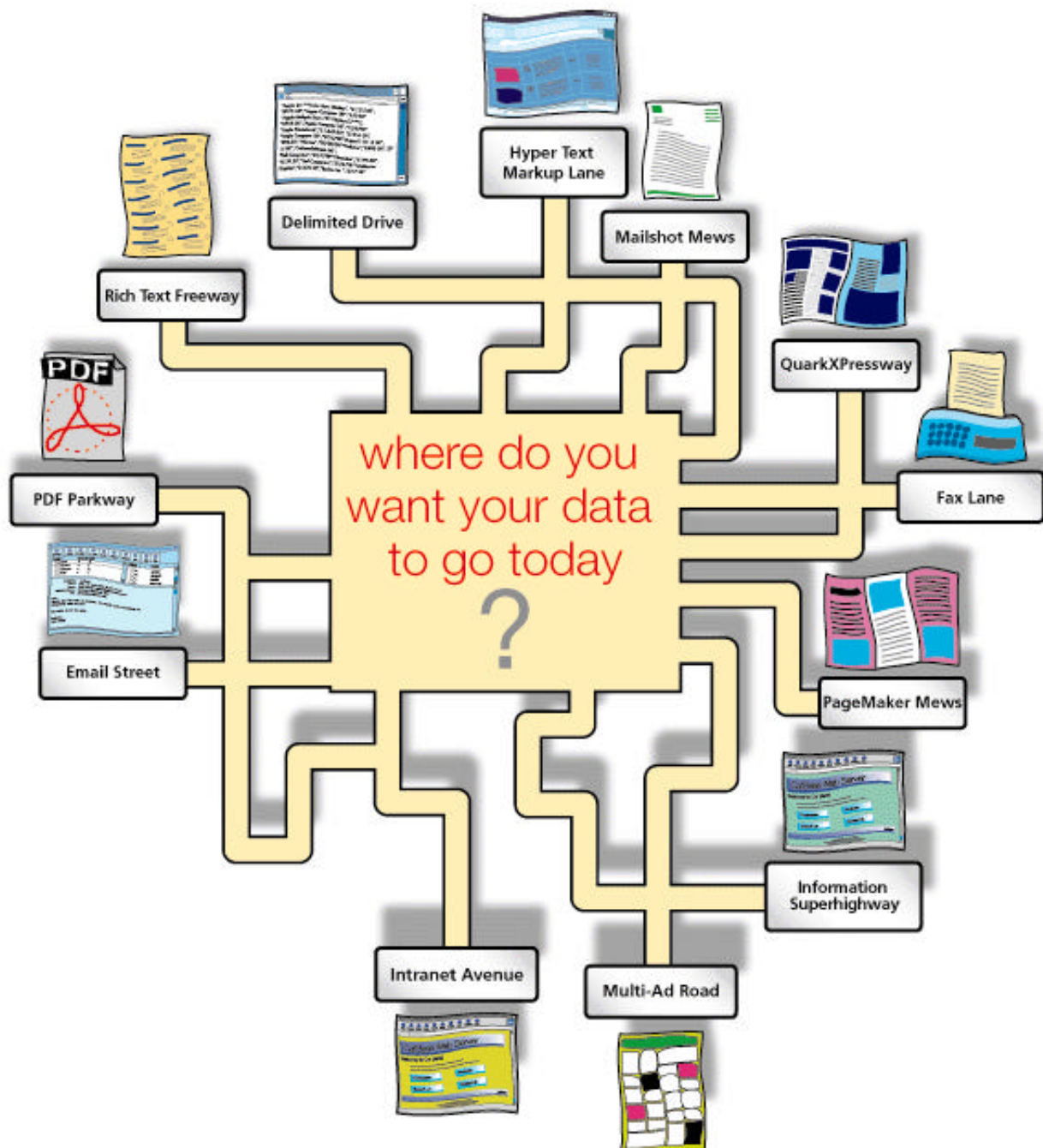


catbase⁴

The Power to Publish



Demo Manual

Version: 4.18

Last Updated: June 1999

INSTALLATION

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What Is CatBase?

CatBase is a fully functional relational database management system which has been specially programmed to provide various publishing functions that are not normally found in a database. It is designed to make it easy for you to publish your catalogue, directory, or similar type of publication in various ways, all from the same source.

We used to think of publishing as simply printing information on paper. Not any more! Now we also need to make our information available over the Internet; to other people in our offices via our office intranet; on CD; and in various other electronic formats. CatBase enables you to do all of these things efficiently, accurately, quickly, and easily.

With CatBase you:

Accumulate

Start by getting data into the database, either by entering it manually, importing it from virtually any other source, or by scanning printed text using OCR software (currently, Macintosh only).

Update

Update the data as necessary, either manually or by importing an update file (for example, you may want to update product prices using data from your accounts system).

Communicate

If you have information on people or companies in the database you can communicate with them directly from the database via:

- Mail merge letters
- Faxes (Mac only, currently)
- Emails

Disseminate

Once the data is ready to publish, you can do so in any of the following formats:

- In Print:
 - QuarkXPress documents
 - Multi-Ad Creator 2 documents (Mac only)
 - PageMaker documents
 - Microsoft Word documents
 - Any page layout or word processing program that can interpret RTF tags
- Electronically:
 - HTML documents
 - Text files in various formats (tab- or comma-delimited)
- The Internet:
 - Run CatBase as a completely self-contained web server

INTRODUCTION

- Office Intranet:
Run CatBase as a completely self-contained Intranet server, enabling everybody on the office network to have access to the data.

Of course, you can also do all the things you would expect with a database, such as:

- Reports
- Graphs & charts

The Demo Version

The Demo version of CatBase is a fully functional version of the program -- you can do everything with it that you can do with the full version. However it is limited to 50 records per table.

System Requirements

CatBase runs on Windows 95, Windows NT, and Macintosh operating systems. It is available in Single-User and Multi-User flavours. In a multi-user setup, the server can be either Macintosh or Windows (NT is strongly recommended), and the clients can be any combination of Windows and Macintosh.

How to Use This Manual

This manual is designed to give you an overview of what CatBase can do. It is organised into the following chapters:

1. Introduction

That's what you are reading right now.

2. Installation

This brief chapter describes how to install CatBase and start it up, and an overview of the interface.

3. Publishing The Data

Who cares about how the data got into the database? Let's see what CatBase can do with it once it's there! In this chapter we show you how to publish the information in various ways. Look at the sections that are of particular interest to you:

- 3.1 Quark XPress
- 3.2 PageMaker
- 3.3 Multi-Ad Creator
- 3.4 RTF Documents
- 3.5 HTML documents
- 3.6 Text Files
- 3.7 Web or Intranet Server

4. How Does CatBase Do That?

In this chapter we take a look at how to set up CatBase to create the various publishing formats.

5. Using the Database

We take a look at the data entry screens and how to find and modify records.

6. Customising the Database

Here we show you how you can set up the database to suit your specific requirements.

7. Importing Data

An overview of the data importing facility.

8. Reporting and Communicating

How to create:

- 8.1 Quick Reports (columnar reports)
- 8.2 Charts
- 8.3 Labels
- 8.4 Mail shots
- 8.5 Faxes
- 8.6 Emails
- 8.7 Memos

9. Any Questions?

How to get additional information about CatBase

10. How to Order

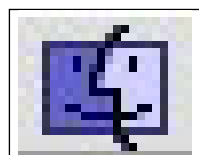
Contact information and an order form.

11. Index

Conventions used in this Manual

The screen shots shown are generally taken on a Macintosh, so if you are using Windows, your screens will look slightly different.

Most features work identically on both Mac and Windows; where there is a difference, an icon will be shown to draw your attention to that fact:



Mac



Windows

You will be able to find more detailed information about CatBase in the Reference Manual. This is provided in PDF document format on the CatBase CD, and is also available for downloading from our web site.

INSTALLATION

Installing CatBase

If you received a CD ...

1. Insert the CD into your computer's CD drive.
2. Mac: Copy the CatBase folder onto your hard disk.
Windows: the Installer should start automatically. Follow the instructions.

If you downloaded the demo from our web site ...

You will have downloaded a compressed file onto your hard disk. Double-click on it to install all the files.

And then ...

You should now have a folder called CatBase 4, which contains the following items:

ITEM	MAC	WINDOWS
The CatBase program -- Essential!	One file called CatBase 4.xx PPC ("xx" representing the current version number). This is for use on PowerPC, G3 and iMac computers. One file called CatBase 4.xx 68K. This is for use on other Macintosh computers.	Three files: Catbase4.EXE, Catbase4.4DC, and Catbase4.rsr.
The data file -- Essential!	One file called Demo Data	Two files: Demodata.4dd and Demodata.4dr
The plug-ins folder -- Essential!	A folder called Mac4DX	A folder called Win4DX
The Web Site folder	This folder is called HTML	This folder is called HTML
Pictures used in the Demo	A folder called Pictures	A folder called Pictures
The Documentation folder	CatBase Demo Manual.pdf: <i>This document as a PDF file</i> Acrobat installer (<i>required for opening the documentation</i>) Reference Manual folder: <i>this folder contains the complete CatBase reference manual as PDF documents.</i>	CatBase Demo Manual.pdf: <i>This document as a PDF file</i> Acrobat installer (<i>required for opening the documentation</i>) Reference Manual folder: <i>this folder contains the complete CatBase reference manual as PDF documents.</i>
Spelling Checker Dictionary	A file called Dictionary	A file called Diction.dic
3rd Party Demos Folder	Demo versions of other programs and plug-ins.	Demo versions of other programs and plug-ins.
New Database	One file called New Database	A folder called NewDatabase, which contains two files.
Examples folder	Some files that are used as examples in the Demo.	Some files that are used as examples in the Demo.
		There are also a few other files which must remain in the folder.

INSTALLATION

Everything labelled **Essential** in the CatBase folder is VITAL and must not be removed from the folder. Also, you must not change the names of the plug-ins folder (Mac4DX or Win4DX) and the HTML folder.

Starting CatBase

To start CatBase, double-click on the CatBase icon (on Windows: choose CatBase from the Start menu or double-click on Catbase4.EXE). (Note: if you are using Windows and your system is not displaying file extensions, it's the icon that looks like a cube sitting on a cog).

If you see a dialogue asking you to select a data file, double-click on Demo Data (Mac) or DemoData.4dd (Windows).

If you are using the Demo version of CatBase, you will see a message like this:



Click on the **Demo Mode** button.

You will then see the Password dialogue:

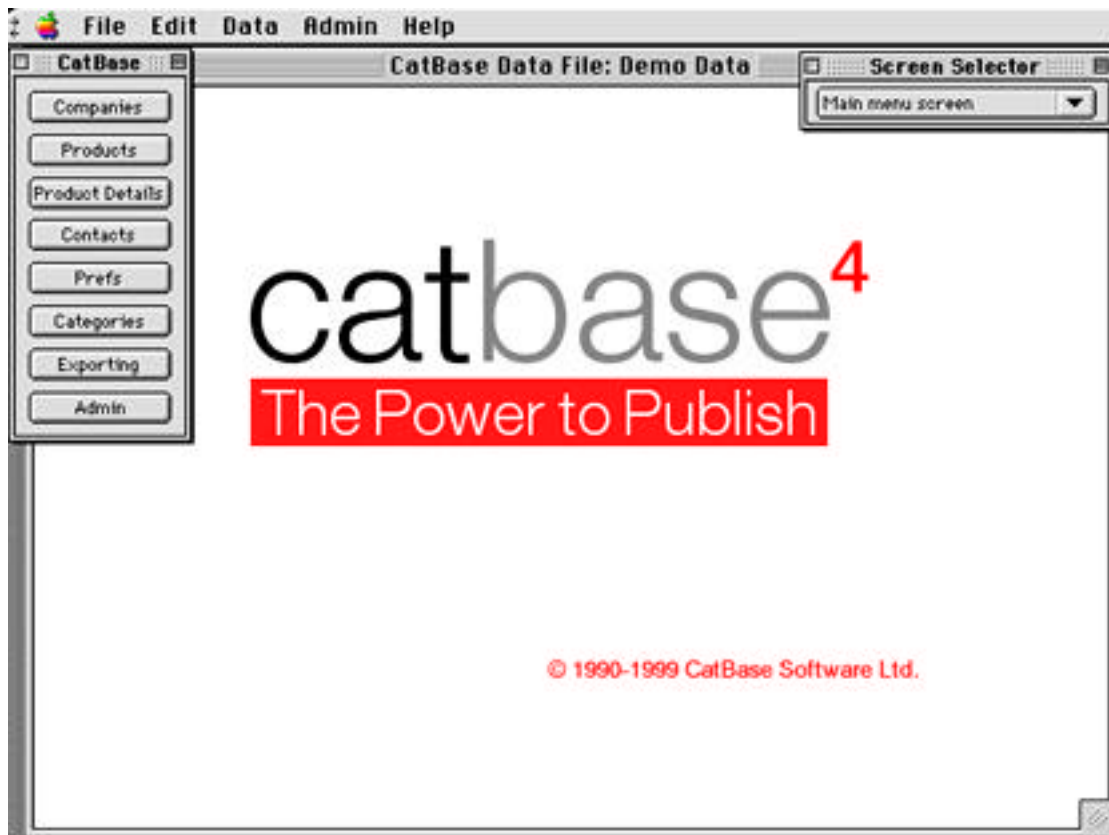


We have not set up any passwords in the Demo database, so just click on the **Log In** button or press the Return key.

Click the mouse button anywhere on the screen, or press the Return key again, to make the status window go away if it is still visible.

You'll then see the main CatBase screen:

INSTALLATION



There are two floating palettes visible: the CatBase options palette and the Screen Selector palette (they may not be in exactly the same positions as shown in this illustration).

If either of the two floating palettes are not visible, you can show them by choosing **Options Palette** or **Show Screen Selector ...** from the **File** menu.

CatBase Options Palette

This palette provides access to the various functions and utilities in CatBase. All options are also available by making selections from the menu bar, so you can choose to be a button-pusher or a menu-chooser. If you feel that the Options palette clutters up your screen, you can close it by clicking on its Close box.

Screen Selector

At the moment, you have only one window open, but as you work with CatBase you will frequently have a number of windows open at once. The Screen Selector maintains a list of all open windows, so if the one you want gets buried, you can easily bring it to the front by selecting it from the list on this palette.

You can tell CatBase whether or not you want either of these palettes displayed by modifying the choices on the Preferences screen. To modify your Preferences, either click on the **Prefs** button on the CatBase palette or choose **Preferences** from the **File** menu.

INSTALLATION

Let's take a quick look at what's on the menu.

File Menu

File	Edit	Data	Admin	H
Options palette				⌘O
Import				⌘I
Memos				⌘M
Preferences				⌘P
Send message ...				
Send email...				
Show screen selector ...				
Save Database...				
Quit				⌘Q

Options palette: Displays the CatBase options palette if it isn't already displayed.

Import: Provides access to the Import Formats table for importing data.

Memos: Provides access to the Memos facility.

Preferences: Opens up the User Preferences screen.

Send Message: Lets you send a message to another CatBase user (multi-user version only).

Send email ...: Lets you send an email while you are using CatBase.

Show screen selector: Displays the Screen Selector palette if it isn't already displayed.

Save Database: Forces CatBase to flush all modified data from memory to disk.

Quit: Closes CatBase down.

Edit Menu

Contains the usual editing functions such as Cut, Copy, Paste etc.

Data

This is the menu you will use most. It provides access to your data:

Data	Admin	Help
Companies		⌘1
Products		⌘2
Product Details		⌘3
Categories		⌘4
Contacts		⌘5
Export Style Sheets		⌘6
Style Sheets		⌘7
H&Js		⌘8
Colours		⌘9
Email Accounts...		

Companies: Provides access to one of the two main tables, the Companies table. (Note: You can change the name of this table to anything that suits your needs; see Chapter 6, Customising the Database, for more information).

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Products: Provides access to the other main table, the Products table. (Note: You can change the name of this table to anything that suits your needs; see Chapter 6, Customising the Database, for more information).

Product Details: Provides access to the Product Details table. This table is related (linked) to the Products table. See Chapter 5, Using the Database, for more information.

Categories: Provides access to the Categories table. You can set up Categories in a three-level hierarchy, and each Company or Product record can go into any number of Categories.

Contacts: Provides access to the Contacts table, which is related to the Companies table. See chapter 5, Using the Database, for more information.

Export Style Sheets: Provides access to the Export Style Sheets table. Export Style Sheets control the content and format of your data when you publish it. See Chapter 4 for more information on Export Style Sheets.

Style Sheets: Provides access to the Style Sheets table. Working with Export Style Sheets, Style Sheets control the formatting of your data when it is published.

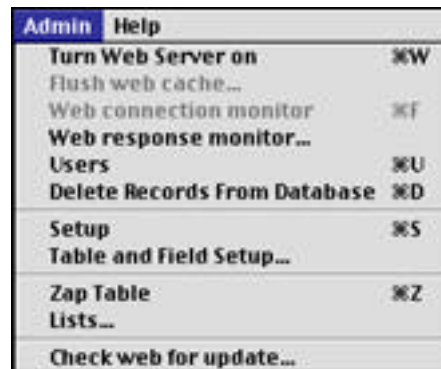
H&Js: Provides access to the Hyphenation and Justification table, which is used in Style Sheets.

Colours: Lets you define and create colours to use in your publications.

Email Accounts ... Lets you set up your email account details (necessary if you want to send emails from the database).

Admin Menu

This is where you go to perform database administration functions such as managing the web server and setting up the database:



Admin	Help
Turn Web Server on	⌘W
Flush web cache...	
Web connection monitor	⌘F
Web response monitor...	
Users	⌘U
Delete Records From Database	⌘D
Setup	⌘S
Table and Field Setup...	
Zap Table Lists...	⌘Z
Check web for update...	

Turn Web Server on: Tells CatBase to function as a Web Server.

Flush Web Cache: For use when the web server is running.

Web Floater: Displays the Web Server floating palette when the Web Server is running.

Web response monitor: Logs incoming and outgoing requests and replies when the web server is running.

Users: Lets you add new authorised Users to the database.

Delete Records from Database: This is where you go to actually delete records that have been flagged for deletion.

Setup: Set various database preferences (as opposed to user preferences)

INSTALLATION

Table and Field Setup: This is where you go if you want to change the names of the Companies, Products, Contacts, or Product Details tables and their associated fields, and specify which fields to display or hide.

Zap Table: Lets you instantly delete ALL THE RECORDS in a table. Very dangerous!

Lists: For managing the various lists that are used in CatBase.

Check Web for Update ... Checks our web site to see if a newer version of CatBase is available.

OK, now let's move on to the fun part ... publishing some data!



The Demo Database

The Demo Database contains information about some computer and software suppliers, and their products. We have used the Companies table for the basic company information (name, address, phone numbers, etc.) and the Products table for information about the products they sell. Each Company and Product has been put into one or more Categories. Let's just take a moment to have a quick look at the Categories.

Choose **Categories** from the **Data** menu (or click on the Categories button in the Options palette). You will see the standard CatBase Search window:



This is "command central" for accessing the data in your database -- you'll see this window whenever you choose a data item from the menu. From here you add new records or search for existing ones.

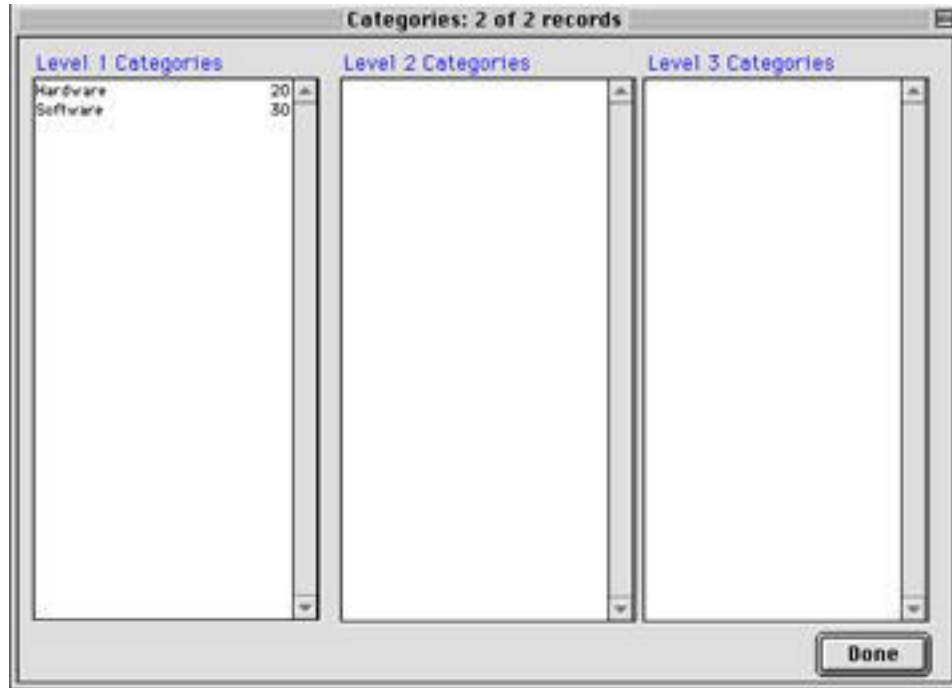
Click on **All Records** to see a list of all the Categories:

Level 1 Name	Number
Hardware	20
Software	30



PUBLISHING DATA

What, only two Categories? No, of course not. Click on the **Show Hierarchy** button to see how the Categories are set up:



The Categories are set up in a three-level hierarchy. Click on one of the items in the Level One list, and the corresponding Level Two Categories will be displayed; click on a Level Two category and the corresponding Level Three categories will be displayed ... for example:



Each Company and Product record can go into any number of Categories on any level. When the data is published, it can (optionally) be sorted by Category.

Click on **Done** to close the Hierarchy window, and on **Done** again to close the Categories window.



Publishing Data

The steps involved in publishing your CatBase data are as follows:

1. Set up one or more Export Style Sheets in the database. These describe what information you want to include and how you want it organised and formatted.
2. Select the records you want to publish.
3. Tell CatBase which Export Style Sheet to use, and what the destination format is (for example, a QuarkXPress layout, HTML documents, etc.).
4. Export the data to a text file.
5. Open up the text file in the destination program (XPress, web browser, PageMaker, etc.)

In this chapter we will show you how to publish data from CatBase without going into detail about how it all works. You will find an overview of how Export Style Sheets and some other features work in later chapters; if you need more detailed information, please refer to the relevant chapter in the Reference Manual.



PUBLISHING WITH QUARKXPRESS

3.1 Publishing with QuarkXPress

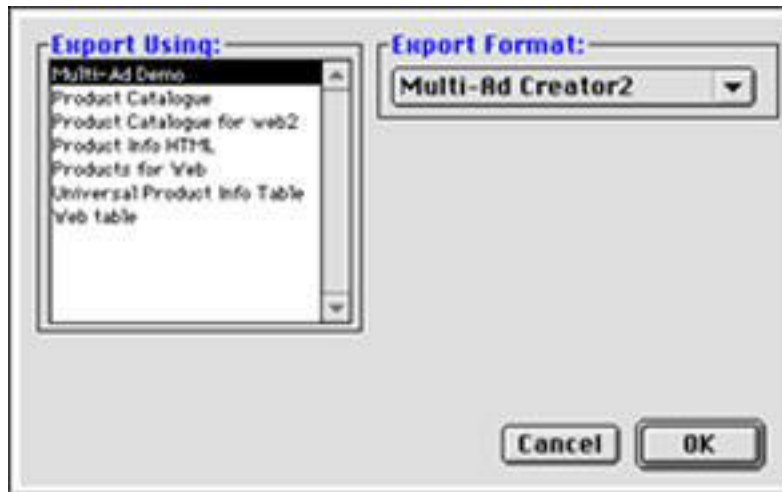
You will need to have a copy of QuarkXPress in order to try these examples.

3.1.1 XPress Example 1: Product Catalogue with Pictures

This example creates a colourfully illustrated product catalogue.

To use this example, you will need to have a QuarkXtension called Xtags installed in the Xtension folder in your QuarkXPress folder. If you do not have a copy of XTags, you will find a demo in the 3rd Party Demos folder. Simply run the Xtags installer and then copy the XTags Demo into your Xtension folder (Quit XPress first if it's already running). XTags makes it possible for Quark to create and fill picture boxes automatically.

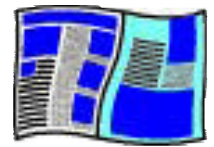
- i. Choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options palette.
- ii. When the Search Dialogue window appears, click on the **All Records** button. You will then see a list of all the Product records in the database.
- iii. Choose **Export** from the **File** menu. You'll see the Export Dialogue:



The Export Dialogue shows a list of all Export Style Sheets that have been set up for the selected table (Products, in this case), and a pop-up menu listing the various available Export Formats (publishing destinations).

- iv. Choose Product Catalogue in the **Export Using:** list, and make sure that XPress 3.x or 4.x is selected in the **Export Format** pop-up menu.
- v. Click on **OK**.
You will then see a dialogue asking you to enter a name for the file to create. The default name is Export (Export.xtg on Windows). Change the name if you like, and make sure it is going to be saved into the CatBase folder, then click on the **Save** button.
- vi. CatBase exports the data from the database to your text file, and displays a thermometer telling you how it is getting along.
- vii. When CatBase has finished exporting the data, start QuarkXPress and create a new document with a three-column text box. Save this document into the CatBase folder. (It's important that the document is saved at this point, and that

PUBLISHING WITH QUARKXPRESS



it is saved into the CatBase folder, otherwise the picture importing will not work correctly.)

ix. When the document is open, click in the text box and then choose **Get Text with Xtags** from the **File** menu. (Note: If this menu option is not available, then you have not installed the XTags Xtension.)

x. Locate the file you just created and double-click on it.

Watch as the data is imported into the document, formatted, and the pictures are placed on the page. (Note: If you are using the demo version of XTags, the import will stop after 50 paragraphs.)

When it's done, your screen should look something like this:

<p>Apple 20" Colorsync Display</p>  <p>The Apple Colorsync Display (also known as AppleVision 850) is a superior-quality colour display that provides excellent image quality in a large-screen display.</p> <p>It's a good match for powerful, flexible systems such as the Power Macintosh 8000, 9000 and G3 series models.</p> <ul style="list-style-type: none">• Screen size: 20 inches (diagonal)• Viewable image size: 19.0 inches (diagonal)• Resolution: Various options• Dot pitch: 0.25-mm aperture grille pitch• Picture tube: Sony Trinitron <p>Price: £1295.00</p> <p>MANUFACTURER: Apple Computer UK Tel: 0181 569 1199</p> <p>Apple Multiple Scan 720 Display (17")</p>	<ul style="list-style-type: none">• Picture tube: Flat, square, shadow mask <p>Price: £525.00</p> <p>MANUFACTURER: Apple Computer UK Tel: 0181 569 1199</p> <p>Apple Powerbook</p>  <p>Standard features include:</p> <ul style="list-style-type: none">• Lithium Ion battery for up to 3.5 hours of life under normal use• Built-in 10BASE-T Ethernet and LocalTalk connectors• VGA monitor output port 2D/3D graphics acceleration through integrated video controller• Two Type II PC Card slots with CardBus capability• 16-bit stereo input/output ports• Two built-in stereo speakers• 4-Mbps IRDA port• Mac OS 8.1 <p>Price: £1945.00</p> <p>MANUFACTURER: Apple Computer UK Tel: 0181 569 1199</p> <p>ArtPad</p>	<p>CatBase</p>  <p>CatBase is the complete database publishing solution. It's a fully functional relational database that you can use to publish your catalogue or directory in various ways in print and electronic media. A fully functional demo is available by downloading from our web site or by calling us on 0700 CATBASE and requesting a demo CD.</p> <p>Price: From £395</p> <p>MANUFACTURER: CatBase Software Ltd. Tel: 0700 CATBASE Fax: 01920 877917</p> <p>Dimension XPS R Series</p>  <ul style="list-style-type: none">• New Pentium II Processor featuring MMX technology• Outstanding speeds of 350 and 400 MHz• New 440BX chipset and
---	---	--

If the pictures did not appear:

- Close the Quark document.
- Open up your CatBase folder and check that -
Your XPress document has been saved into the folder (not within another folder),

and

The Pictures folder is also in the CatBase folder (i.e., not within another folder)

In other words, the XPress document and the Pictures folder must both be in the same folder together.



PUBLISHING WITH QUARKXPRESS

Now for something a little more ordinary ...

3.1.2 XPress Example 2: Product Information Table

In this example, we will produce a basic table containing information about products listed in the database.

i. If you do not already have a list of Products on your screen, choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options palette, and click on the **All Records** button in the Search Dialogue window.

ii. Choose **Export** from the **File** menu.

iii. In the Export dialogue, select the **Universal Product Info Table** in the **Export Using:** list, and make sure that **Xpress** is selected under **Export Format**.

iv. Click on **OK**, enter a name for the export, and click on **Save**.

When CatBase has finished exporting the data:

v. Create a new XPress document with a one-column text box.

vi. Click in the text box and choose **Get Text ...** from the **File** menu.

vii. Locate the file you just exported from CatBase and click on it **ONCE**.

viii. Make sure that the **Include Style Sheets** check box is selected in the Get Text dialogue.

ix. Click on **Open**.

Your document should look like this:

Apple 20" Colorsync Display	£1,215.00	£972.00	Apple Computer UK	5/9/98
Apple Multiple Scan 720 Display (17")	£528.00	£422.40	Apple Computer UK	27/6/98
Apple Powerbook	£1,645.00	£1316.00	Apple Computer UK	27/6/98
ArtPad	£115.00	£92.00	Wacom	00/00/00
CatBase	£895.00	£716.00	CatBase Software Ltd.	5/9/98
Dimension XPSR Series	£2,199.00	£1759.20	Dell Computers	29/7/98
FileMaker	£199.00	£159.20	Filemaker	29/7/98
Inspiron 3000	£2,199.00	£1759.20	Dell Computers	27/6/98
Intellicolor Displays	£1,466.00	£1172.80	Radius Inc.	29/7/98
Intelligence	£99.00	£79.20	Extensis	27/6/98
Jaz Drive	£249.00	£199.20	Omega	00/00/00
LaserWriter 8500	£1,316.00	£1052.80	Apple Computer UK	27/6/98
Macintosh Server G3	£2,080.00	£1664.00	Apple Computer UK	27/6/98
Macromedia Director	£999.00	£799.20	Macromedia	00/00/00
Macromedia Dreamweaver	£195.00	£156.00	Macromedia	27/6/98
Mask Pro	£249.00	£199.20	Extensis	00/00/00
MediaMatch 24WS	£1,799.00	£1439.20	Radius Inc.	27/6/98
Microsoft Office	£295.00	£236.00	Microsoft	27/6/98
PenPartner	£150.00	£120.00	Wacom	27/6/98
Pentools		£0.00	Wacom	27/6/98
PhotoFrame	£99.00	£79.20	Extensis	27/6/98
Power Macintosh G3 Desktop	£1,185.00	£948.00	Apple Computer UK	27/6/98
PrecisionView	£949.00	£759.20	Radius Inc.	00/00/00
PressView Displays	£2,199.00	£1759.20	Radius Inc.	27/6/98
QuickCam	£89.95	£71.96	Connectix	29/7/98
ScanMaker 330	£149.00	£119.20	Microtek	29/7/98
ScanMaker 5	£2,299.00	£1839.20	Microtek	27/6/98
ScanMaker 630	£229.00	£183.20	Microtek	27/6/98
SpeedDoublor	£124.99	£99.99	Connectix	18/7/98
Surf Express	£59.95	£47.96	Connectix	00/00/00
UltraPad	£230.00	£184.00	Wacom	00/00/00



The columns of information are the Product Name, Price, Discount Price, Supplier, and Date Updated.

Notice how CatBase has handled various formatting tasks automatically:

1. The *Disc. Price* has been calculated as a 20% discount, and set in red.
2. The *Supplier* name is in green.
3. The *Date Updated* is in italics.

These formatting options are controlled by the Export Style Sheet (please see Chapter 4 for more information on Export Style Sheets).

3.1.3 XPress Example 3: Company Details List

This example creates a list of Companies in the database, sorted by Country and, within each Country, by company name.

- i. Create a list of Companies by choosing **Companies** from the **Data** menu or by clicking on the Copanies button on the CatBase Options palette, and then clicking on all Records.
- ii. Choose **Export** from the **File** menu.
- iii. Select the *Company Info by Country* Export Style Sheet and make sure that XPress is selected, then click on OK.
- iv. Enter a name for the file and click on **Save**.
- v. When CatBase has finished exporting, create a new XPress document with a two-column text box.
- vi. Click in the text box and then choose **Get Text ...** from the **File** menu.
- vii. Locate the file you just created and click on it once. Make sure that the **Include Style Sheets** check box is checked, then click on Open.

Your screen should look like this:



PUBLISHING WITH QUARKXPRESS

Germany	USA
Wacom Hellersbergstrasse 4, Neuss D-41460 Phone: +49-(0)2131-12390 Web Site: www.wacom.de Sales Email: sales@wacom.de	Extensis 1800 SW First Avenue, Suite 500, Portland 97201 Phone: 1-800-796-9798 Web Site: www.extensis.com Sales Email: info@extensis.com
The Netherlands	Radius Inc. 460 East Middlefield Road, Mountain View 94043 Phone: 650-404-6000 Fax: 650-404-6248 Web Site: www.radius.com Sales Email: sales@radius.com
Connectix Orlyplein 85, Amsterdam 1043 DS Phone: 31-20-5814385 Fax: +31-20-5814380	
Iomega Taatsendijk 201, Utrecht 3528 BH Phone: 353 1 8075 070 Fax: 353 1 80 75075 Web Site: www.Iomega.com	
Microtek Phone: +31 (0)10 2425688 Fax: +31 (0)10 2425699 Web Site: www.microtek.nl	
UK	
Apple Computer UK 6 Roundwood Ave., Stockley Park, Uxbridge UB11 1BB Phone: 0181 569 1199 Web Site: www.apple.com	
CatBase Software Ltd. 50 The Maltings, Stanstead Abbots SG12 8HG	

Notice how the country headings have been formatted, and that each one appears only once. This is controlled by the Unique Group Entry attribute on the Country element in the Export Style sheet (please see Chapter 4 for more information about Export Style Sheets).

That's it for our Quark demos. If you are interested in seeing how CatBase works with other publishing destinations, please look at the other examples in this chapter. Otherwise, we suggest that you proceed to Chapter Four to discover how CatBase uses Export Style Sheets to control the formatting of your data.



3.2 Publishing with PageMaker

You will need to have a copy of PageMaker in order to try these examples.

Versions of PageMaker prior to V. 6.5 supported the RTF text tagging format for automatically formatting text, whereas V. 6.5 and beyond additionally support a more sophisticated format including the automatic placement of in-line pictures. So it's important to make sure that you know which version of PageMaker you are using! If you are using Version 6.5 or later, you will select the PageMaker 6.5+ choice for exporting data, and if you are using an earlier version, you'll select the PageMaker 6.5-choice.

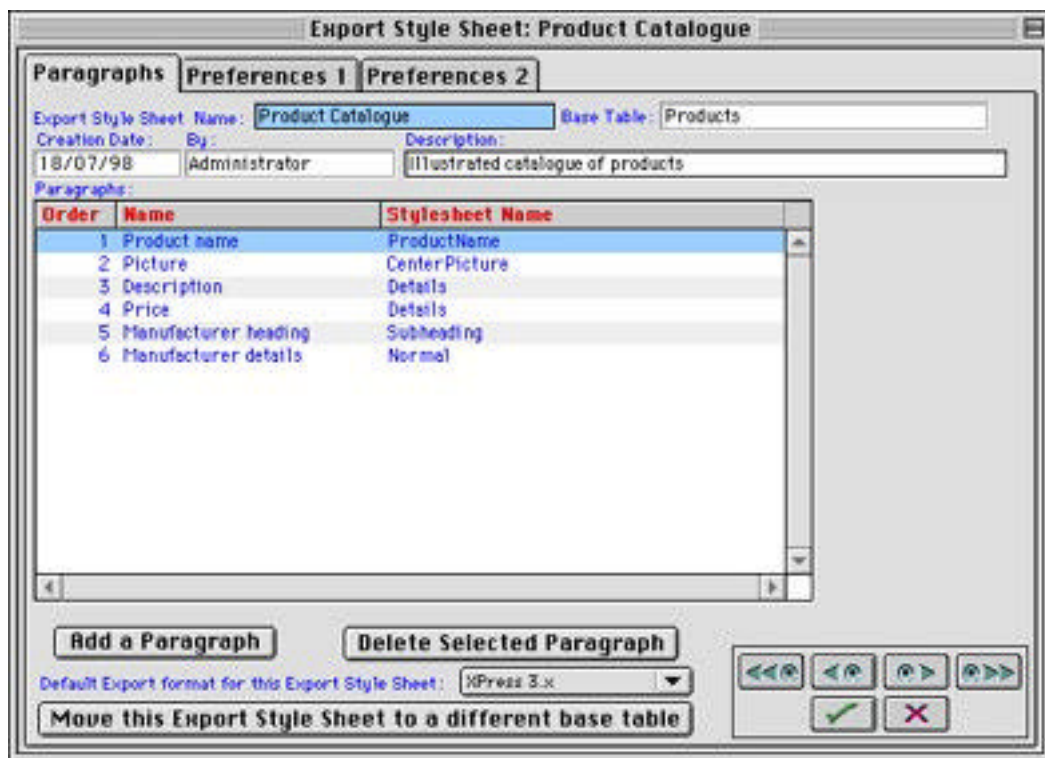
3.2.1 PageMaker Example 1: Product Catalogue

This example creates a catalogue of products in the database -- with pictures if you are using PageMaker Version 6.5 or later.

Important!

If you are using PageMaker Version 6.5 or later, you must make one small change in the database before trying this example:

- i. Choose **Export Style sheets ...** from the **Data** menu and click on **All Records**.
- ii. Double-click on the Export Style Sheet called Product Catalogue to open it up. You'll see this screen:



- ii. Click on the **Preferences 1** tab. You'll then see the first of two Preferences pages. This page includes an area for PageMaker 6.5 or later:



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- iii. You need to tell CatBase where to find the folder that contains the pictures. Click on the **Select** button, locate the CatBase folder on your computer, and click on Select. You should end up with a pathname something like this (on a Mac):

MacHD:CatBase 4.18:

On Windows, the pathname will be something like:

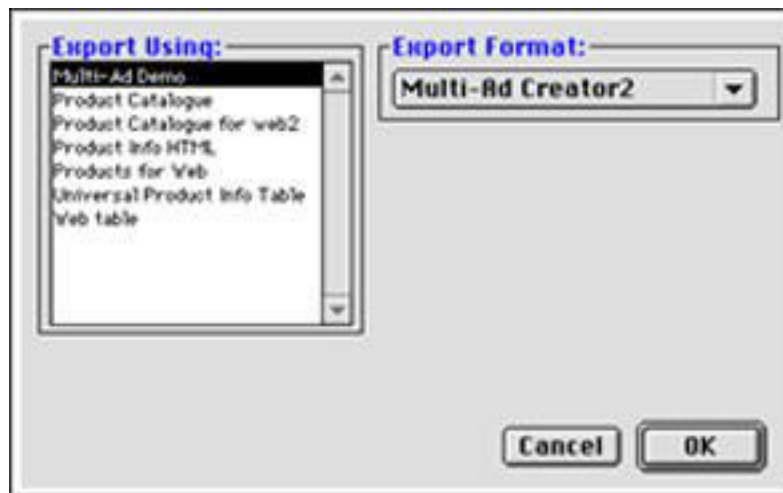
C:\Program Files\CatBase4\

The important thing is that you select the folder *that contains* the Pictures folder (the Pictures folder should be in your CatBase folder).

- iv. Press the Enter key on your keyboard twice to close the Export Style Sheet.

Now, to export the data:

- i. Choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options palette.
- ii. When the Search Dialogue window appears, click on the **All Records** button. You will then see a list of all the Product records in the database.
- iii. Choose **Export** from the **File** menu. You'll see the Export Dialogue:



The Export Dialogue shows a list of all Export Style Sheets that have been set up for the selected table (Products, in this case), and a pop-up menu listing the various available Export Formats (publishing destinations).



- iv. Choose *Product Catalogue* in the **Export Using:** list, and select either PageMaker 6.5- or PageMaker 6.5+ in the **Export Format** pop-up menu.
- v. Click on **OK**.

PUBLISHING WITH PAGEMAKER



You will then see a dialogue asking you to enter a name for the file to create. The default name is Export (Export.txt on Windows). Change the name if you like, and make sure it is going to be saved into the CatBase folder, then click on the **Save** button.

- vi. CatBase exports the data from the database to your text file, and displays a thermometer telling you how it is getting along.
- vii. When CatBase has finished exporting the data, launch your copy of PageMaker if it isn't already running, and create a new two-column document.
- viii. Make sure that Autoflow is ticked (under the Options or Layout menu)
- ix. Choose **Place** from the **File** menu.
- x. Locate the file you just created and select it.
- xi. Make sure the **Read Tags** check box is selected.
- xii. Click on **OK**.
- xii. Click in the top left-hand corner of the document to place the text. Watch as the data is imported into the document and formatted. When it's done, your page should look something like this:

<h3>Apple 20" ColorSync Display</h3>  <p>The Apple ColorSync Display (also known as Apple Vision 850) is a superior-quality colour display that provides excellent image quality in a large-screen display.</p> <p>It's a good match for powerful, flexible systems such as the Power Macintosh 8000, 9000 and G3 series models.</p> <ul style="list-style-type: none">• Screen size: 20 inches (diagonal)• Viewable image size: 19.0 inches (diagonal)• Resolution: Various options• Dot pitch: 0.25-mm aperture grille pitch• Picture tube: Sony Trinitron <p>Price: £1215.00</p> <p>MANUFACTURER:</p> <p>Apple Computer UK Tel: 0181 569 1199</p>	<h3>Apple Multiple Scan 720 Display (17")</h3>  <p>The Apple Multiple Scan 720 is a 17-inch, full-page display designed for the demanding user who wants large-screen performance at a competitive price.</p> <p>Its fat, square shadow-mask picture tube delivers clear text and sharp pictures, making it a perfect choice for word processing, spreadsheets, and browsing the Internet.</p> <p>The Apple Multiple Scan 720 works with all Power Macintosh and Macintosh computers — from the most affordable to the top of the line.</p> <ul style="list-style-type: none">• Screen size: 17 inches (diagonal)• Viewable image size: 16 inches• Resolution: Various• Dot pitch: 0.28-mm dot pitch• Picture tube: Flat square, shadow mask <p>Price: £525.00</p> <p>MANUFACTURER:</p> <p>Apple Computer UK Tel: 0181 569 1199</p>
--	--

If you are using an older version of PageMaker, the pictures will not appear.



PUBLISHING WITH Pagemaker

You can globally change the formatting of any text by modifying the associated Style Sheet.

3.2.2 PageMaker Example 2: Product Information Table

This example creates a basic table containing information about products listed in the database.

- i. If you do not already have a list of Products on your screen, choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options palette, and click on the **All Records** button in the Search Dialogue window.
 - ii. Choose **Export** from the **File** menu.
 - iii. In the Export dialogue, select the **Universal Product Info Table** in the **Export Using:** list, and make sure that one of the **PageMaker** formats is selected under **Export Format**.
 - iv. Click on **OK**, enter a name for the export, and click on **Save**.
- When CatBase has finished exporting the data:
- v. Create a new one-column PageMaker document.
 - vi. Choose **Place ...** from the **File** menu.
 - vii. Locate the file you just exported from CatBase and click on it.
 - viii. Make sure that the **Read Tags** check box is selected.
 - ix. Click on **OK**.
 - x. When the text file has been loaded, click in the top left-hand corner of the document to place the text.

Your page should look like this:

Apple 20" Colossync Display	£1,215.00	£972.00	Apple Computer UK	5/9/98
Apple Multiple Scan 720 Display (17")	£528.00	£422.40	Apple Computer UK	27/6/98
Apple Powerbook	£1,645.00	£1316.00	Apple Computer UK	27/6/98
ArtPad	£115.00	£92.00	Wacom	00/00/00
CatBase	£895.00	£716.00	CatBase Software Ltd.	5/9/98
Dimension XPS R Series	£2,199.00	£1759.20	Dell Computers	29/7/98
FileMaker	£199.00	£159.20	Filemaker	29/7/98
Inspiron 3000	£2,199.00	£1759.20	Dell Computers	27/6/98
Intelliscolor Displays	£1,466.00	£1172.80	Radius Inc.	29/7/98
Intelligence	£99.00	£79.20	Extensis	27/6/98
Jaz Drive	£249.00	£199.20	Omega	00/00/00
LaserWriter 8500	£1,316.00	£1052.80	Apple Computer UK	27/6/98
Macintosh Server G3	£2,080.00	£1664.00	Apple Computer UK	27/6/98
Micromedia Director	£999.00	£799.20	Micromedia	00/00/00
Micromedia Dreamweaver	£195.00	£156.00	Micromedia	27/6/98
Mask Pro	£249.00	£199.20	Extensis	00/00/00
MediaMatch 24WS	£1,799.00	£1439.20	Radius Inc.	27/6/98
Microsoft Office	£295.00	£236.00	Microsoft	27/6/98
PenPartner	£150.00	£120.00	Wacom	27/6/98
Pentools		£0.00	Wacom	27/6/98
PhotoPrime	£99.00	£79.20	Extensis	27/6/98
Power Macintosh G3 Desktop	£1,185.00	£948.00	Apple Computer UK	27/6/98
PrecisionView	£949.00	£759.20	Radius Inc.	00/00/00
PressView Displays	£2,199.00	£1759.20	Radius Inc.	27/6/98
QuickCam	£89.95	£71.96	Connectix	29/7/98
ScanMaker 330	£149.00	£119.20	Microtek	29/7/98
ScanMaker 5	£2,299.00	£1839.20	Microtek	27/6/98
ScanMaker 630	£229.00	£183.20	Microtek	27/6/98
SpeedIO cable	£124.99	£99.99	Connectix	18/7/98
Surf Explorer	£59.95	£47.96	Connectix	00/00/00
Ultra Pad	£230.00	£184.00	Wacom	00/00/00
VirtualPC	£124.99	£99.99	Connectix	29/7/98
Zip Drives	£125.00	£100.00	Omega	27/6/98

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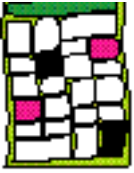
The columns of information are the Product Name, Price, Discount Price, Supplier, and Date Updated.

Notice how CatBase has handled various formatting tasks automatically:

1. The *Disc. Price* has been calculated as a 20% discount, and set in red.
2. The *Supplier* name is in green.
3. The *Date Updated* is in italics.

These formatting options are controlled by the Export Style sheet (please see Chapter Four for more information on Export Style Sheets).

That's it for our PageMaker demos. If you are interested in seeing how CatBase works with other publishing destinations, please look at the other examples in this chapter. Otherwise, we suggest that you proceed to Chapter Four to discover how CatBase uses Export Style Sheets to control the formatting of your data.



PUBLISHING WITH MULTI-AD CREATOR



3.3 Publishing with Multi-Ad Creator

You will need to have a copy of Multi-Ad Creator in order to try these examples (and it is assumed that you know how to use it!).

Mac
Only!

3.1.1 Multi-Ad Example 1: Product Catalogue

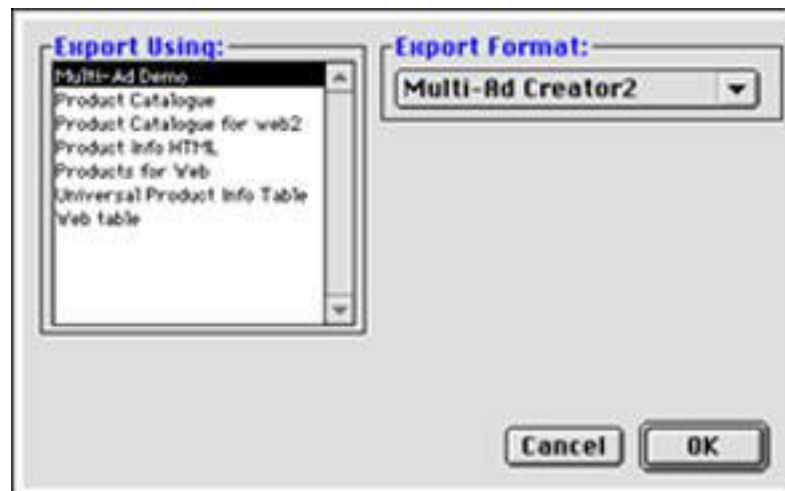
This example creates a product catalogue. Each product appears in its own text box.

First of all:

- i. Start up Multi-Ad Creator and create a new document..
- ii. Create two Text Styles and name them whatever you wish. One will be used for formatting the product names, and the other for the the product descriptions. Select the font, style, etc. that you want to use for each of the two Text Styles.
- iii. Create two Paragraph Styles and name them ProductName and Details (note: no spaces in ProductName). Select the appropriate Text style for each Paragraph Style.

Now, in CatBase:

- i. Choose **Products ...** from the **File** menu and click on **All Records**.
- ii. In this example we do not want to export all the Product records. Select about six records by holding down the Command key (Mac) or the Control key (Windows) and clicking on individual line items. Once you have made a selection, choose **Show Subset** from the **Search** menu. You should then have a list of only the Products you selected.
- iii. Choose **Export** from the **File** menu. You will see the Export Dialogue:



The Export Dialogue shows a list of all Export Style Sheets that have been set up for the selected table (Products, in this case), and a pop-up menu listing the various available Export Formats (publishing destinations).

- iv. In the Export dialogue, select Multi-Ad Demo in the **Export Using** area, and make sure that Multi-Ad Creator is selected in the **Export Format** popup. Then click on **OK**.

PUBLISHING WITH MULTI-AD CREATOR



- v. Type in a file name for the export file and click on **Save**.
- When the export is finished:
- i. Go to the Multi-Ad Creator document that you created.
 - ii. Choose **Import Text ...** from the **File** menu.
 - iii. Select the file you just exported from CatBase.
 - iv. Select the **Break Text** radio button and click on **Place**.
 - v. The Break Text window appears:

Your screen will probably look a bit different at first. There are three important changes to make.

- i. Select the **At delimiter** radio button in the **Break text** area and enter [break] into the text area. The **Break Text** area should look like this:

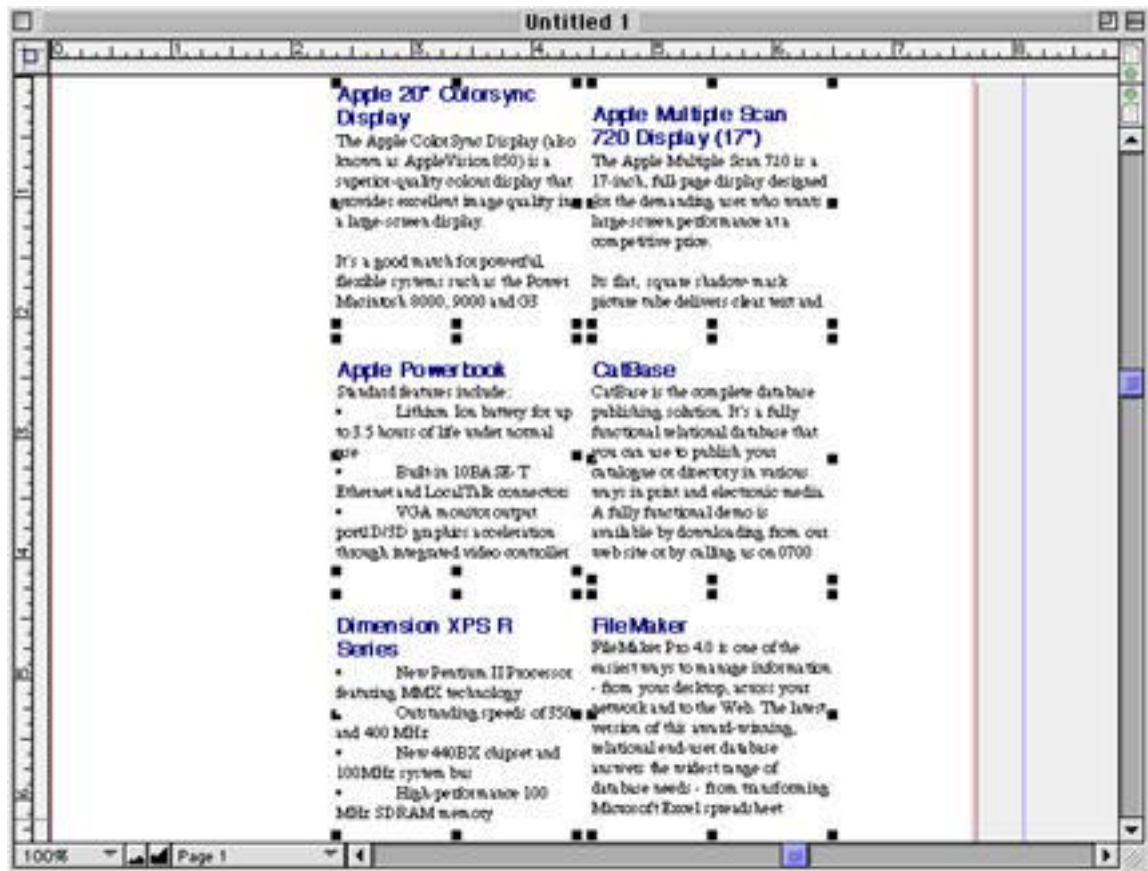
- ii. Select the **Apply Tags** radio button in the **Format** area.
- iii. Select the **Make array of blocks** radio button, below the **Break Text** area.

Now you can click on **OK**.

Multi-Ad Creator imports your text file and creates a new text block for each Product. When it's done, your screen should look something like this:



PUBLISHING WITH MULTI-AD CREATOR



Of course, yours will probably have different formatting selected for the product names and descriptions.

Each Product has been placed into an individual text block, which can be moved around and modified as necessary.

You can experiment with the various import options to obtain different effects. For example, if you choose **Place by Hand** instead of **Make array of blocks** in the **Break Text** dialogue, you can draw each text block individually as the text is imported.

If you are interested in seeing how CatBase works with other publishing destinations, please look at the other examples in this chapter. Otherwise, we suggest that you proceed to Chapter Four to discover how CatBase uses Export Style Sheets to control the formatting of your data.

PUBLISHING RTF DOCUMENTS



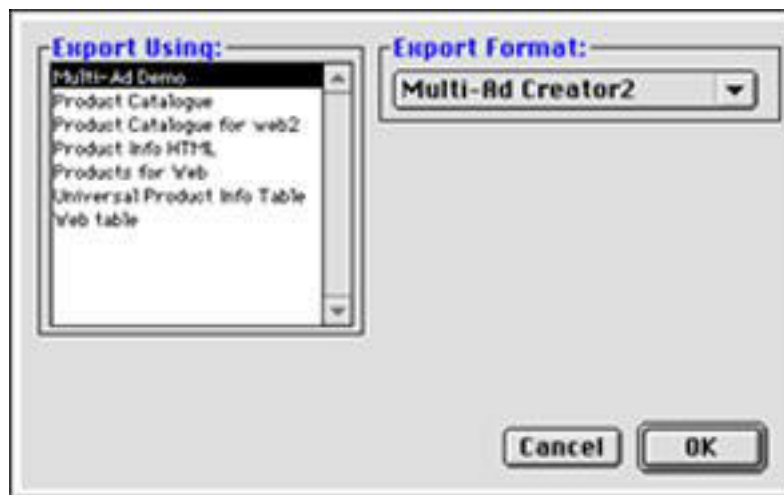
3.4 Publishing RTF Documents

The RTF (Rich Text Format) document format is a very versatile format that can be interpreted by a wide variety of word processing and page layout programs. For the purposes of our demo, we will be using Microsoft Word.

3.4.1 RTF Example 1: Product Catalogue

This example creates a product catalogue.

- i. Choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options palette.
- ii. When the Search Dialogue window appears, click on the **All Records** button. You will then see a list of all the Product records in the database.
- iii. Choose **Export** from the **File** menu. You'll see the Export Dialogue:



The Export Dialogue shows a list of all Export Style Sheets that have been set up for the selected table (Products, in this case), and a pop-up menu listing the various available Export Formats (publishing destinations).

- iv. Choose Product Catalogue in the **Export Using:** list, and select RTF in the **Export Format** pop-up menu.
- v. Click on **OK**.
You will then see a dialogue asking you to enter a name for the file to create. The default name is Export (Export.RTF on Windows). Change the name if you like, and make sure it is going to be saved into the CatBase folder, then click on the **Save** button.
- vi. CatBase exports the data from the database to your text file, and displays a message telling you how it is getting along.
- vii. When CatBase has finished exporting the data, start Word (or whichever program you are using).
- viii. Import the document into your program in the appropriate way. With Word (or most other word processors), you will do this by choosing **Open ...** from the **File** menu, and then selecting and opening the document. With page layout



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programs, such as PageMaker, you must first create a new document and then import the text into that document by choosing **Place** or **Import Text**, or something similar, from the **File** menu (consult your program's documentation if you are not sure how to do this. Look in the index under "Importing text").

Watch as the data is imported into the document and formatted!
When it's done, your page should look something like this:

Apple 20" Colorsync Display

The **Apple ColorSync Display** (also known as AppleVision 850) is a superior-quality colour display that provides excellent image quality in a large-screen display.

It's a good match for powerful, flexible systems such as the PowerMacintosh 8000, 9000 and G3 series models.

- Screen size: 20 inches (diagonal)
- Viewable image size: 19.0 inches (diagonal)
- Resolution: Various options
- Dot pitch: 0.25-mm aperture grille pitch
- Picture tube: Sony Trinitron

Price: £1215.00

MANUFACTURER:

Apple Computer UK
Tel: 0181 569 1199

Apple Multiple Scan 720 Display (17")

The **Apple Multiple Scan 720** is a 17-inch, full-page display designed for the demanding user who wants large-screen performance at a competitive price.

Its flat, square shadow-mask picture tube delivers clear text and sharp pictures, making it a perfect choice for word processing, spreadsheets, and browsing the Internet.

The Apple Multiple Scan 720 works with all PowerMacintosh and Macintosh computers – from the most affordable to the top of the line.

- Screen size: 17 inches (diagonal)
- Viewable image size: 16 inches
- Resolution: Various
- Dot pitch: 0.28-mm dot pitch
- Picture tube: Flat, square, shadowmask

Price: £528.00

If your document looks nothing like this, and appears to be full of gobbledygook, this is most likely because you do not have the RTF filter installed. Please check your program's documentation to find out how to correct this.

3.4.2 RTF Example 2: Product Price List

In this example, we will produce a basic table containing information about products listed in the database.

- If you do not already have a list of Products on your screen, choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options

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- palette, and click on the **All Records** button in the Search Dialogue window.
- ii. Choose **Export** from the **File** menu.
 - iii. In the Export dialogue, select the *Universal Product Info Table* in the **Export Using:** list, and select **RTF** under **Export Format**.
 - iv. Click on **OK**, enter a name for the export, and click on **Save**.
- When CatBase has finished exporting the data:
- v. Open the document into your program, as described in the first example, above.

Your document should look like this:

Apple 20" Colorsync Display	£1,215.00	£972.00	Apple Computer UK	<i>05/09/98</i>
Apple Multiple Scan 720 Display(17")	£528.00	£422.40	Apple Computer UK	<i>12/09/98</i>
Apple Powerbook	£1,645.00	£1,316.00	Apple Computer UK	<i>27/06/98</i>
ArtPad	£115.00	£92.00	Wacom	<i>00/00/00</i>
CatBase	£895.00	£716.00	CatBase Software Ltd.	<i>19/11/98</i>
Dimension XPS R Series	£2,199.00	£1,759.20	Dell Computers	<i>29/07/98</i>
FileMaker	£199.00	£159.20	Filemaker	<i>29/07/98</i>
Inspiron 3000	£2,199.00	£1,759.20	Dell Computers	<i>27/06/98</i>
Intellicolor Displays	£1,466.00	£1,172.80	Radius Inc.	<i>29/07/98</i>
Intellihance	£99.00	£79.20	Extensis	<i>27/06/98</i>
Jaz Drive	£249.00	£199.20	Iomega	<i>00/00/00</i>
LaserWriter 8500	£1,316.00	£1,052.80	Apple Computer UK	<i>27/06/98</i>
Macintosh Server G3	£2,080.00	£1,664.00	Apple Computer UK	<i>27/06/98</i>
Macromedia Director	£999.00	£799.20	Macromedia	<i>00/00/00</i>
Macromedia Dreamweaver	£195.00	£156.00	Macromedia	<i>27/06/98</i>
Mask Pro	£249.00	£199.20	Extensis	<i>00/00/00</i>
MediaMatch 24WS	£1,799.00	£1,439.20	Radius Inc.	<i>10/10/98</i>
Microsoft Office	£295.00	£236.00	Microsoft	<i>27/06/98</i>
PenPartner	£150.00	£120.00	Wacom	<i>27/06/98</i>
Pentools		£0.00	Wacom	<i>27/06/98</i>
PhotoFrame	£99.00	£79.20	Extensis	<i>27/06/98</i>
Power Macintosh G3 Desktop	£1,185.00	£948.00	Apple Computer UK	<i>27/06/98</i>
PrecisionView	£949.00	£759.20	Radius Inc.	<i>00/00/00</i>
PressView Displays	£2,199.00	£1,759.20	Radius Inc.	<i>27/06/98</i>
QuickCam	£89.95	£71.96	Connectix	<i>29/07/98</i>
ScanMaker 330	£149.00	£119.20	Microtek	<i>29/07/98</i>
ScanMaker 5	£2,299.00	£1,839.20	Microtek	<i>27/06/98</i>
ScanMaker 630	£229.00	£183.20	Microtek	<i>27/06/98</i>
SpeedDoubler	£124.99	£99.99	Connectix	<i>18/07/98</i>
Surf Express	£59.95	£47.96	Connectix	<i>00/00/00</i>
UltraPad	£230.00	£184.00	Wacom	<i>00/00/00</i>
VirtualPC	£124.99	£99.99	Connectix	<i>29/07/98</i>
Zip Drives	£125.00	£100.00	Iomega	<i>27/06/98</i>

Depending upon the dimensions of your document, you may need to fiddle around with the tab settings a little to get the columns to line up correctly.

The columns of information are the Product Name, Price, Discount Price, Supplier, and Date Updated.

Notice how CatBase has handled various formatting tasks automatically:

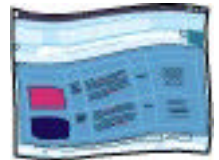
1. The *Disc. Price* has been calculated as a 20% discount, and set in red.
2. The *Supplier* name is in green.
3. The *Date Updated* is in italics.

These formatting options are controlled by the Export Style Sheet (please see Chapter 4 of this document for more information on Export Style Sheets, or Chapter 7 of the Reference Manual for detailed information).



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That's it for our RTF demos. If you are interested in seeing how CatBase works with other publishing destinations, please look at the other examples in this chapter. Otherwise, we suggest that you proceed to Chapter Four to discover how CatBase uses Export Style Sheets to control the formatting of your data.



3.5 Publishing HTML Documents

HTML documents are a very useful, and increasingly popular, method of distributing information. The document consists simply of a text file containing special tags; since the file is purely text, it is small and therefore suitable for sending by email, and it can be interpreted by web browsers and an ever-increasing number of other applications such as word processors and page layout programs. For our examples, we will use a web browser to view our HTML documents.

3.5.1 HTML Example 1: Product Catalogue with Pictures

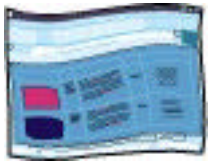
This example creates a colourfully illustrated product catalogue.

- i. Choose **Products** from the **Data** menu, or click on the Products button on the Options palette.
- ii. When the Search Dialogue window appears, click on the **All Records** button. You will then see a list of all the Product records in the database.
- iii. Choose **Export** from the **File** menu. You'll see the Export Dialogue:



The Export Dialogue shows a list of all Export Style Sheets that have been set up for the selected table (Products, in this case), and a pop-up menu listing the various available Export Formats (publishing destinations).

- iv. Choose *Products for web* in the **Export Using:** list, and make sure that HTML is selected in the **Export Format** pop-up menu.
- v. Click on **OK**.
You will then see a dialogue asking you to enter a name for the file to create. The default name is Export.html (Mac) or Export.htm (Windows). Change the name if you like (but not the file extension!), and make sure it is going to be saved into the CatBase folder, then click on the **Save** button.
- vi. CatBase exports the data from the database to your text file, and displays a thermometer telling you how it is getting along.
- vii. When CatBase has finished exporting the data, open up your favourite web





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browser (such as Netscape Navigator or Internet Explorer) and make sure that you have a browser window open.

- ix. Locate the file you just created, click on it and drag and drop it onto your browser window.

Watch as the HTML tags are interpreted and the page created! When it's done, your screen should look something like this:

	Product	Description	Price	Supplier
	Apple 20" ColorSync Display	<p>The Apple ColorSync Display (also known as AppleVision 850) is a superior-quality colour display that provides excellent image quality in a large-screen display.</p> <p>It's a good match for powerful, flexible systems such as the Power Macintosh 6000, 9000 and G3 series models.</p> <ul style="list-style-type: none">* Screen size: 20 inches (diagonal)* Viewable image size: 19.0 inches (diagonal)* Resolution: Various options* Dot pitch: 0.25-mm aperture grille pitch* Picture tube: Sony Triniton	£1,215.00	Apple Computer UK 6 Roundwood Ave. Stockley Park Uxbridge Surrey UB11 1BB Tel: 0181 569 1199 Web site: http://www.apple.com
	Apple Multiple Scan 720 Display (17")	<p>The Apple Multiple Scan 720 is a 17-inch, full-page display designed for the demanding user who wants large-screen performance at a competitive price.</p> <p>Its flat, square shadow-mask picture tube delivers clear text and sharp pictures, making it a perfect choice for word processing, spreadsheets, and browsing the Internet.</p> <p>The Apple Multiple Scan 720 works with all Power Macintosh and Macintosh computers -- from the most affordable to</p>	£528.00	Apple Computer UK 6 Roundwood Ave. Stockley Park Uxbridge Surrey UB11 1BB Tel: 0181 569 1199 Web site: http://www.apple.com

If the pictures did not appear, that would be because the documents were not saved into the CatBase folder, or the Pictures folder has been moved (the Pictures folder must be within the CatBase folder).

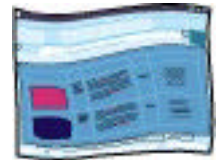
If you scroll down to the bottom of the page, you will see this:



In the Export Style Sheet (on the Preferences 2 page), we specified that there should be a maximum of four products per page, so CatBase has created a number of pages and linked them together.

Additionally, CatBase has created an index page for the products that were exported. To see it, locate the file called Index.html (or Index.htm), which you'll find in the same folder as the rest of the HTML documents, and drag and drop it onto your web browser. You should see this:

PUBLISHING HTML DOCUMENTS



Clicking on any product name will open up the appropriate page.

For another example, export the products using the Universal Product Info export (don't forget to select HTML under Export Format). This will create a table like this:

Here's a listing of our current product line-up:

Product Name	Price	Disc. Price	Supplier	Date Updated
Apple 20" Colorsync Display	£1,215.00	£972.00	Apple Computer UK	5/9/98
Apple Multiple Scan 720 Display (17")	£528.00	£422.40	Apple Computer UK	12/9/98
Apple Powerbook	£1,645.00	£1316.00	Apple Computer UK	27/6/98
ArtPad	£115.00	£92.00	Wacom	00/00/00
CatBase	£895.00	£716.00	CatBase Software Ltd.	5/9/98
Dimension XPS R Series	£2,199.00	£1759.20	Dell Computers	29/7/98
FileMaker	£199.00	£159.20	Filemaker	29/7/98
Inspiron 3000	£2,199.00	£1759.20	Dell Computers	27/6/98
Intellicolor Displays	£1,466.00	£1172.80	Radius Inc.	29/7/98
IntelliHance	£99.00	£79.20	Extensis	27/6/98
Jaz Drive	£249.00	£199.20	Omega	00/00/00
LaserWriter 8500	£1,316.00	£1052.80	Apple Computer UK	27/6/98
Macintosh Server G3	£2,080.00	£1664.00	Apple Computer UK	27/6/98
Macromedia Director	£999.00	£799.20	Macromedia	00/00/00



EXPORTING TO DELIMITED TEXT FILES

3.6 Exporting to Delimited Text Files

Sometimes you may need to transfer data from the CatBase database into a plain (unformatted) file for transfer to another program (such as a spreadsheet), merging into letters using your word processor, reporting, or for some other purpose. CatBase lets you create delimited text files for this purpose.

3.6.1 Text File Example 1: Product List

This example creates a tab-delimited list of products and their prices.

- i. If you do not already have a list of Products on your screen, choose **Products** from the **Data** menu, or click on the Products button on the CatBase Options palette, and click on the **All Records** button in the Search Dialogue window.
- ii. Choose **Export** from the **File** menu.
- iii. In the Export dialogue, select the *Universal Product Info Table* in the **Export Using:** list, and select Plain Text under **Export Format**.
- iv. Click on **OK**, enter a name for the export, and click on **Save**.

When CatBase has finished exporting the data:

- v. Open your word processing, spreadsheet, or page layout program and import the document you just created into it. For example, to import it into an Excel spreadsheet:
 - i. Launch Excel.
 - ii. Choose **Open** from the **File** menu.
 - iii. Locate your text file and double-click on it.
 - iv. Make sure that Tab is selected as the delimiter and import the file.

Your document should look like this:

products2.txt				
	A	B	C	D
1	Apple 20" Colorsync Display	£1,215.00	£972.00	Apple Computer UK
2	Apple Multiple Scan 720 Display (17")	£528.00	£422.40	Apple Computer UK
3	Apple Powerbook	£1,645.00	£1316.00	Apple Computer UK
4	ArtIPad	£115.00	£92.00	Wacom
5	CatBase	£895.00	£716.00	CatBase Software Ltd
6	Dimension XPS R Series	£2,199.00	£1759.20	Dell Computers
7	FileMaker	£199.00	£159.20	Filemaker
8	Inspiron 3000	£2,199.00	£1759.20	Dell Computers
9	Intelliscolor Displays	£1,466.00	£1172.80	Radius Inc.
10	IntelliSpace	£99.00	£79.20	Extensis
11	Jaz Drive	£249.00	£199.20	Imega
12	LaserWriter 8500	£1,316.00	£1052.80	Apple Computer UK
13	Macintosh Server G3	£2,080.00	£1664.00	Apple Computer UK
14	Macromedia Director	£999.00	£799.20	Macromedia
15	Macromedia Dreamweaver	£195.00	£156.00	Macromedia
16	Mask Pro	£249.00	£199.20	Extensis
17	MediaMatch 24WS	£1,799.00	£1439.20	Radius Inc.
18	Microsoft Office	£295.00	£236.00	Microsoft
19	PenPartner	£150.00	£120.00	Wacom
20	PenTools		£0.00	Wacom
21	PhotoFrame	£99.00	£79.20	Extensis
22	Power Macintosh G3 Desktop	£1,185.00	£948.00	Apple Computer UK
23	PrecisionView	£949.00	£759.20	Radius Inc.
24	PressView Displays	£2,199.00	£1759.20	Radius Inc.
25	QuickCam	£89.95	£71.96	Connectix
26	ScanMaker 350	£149.00	£119.20	Microtek
27	ScanMaker 5	£2,299.00	£1839.20	Microtek
28	ScanMaker 630	£229.00	£183.20	Microtek
29	SpeedDoubler	£124.99	£99.99	Connectix
30	Surf Express	£59.95	£47.96	Connectix
31	UltraPad	£230.00	£184.00	Wacom
32	VirtualPC	£124.99	£99.99	Connectix
33	Zig Drives	£125.00	£100.00	Imega

WEB OR INTRANET SERVER



3.7 Web or Intranet Server

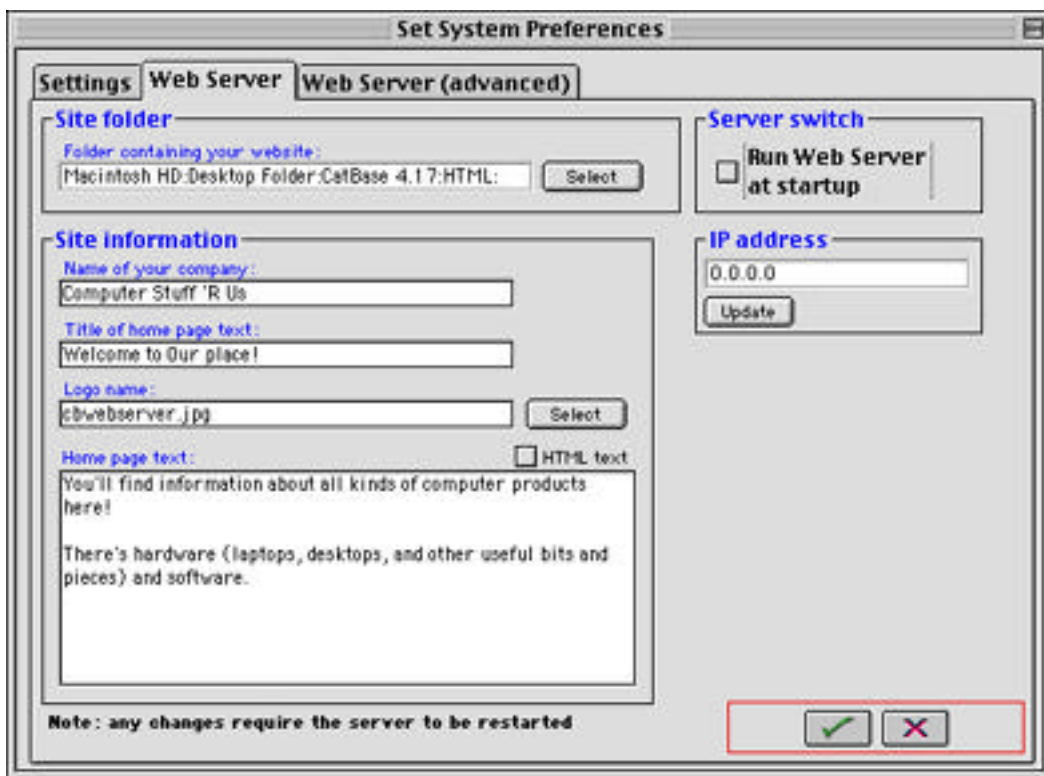
CatBase can function as a completely self-contained web server, and it's remarkably easy to set up!

We have included an example web site with this demo. You can adapt it to your own needs or create your own pages.

To try this example you will need to have two computers networked: one to act as the server and the other as the user. The server will be the computer on which you have installed the CatBase demo, and the user can be any other computer on the network which has a web browser (such as Netscape Navigator or Internet Explorer) installed. If you do not have access to a network, don't despair, there is a way that you can run both CatBase and your web browser on the same computer.

There are only a few steps you need to take to set up the web server.

- i. Close any windows that are open in CatBase.
- ii. At the main screen, choose **Setup** from the **Admin** menu.
- iii. Click on the **Web Server** tab at the top of the screen. You'll then see this page:



- iv. There is a folder called HTML in your CatBase folder, and CatBase needs to know exactly where to find it. Click on the **Select** button in the **Site folder** area, locate the HTML folder within the CatBase folder, click on it once to select it (don't open it), and then click on the **Select** button.
- v. If you want to, you can personalise the site by filling in your company's name and other information in the Site Information area:



WEB OR INTRANET SERVER

Site information

Name of your company :

Title of home page text :

Logo name :

Home page text: HTML text

You'll find information about all kinds of computer products here!

There's hardware (laptops, desktops, and other useful bits and pieces) and software.

The Logo name in this area is the name of a picture file of your company logo. If you have one that you want to use, copy it into the Images folder which is within the HTML folder, then click on the **Select** button in the **Site Information** area and locate your logo.

- iv. You're now ready to run your web server. Before you close this window, though, click on the **Update** button in the IP Address area to find out what the IP address of your computer is:

IP address

Make a note of that number.

- vii. Close the window by clicking on the Close button at the bottom of the screen:



- vii. Choose **Turn Web Server On** from the **Admin** menu.

Your web server is now running.

To check it out:

- i. Start your web browser either on the same computer as CatBase is running or on another computer on your network

WEB OR INTRANET SERVER



- ii. Type the IP address of the CatBase server into the Location area and press Return. If you are running both CatBase and your web browser on the same computer, use the following IP address: 127.0.0.1.
- iii. Shortly you should see the CatBase home page:



If you selected your own logo graphic, that will appear in place of our CatBase Web Server banner.

You can browse through a list of Companies or Products, search for a product by category (click on the Search Us button), or send an email to people who are listed as Users in the database by clicking on the Contact Us button.

HOW DOES CATBASE DO THAT?

How Does CatBase Do That?

In this section we will take a look at the steps you take to tell CatBase how you want your publication formatted.

To set up CatBase to publish data in print, as HTML documents, and as text files, there are two steps to take:

1. Create Style Sheets

These are similar to the style sheets you create in your word processing or page layout program.

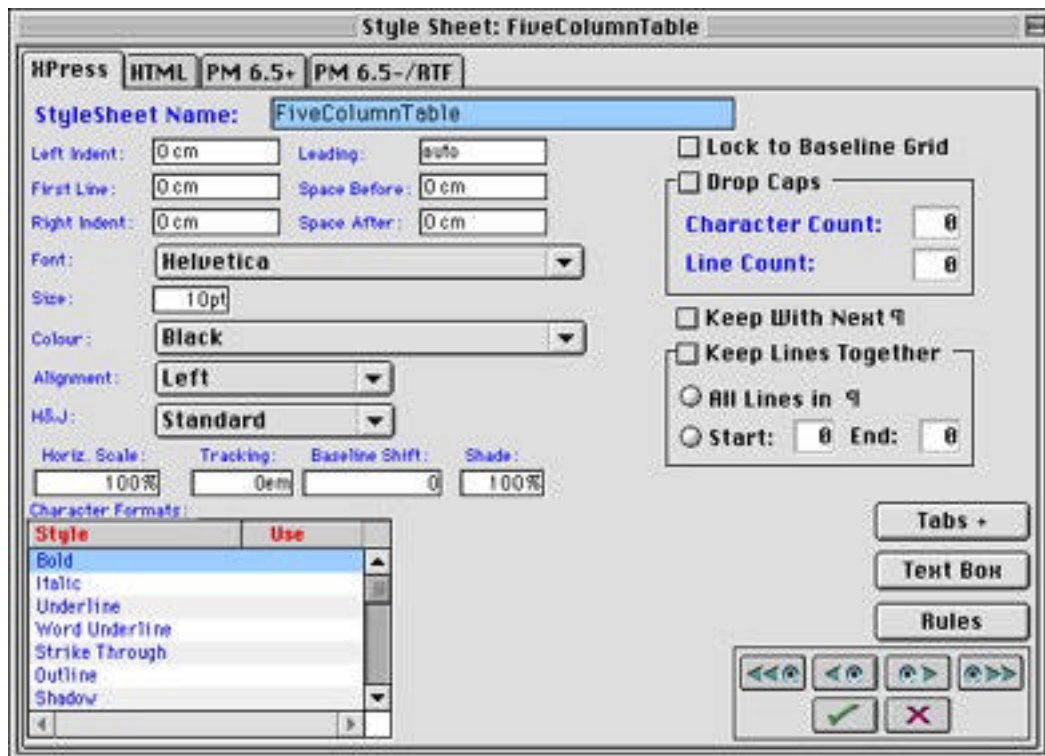
2. Create one or more Export Style Sheets

These tell CatBase what data to include and how to sort and format it.

Style Sheets

Just like the style sheets you use in your page layout or word processing program, the CatBase style sheets describe how you want your data formatted on a paragraph level: the font, size, colour, indents, tab settings, and so on. However with CatBase, a style sheet can be used for formatting text in more than one type of program. For example, you might create a style sheet called CompanyName which you want to use when you publish a catalogue in print, and also when you create HTML documents. Let's take a look at an example:

- i. Choose **Style Sheets** from the **Data** menu, and click on **All Records** when the Search dialogue appears. You'll see a list of style sheets.
- ii. Double-click on the style sheet called FiveColumnTable. The Style Sheet window opens:



STYLE SHEETS

This style sheet is used in the Universal Product Info examples used in Chapter Three.

Note: if the Font pop-up appears blank, that is because you do not have the font that was originally selected for this Style Sheet installed on your computer. Select a font that you like.

There are four "pages" of style sheets -- one for each type of program that will accept style sheet information.

Notice the three buttons at the bottom right of the screen:



The **Tabs** button has a + sign showing; this means that some Tabs have been defined for this style sheet.

iii. Click on the **Tabs** button. A new floating window opens:

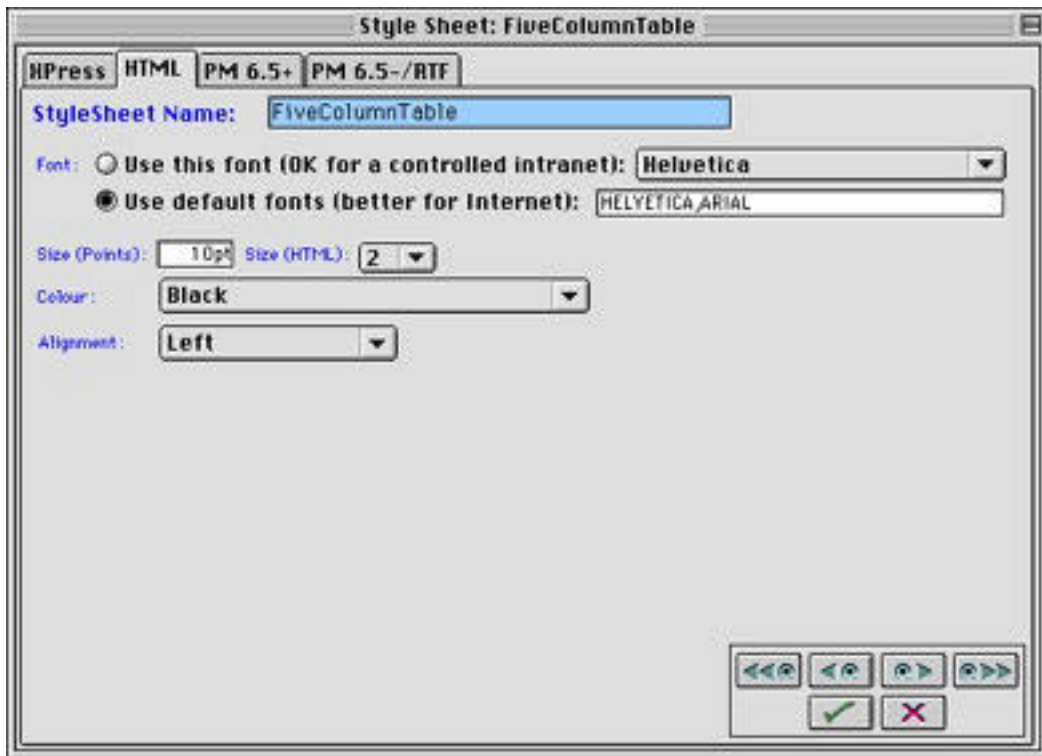


You can see that four Tab stops have been set up.

iv. Close the Tabs window by clicking in its close box.

v. Click on the HTML tab at the top of the window. You will then see the HTML page:

STYLE SHEETS

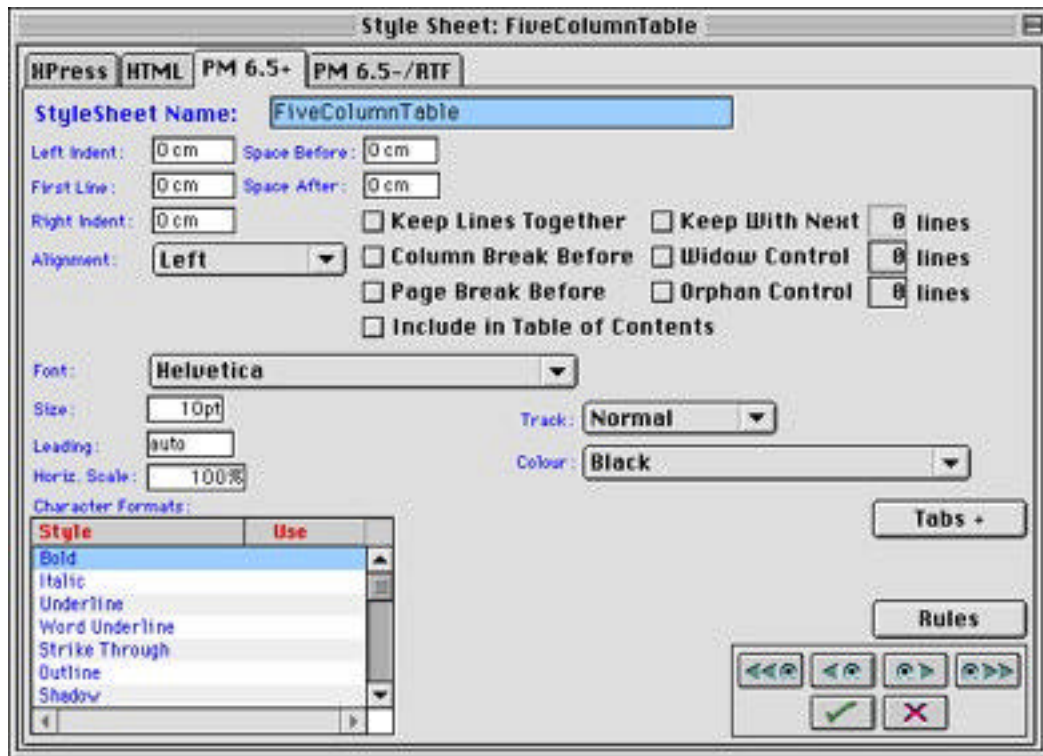


Some of the basic information from the **XPress** page still shows (the font size and colour, for example), but, since the formatting options for HTML text are somewhat limited, there's rather a lot of empty space on this page.


vi. Click on the **PM 6.5+** tab.

The PageMaker 6.5 or later page looks like this:

STYLE SHEETS



Many of the options are the same as the **XPress** page, but there are some differences. The **Text Box** button is absent, for one thing, because this feature is not supported by PageMaker (for the purists: it is not supported natively by XPress, either, but is implemented by way of an Xtension called Xtags).

- vii. Close the Style Sheet window by clicking on the Save button  or pressing the Enter key on your keyboard.
- viii. Click on the **Done** button, or press Enter again, in the list of style sheets to close that window.

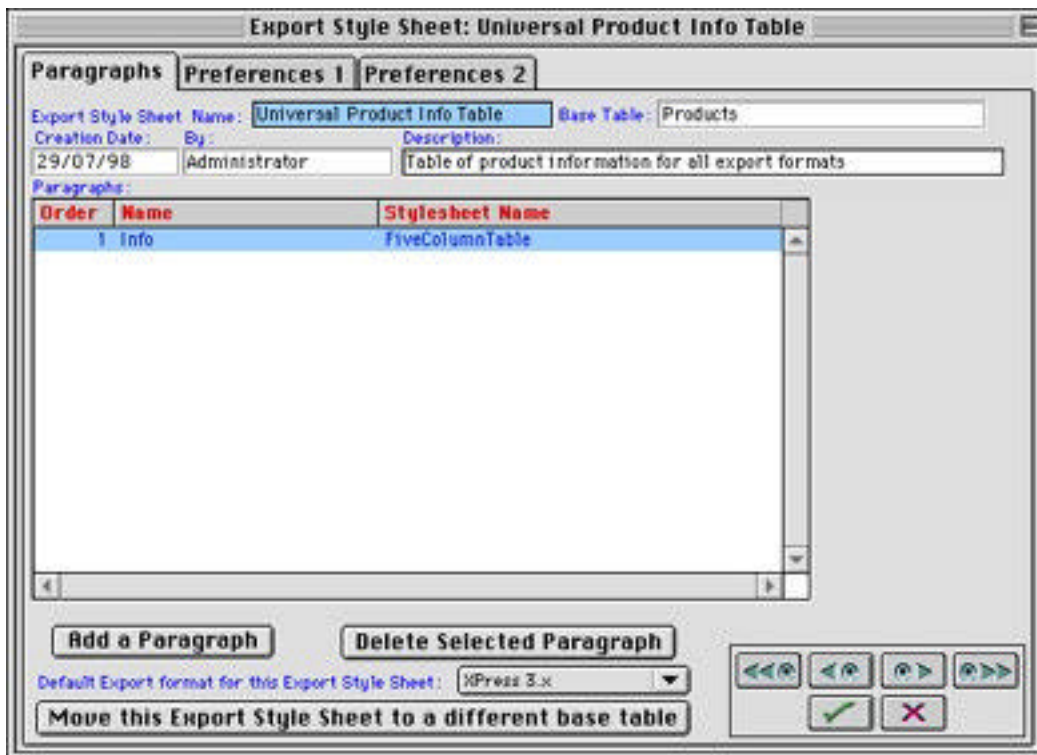
EXPORT STYLE SHEETS

Export Style Sheets

This is what CatBase is really all about! Export Style Sheets are where you go to control the way your publication will look: what data it will include, and how that data will be organised, sorted, and formatted.

Let's dissect an Export Style sheet to see what makes it tick.

- i. Choose **Export Style Sheets** from the **Data** menu and click on **All Records** in the Search Dialogue screen.
- ii. Double click on the Universal Product Info Table to open it up. You'll see this screen:



Each Export Style Sheet is made up of one or more Paragraphs, and each Paragraph is made up of one or more Elements.

To help make the logic of this clear, let's have a quick reminder of what data exported using this Export Style Sheet looks like:

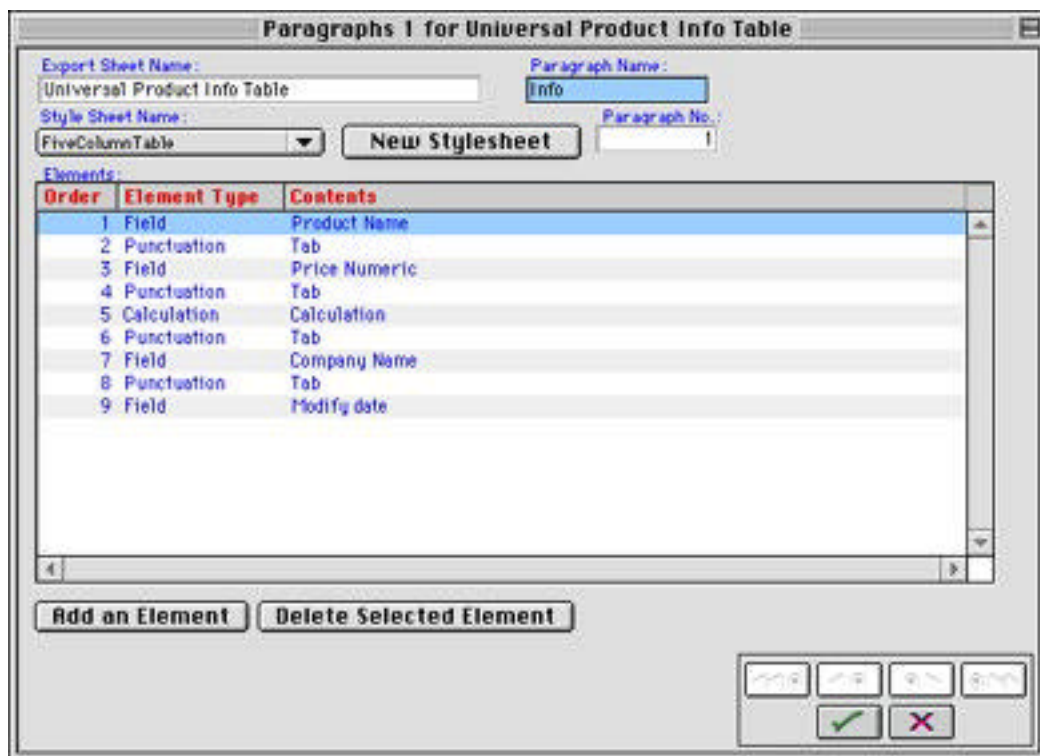
EXPORT STYLE SHEETS

Apple 20" Colorsync Display	£1,215.00	£972.00	Apple Computer UK	05/09/98
Apple Multiple Scan 720 Display(17")	£528.00	£422.40	Apple Computer UK	13/09/98
Apple Powerbook	£1,645.00	£1,316.00	Apple Computer UK	27/06/98
ArtPad	£115.00	£92.00	Wacom	00/00/00
CalBase	£895.00	£716.00	CalBase Software Ltd.	19/11/98
Dimension XPS R Series	£2,199.00	£1,759.20	Dell Computers	29/07/98
FileMaker	£199.00	£159.20	Filemaker	29/07/98
Inspiron 3000	£2,199.00	£1,759.20	Dell Computers	27/06/98
Intellicolor Displays	£1,466.00	£1,172.80	Radius Inc.	29/07/98
Intelligence	£99.00	£79.20	Extensis	27/06/98
Jaz Drive	£249.00	£199.20	Imega	00/00/00
LaserWriter 8500	£1,316.00	£1,052.80	Apple Computer UK	27/06/98
Macintosh Server G3	£2,080.00	£1,664.00	Apple Computer UK	27/06/98
Macromedia Director	£999.00	£799.20	Macromedia	00/00/00
Macromedia Dreamweaver	£195.00	£156.00	Macromedia	27/06/98
Mask Pro	£249.00	£199.20	Extensis	00/00/00
MediaMatch 24WS	£1,799.00	£1,439.20	Radius Inc.	10/10/98

There is one Paragraph of information for each record (each record being, in this case, one Product).

The table consists of five columns of information; remember that in the FiveColumnTable style sheet there were four tab stops, which organise the table into neat columns. Each "column" is a piece of data from the database or, in Export Style Sheet-speak, one Element in the Paragraph.

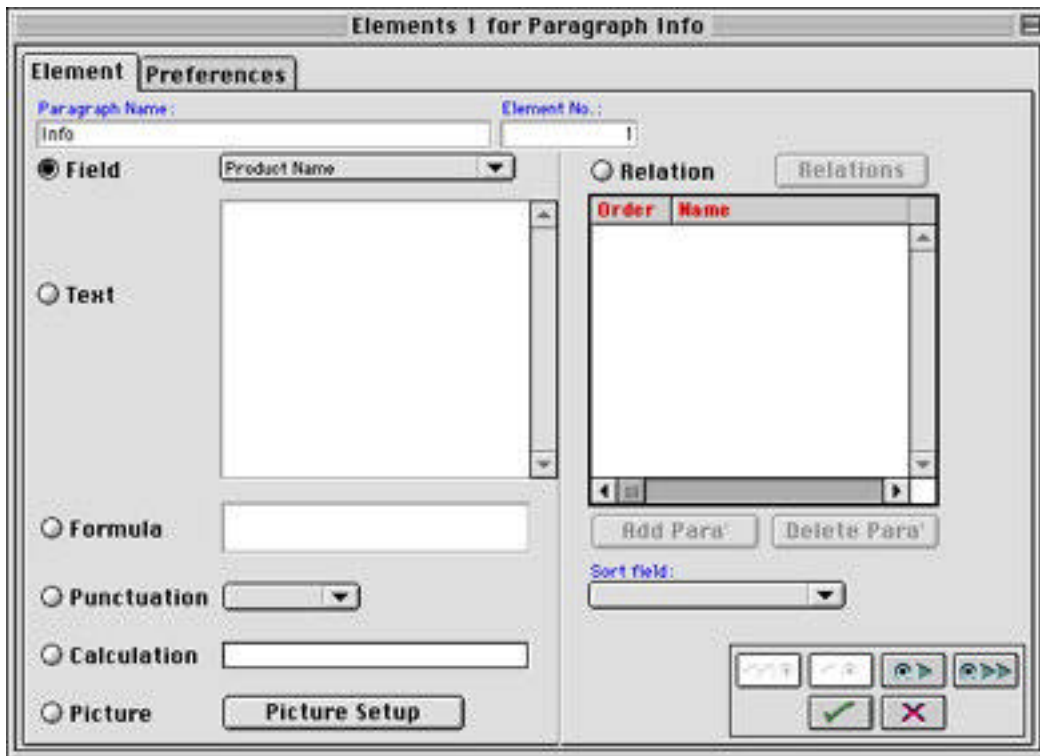
- iii. Double-click on the Info paragraph to see the Elements that make up this Paragraph:



There are five columns (fields) of data in the table, and each one is separated by a Tab character to make the columns line up.

- iv. Double-click on the first Element, the field Product Name. This opens up the Element screen:

EXPORT STYLE SHEETS



There are seven types of Element, and they can be used in any combination, in any order, to build up Paragraphs. Each Element type is briefly described below:

Field: The contents of a field in the database.

Text: Some text that you enter (for example, the word "Phone:")


Formula: A formula that lets you tell CatBase how to make choices about what data to include, and/or how to format it. For example, you can tell CatBase to include a "New Product" message if a product has been added to the database since a certain date.

Punctuation: A special character such as a Tab or a page break.

Calculation: The Calculation Element lets you tell CatBase to perform mathematical operations on numeric fields, for example to markup or discount prices.

Picture: Include a picture for each record

Relation: This Element type lets you grab information from a related table. For example, if you are exporting Company information, you can use a Relation to gather information about all Products that belong to each Company. For an example of an Export Style Sheet that uses a Relation, see the *Cos & Prods for Web* example.

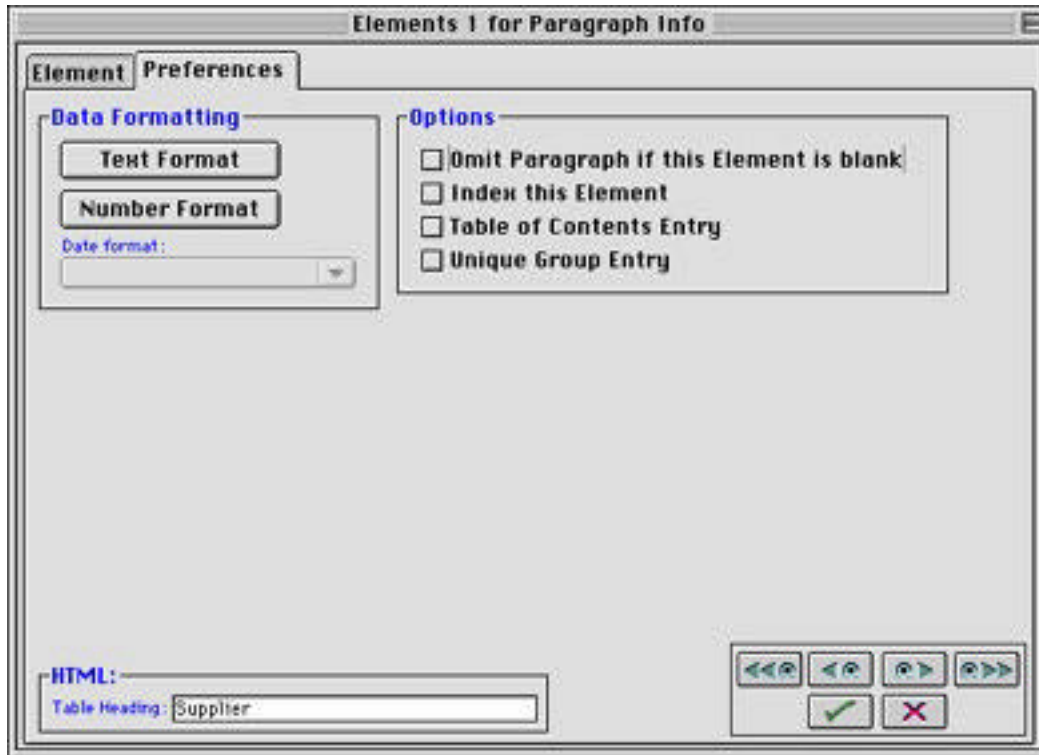
- v. Click the Cancel button  to close the Element window without saving any changes you may have made. You should now be in the Paragraph screen which shows the list of nine Elements.

Remember that when the data is exported, some of the columns have special formatting applied. For example, the Company Names appear in green. How is this

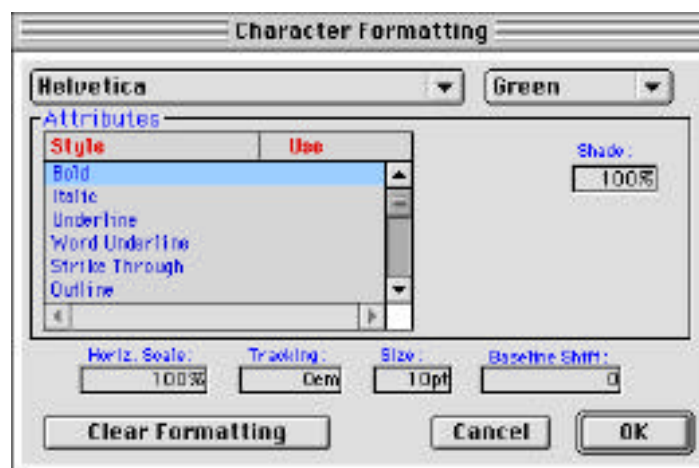
EXPORT STYLE SHEETS

accomplished, you wonder! This is how ...

- vi. Double-click on the seventh Element, the field Company Name.
- vii. Click on the **Preferences** tab at the top of the screen. The Preferences page looks like this:



- viii. Click on the **Text Format** button. You will see the Character Formatting window:



Note: If no font is selected in your version, that's because you do not have Helvetica installed. Click on the pop-up menu of fonts and select one from your system.

Green has been selected as the colour for this Element.

- ix. Click on **Cancel** to close the window.

While we're here, let's have a look at the other options on the Preferences page:

EXPORT STYLE SHEETS

Omit Paragraph if this Element is blank

Omit Paragraph if this Element is blank: Useful for situations such as addresses, when you don't want an empty line to appear if (for example) a company does not have a fax number.

Index this Element

Index this Element: Adds an Index entry when the data is exported, if the selected export format supports indexing (requires an XTension for use with QuarkXPress). When used with HTML exports, this option will create a document called Index.html (Mac) or Index.htm (Windows) containing references to the appropriate page for each entry.

Table of Contents Entry

Table of Contents Entry: Adds a TOC entry when the data is exported, if the selected export format supports it (RTF and PageMaker).

Unique Group Entry

Unique Group Entry: This tells CatBase to include repeated information only once. Very useful for (for example) creating subheadings of country names; for an example, see the *Company Info by Country XPress* example.



HTML:

Table Heading: The heading that will appear at the top of the column when data is exported into an HTML table.

Click on the Cancel button a few times to close the export style sheet.

In the Universal Product Info Table example, there is just one Paragraph containing nine Elements. Browse through some of the other Export Style Sheets to see how the other example exports shown in Chapter Three have been set up.

You will find a detailed description of Export Style Sheets in Chapter 7 of the Reference Manual.

If you want to try setting up an Export Style Sheet for your project, and you are not sure how to go about it, please send us an email or fax describing what you are intending to achieve (ideally, with a sample layout), and we will help you to set it up. Our contact information is shown in Chapter 10.

In the next chapter we will take a look at adding new records and searching for existing ones.

USING THE DATABASE

Using the Database

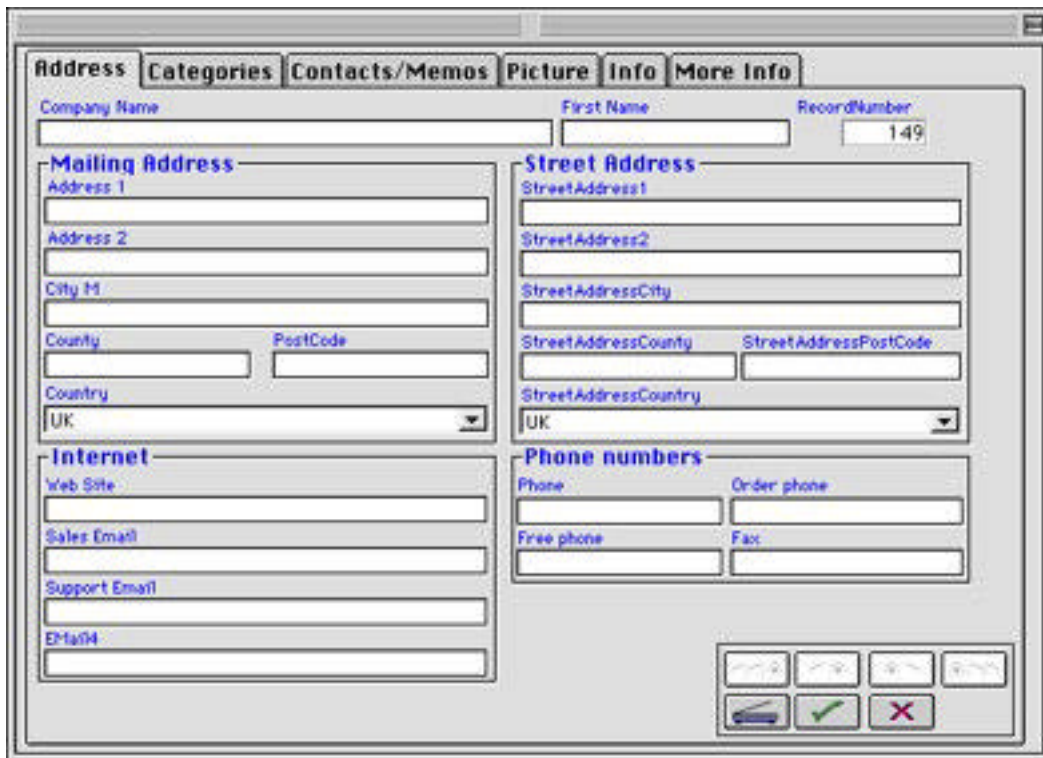
In this chapter we will show you how to create new records, how to find existing ones, and what's on the data entry screens.

Creating New Records

To add a new record to the database, you simply choose the table to which you want to add a record, and then click on the **New Record** button in the Search Dialogue window. For example, to create a new Company record:

1. Choose **Companies ...** from the **Data** menu, or click on the Companies button on the CatBase Options palette.
2. When the Search Dialogue Window appears, click on the **New Record** button.

A new record is created. For the Companies table, it looks like this:



The screenshot shows a data entry form for a Company record. The form is organized into several sections: **Address**, **Categories**, **Contacts/Memos**, **Picture**, **Info**, and **More Info**. The **Address** section includes fields for **Company Name**, **First Name**, and **RecordNumber** (with the value 149). Below this are two main address sections: **Mailing Address** and **Street Address**. The **Mailing Address** section has fields for **Address 1**, **Address 2**, **City M**, **County**, **PostCode**, and **Country** (with a dropdown menu showing 'UK'). The **Street Address** section has fields for **StreetAddress1**, **StreetAddress2**, **StreetAddressCity**, **StreetAddressCountry**, and **StreetAddressPostCode**. Below these are two more sections: **Internet** and **Phone numbers**. The **Internet** section has fields for **Web Site**, **Sales Email**, **Support Email**, and **EmailH**. The **Phone numbers** section has fields for **Phone**, **Order phone**, **Free phone**, and **Fax**. At the bottom right of the form, there are four buttons: a back button, a save button (with a green checkmark), a cancel button (with a red X), and a help button.

The information is organised into fields; each field contains a specific type of data, such as a company name or phone number. It's important for each piece of data to be stored in the appropriate field, as this will make it possible to search, sort, and export your data in certain ways. For example, by putting each company's phone number into the Phone number field, you will be able to search for a company by its phone number, to find all companies in outer London by searching for phone numbers that begin with 0181, to precede phone numbers with the text "Tel: " when they are published, and so on.

You can change the names of the fields if you wish, and you can tell CatBase not to display fields that you are not using, so as to prevent data from being entered into

USING THE DATABASE

unused fields by mistake and to un-clutter the screen. This is done by choosing **Database Setup** from the **Admin** menu, and is described in more detail in Chapter 6.

Notice the box containing a group of buttons at the bottom of the screen:



The top row of buttons are the record navigation buttons. If you have just created a new record, or if you are looking at the first or last record in the list, some or all of the buttons in the top row will be dimmed. When you have found a selection of records and have opened one, you can use these buttons to move through the list:



Go to the first record in the list.



Go to the previous record.



Go to the next record.



Go to the last record in the list.

The bottom row of buttons each have special functions:



Scan text and convert using OCR (requires a suitable scanner and TextBridge OCR software).

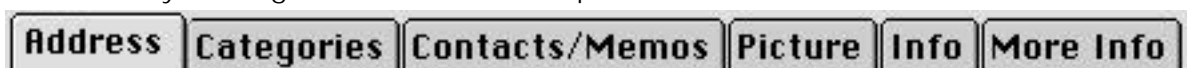


Close the record, saving any changes that were made.



Close the record, but don't save any changes that were made.

There are six "pages" of information for the Companies table, and these are accessed by clicking on the tabs at the top of the window:



You click on these tabs to move among the different "pages" of the record.

Following is a brief description of what's on each page; you will find a detailed explanation in Chapter 3 of the Reference manual.

USING THE DATABASE

Address page

Here you'll find fields for basic company information such as their address and telephone numbers.

Categories page

On this page you can specify which Categories the company should be listed under (if appropriate), and there are two "Notes" fields for storing descriptive information about the company.

Contacts/Memos Page

On this page you can keep track of any number of Contacts for each company, and set up Memos. Additionally, you will find information about when the record was created, and by whom, and when it was last modified, and by whom.

Picture Page

Here you can specify the name and location of a picture to be used when this company's information is published (a logo, for example).

Info Page


There are a number of fields on this page for storing various different pieces of information for the company.


More Info Page

This page contains some more fields for miscellaneous information.

Entering Data

Type the information you want to save for each record into the appropriate field, and press either the tab or the Return key to move on to the next field.

When you have put all the necessary information into the record, click on the Save button  to close the record and save the changes you've made.

If you do not want to save the changes you have made, click on the Cancel button instead .

Searching for Existing Records

There are two ways to find records in the database, both accessed from the Search screen.

Quick Search

To search by one of the most commonly-used criteria (Company or Product Name, for example), you select a field from the pop-up menu that appears on the Search Dialogue and type in the search criteria. For example, to search for a company by name:

1. Choose **Companies ...** from the **Data** menu. You'll see the Search Dialogue Window:

USING THE DATABASE



There is a pop-up menu in the middle of the screen, and Company Name is selected as the default, as that is most likely to be the field you will search on.

2. Type the name of the company you want to find into the text area. Note that you don't have to type in the complete name; you can just type the first part, and CatBase will find all records that start with that text.
3. Click on the **OK** button or press the Enter key on your keyboard.

For example, in our Demo database, if you type "cat" (without the quote marks, of course), and then click on **OK**, CatBase will find the record for CatBase Software Ltd.

Detailed Search

You can search on any field, or any combination of fields, in the database. To do this:

1. In the Search Dialogue window, click on the **Search Editor** button. You'll then see the Query Editor:

USING THE DATABASE



In the middle of this screen is a list of the fields in the table that you are searching. Note that the field list in your database may be different to the one shown here, as you can change the names of the fields to suit your needs (changing field names is explained in Chapter Six).

For example, suppose you want to find all companies in the UK.

1. Scroll down in the list of fields until you come to Country and click on Country once.
2. Click in the Value text editing area and type in "UK" (without the quote marks). The Query Editor should now look like this:

USING THE DATABASE



3. Click on the **Query** button.

CatBase finds all the companies in the UK and lists them.

You will find a more detailed description of the Query Editor in Chapter 4 of the Reference Manual.

Having found one or more records, double-click on one of them in the list to open the record up.

In the next chapter we will show you how you can customise your database for your publishing project.

CUSTOMISING THE DATABASE

Customising the Database

We have set CatBase up with four basic tables to maintain your data:

- Companies
- Contacts
- Products
- Product Details

You can change the names of these tables if you wish -- for example, if you are planning to produce an association membership directory, you might want to change the name of the Companies table to Members.

These tables are linked together in the following ways:

- Any number of Contacts can be linked to each Company.
- Any number of Product Details can be linked to each Product.
- Any number of Products can be linked to each Company.

In database terminology, the link between each two files is called a *relation*. The advantage of this setup is to make it easy to create publications that combine information from two or more related tables. For example, you may want to create a directory showing each Company and, under each company's information, a list of all of its contacts. Or perhaps you want to publish a catalogue showing each product, along with its supplier (Company) details.

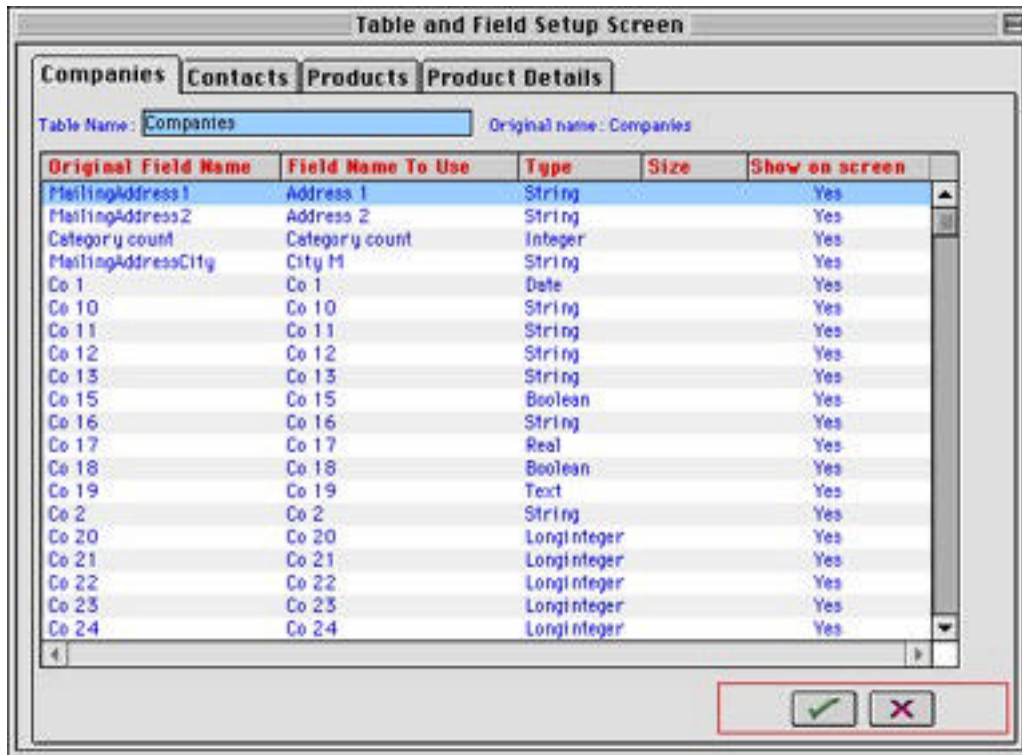
You may find that you need to use only one of these tables, or all of them. It doesn't matter; you can just use the tables and fields that you need.

Each table is made up of a variety of different fields, each of which can contain a certain type of data -- text, numeric, date, time, Boolean, or picture. There's a very good reason for making each field a certain type. If you keep date information in a Text field instead of a Date field, you won't be able to do queries such as "Find all the people who have not contacted us since January" or to sort modified records by the date that they were modified. If you keep price information in a text field instead of a numeric field, you won't be able to get the database to automatically mark up or discount prices when the data is exported. Each field has been given a name, but in order to be flexible, many of the field names are somewhat droll, such as "P 21". Fortunately, you can change each field name to something more meaningful to you.

Changing Table and Field Names

To change the table or field names, choose **Table and Field Setup...** from the **Admin** menu (if you cannot see the **Admin** menu, you'll need to Quit and start up the database again, this time logging in as the Administrator). You'll see this screen:

CUSTOMISING THE DATABASE



There are four pages -- one for each of the modifiable tables (yours may already have been modified, in which case, the field or table names may not be the same as those shown here). To change a table name, simply type in the name you want to use in the Table Name: field.

The list of fields is divided into five columns:

Original Field Name

This column shows the name with which the field was originally christened. You can't change these names -- they are there for reference.

Field Name to Use

This is the field name that you want to use. To change one, click on the name you want to change, and edit it as you would edit text in your word processor.

Type and Size

These columns tell you what type of field it is, and (if it's a String type of field), what length it is. A word of explanation about text fields: There are actually two types of Text field: Text and String. A text field can contain a large amount of text (up to 32,000 characters), and it may contain Return characters. It cannot be indexed. A String field is a maximum of 80 characters in length, and it can be indexed (indexing a field means that searching and sorting on that field will be much faster when you have a lot of records in the database). So it's important to make sure that you use the appropriate type of field.

Similarly, numeric fields come in three flavours: Integer, Long Integer, and Real. An Integer field can hold whole numbers in the range -32000 to +32000.

CUSTOMISING THE DATABASE

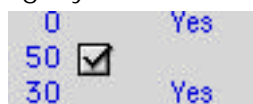
A Long Integer field can hold whole numbers with no limitations on their value.
A Real Number field can hold any number, including decimals.

Typically, you would use an Integer field for information such as Sort Order, when you know that there will never be more than 32000 items to sort. You would use a Long Integer field for larger values such as companies' total annual sales, when the figure could easily get into the millions but it will always be shown in whole numbers. You would use a Real number field for other types of numbers, such as prices. If in doubt, use a Real number field.

Boolean fields hold Yes/No or True/False information.

Show on Screen

This is where you tell CatBase whether you want each field to be shown on the screen or not. The default is "Yes" for every field; to hide a field, click on the "Yes" for that field. The display will change slightly:



Click in the check box to un-tick it.

You can click in the column heading to sort the fields by that column. For example, click in the Type heading to sort the fields according to their type.

When you have made whatever changes you want, click on the Save button



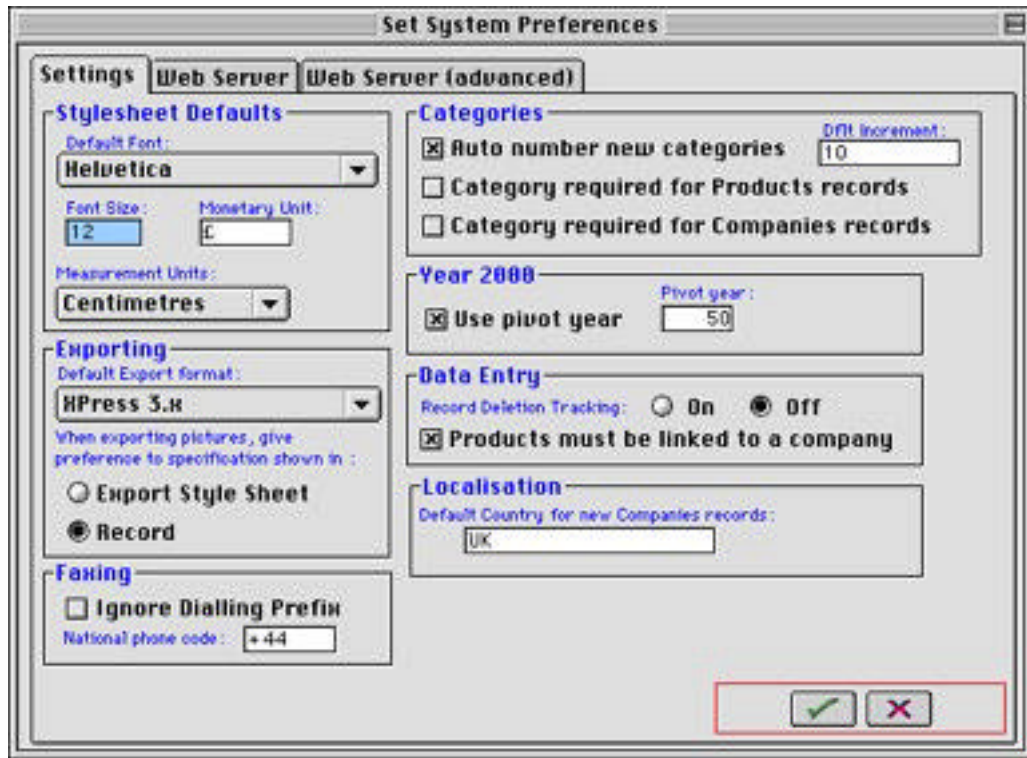
to close the screen and put your changes into effect.

You will find more information about changing table and field names in Chapter 2 of the Reference Manual.

General Preferences

There are various general database preferences that you can change. Choose **Setup** from the **Admin** menu, and you will see this screen:

CUSTOMISING THE DATABASE



There are various options on this screen -- we'll just cover some of the important ones briefly here.

Categories

Product or Company Category required: If either of these boxes are checked, you will not be able to save a Company or Product record unless at least one Category has been selected for that record.

Year 2000

CatBase is fully Year 2000 ready. You can select a "pivot year" for use in data entry - this works as follows: Let us suppose that your Pivot Year is 50. During data entry, if you type in "1/1/51", this will be interpreted as 1/1/1951. If you type in a date of 1/1/48, it will be interpreted as 1/1/2048. This works only in Date type fields! If you type a date into a text field, it will be simply text.

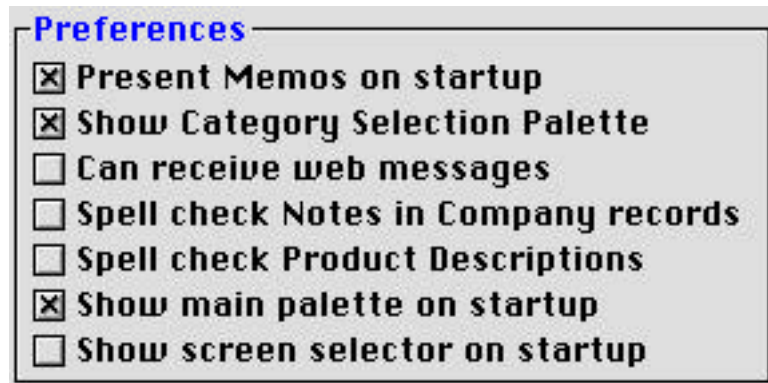
The Web Server page is covered briefly in Chapter 3, and the Web Server (advanced) page is not covered in this introductory manual. You will find detailed information about the Web Server in Chapter 6 of the Reference Manual.

Setting User Preferences

Each person who uses the database can set their own Preferences. To set up a new User record, choose **Users** from the **Admin** menu and click on the **New Record** button when the Search Dialogue appears.

The Users screen contains a set of Preferences check boxes:

CUSTOMISING THE DATABASE



Present Memos on Startup

If this option is selected, each time the user logs on to the database, it will search for his/her current Memos and display them.

Show Category Selection Palette

If this option is selected, whenever the user modifies a Company or Product record, a floating palette will appear, from which he may select categories to assign to that record.

Can receive web messages

If you are planning to use your database as an internet or intranet server, users with this option selected will appear on a pop-up list of people to whom messages can be sent.

Spell Check Notes / Product Descriptions

Select one or both of these options if you want the spelling checker to kick in whenever the Notes field in the Company table, or the Description field in the Products table, is modified.

Show main palette on startup

If this option is selected, the CatBase Options palette will appear every time the user logs on to the database.

Show screen selector on startup

If this option is selected, the Screen Selector floating window will appear when the user logs on to the database.

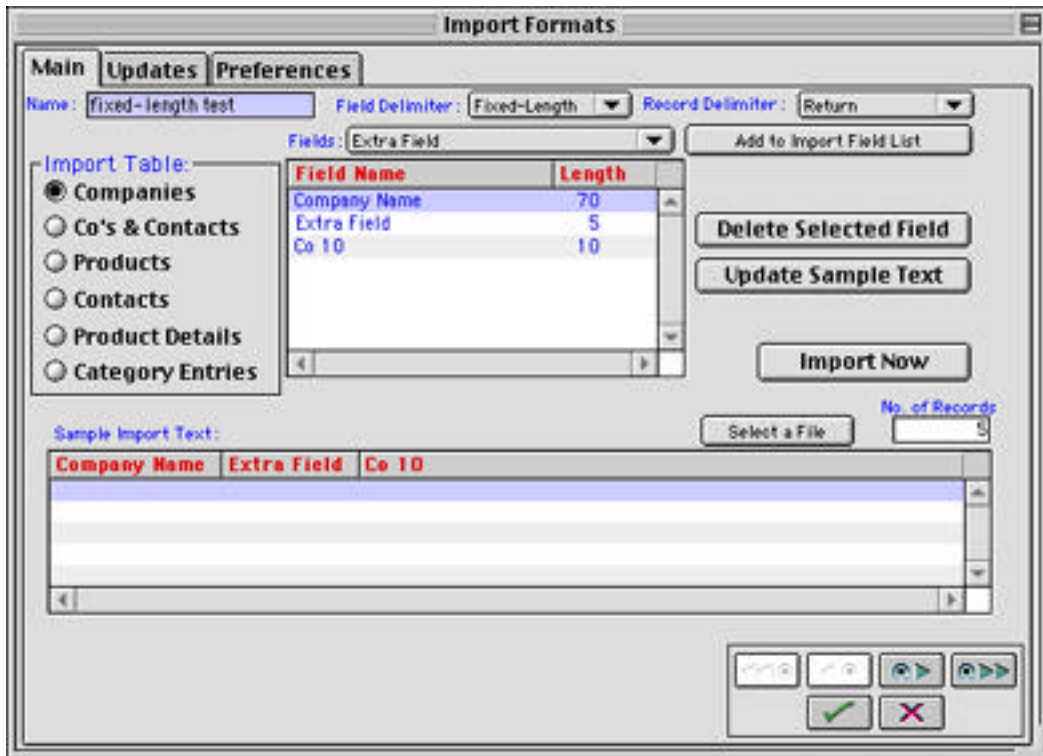
Most of these options can be changed at any time by the user, by choosing **Preferences** from the **File** menu at the main CatBase screen or by clicking on the Preferences button on the CatBase Options palette..

IMPORTING DATA

Importing Data

CatBase provides an easy way for you to import data into the database from some other source, such as another database or a spreadsheet.

To see how this feature works, choose **Import ...** from the **File** menu and click on **All Records** in the Search Dialogue window, then double-click on Fixed-length test. Shortly you will see the Import screen:



This example has been set up to import a file containing fixed-length data fields: there are a set number of fields, and each field has a set number of characters, padded with spaces, as follows:

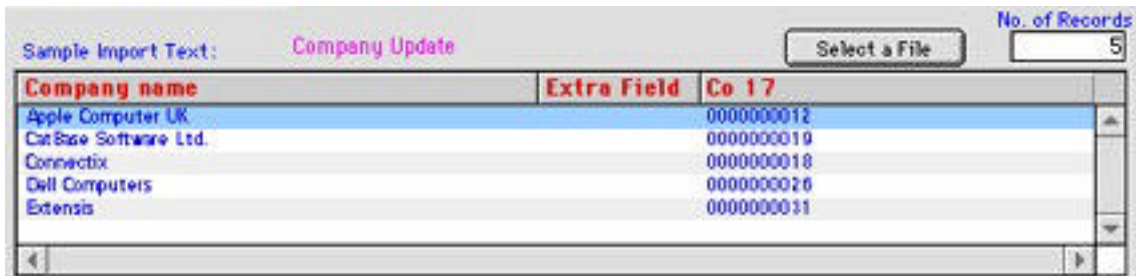
Company Name	70 characters
Extra Field	5 characters: this is a field that we want to ignore
Co 10	10 characters: a number

Before importing the file, it's always best to make sure that the fields are set up correctly.

Click on the **Select a File** button. CatBase will ask you to select the file you are going to import. You will find a file called CompanyUpdate in the Examples folder within your CatBase folder; locate this file and double-click on it.

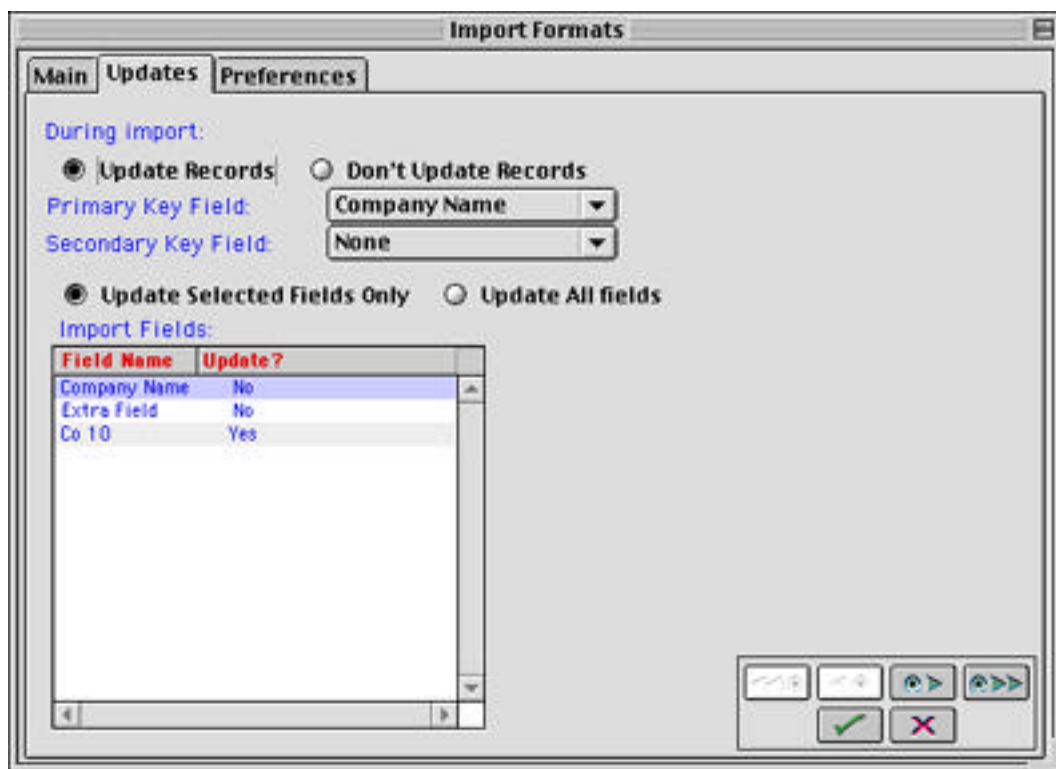
Shortly the Sample Import text area will change:

IMPORTING DATA



The screen shows the first five records from the import file. The Extra Field column is empty because by naming it Extra Field, we have told CatBase to ignore it.

Click on the **Updates** tab at the top of the screen. The Updates page looks like this:



We have indicated that, for this import, we want to update existing records rather than create new ones. The Key Field is Company name; this is the field that will be used to match up import data to existing data. The only field that is going to be updated is the Co 10 field, which contains some numbers.

Click on the **Main** tab to go back to the first page.

Now click on the **Import Now** button to start the importing process.

CatBase imports the records, displaying a thermometer to indicate its progress, and when it has finished it displays a list of all the modified records. If you open up any of those records you will see that the field Co 10 (on the Info page) now contains a number.

REPORTING AND COMMUNICATION

Reporting and Communicating

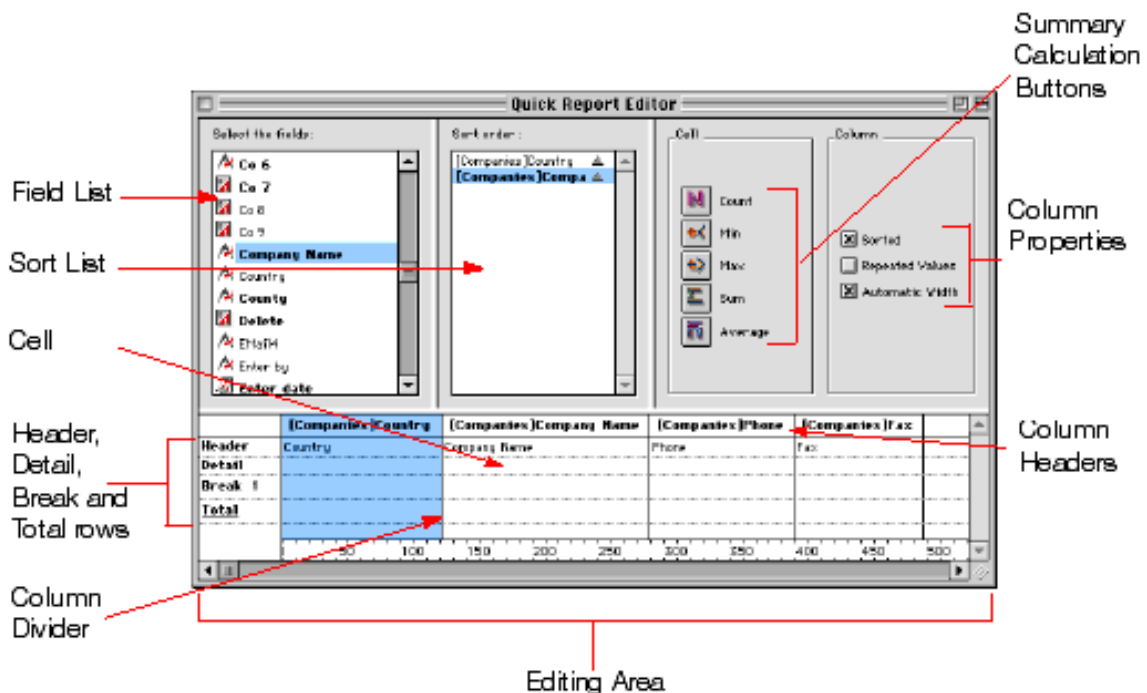
In addition to publishing your CatBase data, you can produce reports, graphs, and labels, and you can also communicate by way of mailshots, emails, and faxes directly from the database.

8.1 Quick Reports

Quick Reports provide an easy way to produce a basic columnar report. For example suppose you want to print out a list of all products and their prices, sorted by product name. This is how to do it:

(Note that in your data file, the name of the Products table may have been changed. It's the second item under the Data menu).

- i. Choose **Products** from the **Data** menu and click on **All Records** in the Search window.
- ii. With the list of Products on your screen, choose **Quick Report ...** from the **File** menu. The Quick Report Editor looks like this:



To create your report, you simply drag and drop fields from the field list into the editing area.

We want our report sorted by Product Name.

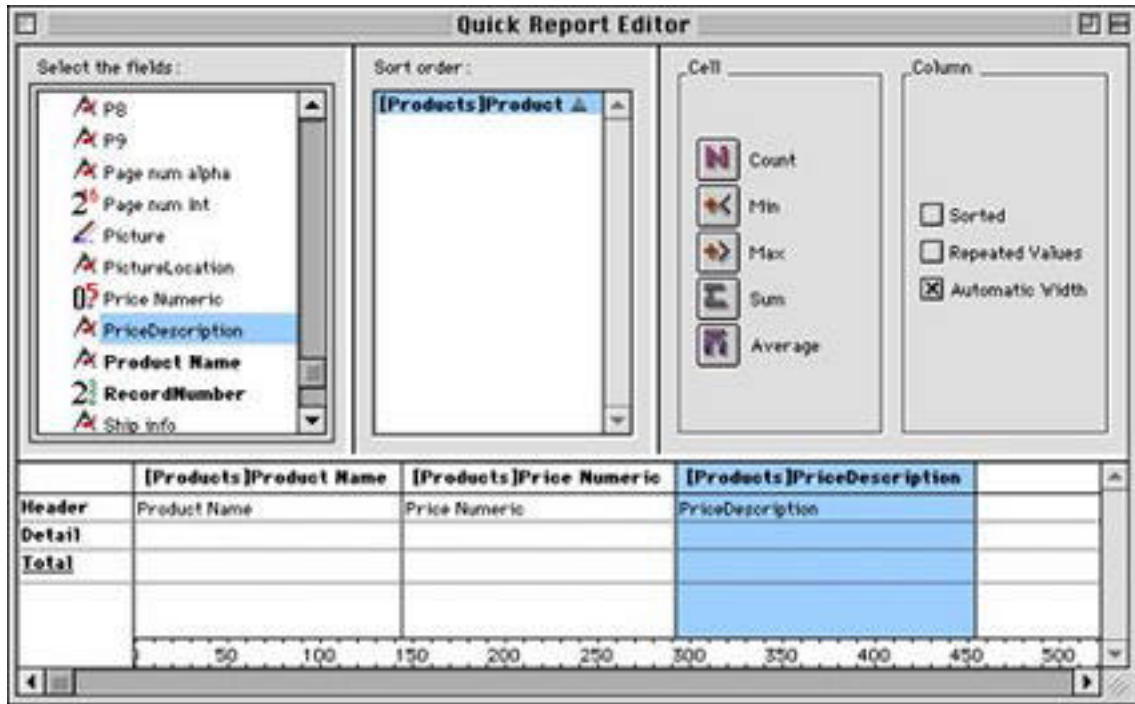
- iii. Scroll down in the list of fields until you find Product Name.
- iv. Click on Product Name, hold down the mouse button, then drag and drop Product Name into the Sort List area.
- v. Product Name appears in both the Sort List area and the editing area.
- vi. Drag and drop the field Price Numeric from the list of fields into the edit area, to

QUICK REPORTS

the right of the Product Name column.

- vii. Drag and drop the field Price Description into the edit area, to the right of Price Numeric.

Now your Quick Report should look like this:



You can let CatBase try to figure out how wide to make each column, but this isn't the best solution. Instead:

1. Choose **Page Setup** from the **File** menu and choose the appropriate paper size.
2. With the Price Description field still highlighted, click on the **Automatic** check box in the **Column** area to de-select it. Now you will be able to resize the column: move the mouse pointer so that it is at the intersection of column and its heading. It should change to a double-sided pointer; move it left or right to make the column wider or narrower. Make this column a bit narrower.
3. Select the other two columns in turn, deselect the **Automatic** check box, and make the Price Numeric column narrower and the Product Name column wider.

The width of the page is marked by a vertical red line -- if you can't see it, you can make the window bigger by clicking on the bottom right-hand corner and dragging it.

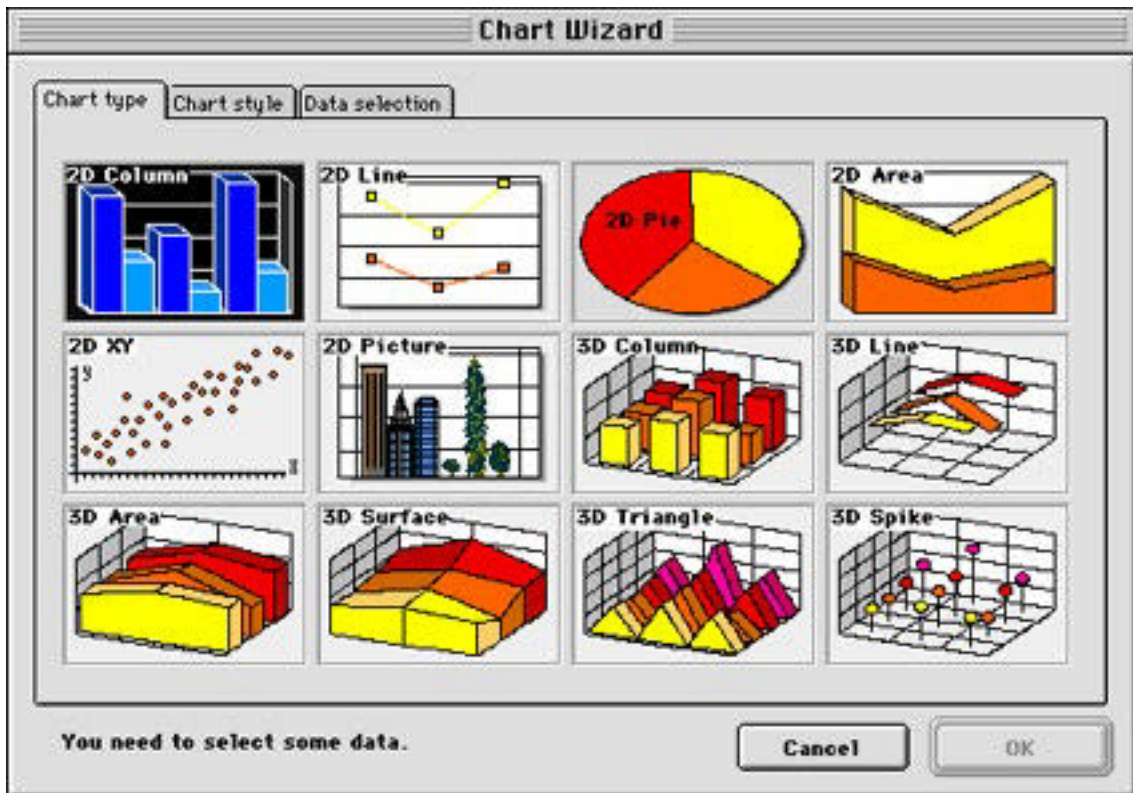
When you have set up the columns, choose **Print** from the **File** menu to print your report.

CHARTS

8.2 Charts

You can produce a variety of charts from your database. As an example, we will create a chart showing the number of products listed for each supplier.

- i. Choose **Products** from the **Data** menu and click on **All Records** in the Search window.
- ii. Choose **Chart ...** from the **File** menu. You'll see the colourful Chart Wizard:

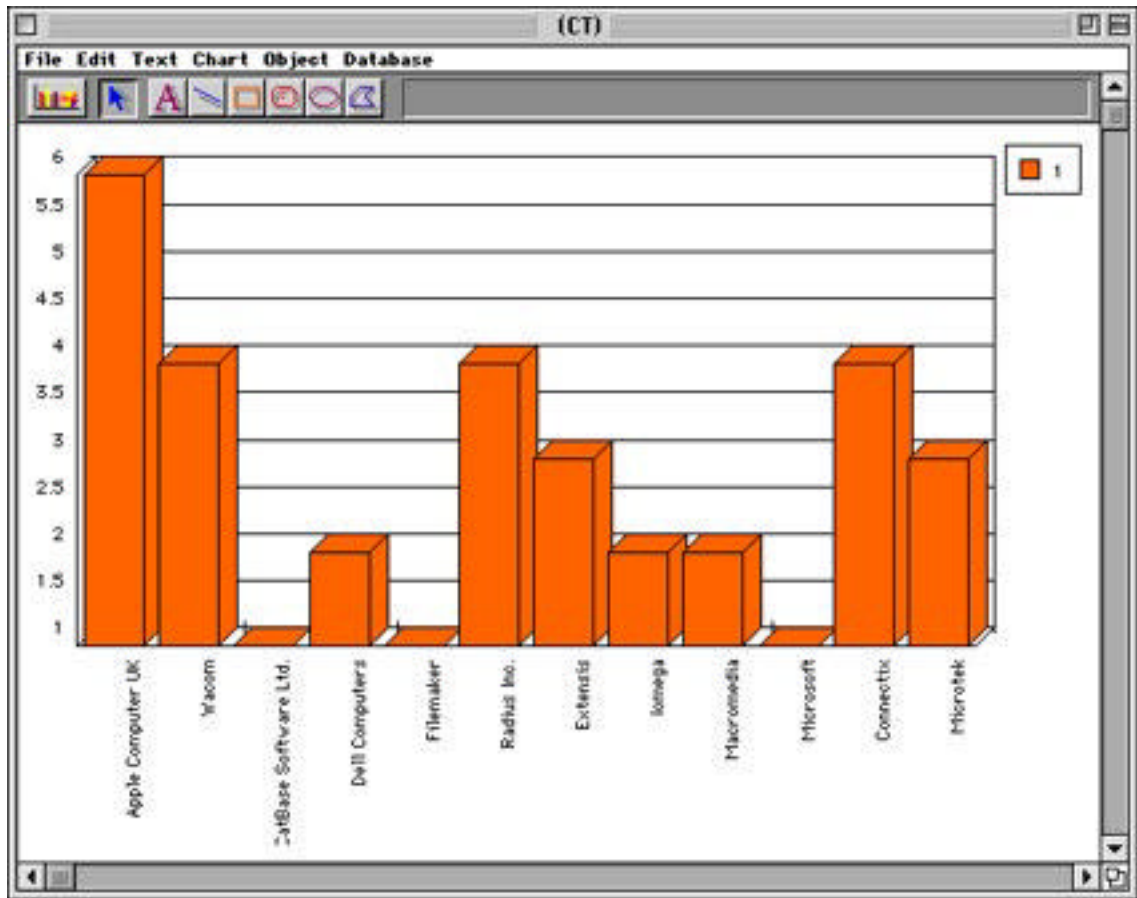


Like it says at the bottom of the window ... you need to select some data.

- iii. Click on the **Data selection** tab.
- iv. If it isn't already selected, choose Products from the Source Table popup.
- v. Drag Company Name from the list of fields and drop it into the Category (X Axis) area.
- vi. Click on the Formula... button, type in the number 1, and click on OK.
- vii. Click on OK.

Your chart is drawn. It should look something like this:

CHARTS



You can experiment with different chart types by using the menu options.

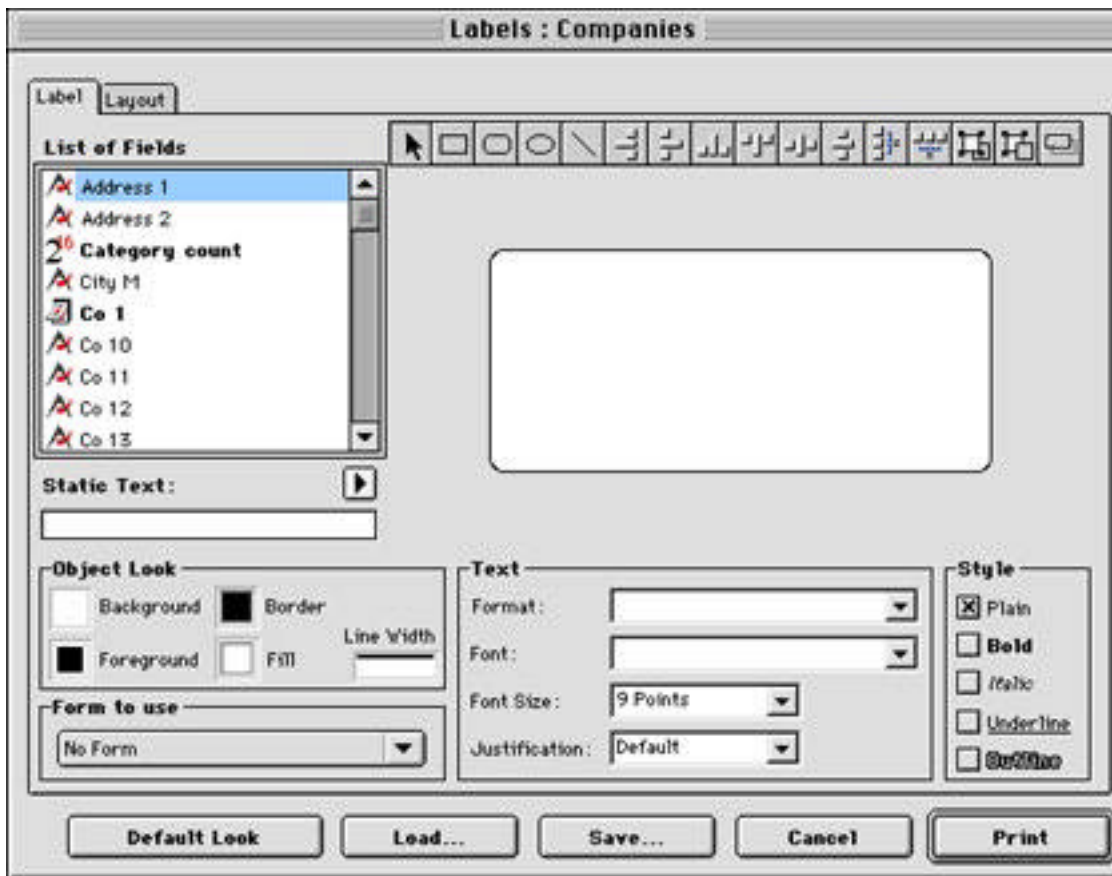
You will find a more detailed description of the Chart Wizard in Chapter 5 of the Reference Manual.

LABELS

8.3 Labels

It's easy to create labels using CatBase.

- i. Choose **Companies** from the Data menu and click on **All Records** in the Search window.
- ii. Choose **Label** from the **File** menu.
- iii. When the Order By window appears, find Company Name in the list of fields, and drag and drop it into the Ordered by area. Click on the **Order By** button at the bottom of the screen.
- iv. You'll then see the Label Wizard:



To create the label, drag and drop fields from the field list onto the label area. Here's an example:



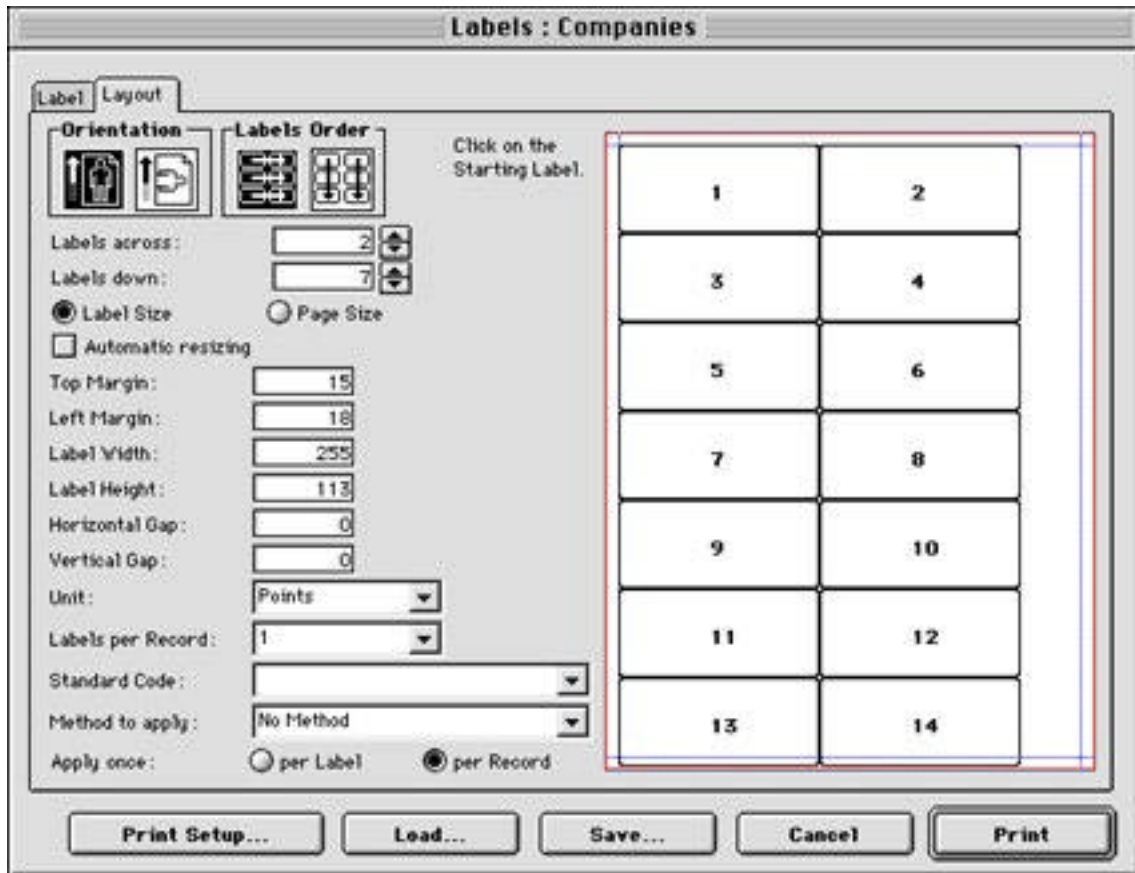
Notice that on the fifth line, two fields have been joined together. This is accom-

LABELS

plished by dropping additional elements onto an existing element. The Label Wizard will intelligently concatenate the data together.

You can select fonts, sizes, and so on for each line.

v. Click on the **Layout** tab. The Layout window looks like this:



This is where you can choose the size of the labels, how many are on the page, and so on.

You can save your label setup by clicking on the **Save** button.

The Label Wizard is described in more detail in Chapter 5 of the Reference Manual.



8.4 Mailshots

Need to send a letter to each company in the database? No problem -- use Quick Letter!

(Note: This feature uses the optional word processor plug-in, 4DWrite. We have included a demo version so that you can try it out.)

- i. Choose **Companies** from the **Data** menu and click on **All Records** in the Search Dialogue window.
- ii. When you have a list of Companies on the screen, choose **Quick Letter** from the **File** menu. You'll see the Quick Letter window:



This window has its own menu bar, which offers the usual word processing features plus some extra goodies.

Under the **Database** menu you will find some options that enable you to merge data from the database:



MAILSHOTS



For example, to merge the Company Name into your letter:

- i. Choose **Insert Field ...** from the **Database** menu.
- ii. Choose Companies from the pop-up list of tables. A list of fields in the Companies table appears. (**NOTE:** In the current version of 4DWrite, there is a bug which means that the original database field names appear in this list instead of the field names that have been specified in the Database Setup screen).
- iii. Double-click on Company Name in the list of fields.

The window closes and you will see some little markers in your letter: «» . If you choose **Show References** from the **Database** menu, it will show the actual field name.

We have set up an example letter; you will find it in the Examples folder. To open it, choose **Open ...** from the **File** menu in the Quick Letter window. Open the Examples folder (which should be in your CatBase folder) and double-click on Example Letter.

Quick Letter is described in detail in Chapter 5 of the Reference Manual.



Faxes



Currently (Version 4.18), this feature is available for Macintosh only.

In order to use this feature, you will need to have the following installed on your Macintosh:

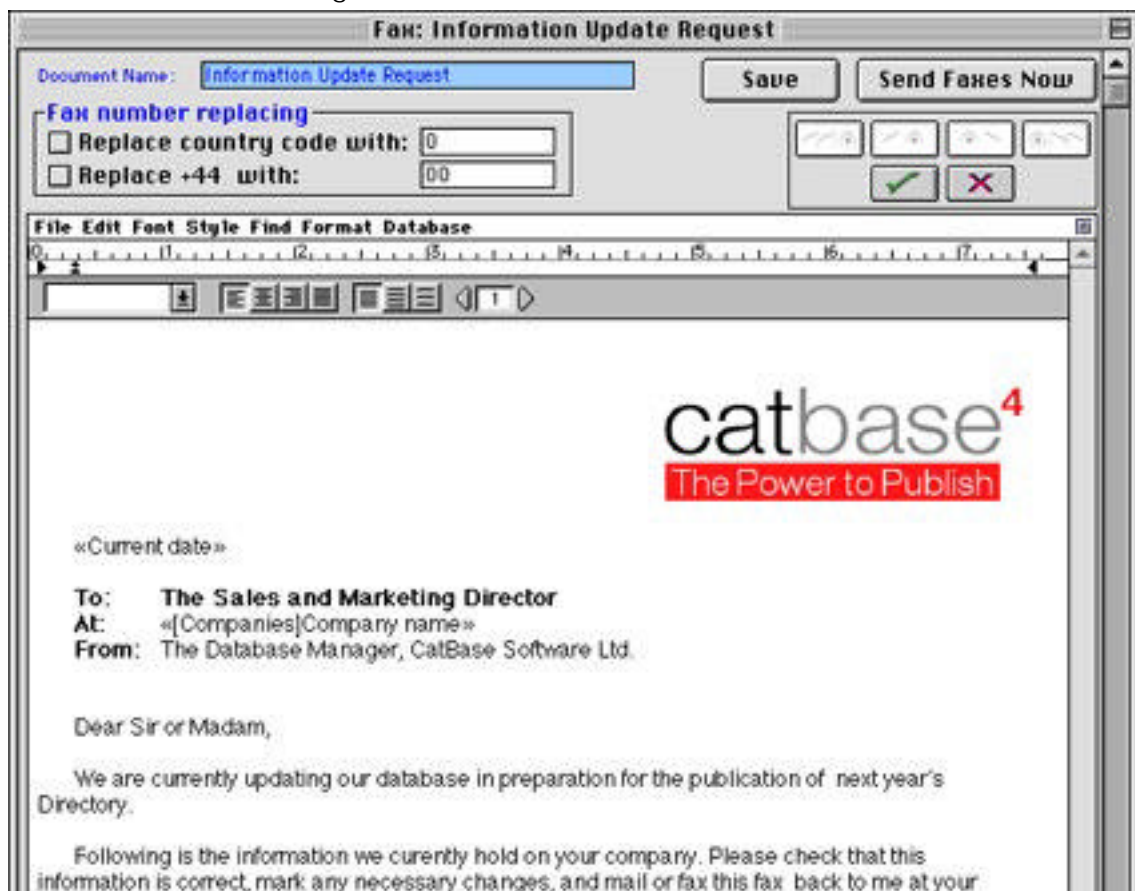
- i. A suitable faxmodem
- ii. FaxExpress software
- iii. 4DWrite word processing plug-in

Please contact us if you require more details.

Assuming that you have fax numbers stored in your database, you can easily send one or hundreds of faxes.

- i. Choose **Companies** from the **Data** menu and click on **All Records** in the Search Dialogue window (or search for a selection of Companies to send faxes to).
- ii. With a list of companies on the screen, choose **Edit and Send Faxes ...** from the **File** menu. You will see the Search Dialogue window again; click on **All Records**.

You'll see the Fax Editing window:





FAXES

(If there is more than one fax format in your database, you'll see a list of them; double-click on one to open it up.)

This window consists basically of a Quick Letter editing area in which you can add text and pictures, and merge data from the database.

To send the faxes, simply click on the **Send Faxes Now** button.

CatBase then creates all the faxes and sends them to the Fax Express spooler. Depending on how you have set up Fax Express, the faxes will either be sent immediately or stacked up for sending later (after 6pm, for example).

If CatBase comes across any records which do not have a fax number, it will let you know this when it has finished sending all the faxes and you will have the opportunity to view a list of those companies.

Sending faxes is described in detail in Chapter 5 of the Reference Manual.



8.6 Emails

It's the modern way to communicate ... and with CatBase you can do it in a flash.

If you want to try this feature, don't forget to create some Company records with your own data first! You must select one of the Email fields on the Company screen for entering the email addresses.

First, you must set up your email account.

- i. Choose **Email Accounts ...** from the **Data** menu and click on **New Record**. The Email Account window looks like this:

The screenshot shows a dialog box titled "Email Account Entry". It has the following fields and controls:

- Email account name:** A text input field.
- Server Settings:** A section header followed by an input field for "SMTP Host (eg. smtp.yourdomain.com):".
- Personal Settings:** A section header followed by three input fields: "Real name:", "Organisation:", and "From (eg. yourname@yourdomain.com):".
- Read from Internet Config:** A button located below the personal settings fields.
- Navigation buttons:** A set of four small buttons (back, forward, cancel, ok) and two larger buttons with a green checkmark and a red X, located at the bottom right of the dialog.

Note: on Windows the **Read from Internet Config** button is not visible.

- ii. Complete the fields with your information. If you have an Internet Config file set up (Mac only), you can click on the **Read from Internet Config** button and most of the fields will be filled for you.

The completed fields should look something like this:



EMAILS

Email account name:
Pat's

Server Settings
SMTP Host (eg. smtp.yourdomain.com):
smtp.hostname.co.uk

Personal Settings
Real name:
Pat Bensky
Organization:
CatBase Software Ltd.
From (eg. yourname@yourdomain.com):
pbensky@catbase.com

Read from Internet Config



- iii. Save the record by clicking on the Save button .
You will see another new Email Account record; click on the Cancel button to get rid of it.
- iv. Now choose **Companies** from the **Data** menu and find the companies to which you want to send emails. If you want to really send some emails, create a few new Company records by clicking on the New Record button in the Search Dialogue window, and type the appropriate email address into one of the Internet fields (be sure to use the **same** field in every record).
- v. With a list of Companies on the screen, choose **Send Email ...** from the **File** menu and click on the **New** button. You'll see this window:

Email Entry

Name:

Send: Single email to:
 Bulk mail on database field: Internet 1

Send via: Pat's

Subject:

Send Now Cancel Save

EMAILS



- vi. Give this email a Name.
- vii. Select the **Bulk Mail** radio button, and select the email field that you have used from the pop-up menu.
- viii. Select the appropriate email account from the **Send via:** pop-up, if it isn't already selected.
- ix. Type in the subject and the message you want to send.
- x. Click on **Send Now**.

CatBase sends your emails, letting you know its progress.

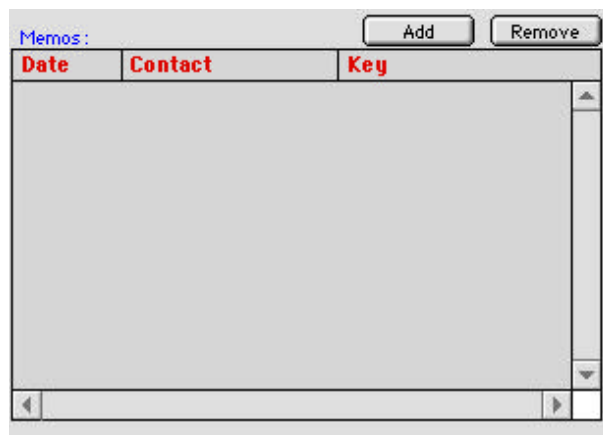
MEMOS

Memos

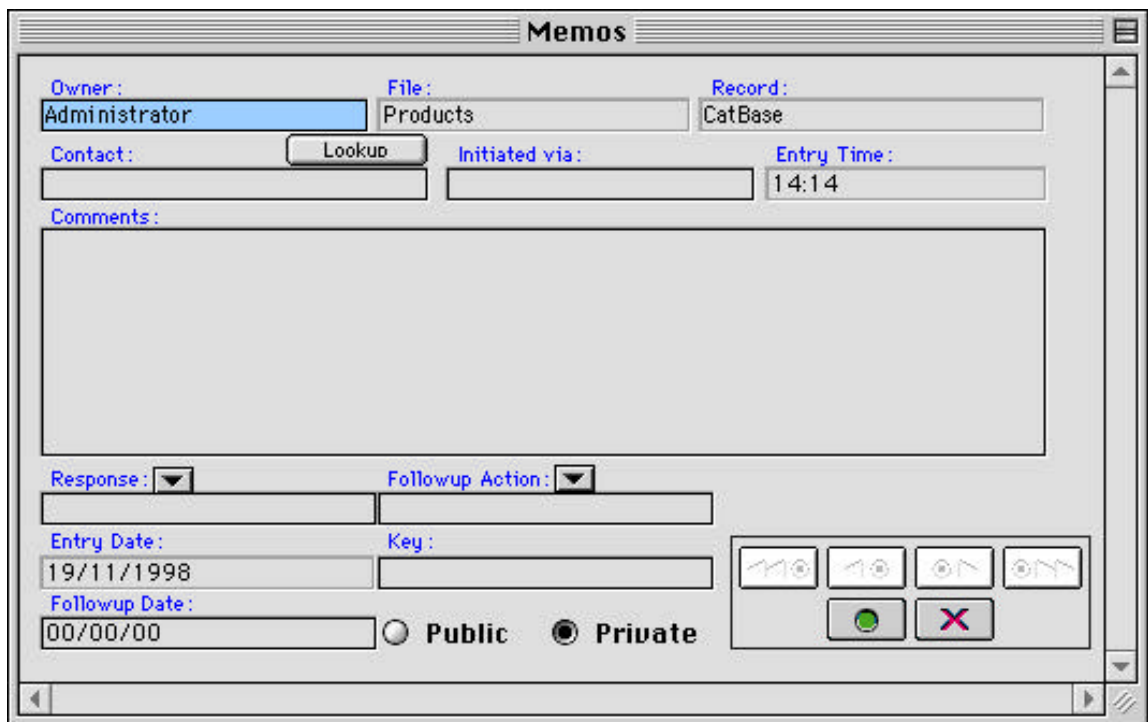
Memos are a useful tool for keeping track of things you need to do. For example, you may want to remind yourself that a particular record will need to be updated in three months' time because a new version is being prepared.

To set up a Memo, you open up the appropriate Company or Product record, go to the second (Companies) or third (Products) page, and add a new Memo.

- i. Choose **Products ...** from the **Data** menu and click on **All Records**.
- ii. Double-click on any record to open it up.
- iii. Click on the **Memos/Other** tab. You will then see the third page, on which is the Memos area:



- iv. Click on the **Add** button. A new Memo opens up:



MEMOS

- v. Type a comment into the Comment field.
 - vi. Enter today's date into the Followup Date field. (Normally, of course, you would enter a followup date of sometime in the future, but for demonstration purposes, let's use today's date for now).
 - vii. Type a short summary of the memo into the Key field.
 - viii. Enter a contact name into the Contact field, or click on the Lookup button to select from a list of contacts for the company.
- Your Memo should look something like this:

The screenshot shows a window titled "Memos" with the following fields and controls:

- Owner:** Administrator
- File:** Products
- Record:** CatBase
- Contact:** Pat Bensky (with a "Lookup" button next to it)
- Initiated via:** (empty field)
- Entry Time:** 14:14
- Comments:** Check to see if they have released a new version.
- Response:** (dropdown menu)
- Followup Action:** (dropdown menu)
- Entry Date:** 19/11/1998
- Key:** New version?
- Followup Date:** 19/11/1998
- Public/Private:** Radio buttons, with **Private** selected.
- Navigation buttons: Home, Previous, Next, End, Refresh, and a red X button.

If you select the **Public** radio button, anybody using the database will be able to see the Memo; otherwise, only you will be able to see it.

- ix. Click on the Save button or press the Enter key to save the Memo. It will now appear in the Memos area:

The screenshot shows a window titled "Memos:" with "Add" and "Remove" buttons. Below is a table with the following data:

Date	Contact	Key
19/11/98	Pat Bensky	New version?

Next time you open that record, the Memo will appear here if you are its Owner (if it has been flagged as Private) or whenever anybody opens the record (if it is Public).

You can also search for memos whenever you are using CatBase by choosing **Memos ...** from the **File** menu.

ANY QUESTIONS?

Any Questions?

We hope that this brief manual has given you a good overview of what CatBase can do, and answered most of your questions about the program. However, if you need to know more about a particular feature, how to set the database up, or if you would like to find out if we can customise CatBase to do some special task for you, please contact us by one of the following methods:

Telephone: 0700 CATBASE (0700 2282273)
(From outside the UK: + 44 700 CATBASE)

Fax: 01920 877917
(+ 44 1920 877917 from outside the UK)

Email: info@catbase.com

Mail: FREEPOST SG455
Ware, Herts. SG12 8BR

or from outside the UK:
50 The Maltings
Stanstead Abbotts
Herts. SG12 8HG
UK

On the following page you will find a handy enquiry form, which you can either fax or mail to us.

catbase⁴

The Power to Publish

ENQUIRY FORM

FROM: _____

COMPANY NAME: _____

ADDRESS: _____

PHONE: _____ FAX: _____

EMAIL: _____

- PLEASE SEND ME A CATBASE DEMO CD
- PLEASE HAVE A TECHNICAL REPRESENTATIVE CONTACT ME
- I HAVE THE FOLLOWING QUERY REGARDING CATBASE:

(USE ANOTHER SHEET IF NECESSARY)

PLEASE TELL US HOW YOU HEARD ABOUT CATBASE:

NOW ... FAX THIS FORM TO CATBASE SOFTWARE LTD. AT 01920 877917 (+44 1920 877917)
OR ... POST IT TO OUR FREEPOST ADDRESS : FREEPOST SG455, WARE, HERTS. SG12 8BR
(FROM NON-UK ADDRESSES: 50 THE MALTINGS, STANSTEAD ABBOTTS, HERTS. SG12 8HG)
OR ... SEND US EMAIL TO info@catbase.com VISIT OUR WEB SITE AT www.catbase.com

CatBase Order Form

- CatBase LE: £395 (1,000 records per table)
- CatBase Single-User: £695.....
- CatBase Multi-User -- 2 Workstations: £1,795
- CatBase Multi-User -- ____ Workstations (CALL us for price)
- XTags (picture import Xtension for QuarkXPress): ____ @ £199:
- Indextension (Indexing Xtension for QuarkXPress): ____ @ £99:
- 4DWrite (word processing plug-in; necessary for composing emails, faxes, and mailshots in CatBase): ____ @ £95:
- Fax Modem + FaxExpress software: £150 (Macintosh only)
- FaxExpress Software Only (plug-in for sending faxes; Macintosh only; suitable modem required): £50

Subtotal:£ _____

Add VAT at 17.5% (UK and EU addresses):£ _____

Delivery: UK addresses: **FREE!**
Non-UK Addresses: Airmail: £20£ _____
Courier: £50£ _____

Total:£ _____

Payment Details All prices quoted are in £ sterling

- Cheque Enclosed Charge my: Visa MasterCard Diners Club BarterCard

Card Number: _____ Expiry Date: _____

Signature: _____

Name: _____

Company: _____

Address: _____

Telephone: _____ Fax: _____ Email: _____

IMPORTANT!!!!

I will be running CatBase on: Macintosh Windows 95/98 Windows NT

Note: For CatBase Multi-User, you need to specify the server operating system; the workstations can be any combination of Mac and Windows 95/98/NT. Windows 95/98 is not recommended for a server.

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