

# **TUTORIAL 3 - PREPARING A DOCUMENT FOR LINKUP!**



**DEMONSTRATION EDITION**



## Please Consider

If you have not already done so, it might be helpful for you to have a read through the LinkUP! User Manual either before you perform this tutorial or afterwards. In particular the Concepts Chapter will help you to get a better grasp of the terminology and technologies involved. The manual also contains explanations of the various LinkUP! Palettes that will be used during this tutorial. The LinkUP! User Manual has been included in your download or on the CD-ROM.

For this tutorial our data source will be locally stored LinkDB files. These are database files created from ASCII text files using our LinkDB utility. The LinkDB Utility is available free of charge and can be found on the MC Research Website and the LinkUP! CD-ROM. Again, a fuller explanation of LinkDB and working with ASCII text files is provided in the Manual.

## Tutorial 3 - Preparing a document for LinkUP!

### Overview

So far you have seen LinkUP! updating pages and how easily operators can construct pages using pre-marked library items. What this section will do is show you how to achieve this with your own documents. By the end of this section you should have a good feel for how to connect to your Data Source, define fields, configure links and markup the pages.

### Requirements

#### LinkUP! 68k XTension for Macintosh

- QuarkXPress 3.32r5 or 4.03
- System 7.5
- 32MB RAM with at least 8MB assigned to QuarkXPress

#### LinkUP! PPC XTension for Macintosh

- QuarkXPress 3.32r5 or 4.03
- System 7.6 or 8.0
- 32MB RAM with at least 10MB assigned to QuarkXPress

Updaters for both QuarkXPress 3.32v5 and version 4.03 have been included on the CD in the 3rd Party Folder. These are also available from Quark's Website ([www.quark.com](http://www.quark.com)). Although LinkUP! will run without both of these Updaters, there are several known bugs in the non-updated versions of XPress that will adversely effect LinkUP! 7s performance and could compromise your document's integrity. We would therefore strongly recommend installing the appropriate Updater.

## Installation

You will need the **LinkUP! 7 LinkDB Demo** XTension installed to be able to work through these tutorials successfully. This is achieved as follows;

### What do you Install?

When you install LinkUP! on a computer alongside a copy of XPress the main LinkUP! program effectively becomes part of your copy of XPress.

A new menu, 'LinkUP' appears at the right-hand end of your QuarkXPress menubar as below.



You will require the following components for this tutorial;

- LinkUP! 7 LinkDB Demo XTension
- Tutorial Files

The first thing you need to do is copy these components from the LinkUP! CD-ROM to your hard disk (If you downloaded the demo then this will not be necessary so skip to the *Installing the XTension* section below).

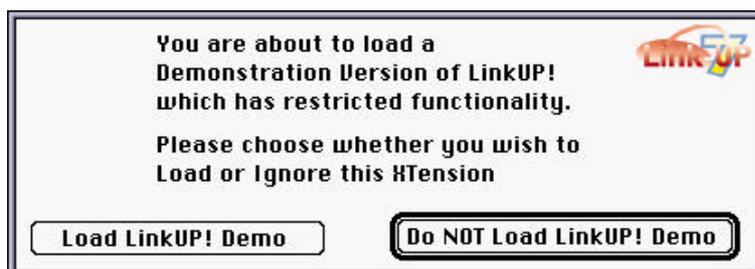
1. Insert the CD-ROM into the disk drive
2. Copy the LinkUP Folder into a location of your choice on your computer

### Installing the XTension

With all the files now installed onto your hard disk it is now necessary to copy the LinkUP! XTension into the **QuarkXPress/XTensions** folder. This will cause LinkUP! to be automatically loaded when QuarkXPress is loaded.

3. Locate the **QuarkXPress/XTensions** folder on your hard disk.
4. Locate the **LinkUP! 7 LinkDB Demo** XTension file either from within the **LinkUP/Program Files/LinkUP! 7 XT LinkDB (ASCII)** folder you have just copied to your hard disk or from within your download
5. Copy the **LinkUP! 7 LinkDB Demo** file into the **QuarkXPress/XTensions** folder

Provided you followed the instructions above correctly you have now installed the LinkUP! XTension on your computer. To verify that the LinkUP! XTension is correctly installed where QuarkXPress will recognise it, you should now try and load XPress in the normal manner. If everything has installed correctly, then you will see an alert similar to the one below, as soon as XPress loads.



## Making it Happen

All the files necessary for the successful completion of Tutorial3 are located in the **Tutorial3** Folder that you downloaded or copied from the CD-ROM to your hard disk during the installation. The only exception to this are the pictures that are located in the **Pictures1** Folder.

1. Launch QuarkXPress with the LinkUP! XTension properly loaded as above.
2. Locate and open the Tutorial3 Document that you copied across during the installation (it's located in the LinkUP! **Tutorial3/Documents** Folder)

NB. BEFORE YOU GO ANY FURTHER MAKE SURE YOU HAVE READ THE CONCEPTS SECTION OF THIS DOCUMENT. IT EXPLAINS SOME KEY TERMS THAT WE WILL BE REFERRING TO THROUGHOUT THIS TUTORIAL.

The main topics that will be covered in this tutorial are;

- Defining LinkUP! fields
- Marking up the QuarkXPress page
- Database links and configuration
- Updating your publication

### Defining LinkUP! Fields

Before you can do anything in your QuarkXPress document, the first task is to obtain a list of database fields to work with. Defining LinkUP! fields is the process of describing the textual or numerical elements on the QuarkXPress page e.g. SKUs, part numbers, prices, pictures etc. There are two ways to obtain a list of fields to work with in LinkUP! you can either manually create them or alternatively you can import them straight from your data source.

The fields defined for any document are listed in the Markup Tools Palette. Display this now as follows;

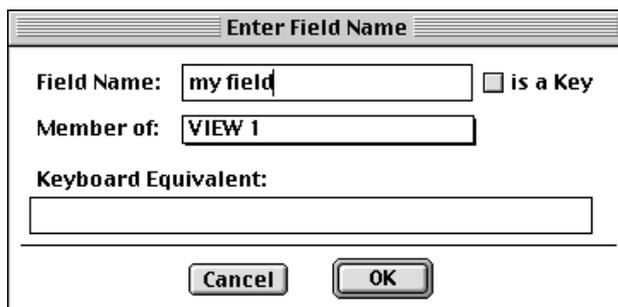
1. From the LinkUP! menu select **Show Palettes Markup Tools**

The list should be empty as there are no fields in this document. In fact this document has been completely untouched as far as LinkUP! is concerned.

To define a field with LinkUP!

2. Click the Define Field Button on the Markup Tools Palette 

The following dialogue appears



Enter Field Name

Field Name:   is a Key

Member of:

Keyboard Equivalent:

You can enter a name for the field, specify if it is a Key Field (see LinkUP! concepts), specify what relational level this field is at (default Level 1) and even define a Keyboard Equivalent.

3. Type the words **my field** in the Field Name box
4. Click **OK**

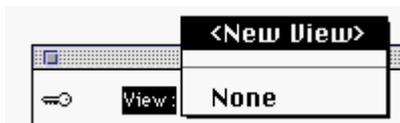
You will now see the field **my field** appear in the Markup Tools Palette



This was just to illustrate that the LinkUP! field names defined in QuarkXPress can be anything at all. Really whatever names best describe the fields to the XPress operators.

As we already have a database to work with, a field list can be obtained directly from the data file. To do this you will need the Data Viewer Palette open.

5. From the LinkUP! menu select **Show Palettes Data Viewer**
6. On the Data Viewer Palette, click the View pull down menu and select the **<New View>** option.



You are immediately confronted with a search box so you can locate the data file, in this case a LinkDB file.

7. Browse your computer and locate and open the **Tutorial3/Data** Folder
8. Click the **Use Currently Open Folder** Button

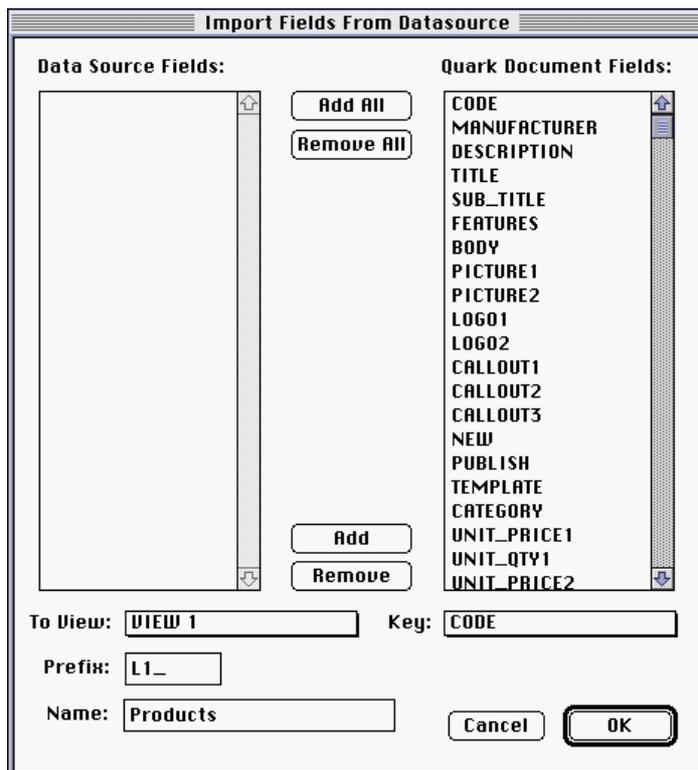
You should have one available table, **Products.LNK.DB**

9. Select this Table and click the **Open** Button

You now have the Import Fields from Data Source dialogue on screen. On the left is a list of available fields in the data source and on the right a list of fields to be imported. For now we will import all field names. You can also prefix each field name, the default being L1\_. This is essential when you are working with relational database structures and need to differentiate between the different levels. You can name the data source and finally you must select a field to use as the Key Field.

10. Click **Add All**
11. Change the Name to **Products**

## 12. Select **CODE** as the Key Field



Key:	CODE
	MANUFACTURER
	DESCRIPTION
	TITLE

## 13. Click the **OK** Button

The Markup Tools Palette now contains all of the field names you have imported. Now you have a list of fields to work with, the next stage is to markup the document.

### Marking up the QuarkXPress page

You will now learn how to markup the page. This is where you assign the field names just imported to specific items that are to be linked to the database. The markup process, like the define field names process is only done once for the entire publication. Future updates to the publication can then be done automatically!

1. Highlight the Stock Number **48632084** located under the word FEATURES



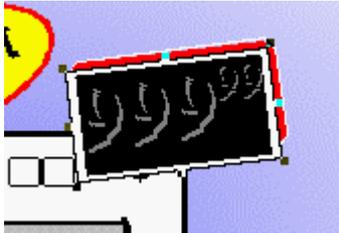
2. Double click on the **L1\_CODE** (the one with a key next to it) in the Markup Tools Palette

This establishes the record to which the items (prices, pictures etc) will be linked. Notice that the number is now underlined in red, indicating that it is the active LinkUP! Record Number (LRN). Subsequent markups will also be underlined in red, providing a visual confirmation that you are linking the appropriate text and pictures to the appropriate record. It is important that you highlight only the actual code itself and not any other characters such as carriage returns, spaces or tabs as LinkUP! would then search the database for the entire string including the number and the space for instance, and would not return the correct result.

3. Now highlight the word **BODY** and then double-click on the **L1\_BODY** field in the Markup Tools Palette

We have now instructed LinkUP! to apply the BODY Field from the database to Stock Number 48632084. Notice that the marked up field is underlined in red.

4. Highlight the words **PRODUCT DESCRIPTION** and then double-click on the **L1\_DESCRIPTION** field in the Markup Tools Palette
5. Highlight the word **FEATURES** and then double-click on the **L1\_FEATURES** field in the Markup Tools Palette
6. Highlight the word **CALLOUT** and then double-click on the **L1\_CALLOUT1** field in the Markup Tools Palette
7. Highlight the large **999.99** price and then double-click on the **L1\_UNIT\_PRICE\_1** field in the Markup Tools Palette



Pictures are marked up in exactly the same way.

8. Select the large picture and then double-click on the **L1\_PICTURE1** field in the Markup Tools Palette
9. Select the **LOGO** picture and then double-click on the **L1\_LOGO1** field in the Markup Tools Palette

This item has now been marked up. We do however need to perform a couple of configurations before we actually update the page and bring the latest information and pictures for the product 48632084. First of all you must tell LinkUP! where to find the pictures as in the previous tutorials.

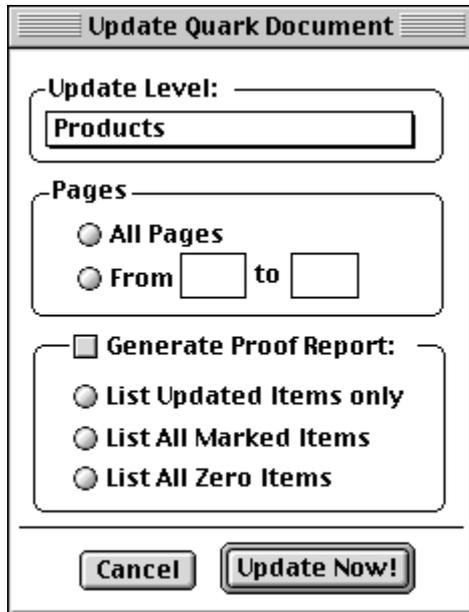
10. From the LinkUP! Menu, select **Configure Picture Paths**
11. Click the **Add** button
12. Browse your computer to find the location of the pictures. (They will be located in the **Tutorial Files/Pictures1** Folder copied to your hard disk during the installation)
13. Click either the **Use Currently Open Folder** Button if you are inside the Pictures1 folder, otherwise highlight the Pictures1 folder and click the **Use Highlighted Folder** Button.
14. Click the **OK** button

Either way you will see that the new picture path has been added.

Now lets update the page;

15. Click the Update button on the Data Viewer Palette

A dialogue will appear as below;



We are about to see LinkUP! use the Products database to update the QuarkXPress page to reflect the information held in our database for the product on the page. The process is very fast...

16. Click the **Update Now!** Button 

LinkUP! will present its **LinkUP! is about to Update** windows, allowing you to observe and confirm each individual update. For now we will just proceed with the process automatically.

17. Click the **Update without further confirmation** button and watch LinkUP! do the hard work!!

On your page you should now see the product as displayed here but with just a few differences that we will address next.



You will probably notice first of all that your 79.95 doesn't look quite like the one above. Effects such as this superscript can be achieved on an individual field basis. These are setup in the Configure Import Links.

18. From the LinkUP! menu select **Configure Import Links**

On the left-hand-side of the screen is a list of the available LinkUP! fields. As you click on each one of these, the rest of the screen will change to reflect the individual configuration for each field, also showing which field in the data source the LinkUP! field is linked to.

The links for this document were setup for us automatically because we actually imported the field names. The mapping to the database fields can also be achieved within the Configure Import Links screen by clicking the Select Database button and choosing the relevant field from the Select Field list.

To achieve the superscript effect on the price and the \$ symbol you will need to setup a prefix for the field and also set some find options. It is important to note that all of these effects are taking place without having to make any changes in your data

19. Click on the **L1\_UNIT\_PRICE1** field on the left-hand-side of the screen

20. Add a **\$** symbol into the **Add Prefix** box

21. Add a full stop '.' into the **Find** box

22. Type **<V>** into the **Change** box

23. Click the **Quark Use Tags** Button

What you have told LinkUP! to do is add a \$ symbol in front of the Unit Price1. You have also instructed LinkUP! to look for a full stop in the price, which will obviously fall before the units, and replace it with the Quark Tag <V> which is the Superscript Quark Tag.

This will illustrate to you the power of Tag processing during an update. For reference the screen should now look like this:

Allow update from database

Add Prefix:

Add Suffix:

If Absent:

Find:   Replace  Before  After

Change:

Use Tags:  None  Quark  LinkUP!

Delete if Empty

Previous:

Next:

24. Click the **OK** button

25. Click the Update Button  on the Data Viewer Palette and click through the confirmation screens as before

If you setup the Import Links correctly, LinkUP! will have updated the page and this time the price field will be in superscript with a \$ symbol in front of it.

For the more astute of you, you will notice that the list of features is also different in the sample page above from your updated page. The features are actually listed with bullets in front of them.

Again you will need to use the Configure Import Links Screen to achieve this effect.

26. Select **Configure Import Links** from the LinkUP! Menu

27. Select the **L1\_FEATURES** field from the field list on the left-hand-side

This is currently all blank, so you will need to change it to appear as in the example below.

Allow update from database

Add Prefix:

Add Suffix:

If Absent:

Find:   Replace  Before  After

Change:

Use Tags:  None  Quark  LinkUP!

Delete if Empty

Previous:

Next:

The data in the Features field in the database contains a list of features separated by a \* symbol. What the above screen does is look for the \* symbol and replace it with a bullet and

carriage return. Also, as there is no \* symbol before the first feature in our database, we will insert a bullet point here as well for consistency. To obtain a bullet on your computer user the **Option 8** Key.

28. Click the Update Button  on the Data Viewer Palette and click through the confirmation screens as before

The end result is as above with a formatted list of features each preceded by a bullet.

There is no limit to number of effects that can be achieved automatically this way on the XPress page without having to place any tags or changes in your data. A full list of Quark Tags is given in the QuarkXPress User Guide.

### Looking Deeper

If you want to delve a bit deeper into what is actually happening on the page behind the visible underlines, you can use the Markup Configuration Palette. This is displayed by selecting **Show Palettes Markup Configuration** from the LinkUP! menu. When you click on a markup, this palette will tell you all you need to know about it. Try it out for yourself on the page you have just prepared. For more information on the Markup Configuration Palette see the Navigation Section of the LinkUP! User Manual.

## Further Tutorials

There are currently five Tutorial Files available for LinkUP! 7;

- Tutorial 1 - Updating a QuarkXPress Document
- Tutorial 2 - Template Building
- Tutorial 3 - Preparing a document for LinkUP!
- Tutorial 4 - Building Documents from Single Templates
- Tutorial 5 - Building Documents from Multiple Templates

Please keep an eye on the MC Research web site for new Tutorials covering a range of applications for LinkUP! including;

- Creating a Directory
- Creating Retail Flyers
- Using LinkUP! with Holiday Brochures
- Creating Property Guides

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