# SETTING UP YOUR DATABASE

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## Planning Your Database

Before you set up your database, you should take a little time to think about how you will be using it. You will need to decide which tables you will use to maintain your data, what data will go into which fields, and how you want to set up your Categories. We will briefly discuss each of these items so that you will have the knowledge you need about CatBase to enable you to set up your database in the best possible way for your intended use of it.

A word that you may not be familiar with, but which you will see used quite frequently here, is "related." When we talk about tables being *related* to each other, we mean that they are linked by a common factor. For example, a Product record may be related to a Company record. This means that they are linked together by the Company's record number. The point of having related tables is that the relation makes it possible to "grab" data from the other table. For example, you might want to build a directory of every company in your database, and list all the products that each company supplies underneath the company's address. You would be able to tell CatBase that you wanted to use the relation between the Companies and Products file. Then, when the Company records are being transferred from CatBase to your page layout program, CatBase will automatically find all the Product records that belong to each company and include the Product information in the format you have specified.

Note: you will find a Glossary in the Appendix, where you can look up any words that are unfamiliar to you.

## Tables

There are two basic tables that are used for maintaining data in CatBase: Companies and Products. The data that is maintained in these tables will be used to create your publication. You can change the names of these tables if you wish -- this is explained later on in this chapter.

There are also a few tables related to Companies and Products. The Contacts table is related to Companies, and Product Details is related to Products. Additionally, Category Entries are related to both Companies and Products, and Companies and Products can be related to each other. The chart below shows these tables, how they are related to each other, and how they can be used.

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| Table | Related to | Related Field | Use |
|---|---|---|---|
| Companies | Products<br>Contacts<br>Categories<br>Memos | RecordNumber | Maintain information such as address, telephone numbers, and other general information about companies. You can also use this table for any other type of information that requires address data, such as membership details for a club or society. You will be able to create any number of contacts for each company record, and any number of Product records may also be related to one Company record. If you are going to publish information on products only, and do not need to keep information on each product's supplier (for example, if they are all products that your company makes), you might not use the Companies table at all. |
| Products | Companies<br>Product Details<br>Categories<br>Memos | RecordNumber | Maintain information on individual products. Each Product record can be related to a company record. You can make it a requirement that each Product record be related to a Company record. |

| Table | Related to | Related Field | Use |
|---|---|---|---|
| Contacts | Companies | RecordNumber | Maintain information on any number of Contacts for each Company. Each Contact record MUST be related to one Company record. |
| Product Details | Products | RecordNumber | Maintain information on any number of detail records for each Product. Each Product Detail record MUST be related to one Product record. Product Detail records are useful if you have a number of variations on a basic product, for example, a product might be available in four different sizes, with the size (and perhaps the price) being the only difference. In that case, you would have one Product record with four Product Detail records. An example is shown in Chapter 3. |
| Category Entries | Companies Products | RecordNumber | Each Company or Product record can be assigned to any number of Categories. Once you have assigned Categories, you will be able to search for records belonging to a particular Category (for example, find all Companies that have been assigned to Engineering) and create publications sorted by Category. |

| Table | Related to | Related Field | Use |
|-------|-----------|---------------|-----|
| Memos | Companies Products | RecordNumber | Memos are a useful way of setting up reminders for yourself or for another CatBase user. In addition to being related to Company and Product records, Memos can be free-floating. |

*Fields*

Each table contains a number of fields, with each field being used to hold one particular type of data. For example, in the Companies table there is a field for the company name, and a number of fields for holding address information. Most tables have at least one field that you can never change — the record number field. CatBase needs this field to maintain the integrity of its relations with the other tables. Record numbers are assigned automatically whenever a new record is created; you usually don't need to pay much attention to them. In addition to the record number field, each table usually has at least one mandatory field. In the Companies table, the Company Name field is mandatory. In the Products table, the Product Name field is mandatory. You won't be able to save a Company or Product record unless the appropriate mandatory field has an entry in it.

We have set up a number of fields in the Companies and Products tables for specific types of data, but you can use these fields in any way you wish. There are also a number of "user-definable" fields that have generic names like CO1 or P1. You can change the names of the fields (this is explained in detail later on in this chapter).

Each field is designed to hold a certain type of data. There are five basic field types: numeric, character, Boolean, time, and date. Numeric fields can be real number, integer, or long integer. Character fields can be of a specific size (for example, the Company Name field is 70 characters) or unlimited (truthfully, a character field of "unlimited" size can hold a maximum of 32,000 characters). A Boolean field holds Yes/No data; it is either True or False. You can see a complete list of fields and their types for each table at any time by choosing **Table and Field Setup …** from the **Admin** menu.

If you are not sure whether to use the Companies or Products tables, or both, make a list of the pieces of data that you want to put into the database; each piece of data will go into a different field in the database. This list might include information that will never appear in a publication. Then see how your data matches up with the fields in the Companies and Products tables. If you are still unsure, please contact us! We will be happy to help you figure out the best solution for your particular requirements, and we won't charge you for it!

*Categories*

If you are going to use Categories, think about which Categories you want, and how you need to organise them. Do you need to set them up in a hierarchical system, or do they all have the same level of importance? If you are planning to produce a publication in which Company or Product information is sorted according to the Category to which each record has been assigned, do you need to have the Categories organised so that there is a level of sub-categories under each main category heading? Setting up Categories is explained in detail later on in this chapter.

## The Administrator's Job

You must assign one person as the Database Administrator. This person will have special responsibilities such as adding or removing users, assigning their access levels, physically deleting records that have been marked for deletion, changing field and table names, updating and backing up the database. The Administrator has a special password, giving him access to the special Administrator functions. If you purchased CatBase Single-User, you will be the System Administrator.

We have provided a separate Administrator's Reference, in which you will find detailed information regarding the maintenance of the database; topics such as making backups, deleting records, and various utilities are described in the Administrator's Reference. We urge you to read **at least** the section on making backups before you begin using your database.

Important note: This section assumes that you have already worked through the Demo, and are familiar with the basics of CatBase. You must also work through Chapter One, Installation, which shows you how to start a new database.

➢ Launch CatBase as described in Chapter One.
If an Open Data File dialogue appears:
➢ Locate your new data file and double-click on it.
If you are using the multi-user (network) version of CatBase, you will see a network connection window; double-click on the CatBase item in the list.
The password screen appears:
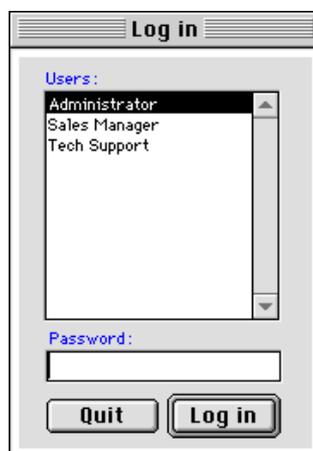
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➢ Enter the Administrator password. This can be found in your Welcome let-ter (you will be able to change this password to anything you wish).
➢ Double-click on Administrator.

You will see a message box telling you what's going on as the database opens. When it says "Click/Press Return to continue", it is ready to roll. Click anywhere on the screen or press the Return key on your keyboard.

You'll see the CatBase main menu screen, with the Admin menu bar:
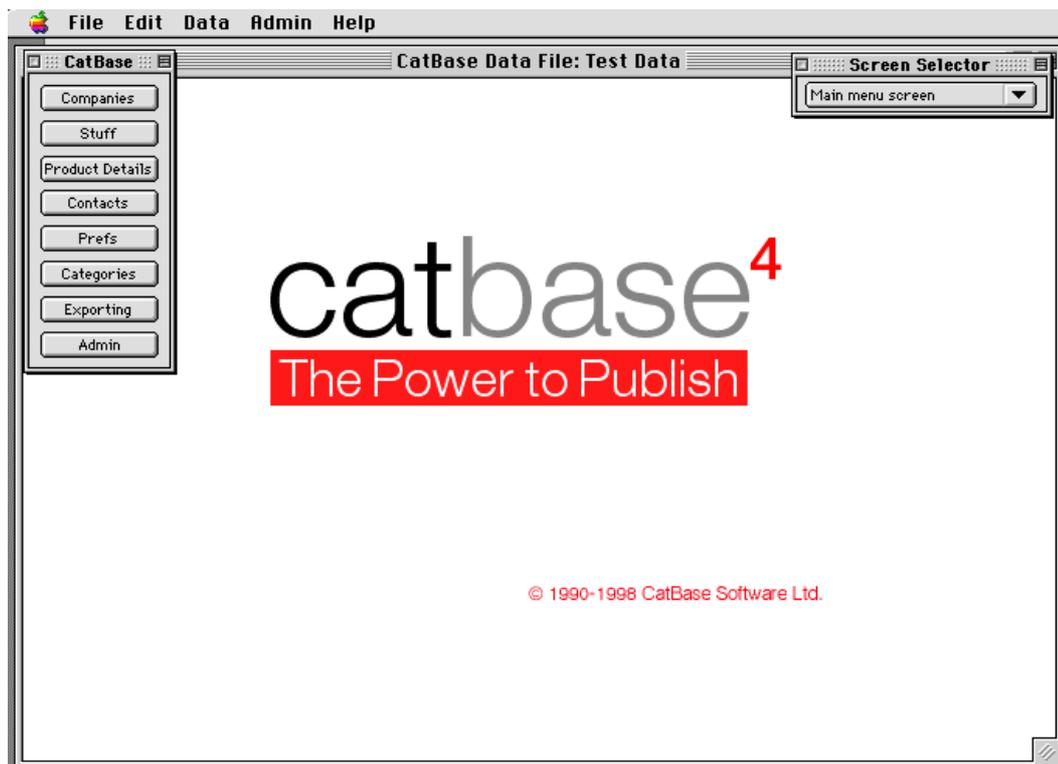


The Admin menu offers some special functions that are not available to users who do not have Administrator-level access:

➢ Follow the steps described below to start using the database. Please follow them in the order in which they are presented.

## Changing Table and Field names

This section tells you how to change the table and field names in your database. You do not have to do this now; they can be changed at any time and it won't mess anything up.

➢ Choose Table and FIeld Setup … from the **Admin** menu. You'll then see the Table and FIeld Setup window:
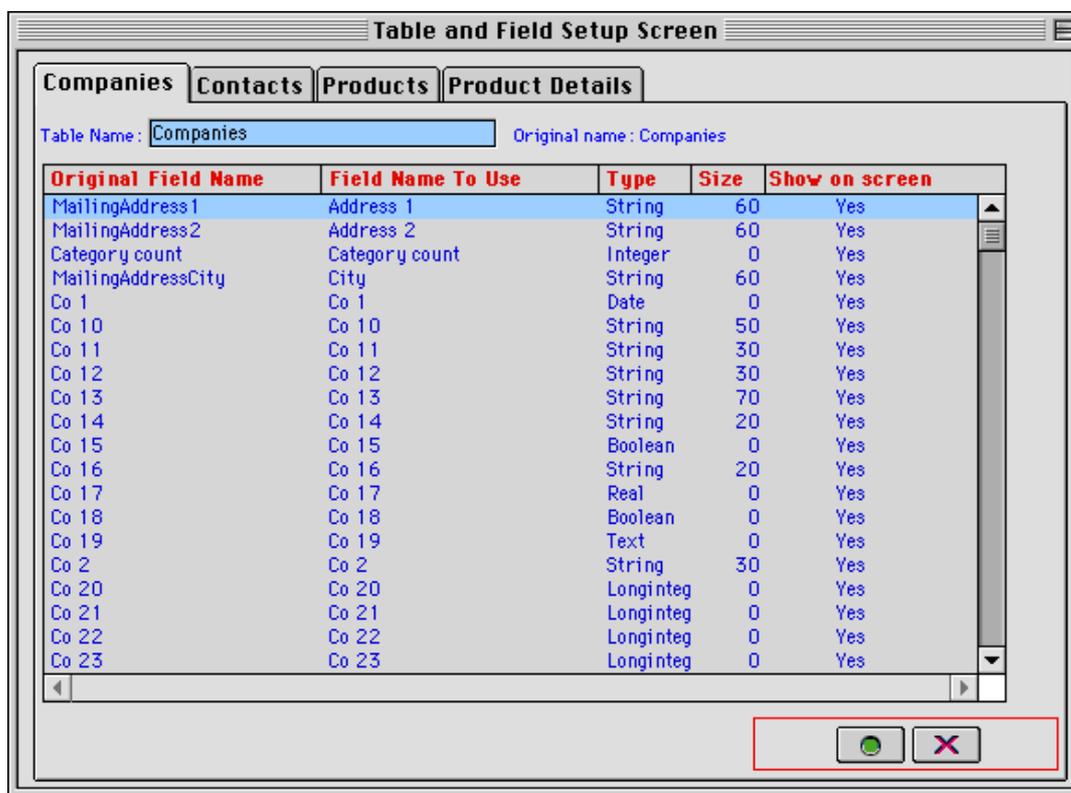


There are four pages to this screen: one for each table. Each page lists the fields available for that table.

Above the list of fields is the table name. To change the name of the table, simply click in this field and edit it.

The list of fields shows five columns of information:

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*Original Field Name*
This is the name of the field as it was originally set up in the database. You can't change anything in this column.

*Field Name To Use*
This is where you can specify the field name that you would like to use. To change a field name, click on it. You will then be able to edit it.

*Type*
This column tells you what type of field it is. Each field type is described below:

Boolean: Yes/No, or True/False data. Useful for keeping track of information such as whether or not the record has been updated since the last mailing. Boolean fields appear either as "Yes/No" radio buttons or as check boxes.:

Date: Well … this field is for holding dates.

Integer: A whole number (i.e., no decimal point) in the range of plus or minus 32000. Integer fields are useful for such information as number of employees, no. of family members, and that sort of thing (as long as you are sure it will never need to hold a number greater than 32,000).

Long Integer: An integer of any size.

Picture: Picture field.

Real: A real number (i.e., one that may have decimal places). Useful for information such as prices.

Short Text: A text field of a specific length (which is shown in the Size column). For example the Company Name field is 70 characters in length -- in other words, it will hold up to 70 characters. A String field cannot contain Return characters.

Text: A text field that can contain up to 32,000 characters, which may include Return characters.

Time: A field for keeping time data.

It's most important that you use the appropriate type of field for the type of data that you will putting into it. For example, if you want to keep track of the date on which you received information pertaining to each record, you would use one of the Date type fields. This will make it possible for you to easily search the database for records that have not been updated since a certain date, for example. If you put the dates into an ordinary text field, you wouldn't be able to do searches like that.

*Size*
This column shows the size of string fields (i.e., the maximum number of characters they can hold).

*Show on Screen*
In this column you can specify whether or not you want each field to appear on the data entry screen. You may want to hide fields that are not in use, so that

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they don't clutter up the screen and provide opportunities for people to enter data into the wrong fields. To change a field's display status, click on the appropriate line in this column. The display will change:



Click in the check box to toggle it on or off.

You can click in any column heading to sort the fields by that column. For example if you wanted to see what String fields were available, click in the Types column heading. All the fields will be sorted by type.

To change the table and field names for the other tables, click on the appropriate tab at the top of the screen.

As you are setting up the field names for each table, you may find it helpful to open up a record form that table in another window so that you can see where the various fields are used.

Remember, you are not under any pressure to "get it right" now. You can come back and change these settings any time you like.

When you have made all the changes you want to make now, click on the Save button (  ) to close the window and save the changes you've made.

## Setting Preferences

The next thing you should do is set up certain system parameters and defaults for your database.

➢ Choose Setup from the Admin menu.

The Set System Preferences screen opens up:

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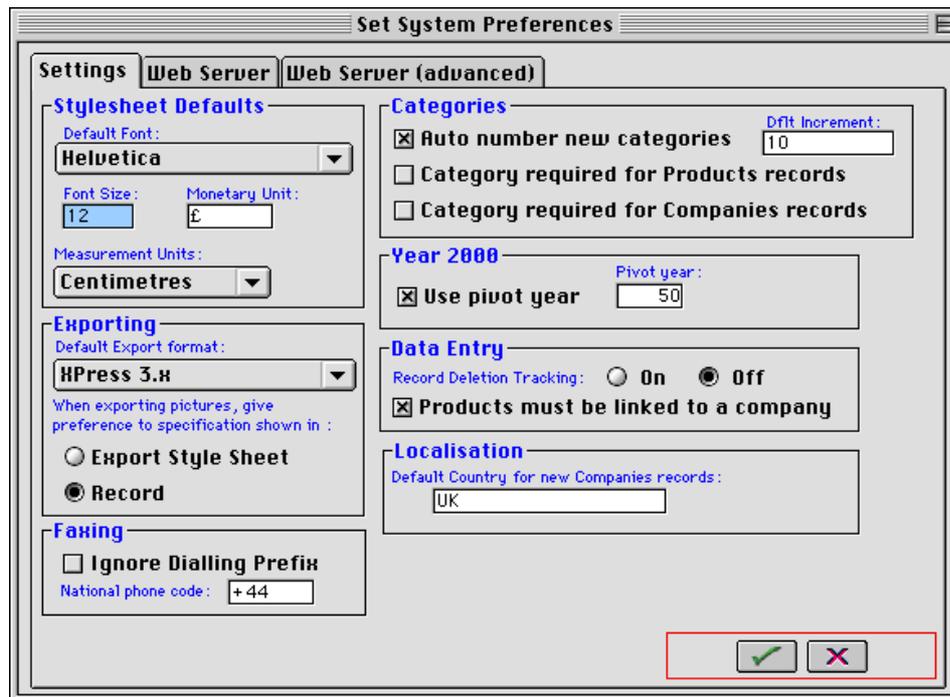


Note that in the rest of this chapter, we refer to the tables by their original names (Companies, Products, etc.) -- but yours may be different now.

You do not have to set all these defaults now. You can come back and change them at any time. However, you must at least make sure that the "Products must be linked to a Company" and the two category requirement selections are appropriate for your needs. While these options can be changed at any time, doing so after you have started entering data could result in your database being inconsistent.

Following is a description of each item on this screen.

*StyleSheet Defaults*
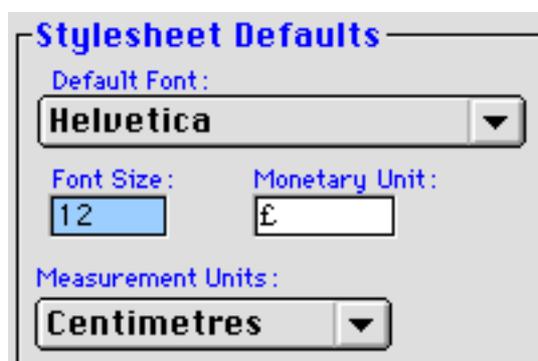


Default Font

Whenever you create a new Style Sheet, it will have the font that you choose here selected. Of course, you'll be able to change it for each Style Sheet.

Font Size
This is the font size that will be selected as a default when you create new Style Sheets.

Monetary Unit
This is the symbol that will be used as a default when you export numbers to be formatted as prices.

Measurement Units
The measurement unit to be used in your Style Sheets.

*Exporting*



Default Export Format
CatBase can export data in a number of different formats. Here you can select the format you're most likely to use, and this will be used as the default when you set up new Export Style Sheets. This is explained in detail in Chapter 7; for now, just select your usual page layout program.

When exporting pictures ...
If you are going to use pictures to illustrate your publications, you will set up a Picture element in your Export Style Sheet. In the Picture Element, you specify how you want the pictures to appear -- the size of the box, background, etc. This is fine if all the picture boxes are going to be formatted in the same way. If the pictures require individual specifications, you can set up a picture specification for each record. This preference lets you tell CatBase which specification to use. If you select the **Export Style Sheet** radio button, then the picture box specification that has been set up in the Export Style Sheet will always be used. If you select the **Record** radio button, then if a picture specification has been set up for an individual record, then that will be used; if none has been set up, then the Export Style Sheet picture specification will be used.

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*Faxing*



Ignore Dialling Prefix

The CatBase fax facility uses FaxExpress software on the Macintosh (this facility is not currently available for the Windows version). In FaxExpress, you can set up a dialling prefix which will automatically be used whenever you send a fax. This option allows you to tell FaxExpress to ignore the prefix when sending faxes from CatBase.

National phone code

The fax numbers in your database might contain international dialling codes (e.g., "+33 ...") -- because that is how you want them to appear in your publications. However, if you are sending faxes to those companies, you won't want to include the prefix for your own country. If you enter your "home" country prefix in this field, it will be replaced with a 0 when you send faxes.

*Categories*
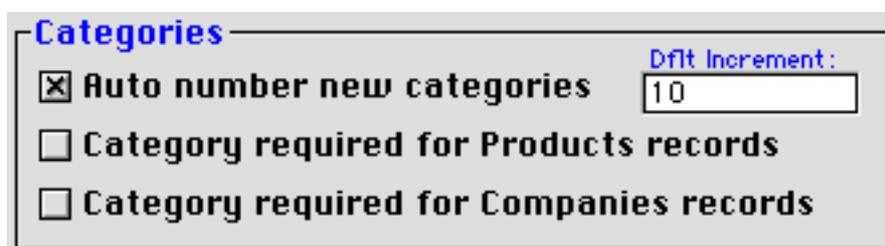


*Auto number new categories*

When you add new Categories, each Category must have a unique number. If you don't care what the numbers are, then select the Auto Number check box and CatBase will assign numbers for you. If you have specific numbers that you want to use, un-check this box. You will then have to type in the number that belongs to each Category.

*Dflt Increment*

If you have selected Auto number new categories, each new number will increased by the amount shown here. This can be useful if you want to leave a gap between numbers to allow for others to be inserted at a later date.

Hint: When you are setting up Export Style Sheets to export data sorted by Category, you can elect to have the Categories sorted either by name or number. If you want to control the order in which the Categories will appear (i.e., not in alphabetical order), then you can simply number them in the order you want them.

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*Category required for Product records*

You can assign as many categories as you wish to each Product record. However, you can decide whether you want to make it a requirement that each product record be assigned to at least one category:

☐ **Category required for Products records**

When this setting is selected (the box is checked), you will not be able to save a Product record unless at least one Category has been selected for that record. This will be important if you are planning to create a publication in which products are organised by Category -- if a Product isn't in any Categories, it won't appear in the catalogue!

*Company category required*

Like the Product category required option, you can also make it mandatory that each Company record be assigned to at least one category:

☐ **Category required for Companies records**

*Year 2000*

```
┌─Year 2000──────────────────────┐
│                    Pivot year:  │
│  ☒ Use pivot year      50       │
│                                 │
└─────────────────────────────────┘
```

CatBase is fully Year 2000-compliant. We have added this feature to simplify data entry of dates. If you type a date using two digits for the century, CatBase will decide what the century is according to the pivot year you have selected here. For example, if the pivot year is 50, CatBase will assume that any year of 50 or later is the 20th century, and any year less than 50 is the 21st. century. In other words, if you enter 1/1/50 this will be converted to 1/1/1950, or if you type 1/1/49, this will be converted to 1/1/2049.

Note: All dates are maintained in the database and displayed with a four-digit year, with one exception: if you click into a date field in which a date in the current century has been entered, it will display the century as two digits.

*Data Entry*

```
┌─Data Entry──────────────────────────────┐
│  Record Deletion Tracking:  ◉ On   ○ Off │
│  ☒ Products must be linked to a company  │
└──────────────────────────────────────────┘
```

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*Record Deletion Tracking*
    If this option is selected ("On"), CatBase will keep track of Company and Product records that are deleted. Record deletion is described in detail in the Administrator's Reference.

    *Products must be linked to a company*
    By default, each product record must be related to a company record in CatBase. This means that when you create a new Product record, you must select a Company for that product to be related to. However, this may not be appropriate for your needs — if you are publishing a catalogue of your own products you don't need to relate them to a company. To release this requirement, uncheck the **Products must be linked to a company** check box.

    Localisation



    <u>Default</u> <u>Country</u> <u>for</u> <u>new</u> <u>Companies</u> <u>records</u>
    When you create a new Company record, this entry will appear in the Country field. If you don't want anything to appear, just leave this field blank.

## Web Server
    Setting up the Web Server is described in detail in Chapter 6. It would probably be a bit premature to get involved in the web server at this point, so please refer to Chapter 6 when you are ready for it.

    When you are satisfied with your settings, click on the Save button to return to the main CatBase screen.

## Changing The Administrator Password
    You may want to change your Administrator password for security reasons. This is not mandatory but we do recommend it if there is any likelihood that other people will be using the database. To change your password:
    ➢ At the main CatBase menu, choose **Preferences** from the **File** menu. The following window appears:
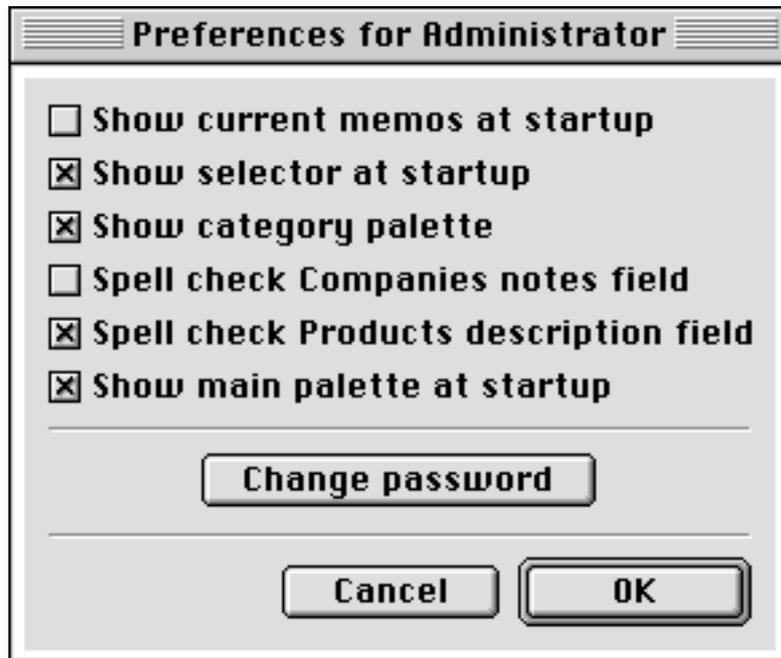
➢ Click on the **Change password** button.
⚊ Enter your new password. It can consist of up to 15 alphanumeric characters.
➢ Click on OK.
⚊ You will be prompted to enter the new password again to confirm it.

If the second entry doesn't match the first, you will have to keep trying until you enter a matching password or cancel.

Don't forget your password! There is no way to determine what the Administrator password is once it has been accepted, and if you do not remember it correctly, you will not be able to log back on as the Administrator.

## Setting up Users

You'll need to create a User record for each person to whom you want to allow access to the database. If you have purchased the Single-User version and you are the only person who will be using the database, you can skip this section.

At the main CatBase screen:
➢ Choose **Users** from the **Admin** menu.
The standard Search window opens up:

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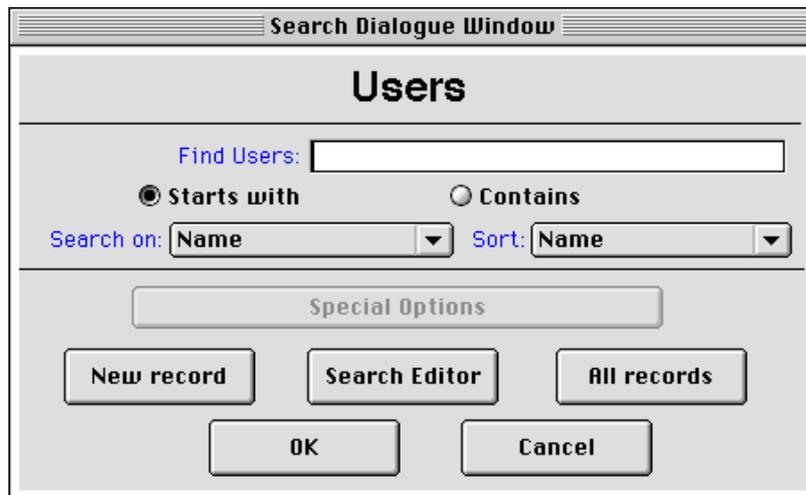


➢ Click on **New Record**.
A new User record opens up:
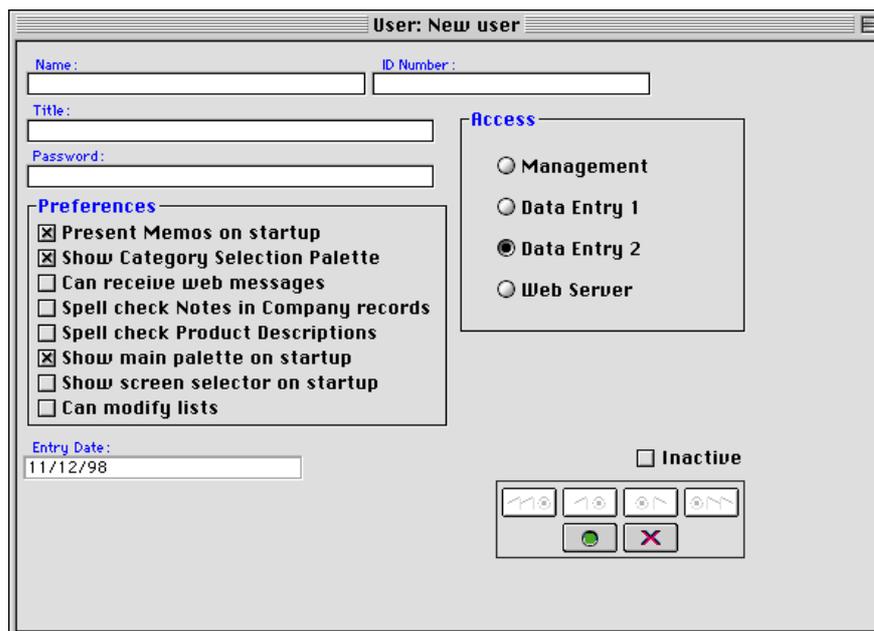


Name
  ⊸ Enter the new user's name into the Name field. This will be used by CatBase when records are created or modified. For example, on the **Memos/Other** tab of the Products data entry screen you will find this information:

| Enter Date | Enter by |
|------------|----------|
| 27/06/1998 | Administrator |
| Modify date | Modify by |
| 05/09/1998 | Administrator |

CatBase automatically keeps track of who created the record and who was the last person to modify it. This can be useful if, for example, you have hired somebody to work in your office for a day updating records. At the end of the day you want to print out all the records she modified so that they can be proofed. You would set her up as a User before she began work, and then at the end of the day, simply search for all records with her user name in the Modified by field. You can also use these fields to quickly find (for example) all records that have not been modified since a certain date.

### ID Number
You can keep track of each user's personnel number or whatever in this field if you wish. It isn't mandatory and it is not used anywhere else in the database. This field is 12 characters in length.

### Title
☞ Enter the user's title, if you wish, into the *Title* field. This field is not used anywhere in the database; it is there for your record-keeping. The *Title* field is 20 characters in length.

### Password
☞ Enter a password for this user into this field.
NOTE that the password is displayed in a special font, Whenever you open the record, the Password field will display a special symbol in place of each letter of the password. It will look something like this:

Password:
🔒🔒🔒🔒🔒

There is no way for you to determine what the password was. The Administrator can, however, change any user's password by making a new entry into the Password field. Each user will be able to change his own password at any time by choosing **Preferences** from the **File** menu.

### Present Memos on Startup
The **Present Memos on Startup** check box is selected by default for a new User. Each time the user logs on to CatBase, the program will check to see if there are any current Memos for him and will list any it finds. To disable this option, click in the check box to deselect it.
Each user can change this option by choosing **Preferences** from the **File** menu.

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Show Category Selection Palette
When you are working with a Company or Product record, you may need to select Categories for that record to go under. There are two ways to do this: by clicking on the Add Category button, and by choosing a category from the Category Selection Palette. The Category Selection Palette is a floating window that looks like this:
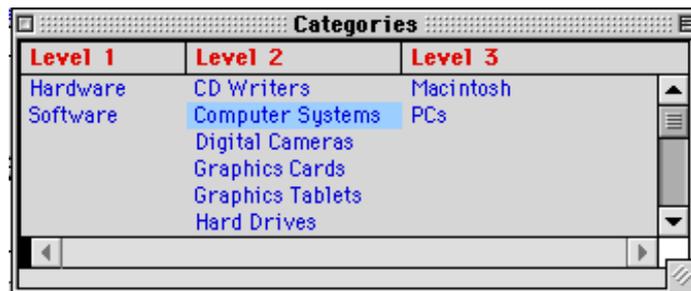


If you are working on a small monitor you may find that this gets in your way, or perhaps you just prefer to use the other category selection method. If you don't want the palette to appear, un-check the **Show Category Selection Palette** check box.

Can Receive Web Messages
When CatBase is running as a web or intranet server, people browsing the database can send messages to Users if this box is checked. This is explained in more detail in Chapter 6.

Spell Check Notes in Company Records
If this box is checked, the spelling checker will be activated whenever text in the Notes field in a Company record is modified.

Spell Check Product Description
If this box is checked, the spelling checker will be activated whenever text in the Description field in a Product record is modified.

Show Main Palette on Startup
If this box is checked, the CatBase Options palette will be displayed each time the user starts up the database.

Show Screen Selector on Startup
If this box is checked, the Screen Selector floating palette will be displayed each time the user starts up the database.

Can Modify Lists
If this box is selected, the User has the authority to modify items in choice lists. For example, on the contacts screen there is a choice list for Salutation. If you type in a salutation which is not in the list, and you do not have the authority to modify lists, you will see a message like this:
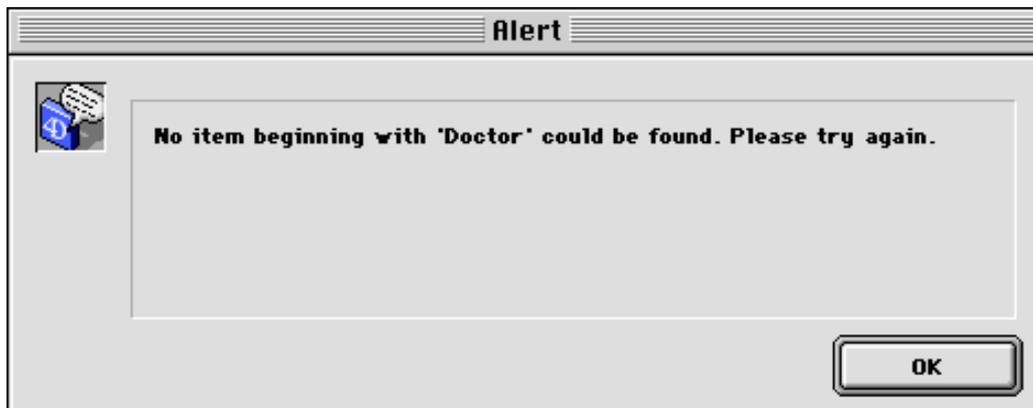
However, if you do have the authority to modify lists, you will be asked if you want to add the item to the list.

### Entry Date

The date on which this User record was created. This date is maintained by the system; you cannot change it.

## Access

There are four levels of access within CatBase: Management, Data Entry 1 (or DE1), and Data Entry 2 (DE2), and Web Server. You designate access levels for the users by selecting the appropriate radio button in the Access box on this screen:
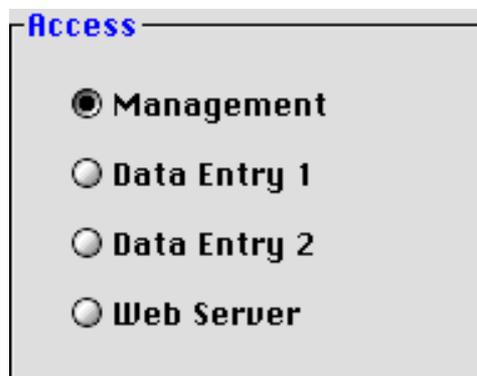


The default access level for a new User is Data Entry 1. A user's access level determines which menu bar he will see when he logs on to CatBase. The following chart illustrates the options offered under the various menu bars:

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## Management

| **File** | **Data** | **Admin** |
|---|---|---|
| Options Palette | Companies | Turn Web Server On |
| Import | Products | Flush Web Cache |
| Memos | Product Details | Web Connection Monitor |
| Preferences | Categories | Web Response Monitor |
| Send Message | Contacts | Users |
| Send Email | Export Style Sheets | Delete Records from Db |
| Show Screen Selector | Style Sheets | Setup |
| Save Database | H&Js | Table and FIeld Setup |
| Quit | Colours | Zap Table |
| | Email Accounts | Lists |

## Data Entry 1

| **File** | **Data** |
|---|---|
| Options Palette | Companies |
| Import | Products |
| Memos | Product Details |
| Preferences | Categories |
| Send Message | Contacts |
| Send Email | Export Style Sheets |
| Show Screen Selector | Style Sheets |
| Save Database | H&Js |
| Quit | Colours |

## Data Entry 2

| **File** | **Data** |
|---|---|
| Options Palette | Companies |
| Memos | Products |
| Preferences | Product Details |
| Send Message | Contacts |
| Send Email | |
| Show Screen Selector | |
| Save Database | |
| Quit | |

### Web Server

The Web Server user has the same menu bar as Management.

### Inactive

You can temporarily deny access to a user by checking the Inactive check box in his User record. When he tries to log on, he will see a message informing him that his access has been denied and he should see the System Administrator, and the database will quit.

## Categories

If you have selected the appropriate options on the Setup screen, every Product or Company record entered into the database must be assigned to at least one Category. You will need to set up one or more Category names before any Product  or Company records can be entered.

CatBase allows Categories to be set up in a three-level hierarchy. For example, you might need a hierarchy like this:

| Level 1 | Level 2 | Level 3 |
|---|---|---|
| Hardware | | |
| | CPUs | |
| | | Macintosh |
| | | IBM |
| | | Compaq |
| | Disk drives | |
| | | Floppy |
| | | Hard |
| Software | | |
| | Business | |
| | | Accounting |
| | | Database |
| | Personal | |
| | | Games |
| | | Finances |

With this kind of setup, it will be easy to create catalogues or directories sorted by category and sub-category. For example, you might put each product into one or more Level Three categories. Next, you would set up different Style Sheets for the Level 1, 2, and 3 category headings. Then when the data is exported, you will see each Level One heading with its Level Two headings underneath, and underneath each Level Two heading will be its Level Three headings with the appropriate products shown under each Level Three heading. If this concept isn't clear, please take a look at the *Companies by Cat + Contacts* example Export Style Sheet in the Demo/tutorial database:

i.      Open up the Demo database.

ii.      Choose Categories from the Data menu and click on All Records.

iii.      Choose Export from the File menu.

iv.      Select the *Companies by Cat + Contacts* Export Style Sheet and, if necessary, change the export format from QuarkXPress to PageMaker or whatever you prefer, then click on OK.

v.      Export the data and then open it up in your page layout program. It should look something like this:

| Hardware | Fred Smith | Filemaker |
| --- | --- | --- |
| *Computer Systems* | **Radius Inc.** | **Microsoft** |
| **Apple Computer UK** | | |
| Kate Marshall | *Printers* | *Integrated Packages* |
| Jane Robbins | **Apple Computer UK** | **Microsoft** |
| Fred Smith | Kate Marshall | |
| **Dell Computers** | Jane Robbins | *Operating Systems* |
| Paul Robinson | Fred Smith | **Apple Computer UK** |
| Joann Smith | | Kate Marshall |
| | *Removable Media* | Jane Robbins |
| *Digital Cameras* | **Iomega** | Fred Smith |
| **Connectix** | | **Microsoft** |
| | *Scanners* | |
| *Graphics Tablets* | **Apple Computer UK** | *Plug-Ins* |
| **Wacom** | Kate Marshall | |
| | Jane Robbins | Photoshop Plug-Ins |
| *Keyboards* | Fred Smith | **Extensis** |
| **Apple Computer UK** | **Microtek** | |
| Kate Marshall | **Software** | *Publishing Packages* |
| Jane Robbins | | **CatBase Software Ltd.** |
| Fred Smith | *Authoring* | James Andrews |
| | **Apple Computer UK** | Pat Bensky |
| *Mice* | Kate Marshall | Max Bensky |
| **Apple Computer UK** | Jane Robbins | Kate Robbins |
| Kate Marshall | Fred Smith | **Microsoft** |
| Jane Robbins | **Macromedia** | |
| Fred Smith | | *Utilities* |
| | *Databases* | **Apple Computer UK** |
| *Monitors* | **CatBase Software Ltd.** | Kate Marshall |
| **Apple Computer UK** | James Andrews | Jane Robbins |
| Kate Marshall | Pat Bensky | Fred Smith |
| Jane Robbins | Max Bensky | |
| | Kate Robbins | |

OK, so your art director would have a fit if you tried to publish something like this, but it's just for illustrative purposes. The Level One headings (Hardware and Software) are shown with their Level Twos sorted alphabetically below (*Computer Systems*, *Digital Cameras*, etc.), and the Level Threes shown under the Level Twos (in this example, there is only one Level Three category in use: Photoshop Plug-ins). Under each category heading are listed the companies that have been put into that Category, along with a list of their contacts.

On the other hand, you might need no more than one level. That's all right; you do not have to have Level 2 or Level 3 Categories.

You must, however, have at least ONE Level 1 Category.

*Setting up Categories*
<u>Level One Categories</u>

➢ At the main CatBase screen, choose **Categories** from the **Data** menu.
➢ Click on **New Record** at the Search dialogue.
A new Level 1 Category record appears:

**2.24**

### Level 1 Category Name
☞ Enter the category name into the *Level 1 Category Name* field and press Tab. Category names do not have to be unique. Category names can consist of up to 80 alphanumeric characters.

### Category Number
If the `Auto number new categories` check box was checked in Setup, CatBase creates a category number for you. The number is calculated by taking the highest existing category number and adding the Increment amount to it.  You can change the number if you wish, by tabbing into the Number field or selecting the number and typing in the number you want to use. If you change the category number, the number you enter will become the new highest number for the purpose of creating more new category numbers. For example, let's suppose that your current highest category number is 4000 and the increment amount is 10. When you create a new category, CatBase will assign it the number 4010. However if you change that number to, say, 3500, the next new category you enter will be 3500+10. But the next time you launch CatBase, the highest number will again be set to the highest existing category number in the database.

If the `Auto number new categories` check box is not selected in Setup, you'll have to enter a category number into the Number field.

Category numbers must be unique.

### Picture Name and HTML Picture Name
Category headings can either be text or pictures. For example, you may want to use pictograms for your category headings instead of text. To use pictures as category headings, you simply need to create the pictures and save them in the appropriate format (i.e., a format that is supported by your intended publishing

destination). We have provided two picture field names for Categories: one for print, and the other (HTML Picture Name) for use in HTML documents or on the Web. For example, you might create an EPS for use in your QuarkXPress documents, and a JPEG for use on the Web.

When you set up Export Style Sheets, you will be able to specify, for each Export Style sheet, how you want the Category headings formatted (pictures or text, etc.).

You will find detailed information about using pictures with various publishing destinations in Chapter Three.

If you do not need any Level 2 or 3 Categories for this Level 1 Category, click on the Save button. A new blank Level 1 Category screen will appear; enter another category or click on the Cancel button to return to the main CatBase screen.

Level Two Categories

If you need to set up one or more Level 2 Categories for this Level 1 Category:

➢ Click on the **Add** button above the Level 2 Categories area.
A blank Level 2 Category screen opens up:
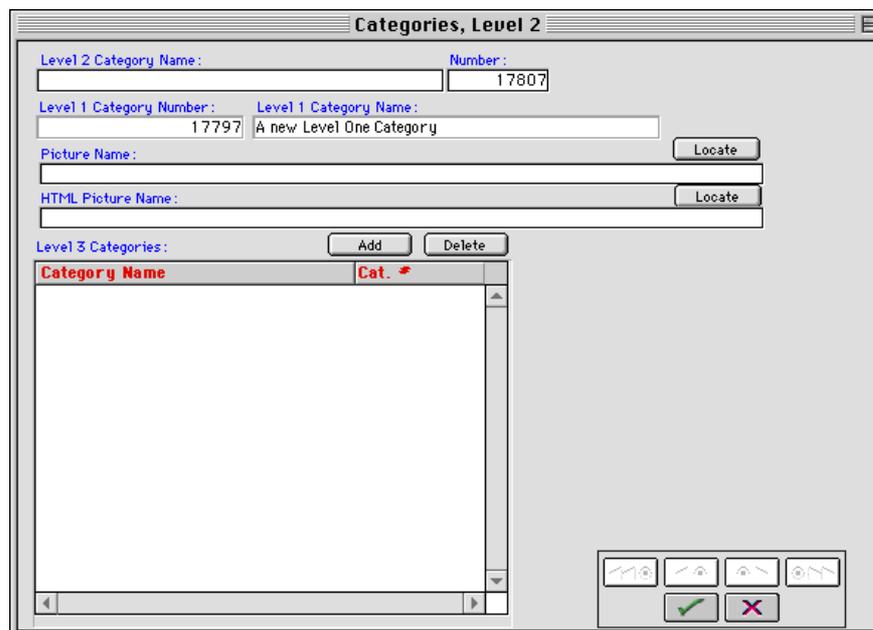


CatBase has entered the appropriate Level 1 category number and name; you cannot change these on this screen.

&#9473; Enter a name and number for this category as you did for the Level 1 Category.
&#9473; You can select Picture Names for Level Two Categories in the same way as for Level One Categories.

## Level Three Categories

To enter a Level 3 Category, click the **Add** button above the Level 3 Categories area.

You can have as many categories on all three levels as you need.
You can not have a category number of less than 1.

When you have finished setting up your Categories, we suggest that you print out a Category Report so that you can check them. To do this:

➢ At the main CatBase screen, choose `Categories` from the `Data` menu and click on **All Records.**

At the bottom of the category list window there are various buttons:



*Show Hierarchy*

To review your category hierarchy before you print the report, click on this button. The view will change to something like this:
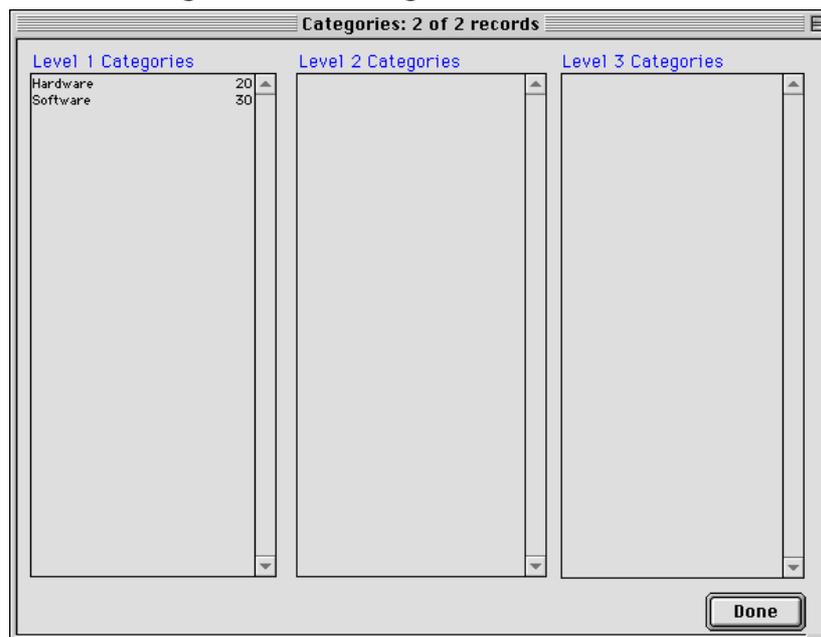


➢ Click on one of the Level One Categories to see its Level Twos; click on a Level Two category to see its Level Threes.

➢ Click on Done to return to the category list.

Print Hierarchy

➢ Click on the Print Hierarchy button to print the category list. You'll see a dialogue like this:

# SETTING UP YOUR DATABASE



You can send the category report directly to the printer, or to a disk file. If you send it to a disk file, you'll be able to open the report up in a word processor or page layout program and format it any way you like.

## Setting Up Your Formatting Options

You will probably want to set up your database so that the hyphenation and justification tables and colours that you use in your publication are available for use when designing Style Sheets. There are two options under the **Data** menu for this purpose.

### *H&J … (Hyphenation and Justification) … for XPress users only*
If you have set up custom Hyphenation and Justification tables in your QuarkXPress document, you will need to let CatBase know about them. A new CatBase database has just one H&J name installed: Standard. Unless you specify otherwise, this will be applied to any new style sheets you create.
To add new H&Js:
➢ Choose **H&J** from the **Data** menu
The following window opens up:
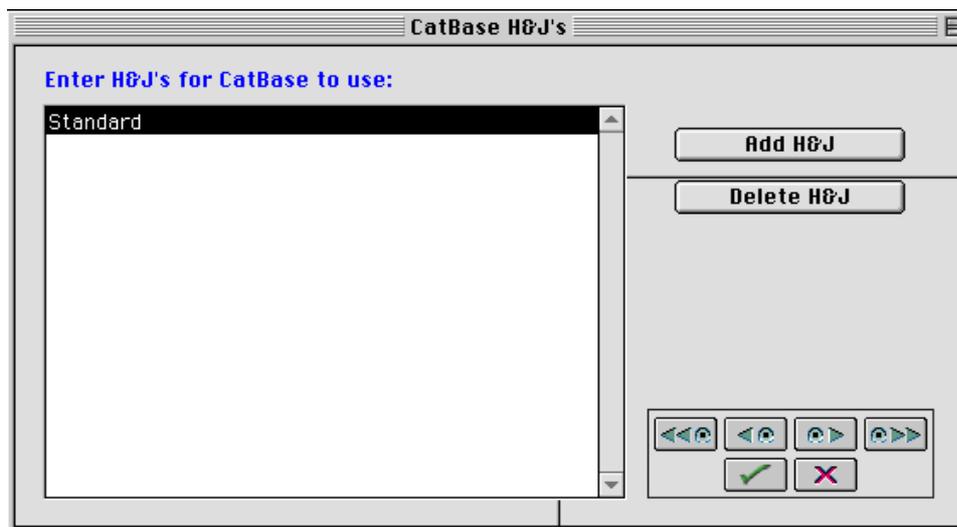
➢ Click on Add H&J to add a new entry. You'll be asked for the name of the new H&J:



Not much to do here!

➼ Type in the H&J name. NOTE: be sure to enter it EXACTLY as it is entered in your XPress document, including upper and lower case. Otherwise you will get an error message when you import your data into the Quark document using this H&J setting.

➢ Click on **OK**.

When you create a new style sheet, the H&J names you entered into your database will be available from the pop-up menu on the Style Sheet screen:



Colours …

CatBase arrives with a basic set of colour choices installed. The basic set is:
    Black
    Blue
    Green
    Red
    White

If you have designed some custom colours for use in your documents, or if you want to create some non-standard colours to use in HTML documents, you'll want to add them to your CatBase database. To do this:

➢ Choose **Colours** … from the **Data** menu.

The Colours window opens up:

# SETTING UP YOUR DATABASE

```
╔════════════════════ CatBase Colours ════════════════════╗

  Choose colours for CatBase to use:
                                              Hexadecimal
  Colour                    Red   Green  Blue    (HTML)
  ┌────────────────────────────────────────────────┐ ▲    ┌──────────────┐
  │Black            0      0      0     000000  │      │  New colour  │
  │Blue             0      0    255     0000FF  │      └──────────────┘
  │Bright Green     0    255      0     00FF00  │      ┌──────────────┐
  │Gold           161    113      0     A17100  │      │Delete colour(s)│
  │Green           34    130      0     228200  │      └──────────────┘
  │Lilac          128    130    255     8082FF  │      ┌──────────────┐
  │orange         255    135      0     FF8700  │      │ Modify colour │
  │Red            255      0      0     FF0000  │      └──────────────┘
  │sky blue        82    155    255     529BFF  │
  │White          255    255    255     FFFFFF  │
  │                                             │
  │                                             │      ┌──┐┌──┐┌──┐┌──┐
  │                                             │      │◀◀││◀ ││ ▶││▶▶│
  │                                             │ ▼    └──┘└──┘└──┘└──┘
  └────────────────────────────────────────────┘         ┌──┐┌──┐
                                                          │ ✓││ ✗│
                                                          └──┘└──┘
╚══════════════════════════════════════════════════════════╝
```
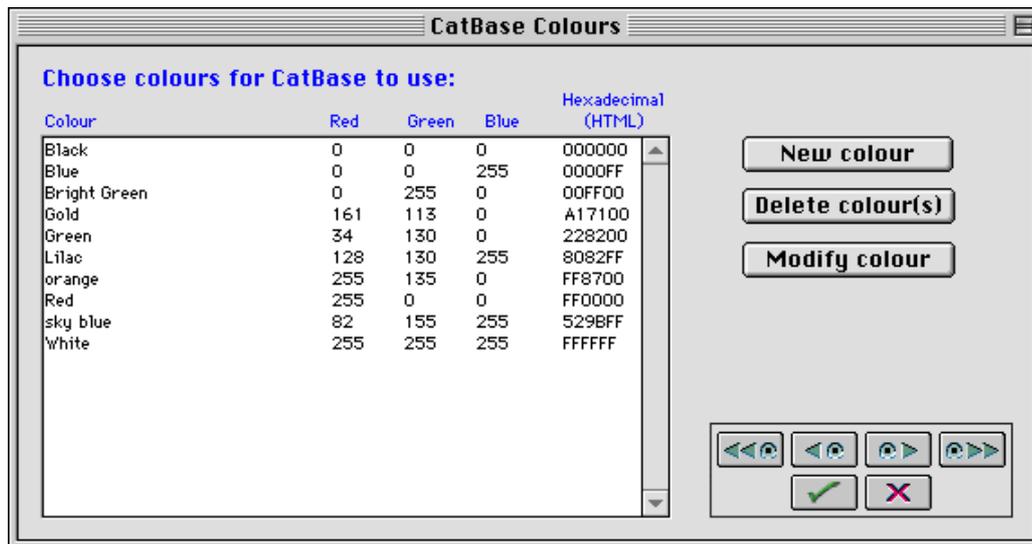
This window shows a list of all the colours that have been set up, along with
their RGB (Red, Green, Blue)  and Hexadecimal values.

*RGB Colour Values*
For some publishing formats (RTF, for example) the program needs to know
how each colour is mixed using the three basic colours.

*Hexadecimal Colour Values*
For HTML documents, you need to supply the hexadecimal value for colours
other than the basic colour set supported by HTML.

To add a new colour, click on the New Colour button.
The Colour editing window looks like this:

**Add colour**

Name:

**Create a colour**

| | 0 |
| | 0 |
| | 0 |

Hexadecimal value: 000000

Cancel    OK
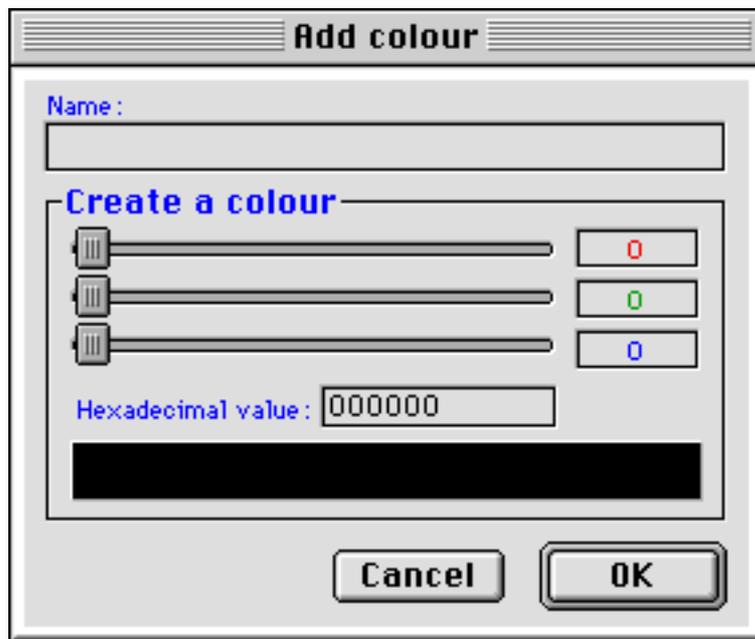
☞  Enter the colour name into the Colour Name field.

NOTE: QuarkXPress users — Make sure you enter it EXACTLY as it is set up in your XPress document, including upper and lower case. Also, if the only publishing destination you will be using is QuarkXPress, you do not need to set the colour values – just make sure that the colour name is spelled correctly.

Now you can create your colour using any one of the following three methods:

*RGB Value Sliders*
Move one of the three sliders to the right to increase the value of that colour. As you move the slider, you'll notice that the other values on this window change dynamically.

*RGB Values*
You can type a number directly into the RGB value fields to the right of the sliders. The maximum value is 255.

*Hexadecimal Value*
If you know the hexadecimal value of the colour you want to create, you can type it into the Hexadecimal Value field.

A new colour might look like this:
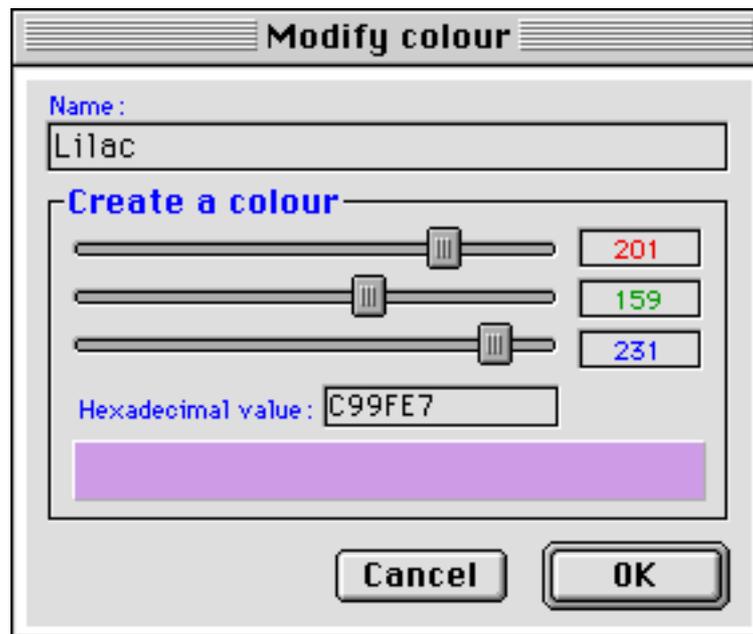
➢ Click on **OK** to save your new colour.

You can have as many Colours as you like.

When you are designing style sheets, your customised list of colours will be available on the pop-up Colours menu:



## Choice Lists

Some fields in CatBase let you pick from a pre-defined selection of choices. You can always recognise a choice list field because you will see a small black arrow to the right of the field. For example, the Country field on the first page of the Companies data entry screen looks like this:



You can enter data into a choice list field either by making a selection from a pop-up menu, or by entering the data into the field.

To make a selection from the pop-up, click on the little black arrow and hold

the mouse button down. A list will pop up, from which you make a selection. If nothing happens when you click on the field label, then no selections have been set up for that particular field.

For example, if you click on the Country field label, you'll see a pop-up something like this:
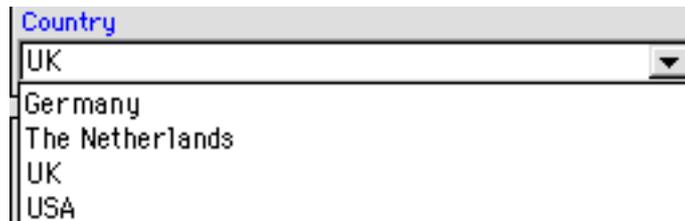


Move the pointer to the item you want and release the mouse button. Your chosen item is copied into the field. If you move the pointer off the pop-up list and release it without selecting anything, nothing is copied into the field.

You can also enter data into pop-up list fields by typing it directly:

➢ Click or Tab into the field
= Enter some text.
➢ Press the Tab key.

CatBase checks to see if the text you have entered matches an item in the list. If it does, that item is copied into the field. You do not need to enter the complete item; in the Salutation field example above, you could enter the letter d and press the Tab key. CatBase would find the first match ("Dr.") and copy that into the field.

If no matching entries are found, and if you have been given privileges to modify lists (as described in the Users section of this chapter), you are given the option of adding your entry to the list:
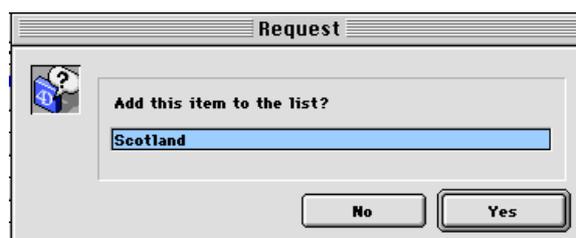


You can make changes to the entry here if you wish. If you click on **Yes**, the item is added to the list and copied into the field. If you click on **No**, the item is not added to the list, and it is left in the field just as you entered it. If you added an item to the list, it will be available in the list immediately.

If you do not have privileges to modify lists, you will see a message informing you that the item was not in the list, and the field will be cleared.

Sometimes you will want to make a new entry for the list, but CatBase thinks that it already has a matching entry and will not let you add your new item. For example, there is a choice list field for Title in the Company Contacts screen.

# SETTING UP YOUR DATABASE

Perhaps there is already an item on the list for Director of Marketing, but you want to add an entry for Director. When you enter Director, CatBase thinks that you want to use Director of Marketing and automatically uses that entry instead of letting you add your new entry to the list. There is an easy solution: You can force CatBase to add your entry simply by preceding it with a + sign. In the example used here, you would enter "+Director" and press the Tab key. CatBase immediately adds Director to the list and places that entry into the field.

You can also set up or delete items from your Lists by using the `Lists` … menu selection from the `Admin` menu. This is the best way to set them up when you know what you want to add and you want to do it quickly. To do this:

➢ Choose `Lists` … from the `Admin` menu
➢ Click on `All Records`
➤ Modify the lists as necessary

There are ten choice lists. Following is a list of the fields that have choice lists, and where to find them.

| Field | Location |
|---|---|
| Actions | Memos |
| Co 2 | Company record, Info tab |
| Country | Company record, Address tab |
| Co 6 | Company record, Info tab |
| Job Function | Contacts |
| P2 | Product record, Memos/Other tab |
| Reason | Memos |
| Response | Memos |
| Salutation | Contacts |
| Titles | Contacts |

(Your fields may have different names to those shown here if you have changed them in Table and FIeld Setup).

## Make a Backup

We suggest that at this point you Quit from CatBase and make a backup of your data file. Back it up onto removable media, floppy disk (or set of floppy disks, depending upon the backup program you use), or another hard disk. You can then use this data file as your "master" whenever you want to start a new database.

## Multiple Data Files

You can have more than one data file for use with your CatBase program. You might want to do this if, for example, you want to "freeze" one version of the database while you are finishing up production, and make a copy to begin updating for the next issue, or if you want to use CatBase for several different projects. Each time you launch CatBase by double-clicking on the CatBase program, it will automatically open the data file that was opened the last time you used CatBase.

# SETTING UP YOUR DATABASE

To open a different data file, either double-click on the data file you want to use, or drag and drop that data file onto the CatBase program icon.

## Getting Data Into The Database

Your database is now ready for use. You have one more decision to make: Are you going to import existing data, or start entering records manually?

You can import data from virtually any other database, spreadsheet, or word processor, from virtually any computer system. This process is explained in detail in Chapter 8, Importing Data.

Entering data manually is explained in the next chapter.

# SETTING UP YOUR DATABASE