data or just to publish it.

Why do I need to use InDesign 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 and, optionally, links to images. When this tagged file is opened up with InDesign, InDesign 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.

If you don't want to use InDesign, CatBase also works very well with Microsoft Word. Word doesn't offer as many design and formatting options as InDesign does, but it may well be just fine for your needs. Please see the **Demo Manual for MS Word** document for more info and examples.

How does InDesign 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](#).

OK - Let's see what it can do!

Xtags plugin for InDesign

If you want to produce a publication that includes images, you'll need to install the Xtags plugin for InDesign. This is required because the "native" InDesign tags do not support the placement of images. Please go to [Em Software's](#) website and download and install the Demo version of Xtags appropriate for the version of InDesign you're using.

The Demo Database

Our Demo Database contains a few different Projects for various types of businesses. 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

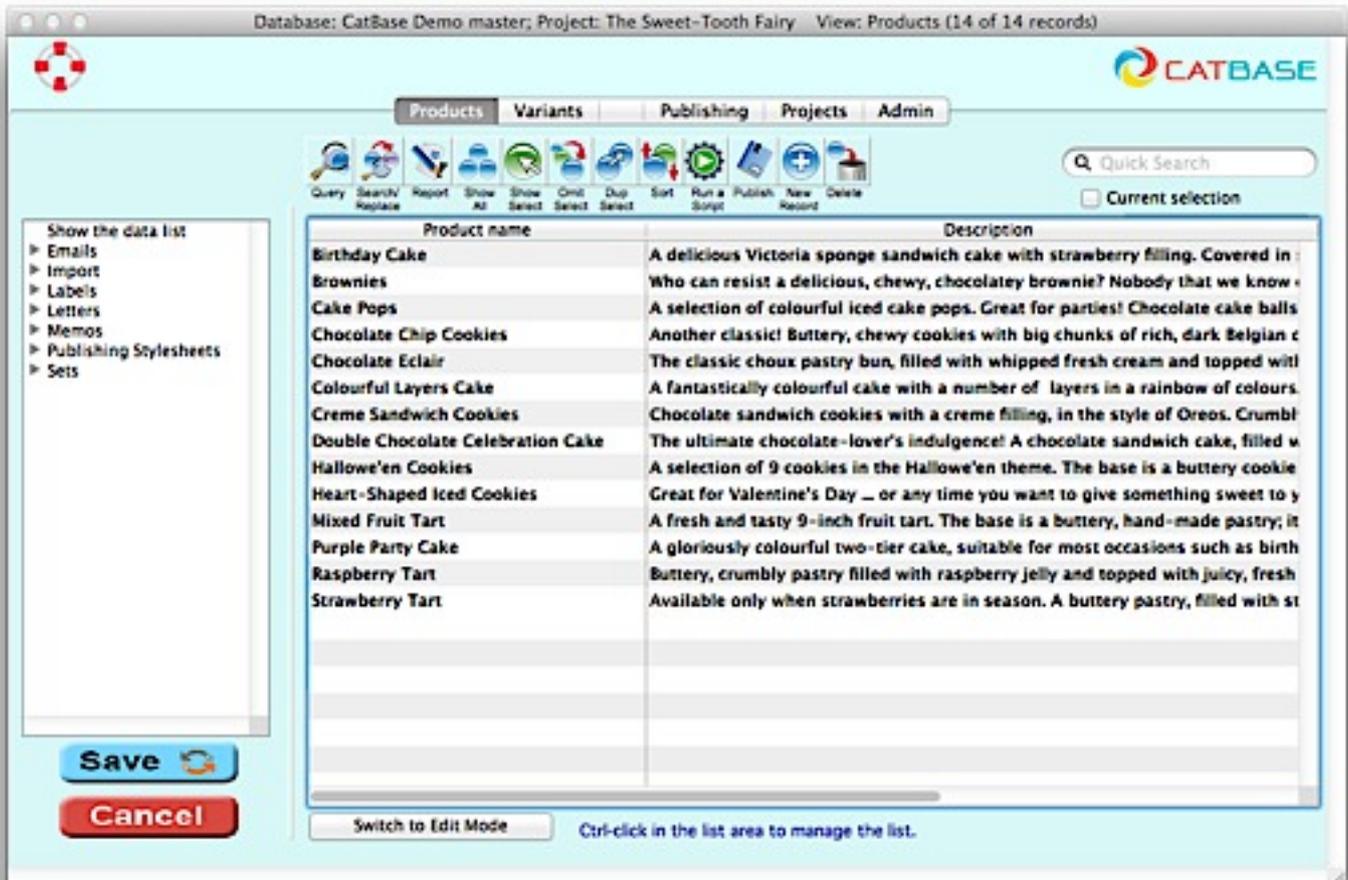
Although your own project probably is not a bakery goods catalogue, these examples will demonstrate how CatBase works and give you some ideas as to the possibilities it offers.

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 **Quick Start** manual.
2. You should see a window similar to this:



- 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:



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

The screenshot shows the 'Variants' tab of the CatBase interface. 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

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

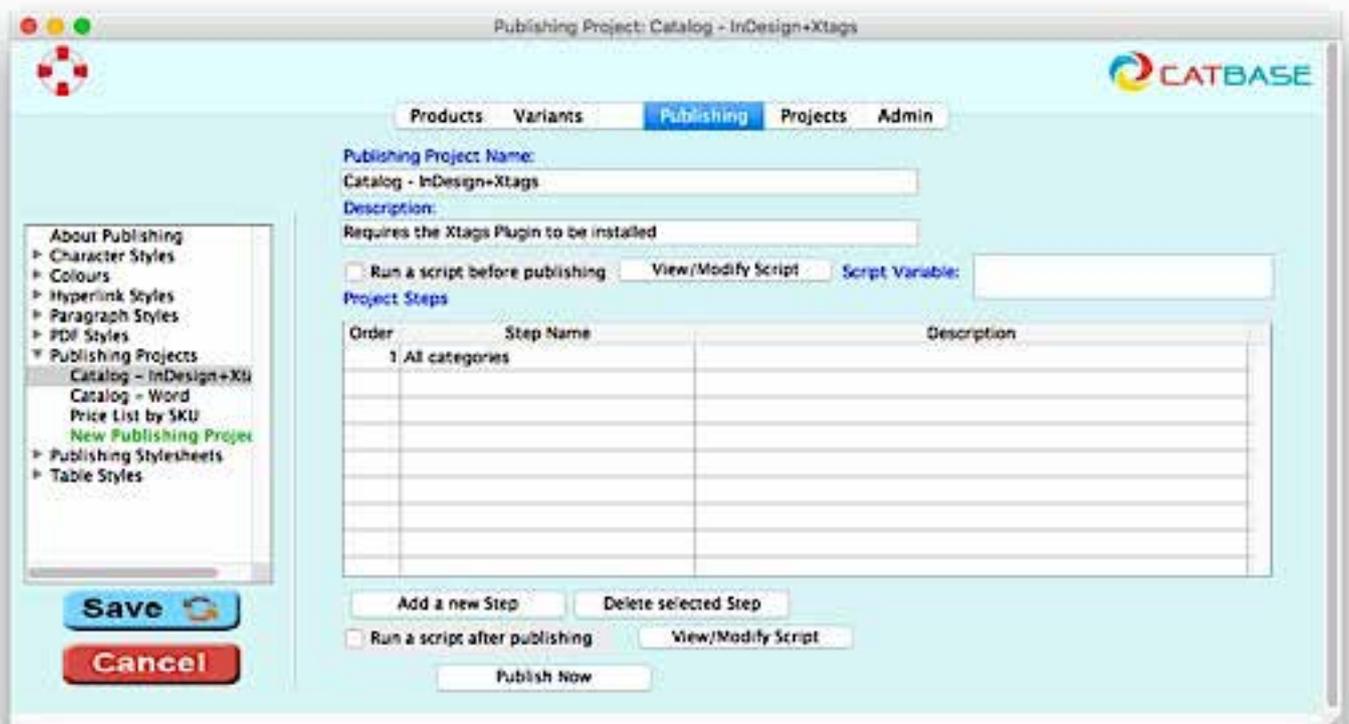
NOTE: You have complete control over the setup of your tables, fields, and data entry and list view forms. You can add/delete fields, place and size them on the form, and create as many Tabs to organise your data into pages as you want.

8. Click the **Save** or **Cancel** button to close that window.
9. Now, go to the **Publishing** main tab:

CatBase Demo Manual for InDesign

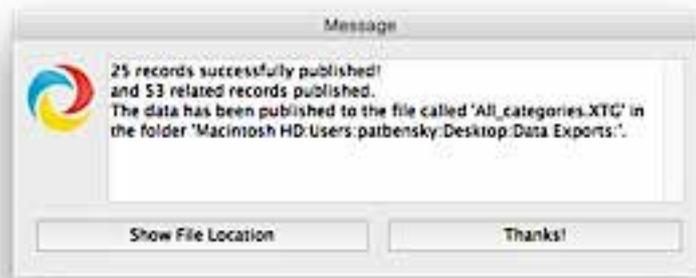


10. Expand the **Publishing Projects** topic on the left-hand side, and select the Publishing Project **Catalog - InDesign+Xtags**:



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

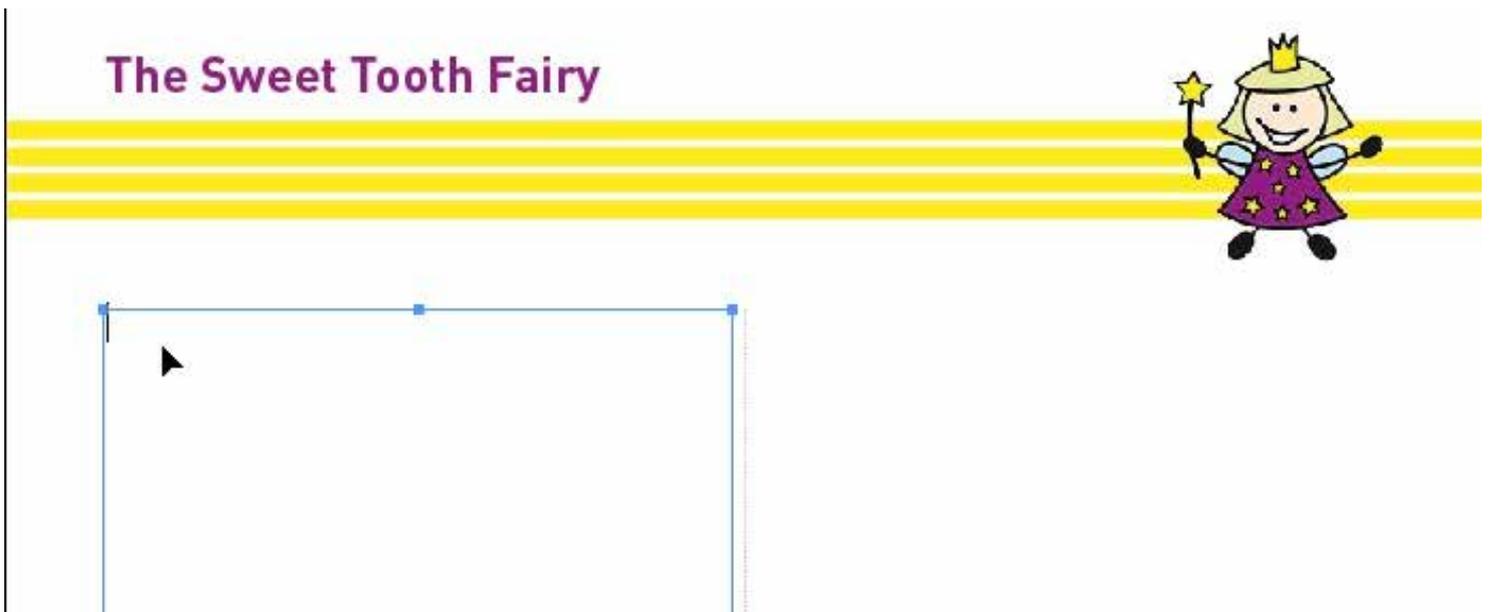
11. Click the **Publish Now** button at the bottom of the window.
12. CatBase publishes the data, and saves it into a file called *All categories.xtg* in the Data Exports folder on your Desktop. You'll see a message like this:



13. Click the **Thanks** button.
14. Start InDesign, if it isn't already running.
15. Open the InDesign template **Sweet Tooth Fairy Catalog.idml**, which you will find in the Sample Documents folder within your CatBase Files folder.

Note: idml documents are templates that can be opened with InDesign Version CS4 and later.

16. Click in the main text box:



17. Choose **Import Text with Xtags ...** from the **File** menu (at the bottom). If you don't see this menu option, you need to [install the Xtags plugin](#).
18. Locate the file you just published in CatBase. It will be found in the **Data Exports** folder on your Desktop.
19. Double-click on the file to import it.
20. When it's done, the document should look like this:

The Sweet Tooth Fairy

Cakes

Cakes

Birthday Cake

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

Description	Price
10-inch cake For 4-6 people	10.00
15-inch cake For 10-15 people	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.

Description	Pack Size	Price
Box of 10 Assorted	10	9.50
Box of 20 Assorted	20	15.00

Brownies

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

Description	Weight	Price
1 lb box Approx. 12 brownies	1.00	8.00
2lb box Approx. 20 brownies	2.00	18.00

Chocolate Eclair

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

Description	Price
Per eclair One size fits all	0.50

Buy one - get one free!

1

Pretty cool, yes?

Let's take a look at some of the document's features ...

Running Header

In the yellow bar at the top of each page, the current category name appears:



These headings are managed using InDesign's **Text Variables** feature.

Hyperlinks

It isn't obvious, but a hyperlink has been created for each product name. To see these, go to the **Window** menu and select **Interactive->Hyperlinks**. The Hyperlinks palette lists all the document's hyperlinks:



The red dots indicate that the links are not valid links - if you look at one, the URL looks something like this:

<http://www.catbase.com/products/Cake Pops.html>

We haven't actually set up individual pages on our website for each product, but if we had, the links would all show as green.

If you export the document to a PDF, you'll see the active hyperlinks.

Special Offers

Some products have Special Offers. If they do, CatBase has included the text of the offer along with an eye-catching icon:



You can create Rules in your Publishing Stylesheets to tell CatBase how to make decisions on what to include and/or how to style it based on criteria that you define. You can find detailed info about Publishing Rules [in this Tutorial](#).

QR Codes

CatBase can create all kinds of bar codes, including the more common stripey variety, and QR codes such as the ones shown in our example. Find out more about creating Bar Codes [in this Tutorial](#).

Variants Tables

Each product has a selection of Variants, which are shown in tables like this:

	Description	Size	Colour	Price
6 layers	Choose your 6 colours	6.00	Various	10.00
6 layers	Choose 6 colours	9.00	Various	15.00
8 layers	Choose 8 colours	6.00	Various	15.00
8 layers	Choose 8 colours	9.00		20.00

In this example, there are 5 columns. But some products don't have the same attributes - for example, the chocolate eclairs come in only one size and colour, so there's nothing in the Size and Colour columns for that product. CatBase has automatically omitted the empty columns and re-sized the remaining columns so that the table is still the same overall width:

Chocolate Eclair



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

	Description	Price
Per eclair	One size fits all!	0.50

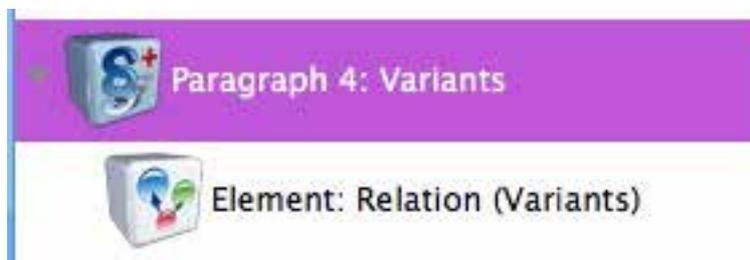
To see how that is managed, we will need to look at the Publishing Stylesheet in CatBase.

1. Go back to CatBase.
2. Go to the **Publishing** main tab.
3. Expand the **Publishing Stylesheets** topic on the left of the window.
4. Select *Catalog for InDesign*:



This shows that there are 5 **Paragraphs** - or sections - of data to be published for each Product record.

5. Expand Paragraph 4: Variants.
6. There is one Element in this Paragraph:

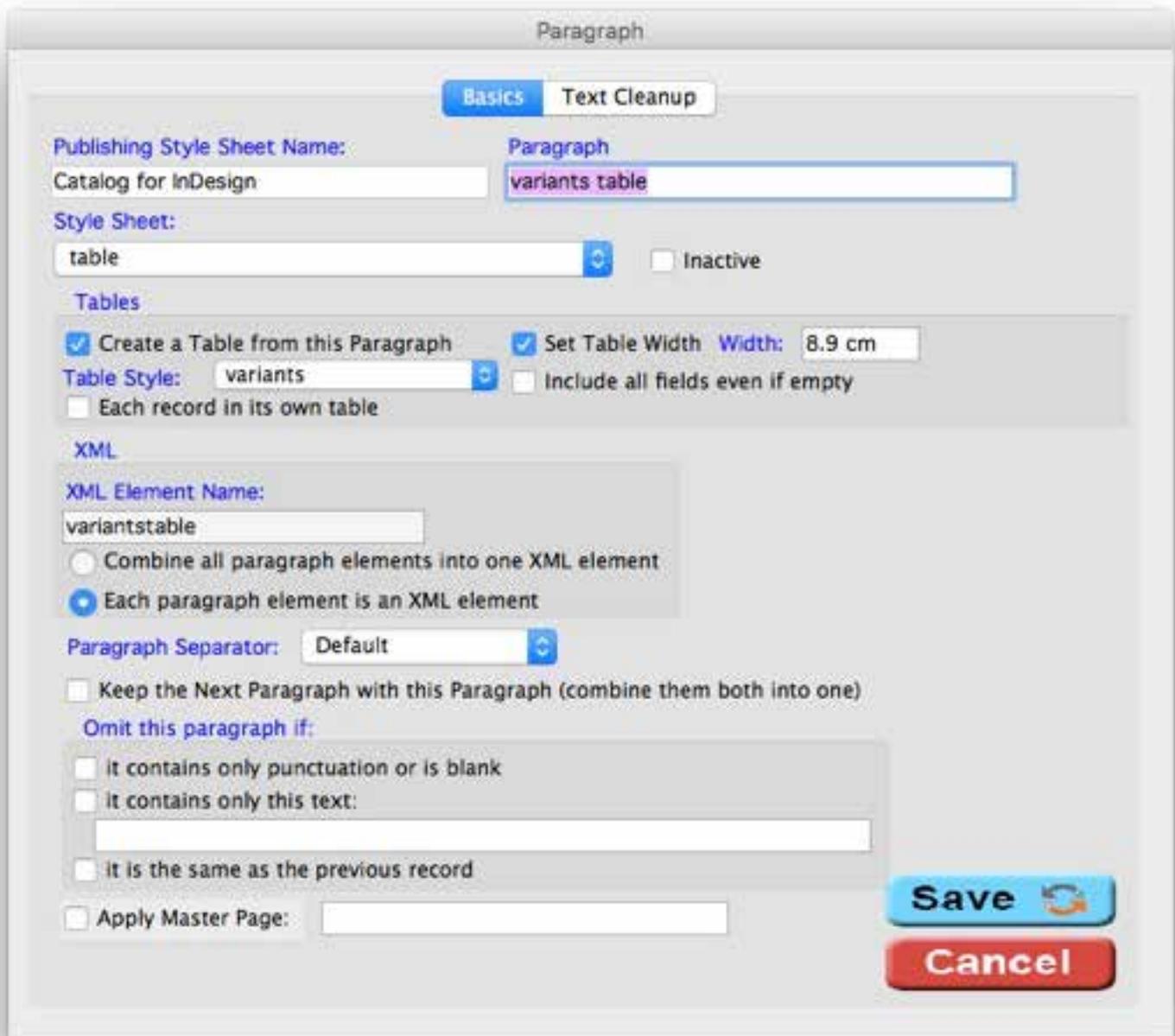


Elements are the “building blocks” of Paragraphs. Each Paragraph can contain any number of Elements, and each Element is of a certain type. Element types include Bar codes, Pictures, Field Data, Static Text, Rules, Calculations, and Relations.

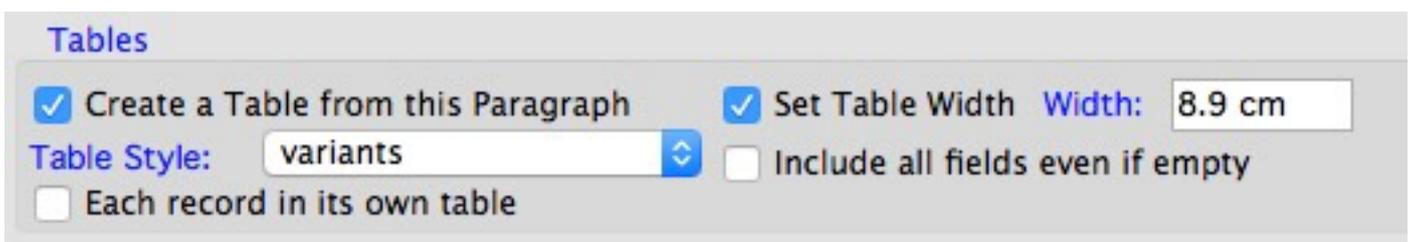
7. Double-click on the Element: Relation (Variants).
8. The Element window opens:



9. This shows that we want to publish the related Variants for each Product.
10. Double-click on Paragraph 1: Variants table:

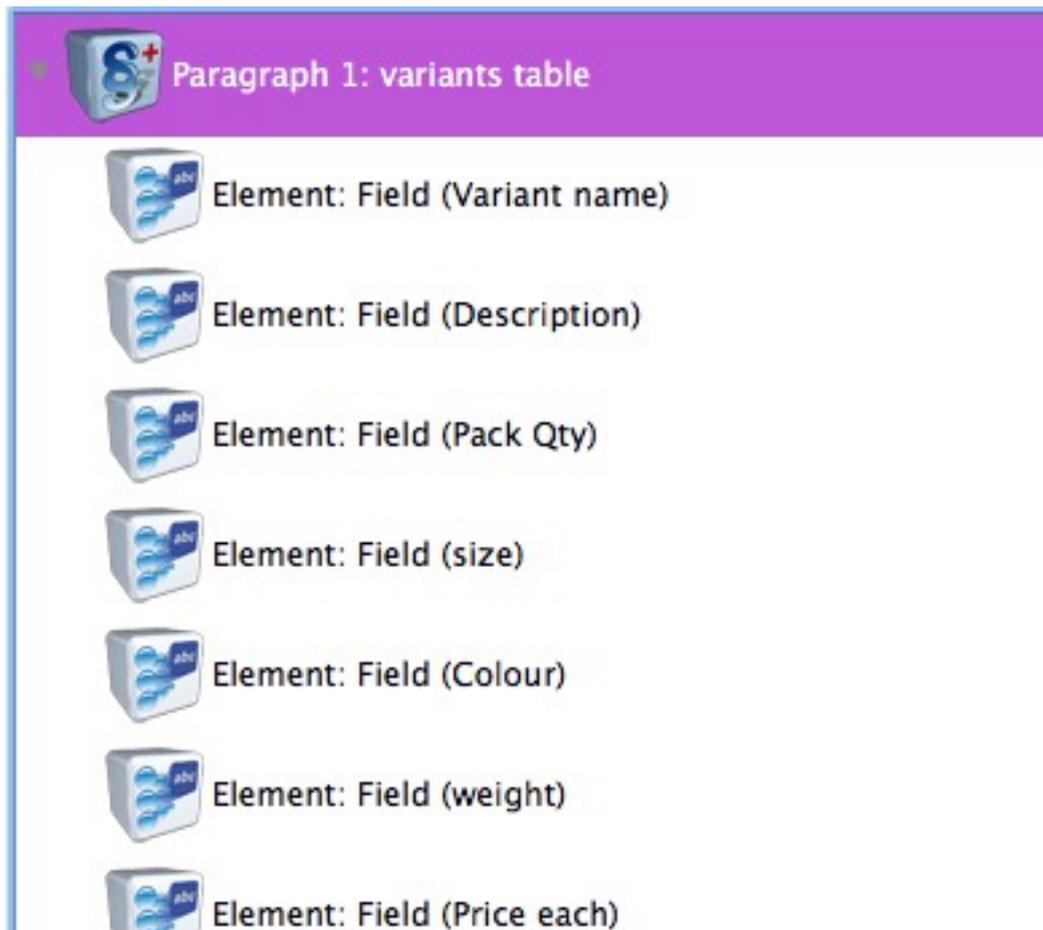


11. Notice, in particular, the **Tables** area:



12. We've selected the **Create a Table from this Paragraph** checkbox, and the **Table Style** "variants".
13. We've selected the **Set Table Width** option and entered a width of 8.9cm. This tells CatBase that every Variants table should have an overall width of 8.9cm. If this option is not selected, the tables will be of varying widths according to their contents.
14. Click the **Save** or **Cancel** button to close this window.

15. Now, to see how the columns within the table are managed, expand the “variants table” Paragraph:



16. Because we've told CatBase to create a table from this Paragraph, each Element will become a column in the table.
17. Double-click the first Element, Variant name:



18. Go to the **Tables** tab.



19. Column Header: The Static **Text option** is selected, and the field is empty. So this column will have no header.

CatBase Demo Manual for InDesign

- Columns: Automatic Width is selected. CatBase will calculate the width for this column.
- Always Include this column** is NOT selected! So - if the column contains no data, it will not be included.
- Close this window.
- Now open the last element, Price Each, and go to the **Tables** tab:



- This time we've got a column heading "Price".
- In the **Column** area, a Set Width of 1.50 is specified. The price column will always be this width.
- In the **Style Sheet** popup menu, "table row bold right" is selected. This means that the Price column will be set in a different style to the rest of the table: it will be aligned right instead of left, and in bold
- Also see that in the **Cell Fill Colour** popup, blue is selected.

To learn more about the various Element types, please [see this Tutorial](#).

Publishing Projects

Publishing Projects manage the publishing process in CatBase. Let's take a look at the one we used to produce our example catalogue.

- In CatBase, go to the **Publishing** main tab.
- Expand the **Publishing Projects** topic on the left, then select **Catalog - InDesign +Xtags**.
- 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 **Publish 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 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, InDesign with Xtags is selected.
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 InDesign Publishing Stylesheet.

CatBase Demo Manual for InDesign

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



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

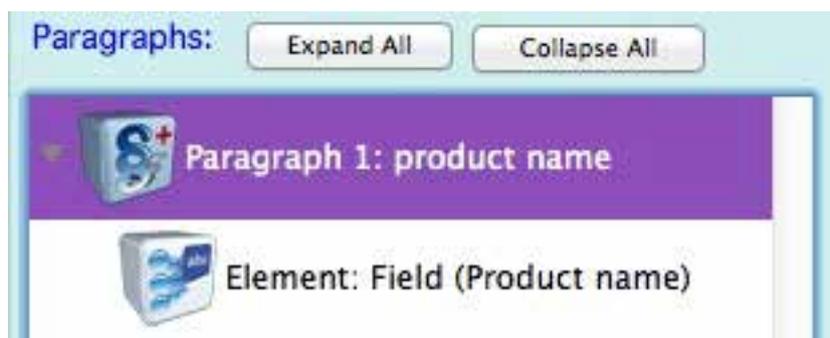


In the InDesign document, the Stylesheet “product name” is selected for each product name in the catalogue:



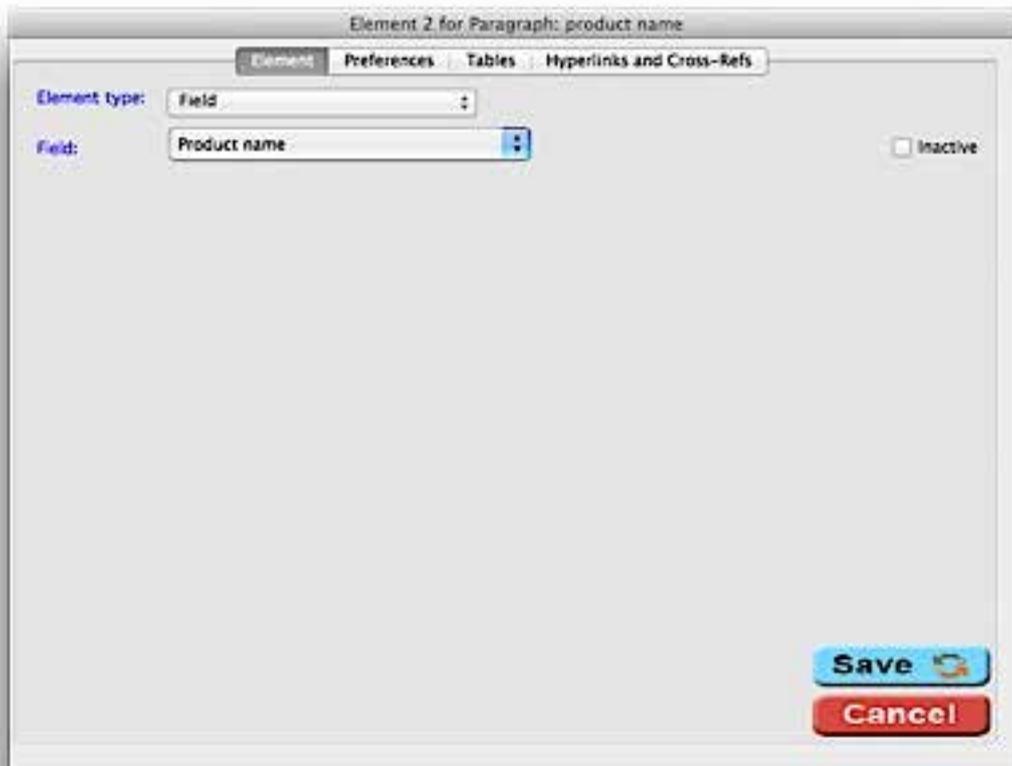
This is how Stylesheets are assigned to the various Paragraphs of data.

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 one **Element** in this Paragraph: the field, Product name.

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

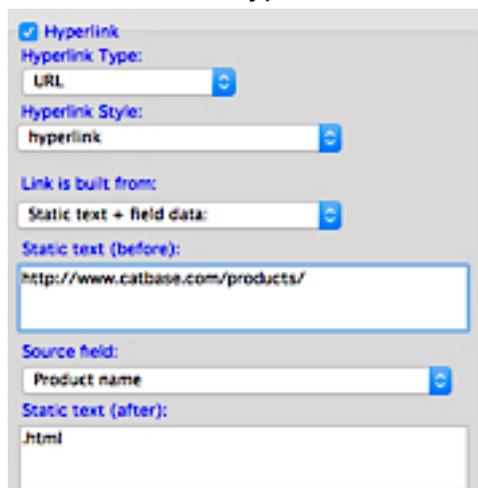


There are 8 Element types:

- 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](#).

Remember the hyperlinks on the product names? Go to the **Hyperlinks and Cross-Refs** tab:

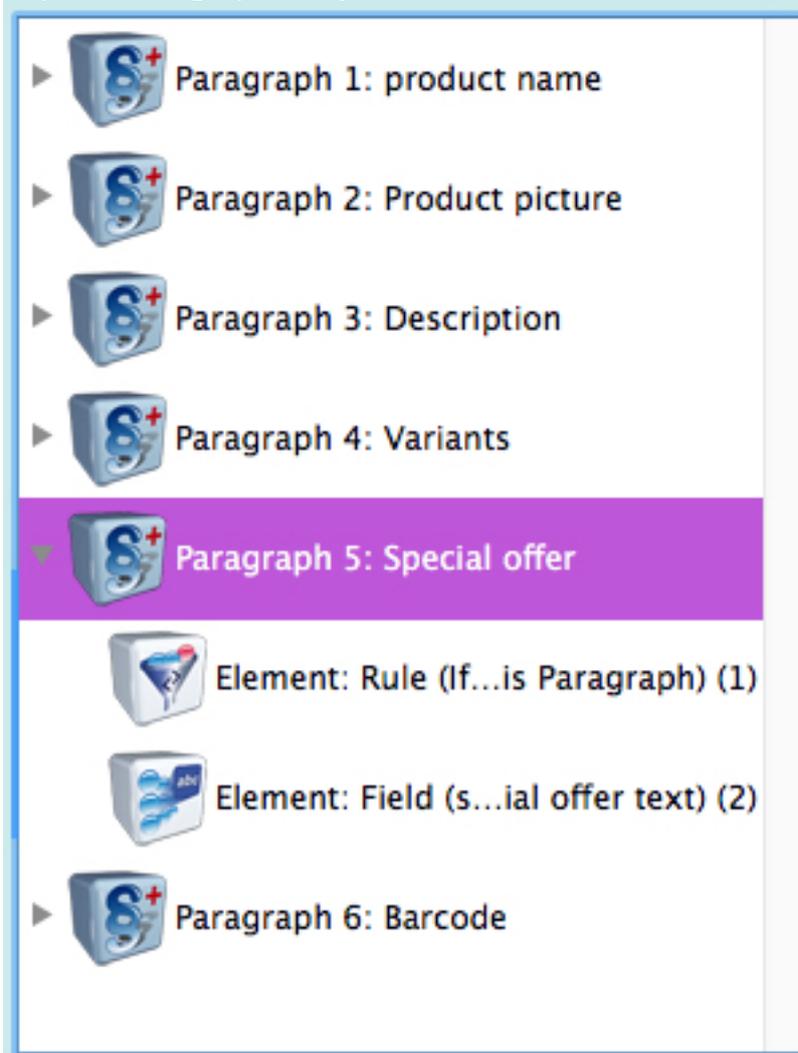


For more info about creating hyperlinks, [see this Tutorial](#).

Rules

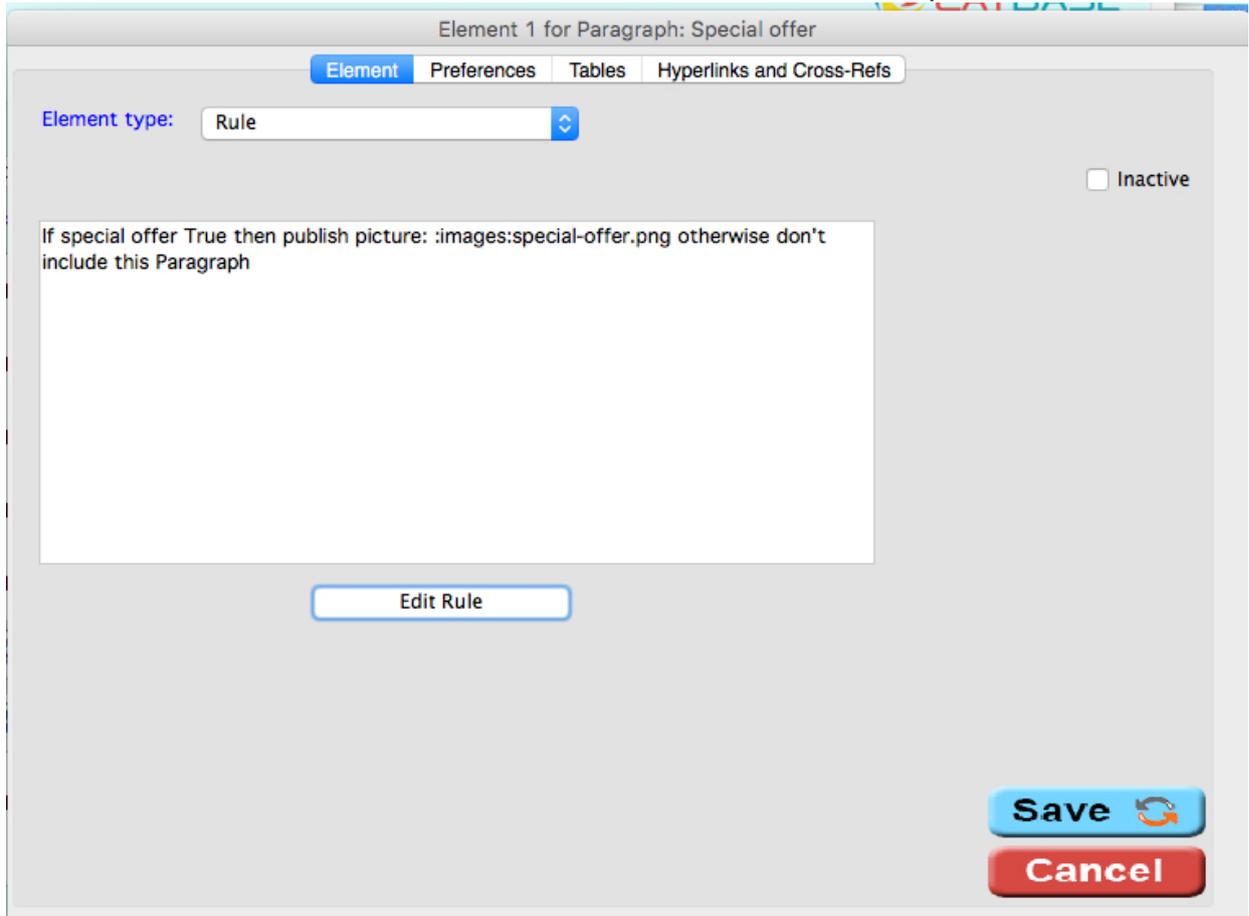
Rules provide a very powerful way for you to tell CatBase how to customise each publication. Remember our Special Offer? Let's see how that works ...

1. Expand Paragraph 5, **Special Offer**:



2. There are two Elements in this Paragraph: a Rule and a Field.

3. Double-click the first Element, **Rule**. The Rule Element window opens:



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

- Rules are based on the formula “**IF** (a criterion is met) **THEN** do something **OTHERWISE** do something different”.
- Go to the **OTHERWISE** tab:

- So our Rule says that **IF** the Special Offer checkbox is selected, **THEN** publish the “special offer” image **OTHERWISE** leave this Paragraph out.
- Click the **Cancel** button to close the Rule window, then click **Cancel** again to close the Element window.

9. Double-click the second Element, the Field “special Offer Text”. The Element shows that the Element type **Field** is selected, and the **special offer text** field has been selected.

To learn more about how to use Rules, please [see the Rules 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:



3. Make sure that **InDesign** is selected as the **Publishing Destination**.
4. Click the **Save** button.
5. Click the **Publish Now** button.
6. When it’s done, switch to InDesign..
7. Open the document **Price list.idml**, which you’ll find in the Sample Documents folder in your CatBase Files folder.
8. Go to Page 2 and click in the text box.
9. Choose **Place** from the **File** menu.
10. Locate the file you just published - it will be called “price list.txt” and you’ll find it in the Data Exports folder on your Desktop.
11. Open the file.
12. The InDesign document should look similar to this:

The Sweet Tooth Fairy

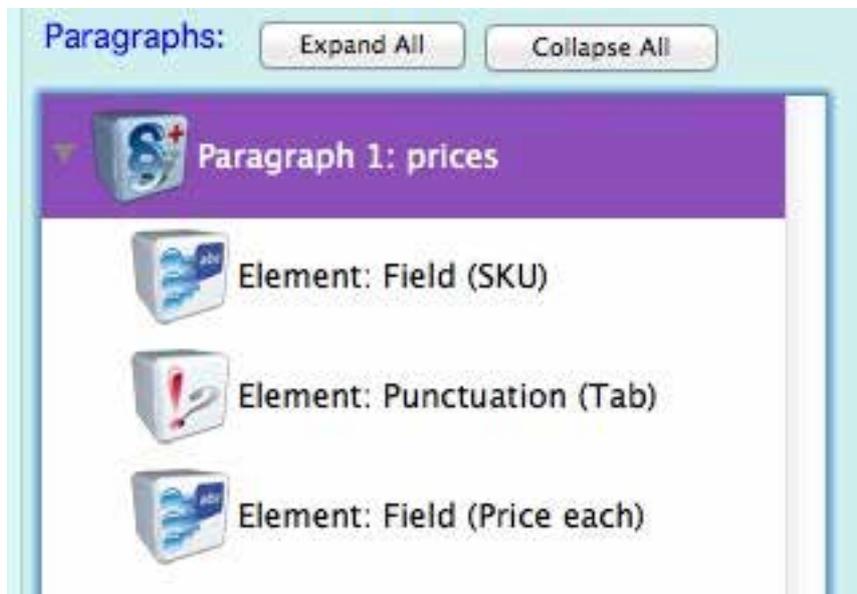


ABC-123	\$0.40
ABC-1234	\$8.00
ABC-12345	\$15.95
ABC-125	\$10.00
CDO-123	\$21.00
CDO-1234	\$18.00
CDO-12345	\$25.00
CDO-12356	\$18.00
DFT-123	\$10.00
DFT-1234	\$15.00
DFT-12345	\$15.00
DFT-1236	\$20.00
EEE-3456	\$0.50
EEE-345667	\$0.50
XYZ-123	\$11.00
XYZ-123-10	\$10.00
XYZ-123-15	\$15.00
XYZ-123-20	\$15.00
XYZ-123-20-48	\$20.00
XYZ-123-30	\$20.00
XYZ-123-40	\$5.00
XYZ-12303	\$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

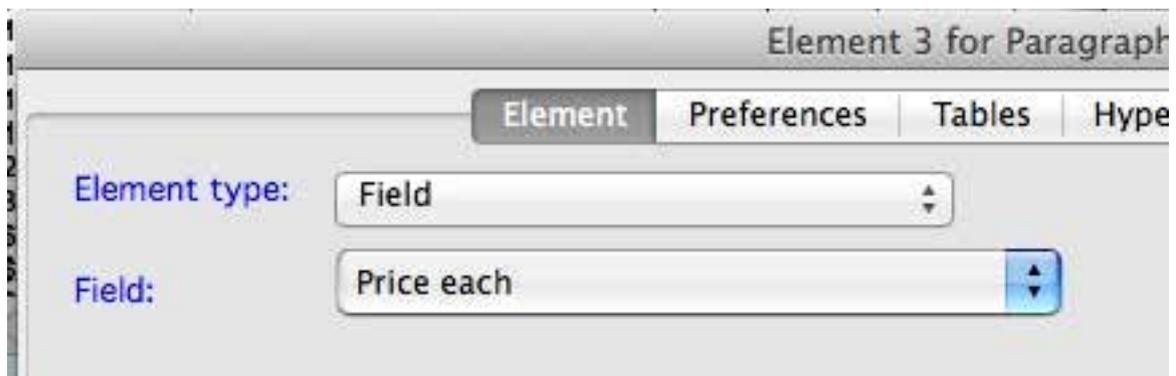
Notice that the prices are in bold, with a \$ sign.

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.

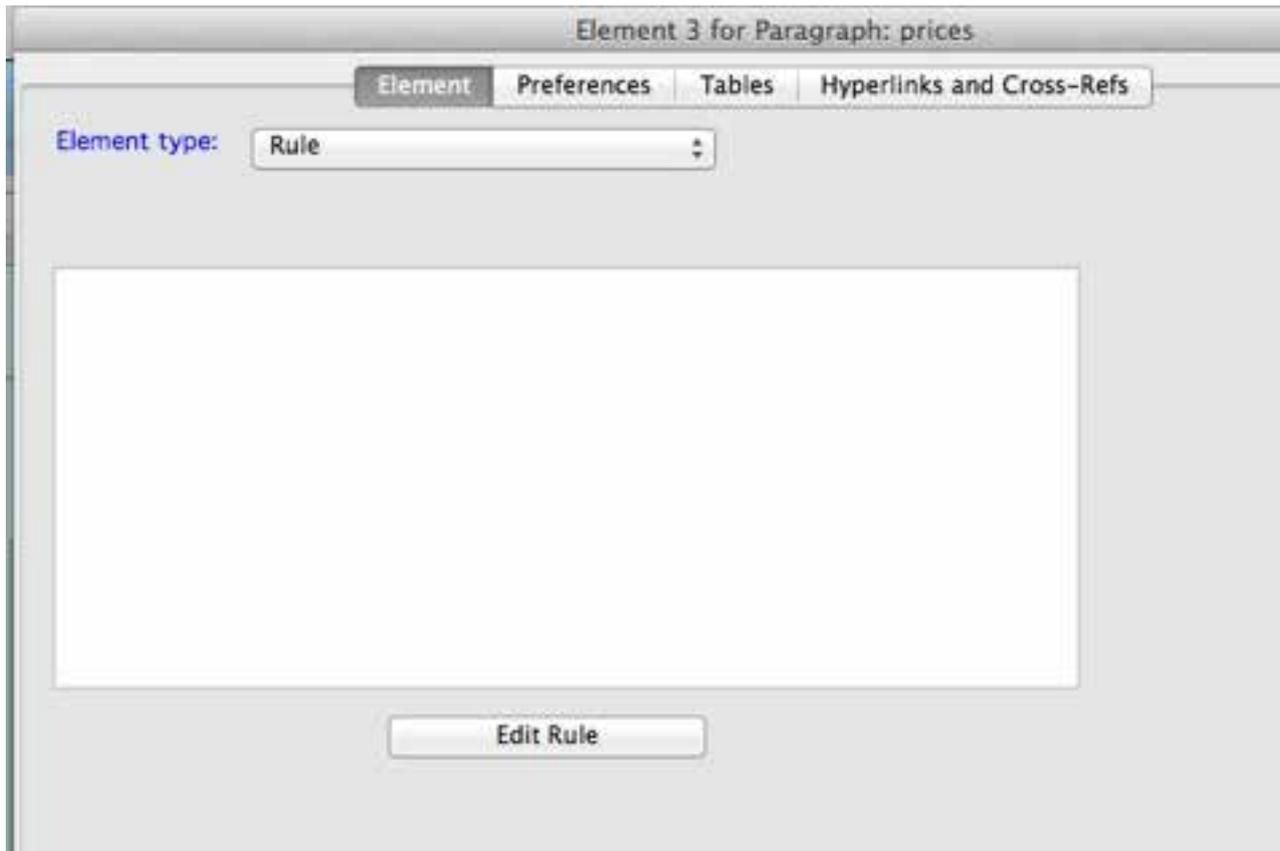
1. In CatBase, go to **Publishing** -> **Publishing Stylesheets** -> **Price list by SKU**
2. Expand the Prices paragraph:



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:

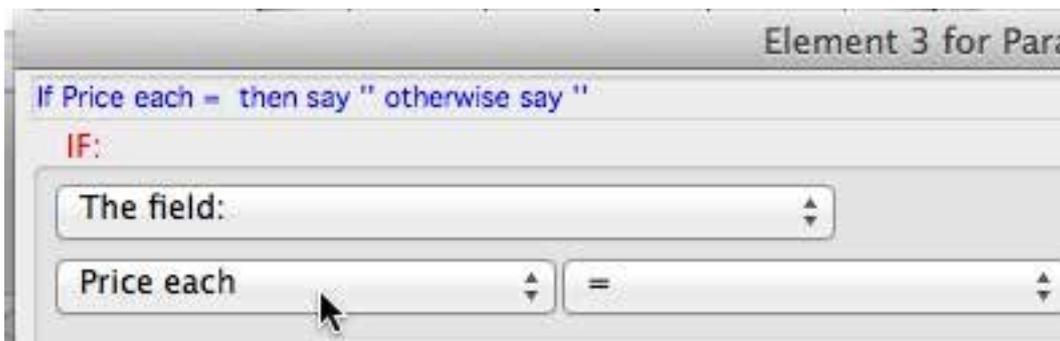


6. Click the **Edit Rule** button. The Rule window opens:

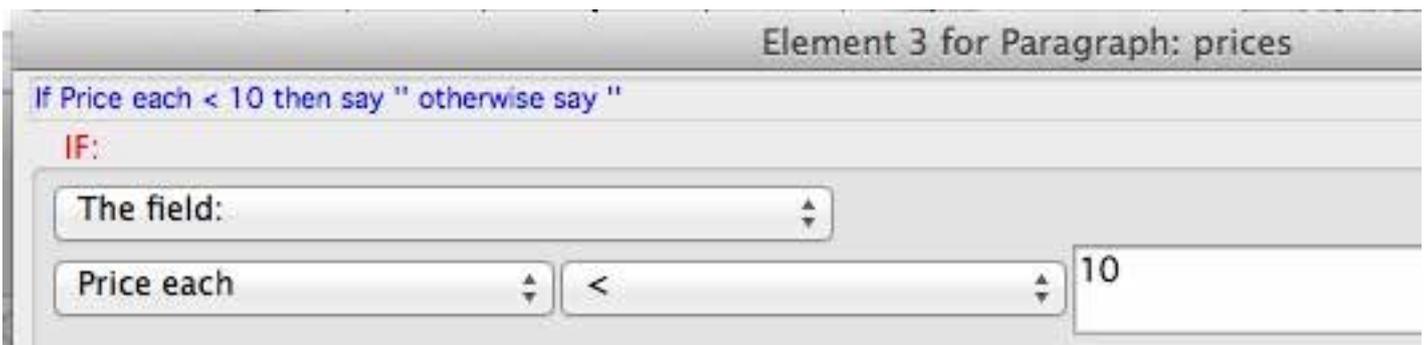


We want to tell CatBase “If the price each is less than 10, then publish the Price Each and change the character style to “red price”, otherwise publish the Price Each without changing the Character Style.”

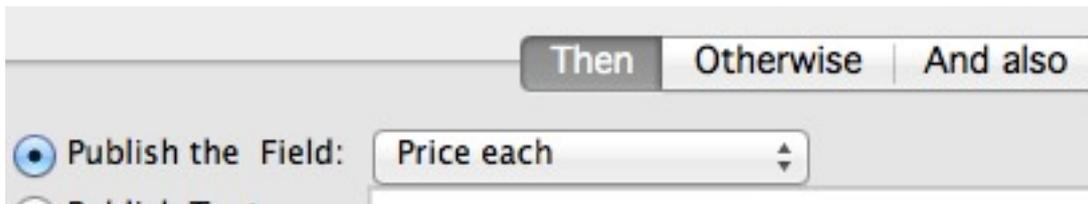
7. Click on the popup list of fields near the top of the window and choose Price Each:



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:



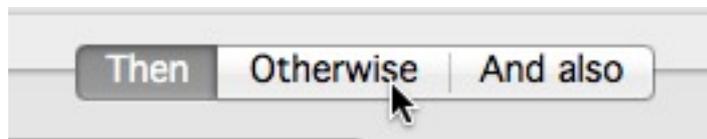
- In the **Then** section, select the **Publish the field** radio button, and choose the **Price each** field from the popup list of fields next to it:



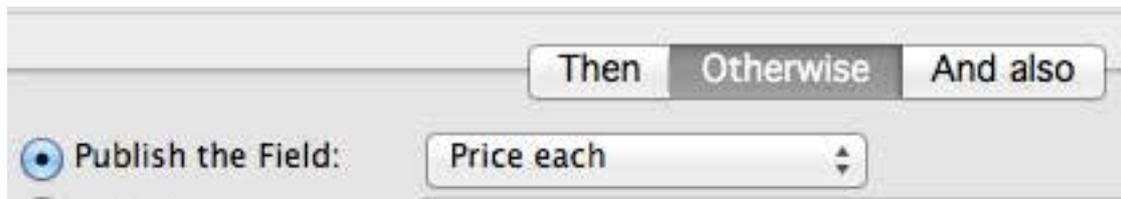
- Towards the bottom of the window, choose **Style for Element** from the **Style** popup, and choose **red price** from the popup next to it:



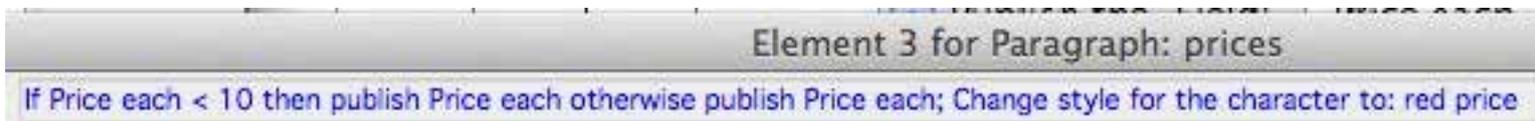
- Click on the **Otherwise** tab:



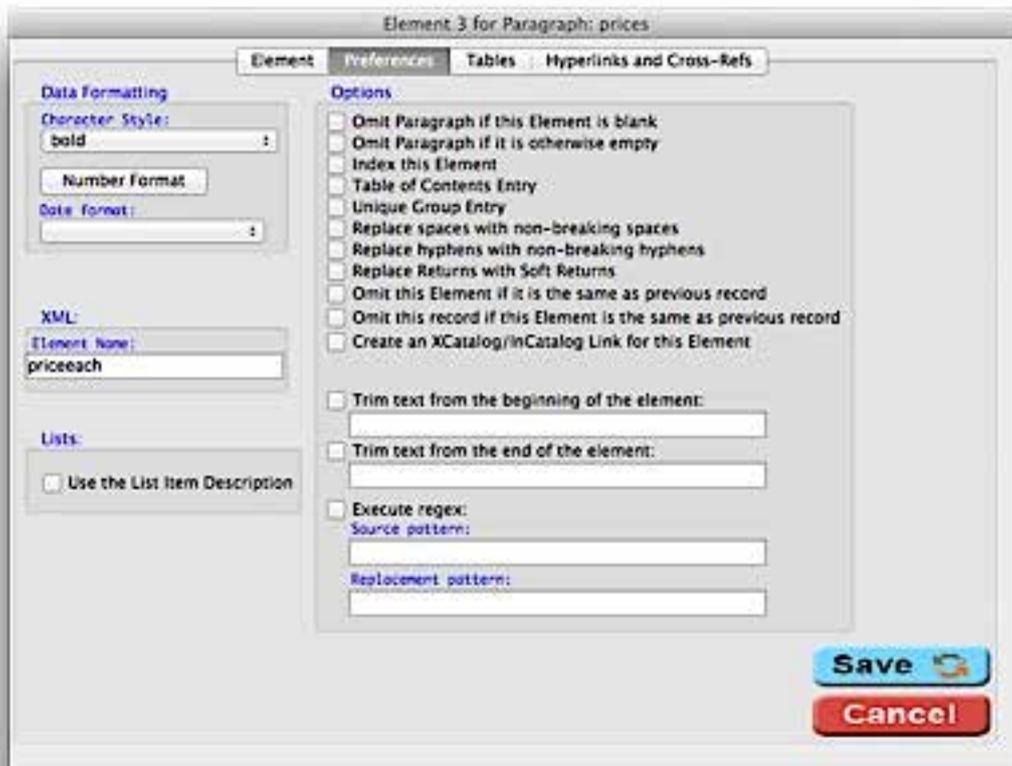
- Select the **Publish the Field** radio button and the Price each field from the popup list:



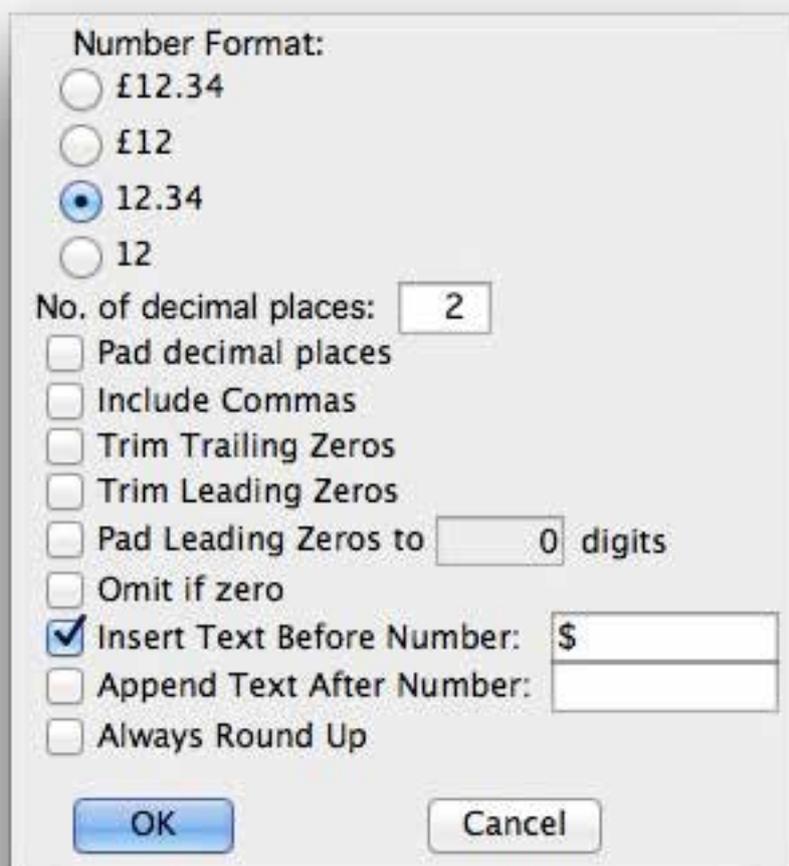
The text at the top of the window should now display your complete rule:



- Click the **Save** button to close the Rule window.
- 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 3: 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.

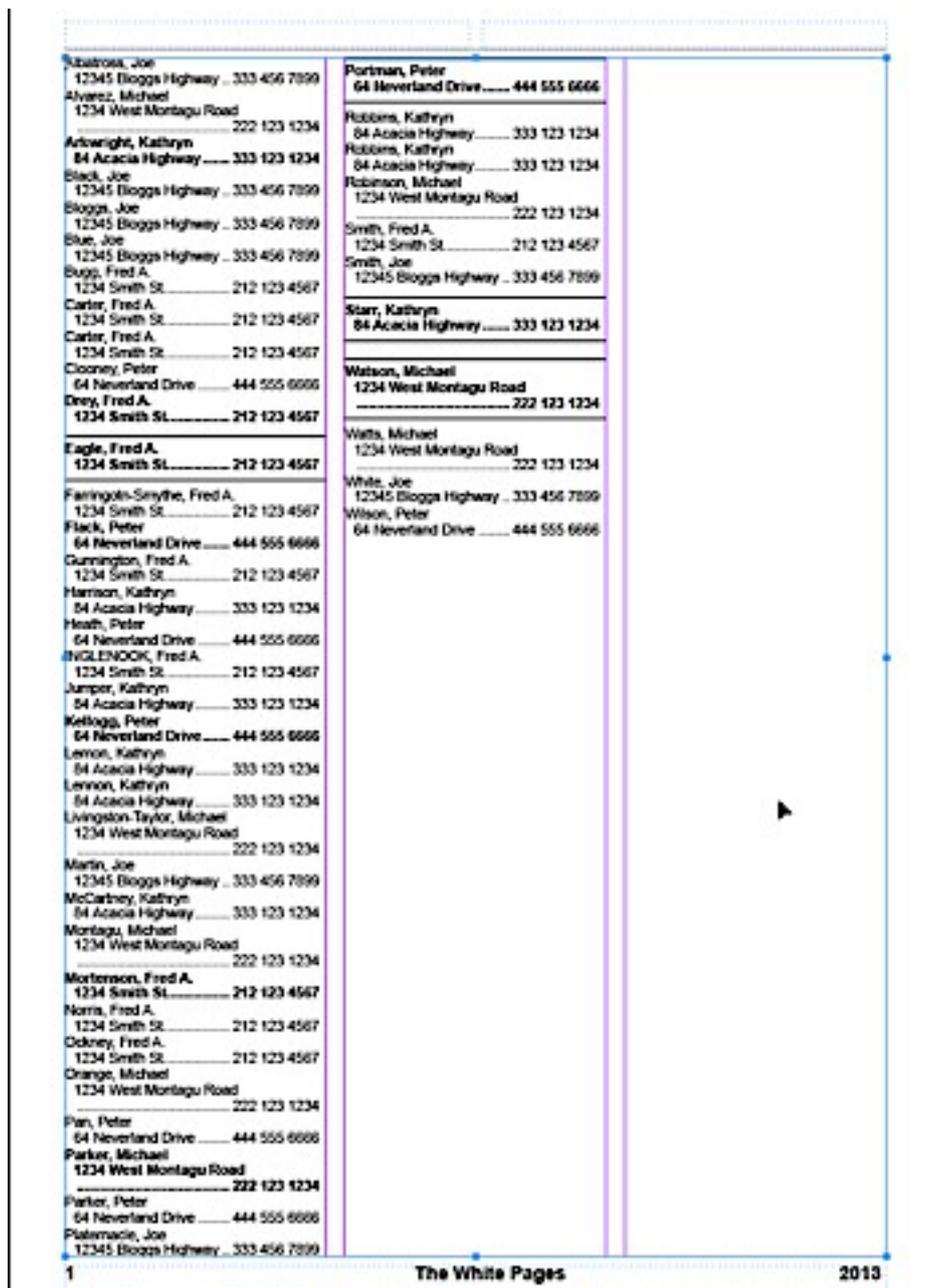
To switch Database Projects, go to the **File** menu and choose **Switch Project**. Select **Telephone Directory** from the list that appears, and click **OK**.

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.



Let's see the Yellow Pages ...

Yellow Pages

1. Open the example document **Yellow Pages.idml**, which you'll find in the Sample documents folder.
2. Go to the **File** menu and choose **Import Text with Xtags** (if you don't see that option under the File menu, you need to [install the Xtags plugin](#)).
3. Locate the file named **Yellow_Pages.xtg**, which you'll find in the Data Exports folder on your Desktop, and double-click it.
4. Your document should look like this:



The placement of those ads isn't ideal. But you can easily move them into better positions - for example:

Accommodation

Accommodation

B & Bs

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

Hotels

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

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

Overridges
123 Bandy Uphill
Road 415 123 4568
www.example.com

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

Sweet Dreams
123 Bandy Uphill
Road 415 123 4568
www.example.com



The Blitton Hotel
123 Bandy Uphill
Road 415 123 4568
www.example.com

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

West Side Hotel
123 Bandy Uphill
Road 415 123 4568
www.example.com

Automotive

Repairs & Maintenance

Auto House
123 Auto Road ... 213 456 7890
www.example.com

Fred's Automotive
123 Auto Road ... 213 456 7890
www.example.com

Pat and Mike's
123 Auto Road ... 213 456 7890
www.example.com

Speedyfit
123 Auto Road ... 213 456 7890
www.example.com

Used Cars

Fred's Automotive
123 Auto Road ... 213 456 7890
www.example.com

YOUR LOCAL FITNESS EXPERTS FOR OVER 26 YEARS!

FOUR SEASONS OF FITNESS

Spring • Summer • Fall • Winter

Buy 6 Months Get 6 Months FREE

Plus One Month FREE Tanning!

\$269 + Tax

Ends 4/30

ADD A FULL YEAR OF TANNING FOR \$100

INCLUDES FULL USE OF FITNESS EQUIPMENT, RACQUETBALL COURT, EXPERT TRAINING & PROGRAMS AND FULL SHOWER FACILITIES.

Health Plan Reimbursement Programs with the following providers: BC/BS MN & ND, United HealthCare, UCare, Medica & Health Partners.

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

The Yellow Pages

1

Scroll down to Page 2:



On this page, the ads are all inline. If the text changes, the ads will stick with their listings.

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

Example 4: 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** topic on the left.
3. Select the Publishing Project **Alpha Listing of all members**.
4. Click the **Publish Now** button.
5. When it's done, switch to InDesign.
6. Open the document Membership Directory.idml, which you'll find in the Sample Documents folder in your CatBase Files folder.
7. Click in the text frame on the first page.
8. Choose **Place** from the **File** menu.

9. Locate the file you just published (members.txt), which you will find in the Data Exports folder on your Desktop, and double-click on it to import it.
10. Your document should look like this:

<p>Joe Albatross 12345 Bloggs Highway, Los Angeles CA 91234 Tel: 333 456 7899 test@test.com</p> <hr/> <p>Ms Michael Alvarez 1234 West Montagu Road, Smithville, San Francisco CA 91111 Tel: 222 123 1234 test@test.com</p> <hr/> <p>Kathryn Arkwright 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234 test@test.com</p> <hr/> <p>Joe Black 12345 Bloggs Highway, Los Angeles CA 91234 Tel: 333 456 7899 test@test.com</p> <hr/> <p>Mr. Fred Bloggs 1234 Bloggs St., West Side, Bloggsville CA 30210 Tel: (213) 123 4567 fred@bloggs.com</p> <hr/> <p>Joe Bloggs 12345 Bloggs Highway, Los Angeles CA 91234 Tel: 333 456 7899</p> <hr/> <p>Joe Blue 12345 Bloggs Highway, Los Angeles CA 91234 Tel: 333 456 7899</p> <hr/> <p>Fred Bugg 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> <hr/> <p>Fred Carter 1234 Smith St., New York NY 12345 Tel: 212 123 4567 fred@example.com</p> <hr/> <p>Fred Carter 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p>	<p>Peter Clooney 64 Neverland Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> <hr/> <p>Fred Drey 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> <hr/> <p>Fred Eagle 1234 Smith St., New York NY 12345 Tel: 212 123 4567 fred3@example.com</p> <hr/> <p>Fred Farringotn-Smythe 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> <hr/> <p>Peter Flack 64 Neverland Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> <hr/> <p>Fred Gunnington 1234 Smith St., New York NY 12345 Tel: 212 123 4567 fred4@example.com</p> <hr/> <p>Kathryn Harrison 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234</p> <hr/> <p>Peter Heath 64 Neverland Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> <hr/> <p>Fred INGLENOOK 1234 Smith St., New York NY 12345 Tel: 212 123 4567 fred@example.com</p> <hr/> <p>Kathryn Jumper 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234</p>	<p>Peter Kellogg 64 Neverland Drive, Apt. 3b, Santa Monica CA 90111 Tel: 444 555 6666</p> <hr/> <p>Kathryn Lemon 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234 kath@example.com</p> <hr/> <p>Kathryn Lennon 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234</p> <hr/> <p>Ms Michael Livingston-Taylor 1234 West Montagu Road, San Francisco CA 91111 Tel: 222 123 1234</p> <hr/> <p>Joe Martin 12345 Bloggs Highway, Los Angeles CA 91234 Tel: 333 456 7899</p> <hr/> <p>Kathryn McCartney 84 Acacia Highway, San Bernardino CA 90111 Tel: 333 123 1234 kathryn@example.com</p> <hr/> <p>Ms Michael Montagu 1234 West Montagu Road, San Francisco CA 91111 Tel: 222 123 1234 michael@example.com</p> <hr/> <p>Fred Mortenson 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> <hr/> <p>Fred Norris 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p> <hr/> <p>Fred Ockney 1234 Smith St., New York NY 12345 Tel: 212 123 4567</p>
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The Membership Directory

1

11. Note that some of the listings have their name in red. These are ones that are Lifetime Members. There's a Rule in the Publishing Stylesheet which tells CatBase to set the names in the *Lifetime Member* style if the member type = Lifetime:



12. Email Addresses: For the members who have email addresses, a hyperlink has been created:

Joe Albatross	Peter Clooney	Peter																																																						
12345 Bloggs High Los Angeles CA 91 Tel: 333 456 7899 test@test.com	<table border="1"> <thead> <tr> <th>Name</th> <th>Count</th> <th>Icon</th> </tr> </thead> <tbody> <tr><td>fred3@example.com</td><td>1</td><td>✉</td></tr> <tr><td>fred4@example.com</td><td>1</td><td>✉</td></tr> <tr><td>fred@bloggs.com</td><td>1</td><td>✉</td></tr> <tr><td>fred@example.com</td><td></td><td>✉</td></tr> <tr><td>joe.s@example.com</td><td>2</td><td>✉</td></tr> <tr><td>joe@example.com</td><td>2</td><td>✉</td></tr> <tr><td>kath@example.com</td><td>1</td><td>✉</td></tr> <tr><td>kathryn2@example.com</td><td>2</td><td>✉</td></tr> <tr><td>kathryn@example.com</td><td>1</td><td>✉</td></tr> <tr><td>michael.o@example.com</td><td>2</td><td>✉</td></tr> <tr><td>michael@example.com</td><td>1</td><td>✉</td></tr> <tr><td>peter@example.com</td><td>2</td><td>✉</td></tr> <tr><td>test@test.com</td><td></td><td>✉</td></tr> <tr><td>test@test.com</td><td>1</td><td></td></tr> <tr><td>test@test.com 1</td><td>1</td><td></td></tr> <tr><td>test@test.com 2</td><td>1</td><td></td></tr> <tr><td>test@test.com 3</td><td>1</td><td></td></tr> </tbody> </table>	Name	Count	Icon	fred3@example.com	1	✉	fred4@example.com	1	✉	fred@bloggs.com	1	✉	fred@example.com		✉	joe.s@example.com	2	✉	joe@example.com	2	✉	kath@example.com	1	✉	kathryn2@example.com	2	✉	kathryn@example.com	1	✉	michael.o@example.com	2	✉	michael@example.com	1	✉	peter@example.com	2	✉	test@test.com		✉	test@test.com	1		test@test.com 1	1		test@test.com 2	1		test@test.com 3	1		
Name	Count	Icon																																																						
fred3@example.com	1	✉																																																						
fred4@example.com	1	✉																																																						
fred@bloggs.com	1	✉																																																						
fred@example.com		✉																																																						
joe.s@example.com	2	✉																																																						
joe@example.com	2	✉																																																						
kath@example.com	1	✉																																																						
kathryn2@example.com	2	✉																																																						
kathryn@example.com	1	✉																																																						
michael.o@example.com	2	✉																																																						
michael@example.com	1	✉																																																						
peter@example.com	2	✉																																																						
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Ms Michael Alva 1234 West Montag Smithville, San Fra 91111 Tel: 222 123 1234 test@test.com																																																								
Kathryn Arkwrig 84 Acacia Highway San Bernardino CA Tel: 333 123 1234 test@test.com																																																								
Joe Black 12345 Bloggs High Los Angeles CA 91 Tel: 333 456 7899 test@test.com																																																								
Mr. Fred Bloggs 1234 Bloggs St., V Bloggsville CA 302 Tel: (213) 123 456 fred@bloggs.com																																																								

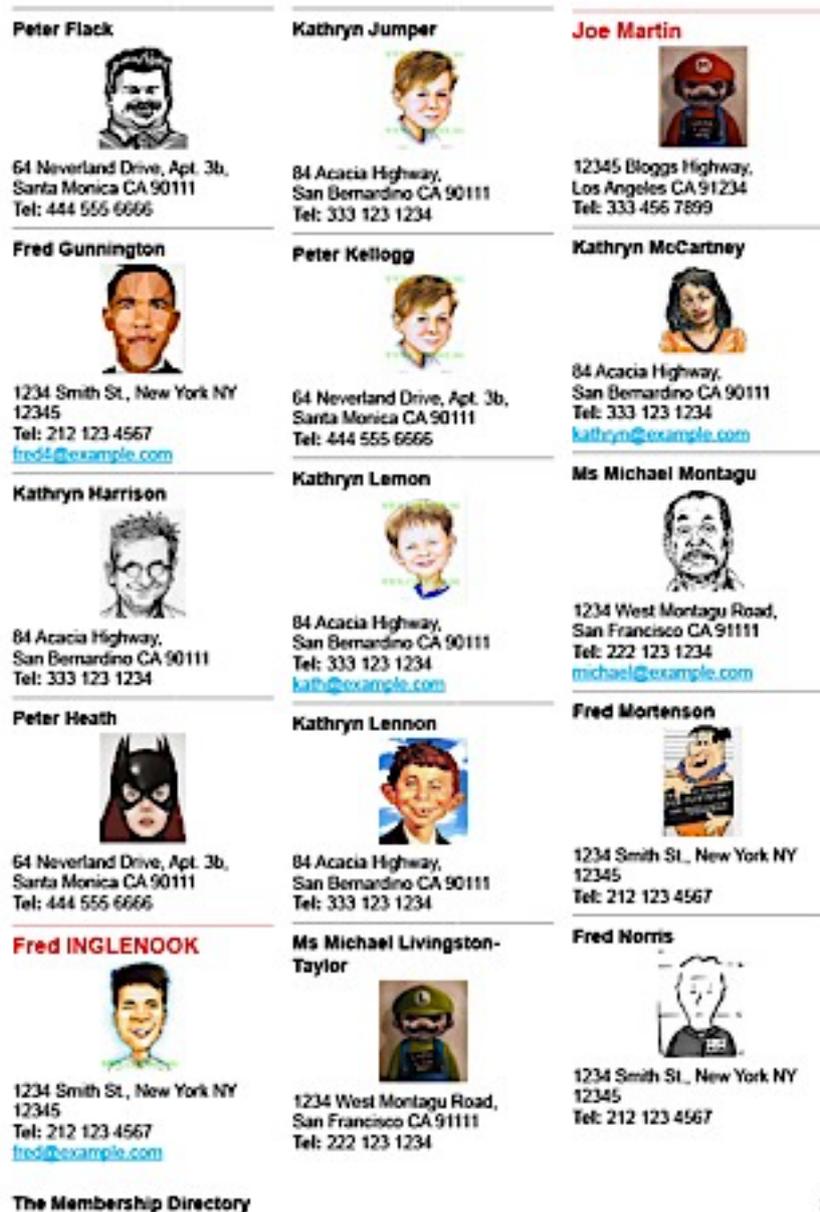
To find out more about automatically creating hyperlinks, [see this Tutorial](#).

Membership Directory with Pictures

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

CatBase Demo Manual for InDesign

1. Go to **Publishing->Publishing Projects**
2. Select the Publishing Project “Alpha listings with mugshots + xtags for InDesign”
3. Click the **Publish Now** button.
4. Import the resulting file (alpha_with_pics.XTG) into the InDesign document using the Xtags plugin
5. It should look like this:



2

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 lifetime 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 InDesign, 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](#).
- **Update Data in an InDesign document:** For example, pricing updates. [See this Tutorial for more info.](#)

What next?

So, now you have an idea of what CatBase can do, and how it works with Adobe InDesign. 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](#).