EXPORTING DATA

Table of Contents

EXPORTING DATA

In order to publish the data that's in your database (other than as an intranet or internet server), you need to export it from the database and put it into another application, such as a page layout program, or to create certain types of text files for use in other applications (such as web browsers).

There are two basic ways to export data:

- Exporting via Export Style Sheets
  This method uses the Export Style Sheets that you have designed to meet the specific formatting requirements of your publications. Please refer to Chapter 6 for information about Export Style Sheets.
- Using Quick Report to export data.
  This is useful if you want to do a simple export of raw data to a delimited text file. It is very fast, and easy to set up.

Exporting using Export Style Sheets

This is the method you will probably use most of the time to export your data.

When you have set up one or more Export Style Sheets (as explained in Chapter 6), you can use them to create the text files that will comprise your publication. The steps involved in doing this are:

- Select the records to include in the publication.
- Select the Export Style Sheet to use
- Export the data to a text file.
- Import the text file into another application

The procedure is explained in detail below.

Selecting records to export

When you set up your Export Style Sheets, each one was based on either the Companies, Contacts, Products, or Categories table. Now that you are ready to export the data, you will first select the records that will comprise your publication from one of those tables.

This is what to do:

➢ At the main CatBase screen, choose either Companies, Products, Contacts, or Categories from the Data menu (your tables may have different names). Remember that if you want the data sorted by Category, you should have designed an Export Style Sheet based on either Company Categories or Product Categories, and now you should choose Categories and not Companies or Products from the Data menu. This is because CatBase will sort the Categories by name or number and will then search for all the Company or Product records that belong to each Category.

➢ At the Search Dialogue, click on **All Records** to include all records in the table, or on Search Editor to search for selected records to include. You might do this if, for example, you want to break the data down into sections. If there are a large number of records you might want to create a separate file for each letter of the alphabet, or for each country, or for each category. Use the Search Editor to search for the records you want to export now. The Search Editor is explained in detail in Chapter Four, Searching and Sorting.
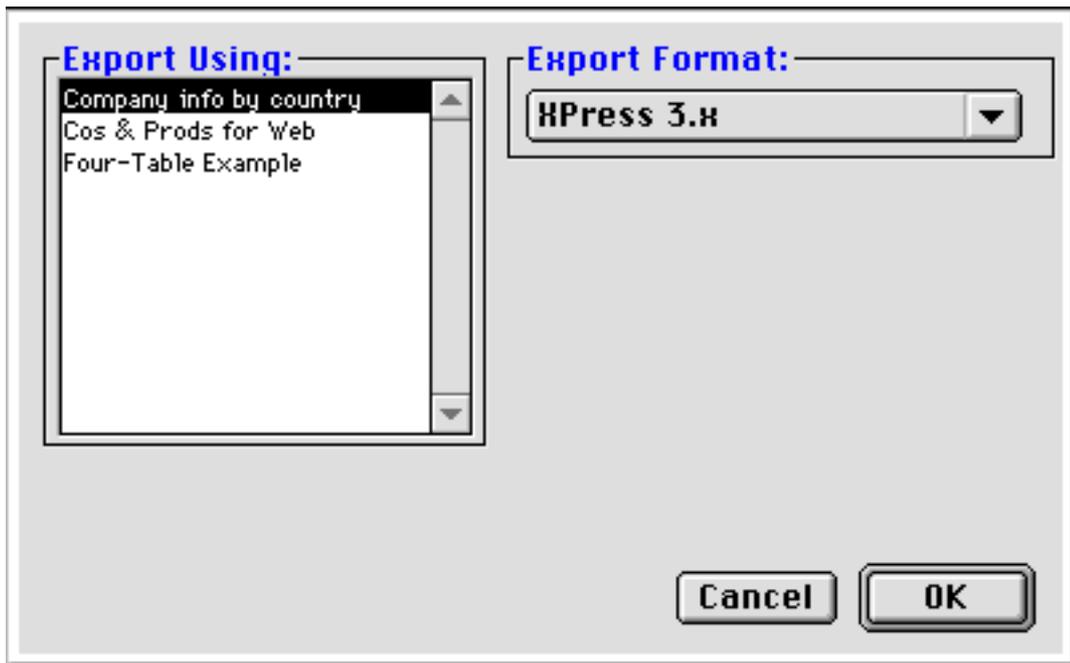
EXPORTING DATA
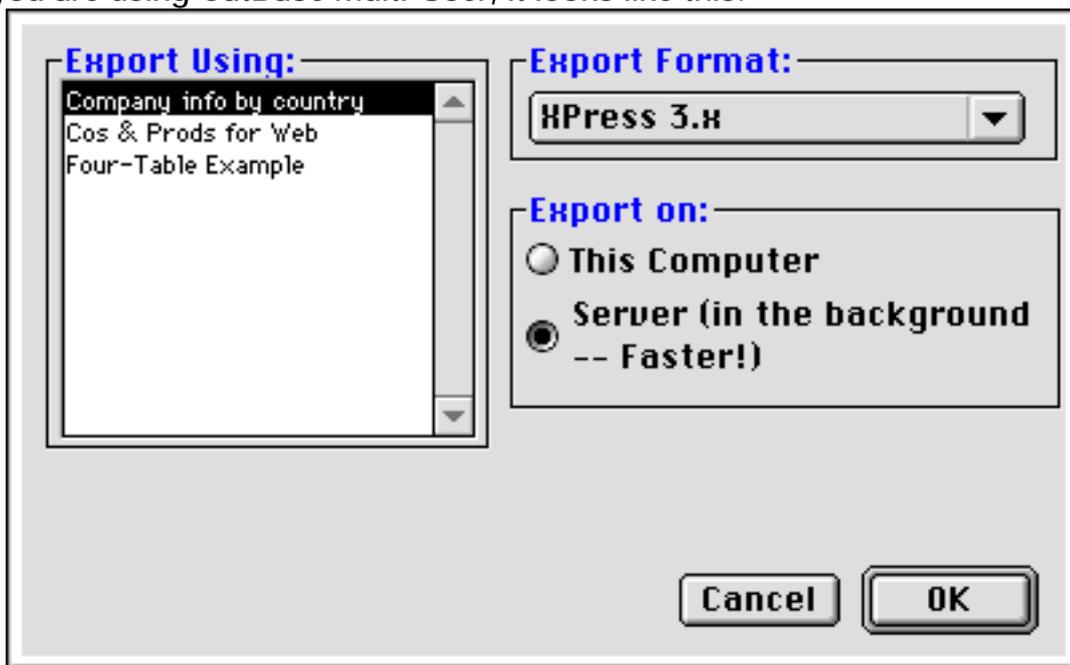
➢ When a list of records is displayed, scan it to make sure you've got the records you want to put into your publication, and then choose **Export** … from the **File** menu.

Choosing the Export Style Sheet
The following dialogue box opens up:

If you are using CatBase Multi-User, it looks like this:

The list on the left of this screen includes all Export Style Sheets that are based on the table whose records you have selected. If an Export style Sheet you have designed is not listed, that is probably because the Export Style Sheet is based on a different table than the one from which you are trying to export data. For example, you based it on Companies but you currently have a list of Products displayed on your screen. Keep in mind that if an Export Style Sheet is based on either Company Categories or Product Categories, you will need to create a list of Categories from which to export data, not Companies or Products. CatBase will find all the appropriate Company or Product records that belong to each Category as the Categories are exported.

Export Format

The Export Format pop-up lists all possible exporting destinations. The choices are:

```
HTML
Multi-Ad Creator2
PageMaker 6.5+
PageMaker 6.5-
Plain Text
XPress 3.x
XPress 4.x
RTF
```

Export Format Name	Description
HTML	Creates a tagged text file which can be interpreted and formatted by a web browser such as Netscape Navigator or Internet Explorer. Can include pictures.

|	
Multi-Ad Creator2	Creates a tagged text file which can be interpreted by Multi-Ad Creator (Mac only).
PageMaker 6.5+	Creates a tagged text file for use with PageMaker version 6.5 or later. Can include pictures.
PageMaker 6.5-	Creates a tagged text file for use with PageMaker versions prior to 6.5.

EXPORTING DATA

Plain Text	Creates a plain delimited text file. There is no formatting information in the file. Each field is separated by a specific delimiter (as specified in the Export Style Sheet), and each record is separated by another delimiter (usually a Return character).
	Plain text files are useful for transferring raw data from the database to another application that is not a publishing destination – for example, a spreadsheet.

XPress 3.0 or 4.0	Creates a tagged text file for use with QuarkXPress. Can include pictures (XTags Xtension required for pictures).

RTF	Creates a tagged text file for use with any application that can interpret RTF tags. RTF is a very widely-supported format; most publishing and word processing programs support it, for example: Microsoft Word PageMaker PagePlus

Each Export Style Sheet has a default Export Format selected, and this will be selected on the Export Format pop-up when you click on an Export Style Sheet in the list on the left of the window. However, you can select a different export format if you want. For example, you may have carefully set up an Export Style Sheet to export your data to QuarkXPress, and then you find that you need to export exactly the same information to a plain text file. No problem! Just select Plain Text from the pop-up when you export the data.

Exporting in Multi-User

If you are using CatBase multi-user (the network version), the Export on: area will be visible:
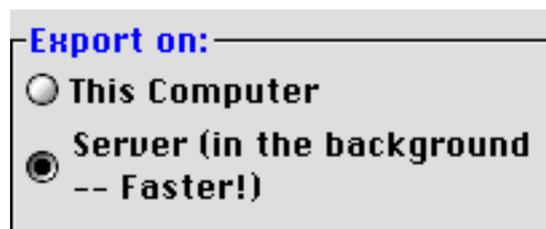
The **Server** radio button is always selected by default, and normally you wouldn't want to change this. When the data is exported on the server it is much

faster because all of the work of finding and formatting the information is done by the server – there is no need for CatBase to copy data back and forth across the network. You can start an export and then carry on working; CatBase will let you know when the export is finished.

Exporting data
To begin the export:
➢ Select the Export Style Sheet you want to use.
➢ Make sure that the correct Export Format is selected (it defaults to the default Export Format that was selected for that Export Style Sheet). Select a different Export Format if you wish.
➢ Click on OK.
You will be prompted to name the file that CatBase will create:
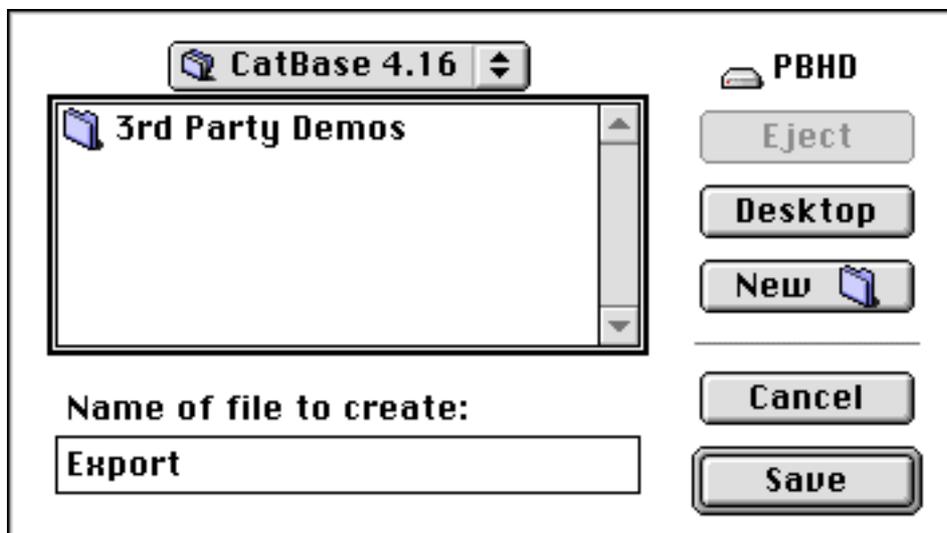
CatBase supplies a default name for the file. On Windows, the appropriate file extension is included – for example, if you are exporting to a plain text file, the default file name will be export.txt.
You can change the file name, but be careful (**Windows users**) not to change the file extension!
➢ Check where the file is going to be saved and select a different folder if necessary.
If you are using CatBase Multi-User, and the file is going to be exported on the server, you can select a location on your own hard disk. The file will be created on the server and then copied onto your hard disk when it's finished.
➢ Click on Save.

CatBase exports the data and lets you know when it is finished.

Importing data into a page layout program
When CatBase has finished exporting the data, it will beep and tell you it's done. Your next step is to open up your publishing destination and import the data into it.

EXPORTING DATA

Publishing Destinations

If you are using a page layout program such as QuarkXPress or PageMaker, you will probably have designed a template for your publication. If you haven't, this would be a good time to do that! The template should consist of the basic specifications for the publication: the page size, number of columns, whether it's double-sided, default page headers and footers, etc. QuarkXPress users: If you are using custom colours, H&Js, etc., you should make sure that they are set up in the template before you import the CatBase data.

Import Filters

If you are importing into a page layout program, you must make sure that you have the correct import filter installed.

The following chart describes what's needed for each type of publishing destination.

Publishing Destination	Requirements
QuarkXPress	You MUST have the XPress Tags Filter or the Xtags Xtension installed in the same folder as your QuarkXPress program (or in the Xtension folder within your QuarkXPress folder). You MUST NOT have the Style Tags Filter installed in the same folder! This will definitely spoil your text formatting. (The Style Tags filter is an old version of the XPress Tags filter.) The XPress Tags Filter can be found in your original XPress program installer. If you are going to import pictures or if you have used style sheets that use text boxes, you must have the XTags Xtension installed in your Xtension folder.
PageMaker versions before 6.5	The RTF Import.flt filter must be installed in the Aldus folder within your System Folder. You can find this filter on one of your PageMaker disks.
PageMaker V. 6.5 or later	No special filters are required if the data was exported specifically for this format.
Any program that can interpret RTF tags	An RTF filter will be needed. Please check your program's documentation.
Multi-Ad Creator2	No special filters are required if the data was exported specifically for this format.

Importing the data:

| Publishing Destination	How to Import
Publishing Destination QuarkXPress	**How to Import** 1. Open up your document or template. 2. If your import includes pictures, and you are using a template, you must save the document before you import the data. 3. If you are **not** using the Xtags Xtension, choose **Get Text ...** from the **File** menu. 4. If you **are** using the Xtags Xtension, choose **Get Text with XTags ...** from the **File** menu. 5. Locate the file you just created and click on it ONCE. 6. Click in the **Include Style Sheets** checkbox to select it. If the check box is dimmed, you have not installed the appropriate import filter. 7. Click on **Open** or press the Enter key.

PageMaker versions earlier than 6.5	1. Open up your document or template. 2. Choose **Place ...** from the **File** menu 3. Locate the file you just exported from CatBase and double-click on it. 4. Place the text on the page.
PageMaker version 6.5 or later	1. Open up your document or template. 2. Choose **Place ...** from the **File** menu 3. Locate the file you just exported from CatBase and select it. 4. Make sure the **Read Tags** check box is selected. 5. Click OK. 6. Place the text on the page.
Multi-Ad Creator	1. Open up your document or template. 2. Choose **Import Text ...** from the **File** menu 3. Locate the file you just exported from CatBase and select it. 4. Select the **Break Text** radio button and click on **Place.** 5. The Break Text window appears:

EXPORTING DATA
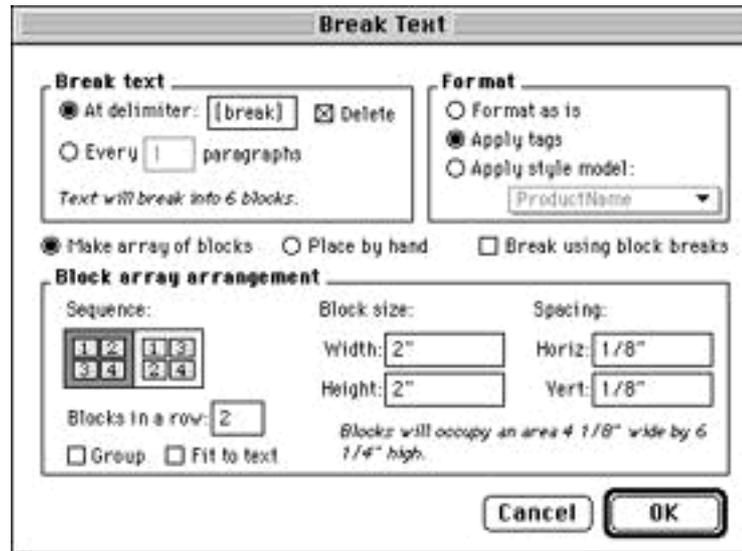
	Your screen will probably look a bit different at first. There are three important changes to make. 6. Select the **At delimiter** radio button in the **Break text** area and enter [break] into the text area. The **Break Text** area should look like this:
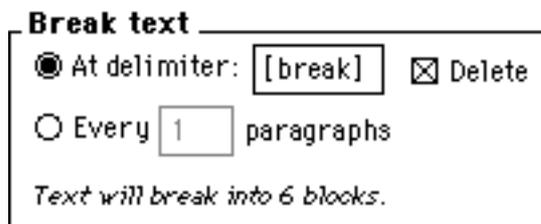
	7 Select the **Apply Tags** radio button in the **Format** area. 8 Select the **Make array of blocks** radio button, below the **Break Text** area. 9. Click on **OK**.

HTML Documents	1. Start your web browser (Netscape Navigator or Internet Explorer, for example). 2. Drag and drop the file you just created onto your web browser's screen, or choose **Open …** from the **File** menu and open it that way.

Plain Text Files	1. Start the application that you want to use to view or manipulate the data. 2. Open up the file you just created, usually by choosing **Open …** from the **File** menu.

You might find that you'll need to do a little "debugging" of your Export Style Sheets. The easiest way to do this is to print out a few pages of the publication and check to see if they are formatted exactly as you want. Mark up any discrepancies you find and then go back to CatBase and make the necessary modifications to the style sheets and Export Style Sheet.

Making global formatting changes after importing

Sometimes you'll want to make global style changes after the data have been placed in your page layout template. No problem! If you are using a page layout or word processing program, you will have Style Sheets set up – either ones that you set up in the application, or that were created when the data was imported. You can make global formatting changes in the publication by modifying the Style Sheets. Here's an example:

You created a Paragraph Style Sheet named Productname in CatBase; that style sheet is used for the product names. When you look at the data after you have imported it into your page layout template, you decide that you would like to make the product names two points larger. You can modify the ProductName style sheet, and the change will immediately be applied to all of the product names in the publication.

Note for QuarkXPress users: If you have made a change to a stylesheet in your CatBase database and you then import a file which uses that stylesheet into a Quark document, the stylesheet changes will NOT be updated in the Quark document if a stylesheet with the same name already exists in that document. The stylesheets are only created if they do not already exist. You must either make the same changes in the Quark style sheet, or delete any modified style sheets from the Quark document; then they will be re-created when you import the file.
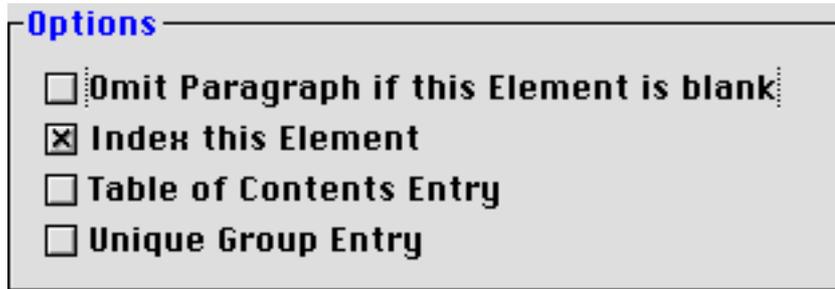
Building Indexes

Indexing is supported by the following publishing destinations:

QuarkXPress (requires an Xtension)
PageMaker (V 6.5 or later)
RTF
HTML

To set up your data for indexing, all you need to do is tell CatBase which field you want to index. This is done very easily by selecting the Index check box on the appropriate Element screen in your Export Style Sheet:

EXPORTING DATA

Options

☐ Omit Paragraph if this Element is blank
☒ Index this Element
☐ Table of Contents Entry
☐ Unique Group Entry

(The Options area is located on the Preferences tab of the Element window.)
Please see Chapter Six for more information about Export Style Sheets.

The following table describes what's needed for each publishing destination,
and how to create the indexes.

Publishing Destination	What's required/how to do it
QuarkXPress	1. You need to have a copy of an Xtension called Indextension installed in your Xtension folder. When you have finalised the layout of the publication: 2. Position your cursor where you want the index to go. If you are going to create a separate Index document, create a text box at the end of your document and click inside it. 3. Choose **Generate Index** from the **Utilities** menu. If this option is not visible, then you have not installed the Indextenion Xtension. You will find a demo version of Indextension on the CatBase CD. 4. Indextension creates the index. If you have created your publication across several Quark documents, you can build a complete index in the following way: 1. Create the index, as described above, for each document. 2. Create a separate document for the index. 3. Copy and paste the indexes form the various documents into one text box in your Index document. 4. Click in the text box and choose **Manual Index Sort** from the **Utilities** menu.
PageMaker Version 6.5 or later	1. When you have finalised the layout of the publication: 2. Choose **Create Index ...** from the **Utilities** menu. You'll see a dialogue box like this:

	3. Make any necessary modifications to the formatting of your index. Refer to your PageMaker documentation for more information. 4. Click on OK. PageMaker generates the index and loads it into the cursor. 5. Click on the document in the place that you want the index to go.

| **RTF**	Check your application's documentation to find out how to create the index. For example, if you are using Microsoft Word Version 6: 1. Finalise the layout of the publication. 2. Choose **Index and Tables ...** from the **Insert** menu.
HTML	A separate HTML document, called index.html (Mac) or index.htm (Windows) is created.

Creating Cross-Reference Indexes

If you set up the index preferences so that the page numbers are separated from the index entries by a Tab, you now have a file that can be used to import page numbers back into CatBase so that any number of cross-referenced indexes can be built. For example, you can easily create an Export Style Sheet that builds a "Companies and Products" index which lists each Company alphabetically, with each company's products listed along with their page numbers. This is how to do it:

1. Make sure you have a current backup of your database!
2. Save the index to a separate plain text file. For example, to do this in QuarkXPress, click within the text box that contains the index. Make sure that no text is selected. Then choose Save Text … from the File menu, enter a file name, and click on Save. This creates a plain text file containing the index entries.

3. In CatBase, choose a field to use for the page numbers. You could rename your chosen field Page Number in the Table and Field Setup screen. Note that the page number field can be either text or numeric; use a numeric field if you want to be able to sort records by page number order. If there is a chance that your index may contain multiple page numbers for any entry, then you will need to choose a text field.
4. If you have imported page numbers into the database from a previous publication, you will need to clear all the existing page numbers before importing the current ones. You can easily do this using Search & Replace.
5. Create a new Import Format by choosing **Import …** from the **File** menu.
6. Choose the appropriate radio button in the Import Table: area.
7. Select the "key" field from the pop-up list of fields. This is the field that you indexed -- e.g., the Company or Product Name. Then click on **Add to Import Field List.**
8. Select your page number field and click on **Add to Import Field List**. The Import screen should now look something like this:
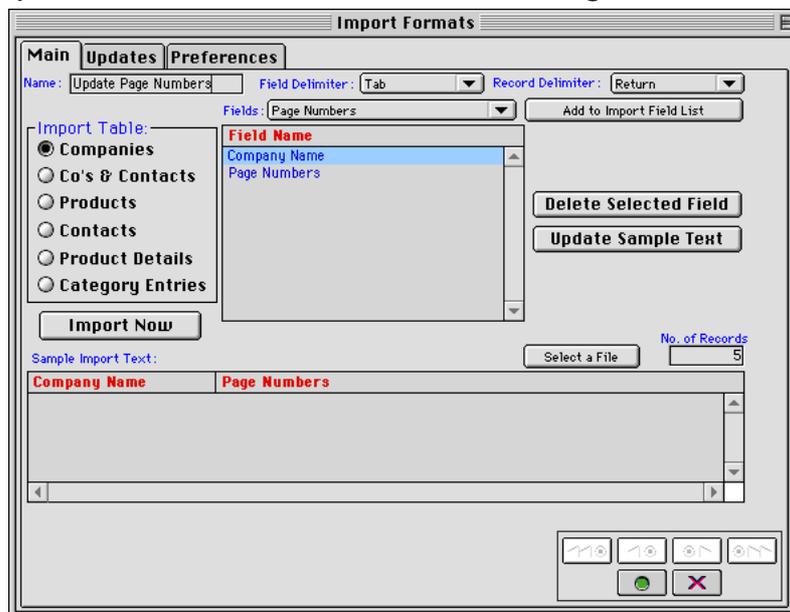
9. Click on the **Select a File** button. Locate the index file you saved as a text file from your document and double-click on it. CatBase imports the first five records and shows them in the Sample Import Text area -- check this to make sure you've selected the correct fields.
10. Click on the **Updates** tab at the top of the screen. The Updates page looks like this:
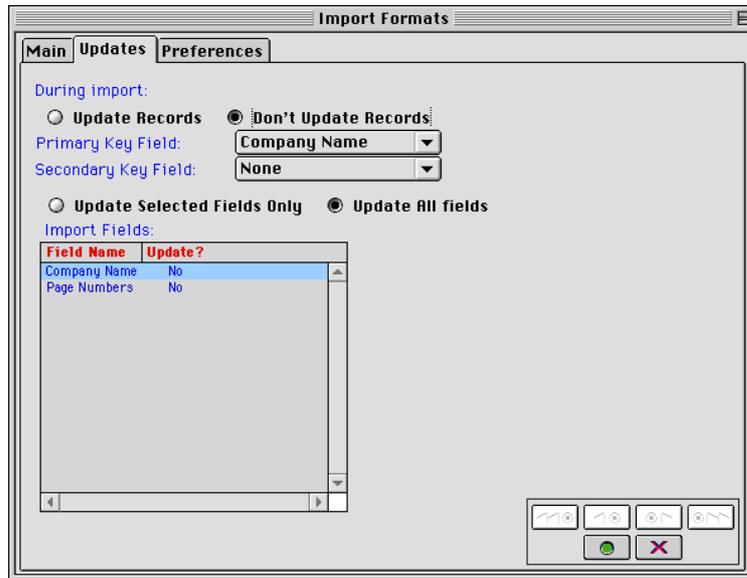
11. Choose the **Update Records** radio button.
    This tells CatBase that for each record it imports, it should look for a matching record in the database by comparing the Key field. When it finds a match, it will copy the page number into the specified page number field.
12. Click on the **Main** tab, and then click on the **Import Now** button.

CatBase imports the file and updates the records with their page numbers.
13. Now you can build Export Style Sheets to create any cross-referenced indexes you need.

A problem that can arise when you index company or product names is that of duplicate names. This may be OK if it's a case of the same entry appearing more than once in the publication, but if they are different entries, you'll have a bit of a problem with your index, as it will think that they are the same entry. The solution is to build the index on the record number field, which is unique for every record. Of course this means that the record numbers will then appear in your publication; however you can make them "invisible" by selecting special character formatting for that Element -- make it very small and white so that it doesn't show up on the page. Then your index will consist of record numbers and page numbers -- you can import the index back into the database as described above, and then create an accurate index from the database.

Please contact the CatBase technical support team if you need help with indexing.

EXPORTING DATA

Exporting via Quick Report

You might need to export unformatted data from your CatBase database for some use other than publication. This is easily accomplished via Quick Report, and is explained in Chapter 5, Reporting. When you export data this way, you create a tab-delimited text file (the field delimiter is a Tab character, and the record delimiter is a Return character) which can be read by many other programs such as other databases, spreadsheets, and word processors.

Creating delimited text files in this way is quick and easy, but somewhat limited. You can also create delimited text files using Export Style Sheets, in which case you have much more control over the content and formatting of the file. For example, using an Export Style Sheet, you can perform calculations (such as marking up or discounting prices), and you can use CatBase Formulas to determine which data to include. Please see Chapter 6 for more details.