



# **QUICK START GUIDE**

65bit Software Ltd

## Revision History

| Version | Date          | Notes  |
|---------|---------------|--|
| 2.0.0   | 18 July 2005  | First draft for InDesign CS2 modifications.  |
| 2.1.0   | 19 April 2006 | Updated for release of version 2.1 of EasyCatalog  |
| 2.1.1   | 18 March 2008 | Removed reference to missing images folder.  |
| 3.0.0   | 15 March 2011 | Revised layout with added tutorials, some tutorials re-written to reflect changes to the software. |
| 3.0.1   | 7 March 2012  | Minor changes to accompany release of German Quick Start Guide.                                    |

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#### **About this Guide**

This QuickStart Guide is intended to get you up-and-running with EasyCatalog as quickly as possible. Further information on the features of EasyCatalog can be found in the User Manual.

Several data and InDesign files accompany this tutorial, and are required to follow the steps outlined in the tutorials later in the guide. By following these actions, you should be able to quickly configure EasyCatalog and gain an insight into the options available for working with your data.

You do not need to complete every section in this tutorial – only the first, 'First Steps', is required.



Where you are required to take action, the icon on the left will be shown.



Important information will be highlighted using this 'warning' icon.



Additional, non-important, information is shown using the 'Information' icon.

If you have any questions regarding EasyCatalog, please don't hesitate to ask using the support form on our web site:

http://www.65bit.com/support

## **Installing EasyCatalog**

A fully-functional 30 day trial of EasyCatalog can be downloaded from our web site:

http://www.65bit.com/downloads/downloadpre.shtm

During the installation process, you will be prompted to select the modules to install. Some of the tutorials in this Quick Start Guide use the Pagination Module. If this module is required to complete any of the tutorials, it will be highlighted at the start of the tutorial.



Note that the Pagination Module is an optional module that must be purchased in addition to EasyCatalog.

## **Supporting Files**



This tutorial uses a number of supporting files which can be downloaded from our web site:

http://www.65bit.com/downloads/easycatalog/files/QuickStartGuide.zip

#### **Tutorial Files**

stock.csv Example data file

Tutorial 5.indl Formatted tables example

Tutorial 7a.indl Simple flow-based pagination example
Tutorial 7b.indl Grouped data pagination example

Further support material, including the full User Guide, is available for download from our web site: <a href="http://www.65bit.com/products/easycatalog/downloads/downloads.shtm">http://www.65bit.com/products/easycatalog/downloads/downloads.shtm</a>

We also have a number of tutorial videos which highlight the main features of EasyCatalog: http://www.65bit.com/products/easycatalog/videos/videos.shtm

## **First Steps**

#### Introduction

In this chapter, you'll learn how to configure EasyCatalog so that you can import your data, and how to import your data into an EasyCatalog panel.

#### **Configuring EasyCatalog**

Once installed, EasyCatalog requires very little configuration to get started.

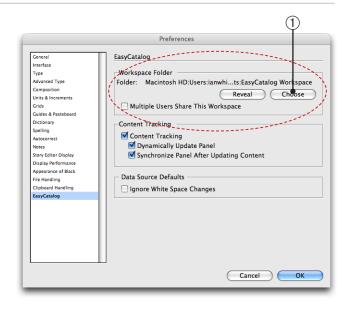
EasyCatalog uses a 'Workspace' folder to store a snapshot of each data source when it is acquired. The workspace folder stores, in addition to a local cache of data, configuration information for each data source you have imported into EasyCatalog.

By default, the EasyCatalog workspace folder is stored in the following location:

Macintosh: Documents:EasyCatalog Workspace
Windows: My Documents/EasyCatalog Workspace

The location of the Workspace folder can be found or modified in EasyCatalog's general preferences, which can be found alongside InDesign's preferences:

Macintosh:InDesign→Preferences→EasyCatalogWindows:Edit→Preferences→EasyCatalog



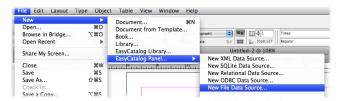
① If you wish to change the location of your workspace folder, click the 'Choose' button. The default location will generally suffice, so we won't change this option.

## **Importing Your Data**



For this tutorial, we will be importing data from a comma-separated values (CSV) file. Data can also be obtained directly from any ODBC-compliant database with the use of an additional plug-in, the 'ODBC Data Provider', or from an XML structure using the 'XML Data Provider'.

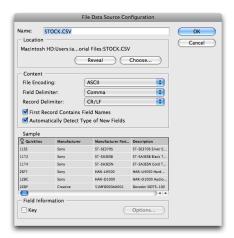
EasyCatalog adds a new sub-menu to the standard InDesign File→New menu - 'New EasyCatalog Panel'. The top part of this menu shows the types of data that can be imported (the contents of this will depend on which of the optional plug-ins you have installed); the bottom part of the menu shows data you have previously imported.





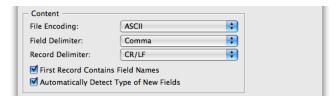
Select the 'New File Data Source...' menu option - a file-picker dialog will open. Navigate to the 'stock.csv' file included with this tutorial and hit the 'OK' button.

EasyCatalog will now examine the structure of the file and present the configuration dialog. Many of the values shown in this dialog will have been determined by EasyCatalog to be the most appropriate for the file. For example, EasyCatalog will attempt to determine the types of the field (such as Alphanumeric fields, numeric fields and currency fields) based on examining the contents of each of the columns.



The dialog is split into three main areas:

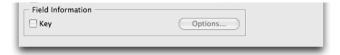
① The overall file configuration options, including the characters used in the file to separate fields and records:



② A preview of the data - this preview will be updated when any of the configuration options in the dialog are changed. This preview is an accurate reflection of how your EasyCatalog panel will appear.



③ Field configuration options - settings that determine how each field should appear on the document can be configured here. Options such as field type (alphanumeric/numeric), currency formats and image paths can all be defined. To edit the options for a field, click in any field in the column you wish to configure and hit the "Options..." button.

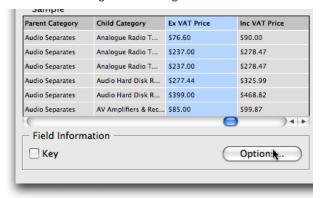


#### **Number Formats**

We need to ensure that the currency fields are correctly configured ('Inc. VAT Price' and 'Ex VAT Price').

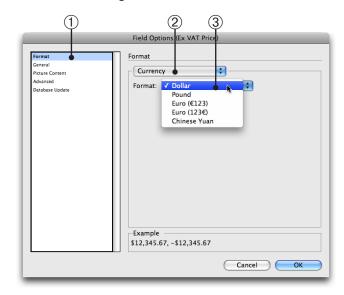


Scroll the preview table to the right using the horizontal scroll-bar, and select the 'Ex VAT' column by clicking on any of the fields in the column. Click the 'Options' button to show the field configuration dialog.



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The field configuration dialog behaves in a similar manner to the InDesign preferences dialog - a list of available properties is shown on the left, and the configuration options are shown on the right.





① Ensuring that 'Field Format' is selected in the left-hand list, ② select 'Currency' from the field type popup. A number of pre-defined currency formats will be presented in the 'Format' popup - ③ select 'Dollar'.

Click 'OK' to confirm the changes to this field repeat the above process for the 'Inc. VAT Price' field.

#### **Images**

Images can also be imported by EasyCatalog - each of the fields can be configured to define where the picture content files reside.



Due to the number of records in the sample file (Stock.csv), we are unable to provide a folder that contains images for all of the records in the file. For the purposes of this tutorial we will not be configuring the location of images.

#### How are Images located?

EasyCatalog will use the content of a field as the filename for an image - for example, if your pictures are stored using a stock code as a filename, you would tag your image frame as 'Stock Code'.

The field used to identify the images may contain:

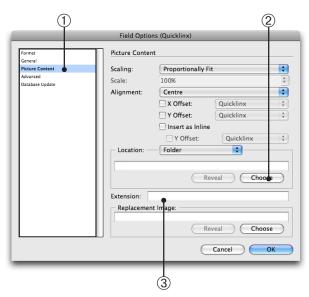
 A full path to the image - for example, your field may contain 'Macintosh HD:Pictures:12345.jpg'. In this instance, the file will be imported from this location and the 'Content Location' specified in the Field Configuration dialog will be ignored, as will the 'Extension'.

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- The filename of the image with extension (e.g. '.jpg') for example, your field may contain '12345.jpg'. EasyCatalog will attempt to locate this image in the folder specified in the 'Content Location' specified in the Fleld Configuration dialog. The extension specified in the 'Field Options' will be ignored.
- The filename of the image for example, your field may just contain '1234' (as would be the case with stock codes, etc). EasyCatalog will look for this image in the 'Content Location' path, and will append the 'Extension' specified in the 'Field Options' dialog.

#### **Configuring Image Fields**

Image fields are configured on the Field Options dialog:



- ① Select 'Picture Content' from the list on the left of the dialog, and ② hit the 'Choose' button in the 'Content Location' area of the dialog. Navigate to the folder containing your images.
- The state of the graphic files you will be using (if appropriate) for example, if you deal exclusively with JPEG files, enter '.ipg' here.

#### That's it!

Configuration of the data source is now complete - further configuration options are available, details of which can be found in the User Manual.



Click 'OK' on the 'File Data Source Configuration' Dialog to create your first EasyCatalog panel.

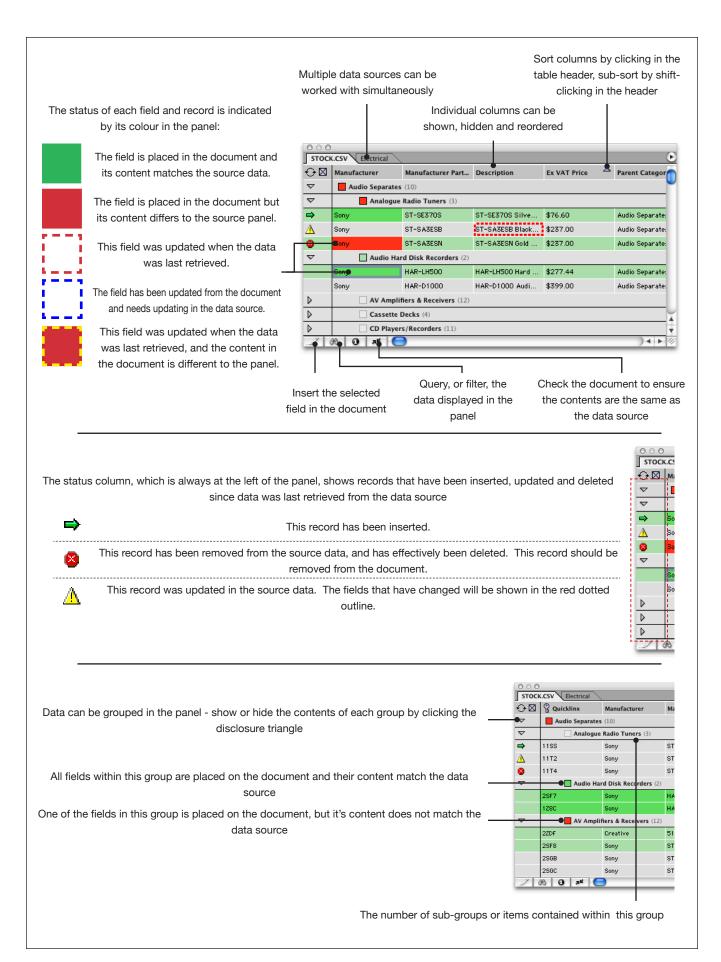
## **EasyCatalog Data Panels**

#### Introduction

The EasyCatalog Panel is your view on the data - unlike contemporary plug-ins, your data is presented in spreadsheet-style panels. Using EasyCatalog Panels, data can be sorted, grouped, filtered - each panel also shows the current status of each record and field, such as whether it is placed on the current document.

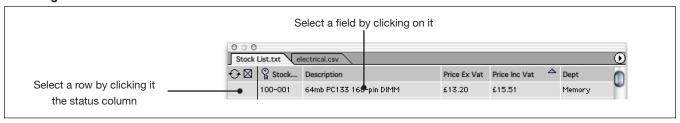
Being able to see your data offers many other advantages - simply scroll around the table, select a field to insert in the document and hit the insert button, for instance. You do not need to know the SKU of a record in order to insert one of it's fields.

Each panel is independent of the others - any queries, sorting or grouping configurations apply to a single panel. For example, you could have two panels open - one showing everything in the 'Electrical' department, one showing everything in the 'Houseware' department. You can even save a panel configuration and give it to another EasyCatalog user to work with!



## **Using the Panel**

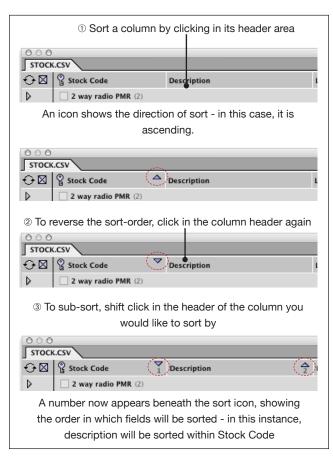
#### **Selecting Records and Fields**



## **Manipulating Data**

#### **Sorting Data**

Data can be sorted and sub-sorted simply by clicking in the header area of the table.



#### **Grouping Data**

If your data contains hierarchical data - data that should be logically grouped by department, manufacturer, etc - the panel can also show the data in this hierarchical manner. More on grouping data is shown in Tutorial 6.

#### **Reordering Columns**

The order of the columns can be changed simply by dragging each column into position - the order of columns is important when inserting tables into a document as the columns in the document will appear in the same order as the panel.

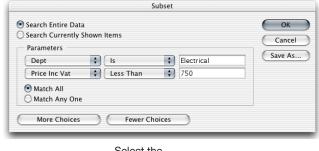
#### **Manually Reordering Records**

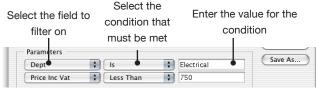
Where simple sorting does not satisfy your needs, the order of the records can be manually adjusted simply by dragging them into position.

#### **Querying/Filtering Data**

If you only need to work with a sub-set of the entire database, apply a filter to the panel.

Create a query, or filter, by selecting 'Show Subset' from the EasyCatalog panel popout menu, or by hitting the 'filter' button ( 🚳 ).





Data will only pass through the filter if all of the conditions are matched ('Match All'), or any of the conditions ('Match Any One')



Add or remove search criteria here

#### **Overview**

The following tutorials have been designed to give you a gradual progression through some of the many features of EasyCatalog. More information on each feature can be found in the User Guide.

#### Tutorial 1 - Placing Fields, Errors and Updating the Document

This tutorial covers the basics - getting fields onto the document, checking the document for errors and updating the document. At the end of this tutorial, you will have experienced how easy it is to link data from your data source to the InDesign document, and how to ensure that your document is always up to date.

#### **Tutorial 2 - Simple Tables**

Using the power of EasyCatalog's panels, you can easily construct simple tables in the document. At the end of this tutorial, you will have learnt how to use EasyCatalog panels as a preview of how your tables will look on the document.

#### **Tutorial 3 - Product Styles**

This tutorial introduces 'Product Styles' - what they are, and why you may want to use them. EasyCatalog lets you design how each record should look - no complex scripting language, or heavy learning curve.

#### **Tutorial 4 - EasyCatalog Libraries**

EasyCatalog Libraries are a convenient way of storing multiple Product Styles - this tutorial will show how to create an EasyCatalog Library, and how to populate the designs stored in them with real data. Using EasyCatalog Libraries, you can create complex page designs in seconds, or just experiment with different designs.

#### **Tutorial 5 - Formatted Tables**

Where you need to design tables for your publication, EasyCatalog can also help - simply show EasyCatalog how your table should look, and the table will be expanded or contracted to accommodate the amount of data being inserted.

#### **Tutorial 6 - Grouping Data**

Data that is structured hierarchically, such as by department and manufacturer, can be viewed in the panel in hierarchical form. The grouping configuration of the panel also affects the way in which groups are automatically paginated in the document.

#### **Tutorial 7 - Text Flow Pagination**

Requires the optional Pagination Module.

Automatically place many thousands of records - by creating a library of *Product Styles*, you can show EasyCatalog how each record (and group) should be paginated. For example, include designs for group headers and individual records in the library.

## **Tutorial 1 - Placing Fields, Errors and Updating the Document**

In this tutorial, you will learn how to:

#### Place a field on the document

How to place field in the document that is linked to the original data,

#### Check the document for errors

How to check the document for errors; how errors are shown in both the panel and on the document

#### Update the document

How to update the contents of the document with the latest data from the data source

## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.

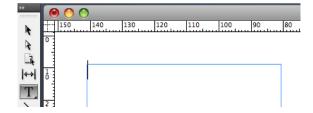
#### **Tutorial**

Using EasyCatalog, you can insert fields from your data directly at any point in an InDesign document. EasyCatalog will link the data in the document to the text or picture content, allowing it to be updated with new data at a later date. Any differences between the content in the document and the source data will also be highlighted.

#### Insering a text field



Start by creating an empty text box, ensuring you have a text insertion point





Select a single field in the EasyCatalog panel







Use the insert button to insert the selected field into the text box

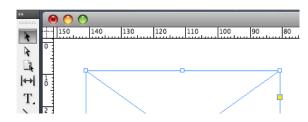


The field is placed in the text box - field marker characters show the bounds of the field content. The markers are shown in green to indicate that the document content matches the original data.

#### Inserting a picture field



Start by creating an empty picture box





Select a single field in the EasyCatalog panel





Use the insert button to insert the selected field into the picture box

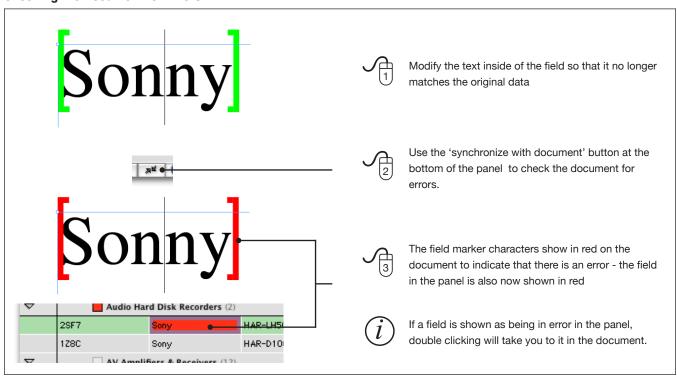


The field is placed in the picture box - the frame is tagged to show the key field value of the record that the image belongs to. This frame tag is non-printing and will not be visible in Preview mode or when the document is output.

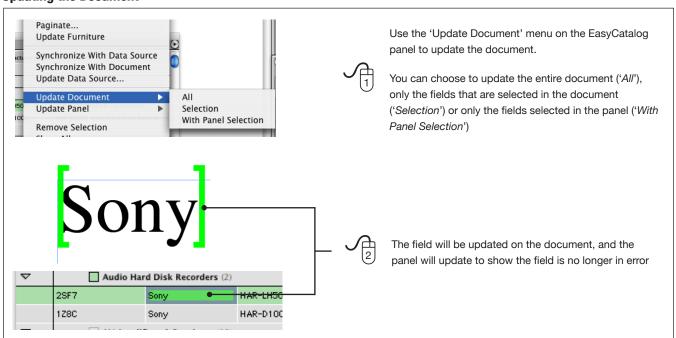


Double click on a placed field in the panel to take you to the first instance of it in the document.

#### **Checking the Document for Errors**



#### **Updating the Document**



## **Tutorial 2 - Simple Tables**

In this tutorial, you will learn how to:

· Insert a simple table into the document

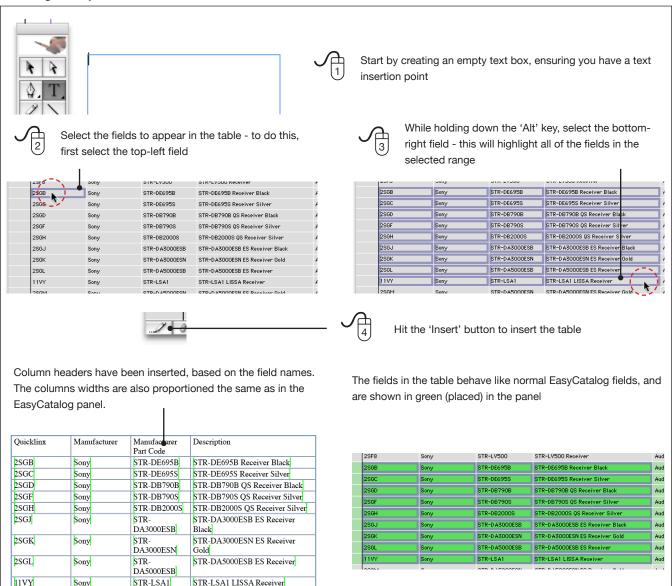
## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.

#### **Tutorial**

#### **Inserting a Simple Table**



## **Tutorial 3 - Product Styles**

In this tutorial, you will learn:

- What a Product Style is, and why you would want to use one
- How to construct a Product Style
- How to populate a Product Style with data

## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.

#### **Tutorial**

#### What is a Product Style?

A *Product Style* is a grouping of InDesign text and pictures boxes which form a design for how each individual record, or group of records, should appear in the document.

Product Styles use place-holders (Field Specifiers) which show where field content should be inserted, and how the fields should appear (font size, style, etc).

For publications that feature a number of predefined styles, *Product Styles* can also be stored in *EasyCatalog Libraries*, allowing a collection of different styles to be stored and easily managed. When *Product Styles* are dragged to the document from an *EasyCatalog Library*, they are populated with the data for the record currently selected in the EasyCatalog panel.

Product Styles can also be used with the Pagination Module to automatically insert multiple records into the document.

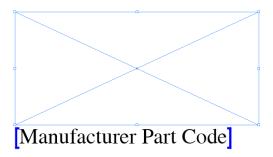
#### What is a Field Specifier?

In order to show EasyCatalog where field content should go, EasyCatalog provides a means of inserting placeholders, or 'Field Specifiers' into the design.

Field Specifiers use blue field marker characters on the document, and can have styling applied in the same way as normal InDesign text. When populated with data, Field Specifiers will retain all of this styling information.



Graphic boxes can also be tagged with Field Specifiers, and during population the image referenced by the field will be imported.



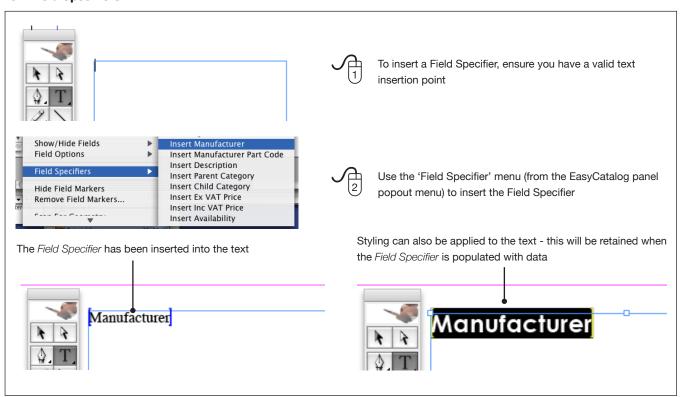
## **Constructing a Product Style**

Product Styles are simply an extension of existing InDesign functionality, so create your Product Style using all of the familiar InDesign tools. Where field content should appear, use the 'Field Specifiers' menu on the EasyCatalog panel to choose the field to insert.

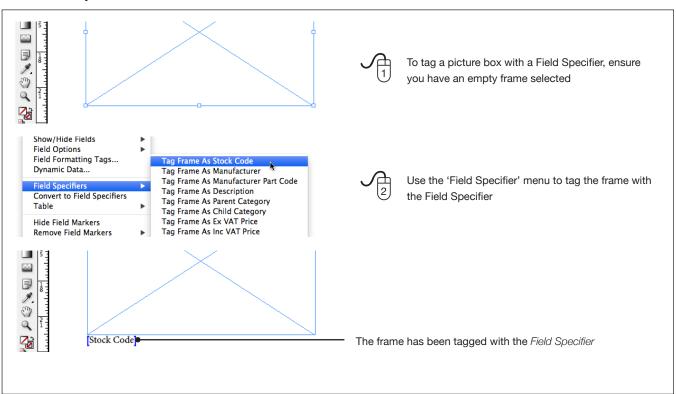


In order for EasyCatalog to determine that all of the boxes belong to the same *Product Style*, they should be grouped on the document.

#### **Text Field Specifiers**

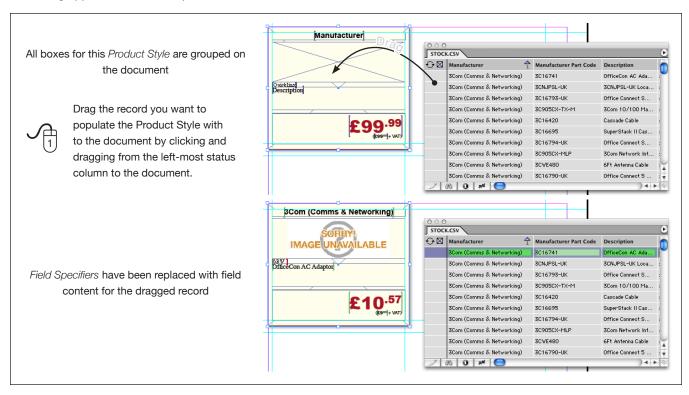


#### **Picture Field Specifiers**



#### How to populate a Product Style

Populating a *Product Style* is as simple as dragging a record from the EasyCatalog panel to any one of the boxes in the *Product Style* group on the document. The *Field Specifiers* will be replaced with field content for the dragged record, maintaining any formatting applied to the Field Specifier.



## **Tutorial 4 - EasyCatalog Libraries**

In this tutorial, you will learn:

• What an EasyCatalog Library is

- How to create an EasyCatalog Library
- How to use an EasyCatalog Library to create complex page designs in seconds

## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

You should have also read Tutorial 3, which gives an overview of what a *Product Style* is and how to create one.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.

#### **Tutorial**

#### What is an EasyCatalog Library?

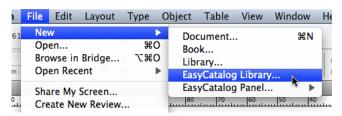
EasyCatalog extends the functionality of InDesign's libraries by allowing designs with dynamic content - *Product Styles* (see Tutorial 3) - to be stored. When an item is dragged from an *EasyCatalog Library* to the document, it will be populated with the record(s) selected in the EasyCatalog data panel.

By storing all of your *Product Styles* in a library, complex page designs can be produced - populated with live data - in seconds.

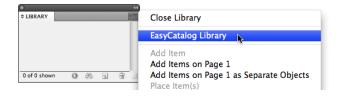
#### **Creating an EasyCatalog Library**

There are two ways in which to create an EasyCatalog Library:

 Use the 'File→New→EasyCatalog Library' menu option you will be asked for a file name and location to create your EasyCatalog Library

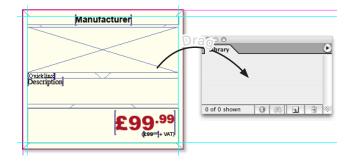


• Create, or open, a standard InDesign library and use the 'EasyCatalog Library' option on the library's pop-out menu.



#### **Populating an EasyCatalog Library**

Populate your EasyCatalog Library as you would a standard InDesign library - simply drag your Product Styles to the EasyCatalog Library.



## Populating Product Styles from EasyCatalog Libraries with Data

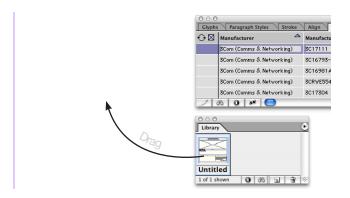
Once your *Product Styles* are stored in an *EasyCatalog Library*, they can be populated with live data from an EasyCatalog panel by simply dragging them to the document.

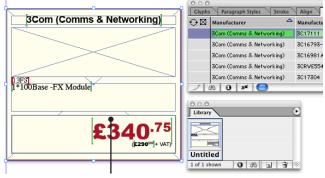


The 'EasyCatalog Library' option on the Library Panel's pop-out menu must be enabled on the library to replace Field Specifiers with field data.



- ① Select a record to populate the *Product Style* with.
- ② Drag the *Product Style* from the library to the page.





The Field Specifiers have been replaced with field content for the selected record

## **Editing items in an EasyCatalog Library**

To edit a *Product Style* stored in an EasyCatalog library, first disable the '*EasyCatalog Library*' menu option. Alternatively, you can drag the item to a new page whilst holding the Alt key to prevent it being propulated with data.

Once you have modified the *Product Style*, replace it in the library either by deleting the old item and then dragging the new item in or by using the '*Update Library Item*' menu option.

#### **Tutorial 5 - Formatted Tables**

In this tutorial, you will learn:

- How to design tables that will be populated with a variable amount of data
- Populate a designed table
- How to store table designs in EasyCatalog Libraries
- Populate a table stored in an EasyCatalog Library

## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

You should have also read Tutorials 3 and 4, which outline what a *Product Style* and an *EasyCatalog Library* are.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.



The example shown in this chapter can be found in the supporting files:

http://www.65bit.com/downloads/easycatalog/files/QuickStartGuide.zip

#### **Tutorial**

#### Introduction

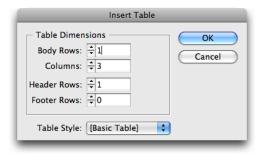
When EasyCatalog encounters a table in a Product Style, it will attempt to add or remove rows in the table to accommodate the amount of data being paginated. By simply defining a prototype row containing Field Specifiers, EasyCatalog can quickly populate complex tables that can include headers, sub-headers and even merge cells together where content matches.

#### **Designing your table**

Field Specifiers can also be included in table designs, allowing you to design how your tables should look. This table design can also be stored in an EasyCatalog Library for later population.



Insert a new table into an empty document with the following parameters:





Using the Field Specifier menu, insert a Field Specifier for the 'Manufacturer' field into the table header; 'Manufacturer Part Code' into column 1; 'Description' into column 2 and 'Inc VAT Price' in column 3.



Normal InDesign formatting options can be applied to the table, cells and text. These will be preserved when populating the table with data.

#### Populating the table

#### Drag Records to the table from the panel

The table can be populated with data simply by dragging and dropping data from the EasyCatalog data panel to the table in the document.



Click in the left-most column of the first record to populate the table with.



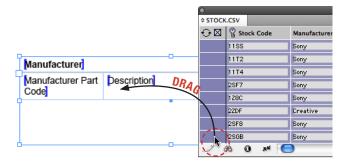


Hold 'Alt' and click in the left-most column on the last record to use.





Drag the records from the panel to the table



The table will now be populated with the selected records.

| Sony          |  |          |  |  |  |
|---------------|--|----------|--|--|--|
| ST-SE370S     | ST-SE370S Silver E-Line Tuner                  | \$90.00  |  |  |  |
| ST-SA3ESB     | ST-SA3ESB Black Tuner                          | \$278.47 |  |  |  |
| ST-SA3ESN     | ST-SA3ESN Gold Tuner                           | \$278.47 |  |  |  |
| HAR-LH500     | HAR-LH500 Hard Drive Recorder                  | \$325.99 |  |  |  |
| HAR-D1000     | HAR-D1000 Audio Hard Drive<br>Recorder/CD Deck | \$468.82 |  |  |  |
| 51MF8000AA001 | Decoder DDTS-100                               | \$99.87  |  |  |  |
| STR-LV500     | STR-LV500 Receiver                             | \$219.72 |  |  |  |
| STR-DE695B    | STR-DE695B Receiver Black                      | \$219.72 |  |  |  |
| <u> </u>      |  |          |  |  |  |

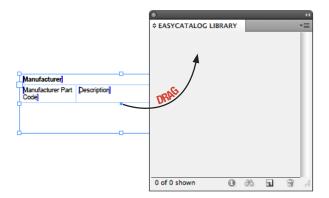
The table header has been populated with data from the first record; the main body of the table has been expanded to accommodate the amount of data.

#### Populate the table from an EasyCatalog Library

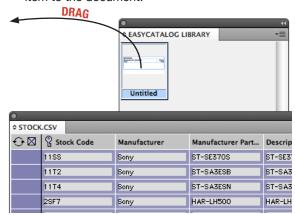
If your table is stored in a *Product Style* within an EasyCatalog Library, it will be populated with all records selected in the panel when the library item is dragged to the document.



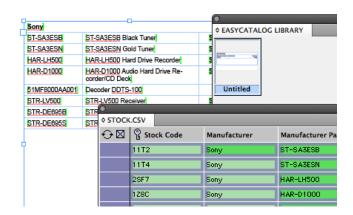
Create a new EasyCatalog Library using the File→New→EasyCatalog Library menu option.



In the data panel, select the records you would like to populate the table with and drag the library item to the document.



The table will be populated with the data selected in the panel.



## **Tutorial 6 - Grouping Data**

In this tutorial, you will learn:

- How to group data in the EasyCatalog panel
- How to work with hierarchical data in the EasyCatalog Panel
- How to specify the sort-order of groups

## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.

#### **Tutorial**

#### **Grouping Data**

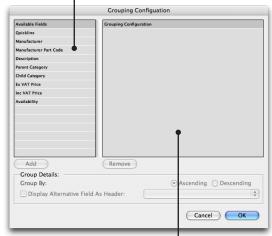
When working with large volumes of data, or data that is hierarchically structured (i.e. contains groups and subgroups, such as department and manufacturer), EasyCatalog can group the data. This not only makes working with the data easier, as it is presented in a hierarchical manner, but it also affects operations such as automatic pagination (headers can be inserted on change of group, for instance).

EasyCatalog provides a grouping configuration dialog to allow you to specify the hierarchical structure of the data and how the data should be sorted within each group. The grouping configuration only applies to individual panels, so different grouping configurations can be applied to different panels.



Display the 'Grouping Configuration' dialog by selecting 'Group...' from the EasyCatalog panel.

The left-hand side of the dialog shows fields the are still available (not used in the current grouping configuration)

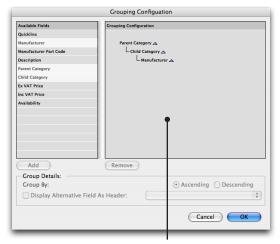


The right-hand side of the dialog shows the current grouping configuration

In this example, we'll group the data by three levels: 'Parent Category', 'Child Category' and 'Manufacturer'. This will produce a panel with a three level hierarchy.



- ① Select the first field to group by, 'Parent Category' and hit the add button. Alternatively, double-click on Parent Category
- ② Now do the same for 'Child Category' and 'Manufacturer'

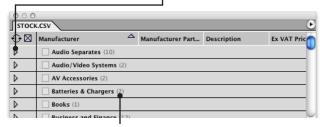


The configuration will appear on the right-hand side of the dialog

#### **Working with groups in the EasyCatalog Panel**

Once grouped, your data will appear in a hierarchical form in the EasyCatalog panel.

The panel will show the new hierarchy of the data. Click the disclosure triangle to expand or contract each group



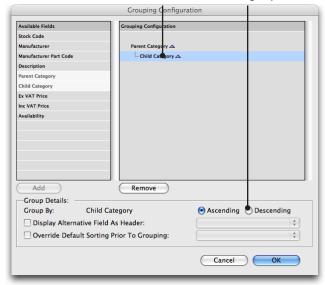
The number of sub-groups is shown on each group row

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## Changing the order of the groups

The sort order of the groups in the panel can also be specified on the 'Grouping Configuration' dialog:

Select one of the rows on the righthand side, then use the 'Ascending' and 'Descending' radio buttons to adjust the sort-order of the group



## **Ungrouping the panel**

To revert back to a record list, select 'Ungroup' from the EasyCatalog panel pop-out menu.

## **Tutorial 7 - Text Flow Pagination**

In this tutorial, you will learn:

- How to use the Pagination Module to automatically insert hundreds of records into a document.
- What the 'Flow-based' pagination is and when to use it.
- What the 'Pagination Rules' panel is and how to use it to configure the Pagination module.

## **Pre-requisites**

You should have already read the first chapter of this tutorial, 'Getting Started', and be familiar with how to use the EasyCatalog panel.

It is assumed that you have a panel open containing the 'stock.csv' sample data file.



This tutorial requires the optional pagination module which is available at additional cost.



This tutorial uses a number of supporting files which can be downloaded from our web site:

http://www.65bit.com/downloads/easycatalog/files/QuickStartGuide.zip

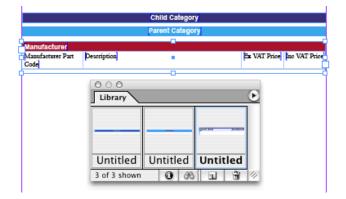
#### **Tutorial**

#### **Installing the Pagination Module**

The Pagination Module is an optional module which is available in the main EasyCatalog installer. During the installation process, ensure that the "Pagination Module" option is checked when prompted.

#### What is the Pagination Module?

Through the use of the Pagination Module, EasyCatalog can insert hundreds or thousands of records into a document automatically. By creating a library of *Product Styles*, the Pagination Module can insert your data into the document and even choose different *Product Styles* for different records.



In many cases, the Pagination Module can be used to automate or semi-automate the production of many different types of publication.

The data selected in the panel - and the structure (e.g. grouping) - of the data is used during the pagination process. This allows library items to be configured that will be inserted at, for example, the start of each group.

#### What is flow-based pagination?

Flow-based pagination is the most widely-used form of pagination, and is ideal for situations such as:

- Production of price lists, catalogs and directories where information flows through a document.
- Where the document should reflow if a record is added, removed or moved.

Each *Product Style* is inserted into an InDesign text flow, either as standard InDesign text or as anchored items within the flow.

#### **Simple Flow-based Pagination Tutorial**

In this example, we'll look at the simplest form of automatic pagination, whereby we'll create a flow of text - headers will be introduced later.



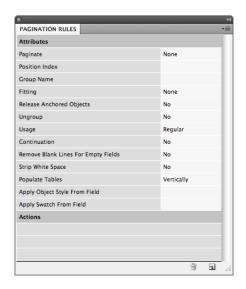
Open the library 'Tutorial 7a.indl' from the Quick Start Guide supporting files.

The 'Tutorial 7a.indl' library consists of a single library item, which is a prototype that shows EasyCatalog how to insert each record into the document. In order to tell EasyCatalog when this library item should be used, the Pagination Rules panel is used.





If the 'Pagination Rules' panel is not already visible, show it from the 'Window' menu.



The Pagination Rules panel shows the attributes assigned to the currently-selected box in the document.

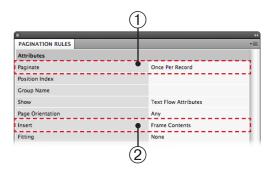


Drag the library item from 'Tutorial 7a.indl' to a new, empty, document.



This library item simply consists of two Field Specifiers in a single text box, separated by a tab.

The Pagination Rules panel will now update to show the attributes assigned to this library item. These attributes are used to instruct EasyCatalog when to use this library item, how to insert it into the document and whether to apply an additional processing (such as fitting the frame to its content).



The two most important attributes are the 'Paginate' and 'Insert' attributes:

This option is set to 'Once Per Record'.

This instructs EasyCatalog to use this library item each time it wants to insert a record from the data panel.

There are two possible options for this attribute: 'Frame Contents' will insert the contents of the frame only; 'As Inline' will anchor the text box into the pagination text

flow.

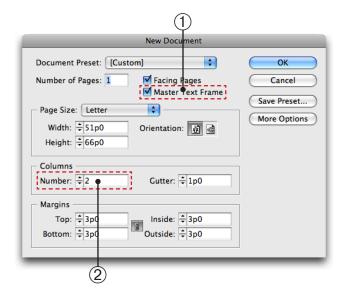
## Paginating the data

2 'Insert'

Flow-based pagination requires a normal InDesign text frame to flow the data into. If the text frame you're paginating into is from a master page, new pages will be inserted into the document automatically when required.



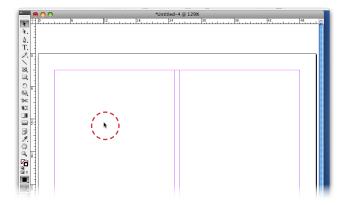
Create a new document with the following options:



① 'Master A text frame will be created on the Text Frame' A-Master to paginate into.

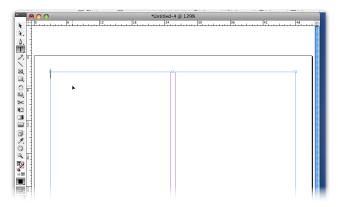
② Columns
In this example, we are paginating into a two column document.

Flow-based pagination requires a text insertion point in the document. At the moment, the text frame we want to paginate into is on the master page: to be able to paginate into it, we first need to override the master text frame on page 1 of our document.





To override the master text frame on page 1 - and allow us to flow text into it - hold down Shift + Apple (Macintosh users) or Shift + CTRL (Windows users) and double-click in this area.



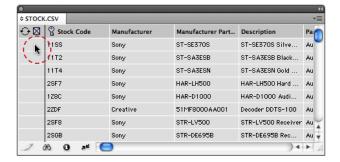
You should now have a flashing text insertion point, so the next step is to select the data to paginate:



Click in the left-most column of the first record to paginate.



If your panel is grouped, ungroup it using the 'Ungroup' menu option.

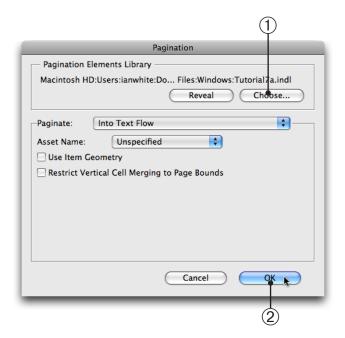




Hold 'Alt' and click in the left-most column on the last record to paginate.



Now select 'Paginate' from the data panel's popout menu.





- ① On the 'Paginate' dialog, hit the 'Choose' button and select the pagination library.
- ② Click 'OK' to commence pagination.

After a few moments, EasyCatalog will commence pagination of the selected data. It will examine each of the records selected in the panel, populate the library item and paste the content into the pagination text flow. Once pagination is complete, you will have a standard InDesign text flow that can be manipulated as normal.

| JK TELEPHONE STRAIGHT EXT   | £3.52         | SERIAL ATA 2.0 CABLE  | <u>1</u> 3.07 |
|---|---------------|---|---------------|
| RETRACTABLE PHONE CORD  | £12.92        | SERIAL ATA 2.0 CABLE  |               |
| RETRACTABLE PHONE CORD  |               | SERIAL ATA 2.0 CABLE  | 18.22         |
| RJ11 to B1 Adaptor Cable  |               | OFFICE ATA 2.0 CARLE  |               |
| Uk Telephone Ext Cable - Colled ( 5111 )<br>BT 3 Way Splitter             | .£5.87        | SERIAL ATA 2.0 CABLE  | £4.69         |
| BT 3 Way Splitter<br>Modular Patch Cord - RJ11/RJ11                       | £1.76         | SERIAL ATA 2.0 CABLE  | £5.87         |
| Modular Patch Cord - RJ11/RJ12 (30.3m)                                    | 95.87         | SERIAL ATA 2.0 CABLE  | £4.69         |
| Modular Patch Cord - RJ11/RJ12 (30.011)<br>Modular Patch Cord - RJ11/RJ13 | £234          | POWER Y SPLITTER CBL;5.25   | £2.34         |
| Modular Patch Cord - HJ11/HJ13  | 0             | DICK DRIVE POWER FXT CBL  | £2.34         |
| Modular Patch Cord - RJ11/RJ14 (7.5m)                                     |               | V DOMED CARLE 2v 3.5" DBV   | £3.52         |
| Modular Patch Cord - RJ11/RJ15 (14.2m)                                    |               | V DOWER CRI :1-5 25""1-3.5""  | 25.87         |
| UK Telephone Extension - Straight (10m)                                   | 60.30         | DADJECTOLAL HID POWER CABLE   | £4.69         |
| UK Telephone Extension - Straight (15m)                                   |               | DAD/CEDIAL HD POWER CABLE   | 25.87         |
| Uk Telephone Cable Extension Reel -                                       | £11.75        | OCCULIFACION SO PINTO   | £11.75        |
| TwinSocket 10m  |               | FACOK 1DBV RIBBON CABLE   | £3.52         |
| UK Telephone Extension Reel -Twin Socket-<br>15m                          | .£8.22        | SACOK SDRV BOLIND CABLE   | £5.87         |
|   |               | 24COK 2DBV ROUND CABLE  | £7.04         |
| Socket (3m)   | £2.34         | SACOK SDRV ROLIND CABLE   | £4.69         |
|   |               | S 4 S OK ADDRY DOLIND CABLE   | £4.69         |
| Socket (5m)   | £3.52         | 34SOK 2DRV ROUND CABLE  | £5.87         |
|   |               | 34SOK 2DRV ROUND CABLE  | £7.04         |
| Contrat/Dual/10m  | £5.87         | 34SOK 2DRV ROUND CABLE  | £4.69         |
| LIGA to DT Socket Adaptor   |               | 34SOK 2DRV ROUND CABLE  | £4.69         |
| D 144 Malo - BT Plug Male Cable - (2m)                                    |               | 34SOK 2DRV RND FLOPPY CBL   | £4.69         |
| D Ist Male - RT Plug Male Adaptor   | £2.34         | 34SOK 1DRV RND FLOPPY CBL   | £4.69         |
| DT Dive LISA Socket Adaptor   | 13.52         | 34SOK 1DRV RND FLOPPY CBL   | £5.87         |
| D Ist RT Socket   |               | 34SOK 1DRV RND FLOPPY CBL   | £3.52         |
| Dularia Cable For Telephone Headset Port                                  | £11./5        | 34SOK 1DRV RND FLOPPY CBL   | £3.52         |
| 115 020 July 24" LVD SCSI Chl   | £29.37        | 34SOK 1DRV RND FLOPPY CBL   | £3.52         |
| 40" Dound EDD Clear   | £7,00         | Ultra ATA Round Ribbon Cable  | £14.09        |
| out ATA 102 Round Cable   |               | 18" ATA133 Round Cable  | 25.99         |
| FACT A WIDE SCSI-68 POS   | £24.67        | 18" ATA133 Round Cable<br>18" Floppy Round Cable                          | £5.99         |
| " TONAL CCCL 2 CBL 3 DBV  | L30.32        | 18" Floppy Round Cable<br>24" Round ATA133 Clear                          | e7.00         |
| INTRNL SCSI3 CBL;7DRV 68P   | £70.50        | 24" Round ATA133 Clear<br>Floppy Cable I34F-I34F-I34F                     | 63.52         |
| SCSI I/SCSI III INT ADPTR   | £10.57        | Floppy Cable I34F-I34F-I34F IDE HDD Cable I40F-I40F-I40F UDMA33           | F2 34         |
| ACCUMENT ADPTR  | £10.57        | IDE HDD Cable I40F-I40F-I40F ODMASS                                       | 95.87         |
| ULT ATA133 RND CBL;40SOK  | £8.22         | IDE HDD 140F-140F-140F 70cm   | £23 50        |
| ULT ATA133 RND CBL;40SOK  | £9.39         | Optra 1200N HDD Adaptor Cable   | c5.83         |
| ULT ATA133 RND CBL;40SOK  | £9.39         | UDMA66 IDECable I80F-I80F-I80F  | C20.3         |
| ULT ATA133 RND CBL;40SOK  | £8.22         | Cascade Cable   |               |
| ULT ATA133 RND CBL;40SOK  | 29.39         | SuperStack Matrix Cable   | C00 3         |
| ULT ATA133 RND CBL;40SOK  | 98.22         |   |               |
| ULT ATA133 HND CBL;40SOK  | 29.39         | LVD terminated SCSI dual drive ribbon                                     | FR2 3         |
| ULT ATA133 RND CBL;40SOK  | £10.57        | 68pin   |               |
| ULT ATA133 RND CBL;40SOK  | £7.04         | LVD terminated SCSI 7drive ribbon 68pin<br>males                          | £52.8         |
| ULT ATA133 RND CBL;40SOK<br>ULT ATA133 RND CBL;40SOK                      | £8.20         | males   | £7.0          |
| ULT ATA133 RND CBL;405CK  | çs 2          | 50 pin 2drive SCSI cable 10 /19<br>68pin SCSI Ribbon 2drive cable         | £18.7         |
| ULT ATA133 RND CBL;40SOKULT ATA133 RND CBL;40SOK                          | £70           | 68pin SCSI Ribbon 2drive cable<br>Ultra DMA ATA33,66 & 100 rated dual IDE |               |
| ULT ATA133 RND CBL;40SUK  | ;R2           | Ultra DMA ATA33,66 & 100 rated dual IDE<br>drive cbl                      | £10.5         |
| ULT ATA133 RND CBL;40SOK  | <u>1</u> 0.2. | drive cbl   | £4.           |
| ULT ATA133 RND CBL;40SOK  |               | 7 - L. F. D. oition Fact SCSI Cable                                       |               |
| SERIAL ATA 2.0 CABLE  |               | 7 1.3m  | £29.          |
| SERIAL ATA 2.0 CABLE  | £7.0          | 1.3m  |               |

Simple flow-based Pagination Example

#### **Headers**

The next step in our pagination will be to include headers into the flow of text. The sample data has a simple three level hierarchy - 'Parent Category', 'Child Category' and 'Manufacturer' - and we want to include headers at the start of each of these levels.

The first stage in the process is configuring the EasyCatalog data panel to show this hierarchy. As shown in Tutorial 6, the data panel can be grouped.

Follow the instructions in Tutorial 6 to group your panel by 'Parent Category', 'Child Category' and 'Manufacturer'.



We now need to show EasyCatalog how each header should appear in the document. This is achieved by including prototypes for each of the different levels in the hierarchy in the pagination library.

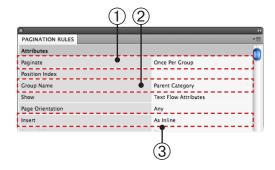


Drag the 'Parent Category' library item from 'Tutorial 7b.indl' to a new, empty, document.



This library item simply consists of a single Field Specifier in a single text box.

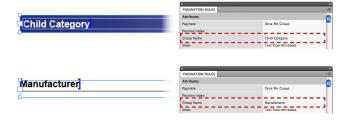
As before, the Pagination Rules panel will now update to show the attributes assigned to this library item.



This library item has three main attributes specified:

| ① 'Paginate'      | This option is set to 'Once Per Group'. This instructs EasyCatalog to use this library item each time it encounters a new group in the panel. |
|-------------------|---|
| ② 'Group<br>Name' | The name of the group level that this library item paginates at.  |
| ③ 'Insert'        | This option is set to 'As Inline', which will anchor the box in to the pagination text flow.  |

Similarly, the other two header library items have similar Pagination Rules set - only the 'Group Name' attribute differs:



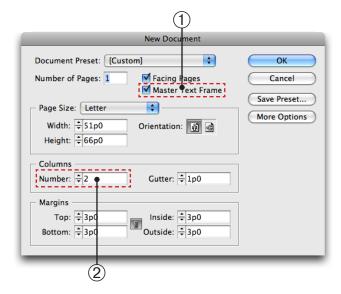
So, to summarize, Tutorial 7b.indl contains four library items: one for each of the levels on the grouping hierarchy in the panel. We have three library items whose Pagination Rules define that they should be used for three different levels in the grouping, and one library item that will be used to paginate each record.



It is not necessary to have a library item for each of the levels in the hierarchy. For example, if a header is not required at the 'Child Category' level, then the item can be ommitted from the library.



Create a new document with the following options:



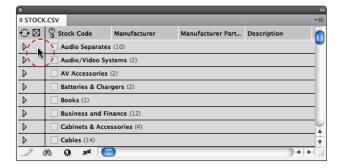


Follow the instructions in 'Paginating the Data' (above) to override the master text frame on page 1. Ensure you have a flashing text insertion point in the document.

As before, we now need to select the data we wish to paginate. This time, however, we are selecting the groups we want to paginate:

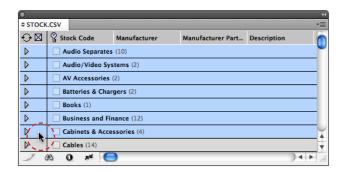


Click in the left-most column of the first group to paginate.



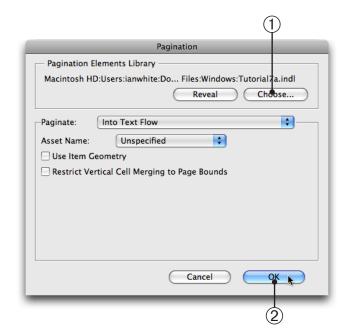


Hold 'Alt' and click in the left-most column on the last record to paginate.



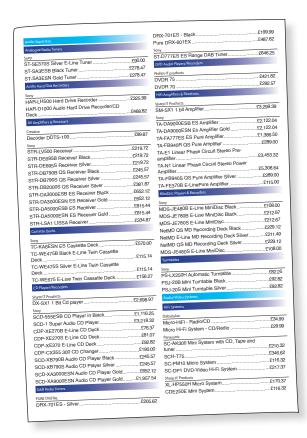


Now select 'Paginate' from the data panel's popout menu.





- ① On the 'Paginate' dialog, hit the 'Choose' button and select the pagination library.
- ② Click 'OK' to commence pagination.



Sample Pagination output including headers

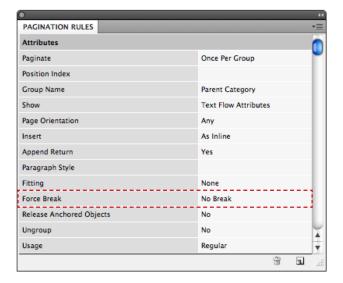
#### Automatically inserting page breaks

EasyCatalog can also automatically insert page breaks when paginating a library item. The Pagination Rule 'Force Break' can be used to specify that the library item should be inserted on a new page, in a new frame or in a new column.



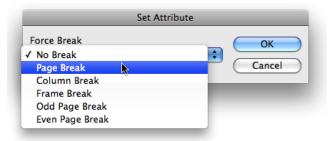
Drag the library item from 'Parent Category' from 'Tutorial 7b.indl' to a new, empty, document.







Double click on the 'Force Break' attribute in the panel to edit it.





Change the attribute to 'Page Break'.

Update the library item in the Pagination library.

When inserting this library item into the document, EasyCatalog will ensure that it starts on a new page.



After changing a Pagination Rule, ensure that you update the library item by using InDesign's 'Update Library Item' option.

#### **About 65bit Software**

65bit Software Limited was founded in 2003 and specializes in the development of high quality Plug-ins for Adobe InDesign and InCopy.

We believe that the growing processing power of today's desktop computers is allowing the development of a new breed of tools, offering levels of integration, power and ease of use previously only seen in high end publishing systems.

At 65bit we are committed to providing best of breed solutions for the database publishing, catalog, newspaper and magazine markets.

In addition to developing InDesign Plug-ins, we offer custom development services and can help you to design and implement an InDesign or InCopy-based solution. You can learn more about our services or submit a request for more information by sending mail to sales@65bit.com

DAM/System Vendors - Any of our products can be included and branded as part of your solution. Please contact sales@65bit. com for more information.

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http://www.65bit.com/support

Twitter: <a href="http://www.twitter.com/65bitsoftware">http://www.twitter.com/65bitsoftware</a>

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