



# EASYCATALOG USER GUIDE

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## CHAPTER 1

# GETTING STARTED

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## WELCOME!

Thank you for evaluating EasyCatalog for Adobe InDesign.

65bit Software are committed to providing high quality software for Adobe InDesign, and appreciate the time you have taken to evaluate our product. All feedback is

welcome, good or bad. Please email any comments to [support@65bit.com](mailto:support@65bit.com) or use our [support form](#) on the website. We promise to respond to every one!

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## WHAT IS EASYCATALOG?

EasyCatalog is a complete database publishing solution, and provides a bi-directional link between data from a variety of sources to content in an InDesign document. Any changes made in the document may be reflected back to the original source of the data.

Document content is constantly tracked, enabling you to determine which records and fields are placed. Document tracking offers a number of benefits:

▶ *Increased productivity:*

Data can be acquired from a variety of data sources quickly and efficiently. Time is not spent re-keying or importing data.

- Errors are reduced, as data on the page is coming directly from the data source without being re-keyed.
- Errors are detected. EasyCatalog can highlight all fields that differ to the original data, and either automatically correct them or highlight them for manual correction in the document.
- Data can be filtered and grouped to only show data relevant to a particular section of the publication, for instance. Filtering your data reduces the amount of

time spent searching through data that is not relevant to the task you're currently performing.

- Data that has been changed on the database can be updated in the document instantly – ideal for deadline-critical publications.
- Records can be dragged and dropped to the page using pre-defined templates stored in libraries. Placeholders in the templates show EasyCatalog where and how each field should appear, and complex page layouts containing live linked data can be constructed in seconds.

▶ *Powerful pagination facilities*

EasyCatalog contains a wealth of facilities for both data driven and design driven publications.

- Formatting may be applied to fields, ensuring that all prices, for instance, appear in a consistent format throughout the publication. Any prices that do

not obey these formatting rules will be highlighted as part of the error-checking procedure.

- Library styles may be defined for records, ensuring records appear in a consistent manner. See '*Templates and Libraries*'
- EasyCatalog offers powerful tabular data functionality, allowing tables to be created from your data at the click of a button.
- Using the optional pagination module, EasyCatalog can automatically create a flow of several hundred pages.
- EasyCatalog leverages the typographical and layout features of InDesign, so the layout and style of your publication doesn't have to suffer.

▶ *Reduced cost of ownership*

- EasyCatalog is a front-end for existing databases – you purchase the plug-in and we, or a systems integrator, provide Data Provider plug-ins to access

your data. Data can be imported from a delimited file (such as a comma or tab-delimited file), ODBC database or an XML file.

- As there is no new 'production' database to integrate with, there will be no integration issues, or unwanted database licenses.
- As EasyCatalog is tightly integrated with Adobe InDesign, there is no new application environment to learn.

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## 30 DAY TRIAL VERSION

Your EasyCatalog plug-in will run in demo mode until a valid registration code is entered. The EasyCatalog trial is valid for thirty days from the date it is first run.

Thank you for taking time to evaluate EasyCatalog – if you have any questions or would like further information, please visit our web site at [www.65bit.com](http://www.65bit.com).

We are here to help you with during your evaluation so if you have any questions whatsoever, please contact us using the [support form](#) on our website.

We aim to respond to all enquiries within one working day of receiving them.

Whilst you are evaluating EasyCatalog, the '*About EasyCatalog*' dialog will appear each time you launch InDesign showing the number of days remaining in your trial period.

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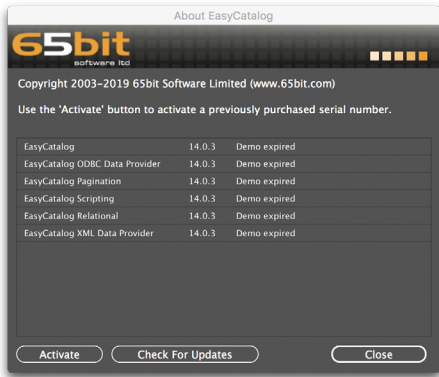
## PURCHASING EASYCATALOG

If you've purchased or downloaded EasyCatalog from one of our partners, please obtain your serial number through them. Alternatively if you downloaded from the 65bit web site, serial numbers can be purchased through our web-store.

<https://www.65bit.com/pricing/buy-upgrade/>

Serial numbers purchased via our web-store will be issued on completion of the credit card transaction, and will activate in around 5 - 10 minutes.





*The number of days remaining in your trial period are shown in the 'About EasyCatalog' dialog.*

*Once you have purchased a serial number, use the 'Activate' button to activate your copy of EasyCatalog.*

## ACTIVATING EASYCATALOG

Following purchase, you will be supplied with a serial number for each of the modules that you have purchased.

EasyCatalog uses internet activation to validate your license codes, which typically takes a few seconds to process. Once registered, all limitations of the demo version will be lifted.

Internet activation offers many advantages, including the ability to purchase additional licenses at a later date whilst retaining the same serial number. Internet activation also helps to ensure that you do not unintentionally violate your EasyCatalog license agreement.

To activate, select '**About EasyCatalog**' from the InDesign application menu (on the Macintosh), or from 'Help' menu (on Windows).

When the '**About EasyCatalog**' dialog appears, press the '**Activate**' button to enter the serial numbers you have been issued. The serial number should be entered exactly as it appears in your order confirmation email, including the hyphens.

If you have an active internet connection, your serial number will be validated on our servers and your software will activate after a few seconds.

### ACTIVATING WITHOUT AN INTERNET CONNECTION

If you do not have an active internet connection, alternative options will be offered after you have entered your serial number:

- Activation using a web-browser on your InDesign machine
- Activation using a web-browser on another machine (with a valid internet connection).

On-screen instructions will step you through the above processes: the website you are sent to will issue you with an Activation Code, which should be entered into the Manual Activation wizard that appears.

### COMMON ACTIVATION ERRORS

*An attempt was made to activate an unknown serial number. If you have recently purchased this serial number, please wait around 15 minutes before trying again. If the problem persists, please contact your vendor.*

The most common cause of this error is entering the serial number incorrectly. Please ensure that you enter the complete serial number (including all dashes). EasyCatalog serial numbers do not contain the letters 'I', 'O', 'U' or 'Z' as these can be confused for other characters. **Try copying and pasting the serial number from your order confirmation email into the activation dialog.**

Sometimes, if you've recently purchased the serial number through our web store, you may need to wait 10 - 15 minutes before the serial number will activate.

*An attempt was made to activate a blacklisted serial number.*

The serial number you have entered has been blacklisted and cannot be used to activate EasyCatalog. Please contact the vendor who sold the license for further information.

An activation attempt failed due to the maximum number of allowable activations being met.

The number of allowable activations for this serial numbers has now been reached and this EasyCatalog serial number cannot be activated. If you are installing onto a new machine, please ensure that you de-activate your serial number and wait 10 - 15 minutes before attempting to activate on your new machine. See '*Transferring an Activation*' below.

If you need further assistance please contact us using the [support form](#).

An error occurred trying to install the eSellerate engine. Please purchase via the Web store or contact [support@65bit.com](mailto:support@65bit.com) for more information.

The e-commerce component of EasyCatalog (eSellerate) could not be installed.

The most common cause of this issue is insufficient user privileges. On Windows machines, right click on the InDesign application icon and select '*Run as Administrator*'. Once registered, InDesign can be started without Administrator privileges.

In the event of this error persisting, please download and install the '*eSellerate Engine*' from: <http://www.esellerate.net/update>

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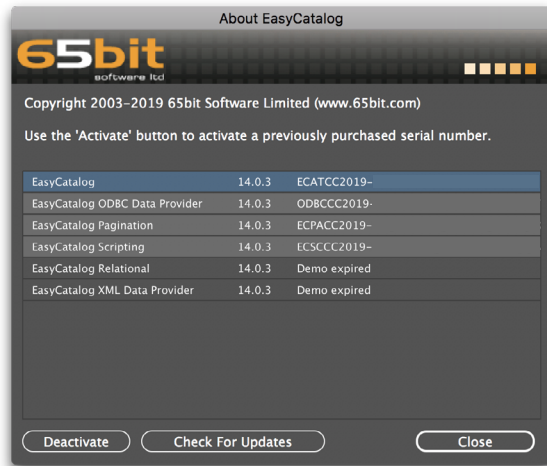
## TRANSFERRING AN ACTIVATION

To transfer an activation for all registered modules, press the '*Deactivate*' button on the '*About EasyCatalog*' dialog.

To transfer an activation for an individual module, highlight the serial number that you would like to transfer in the list of active modules and press the '*Deactivate*' button.

After a few seconds your serial number will deactivate and you should be able to activate the serial number on another machine in around 5 - 10 minutes.

If you have any problems with activation, please contact us using the [support form](#) on our website.



*Transfer an activation using the 'Deactivate' button. This button will only be available when all modules shown in the list are activated.*

*To deactivate a specific serial number, select it in the list and then press the 'Deactivate' button.*

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## KEEPING UP TO DATE

Periodically, bug fixes and enhancements are released on our website. Please use the '*Check for Updates*' button on the '*About EasyCatalog*' dialog to ensure that you are always running the latest version of EasyCatalog.

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## SUPPORT QUESTIONS

All support issues should, in the first instance, be directed to your system integrator or local reseller. Alternatively, visit us at [www.65bit.com](http://www.65bit.com), or contact us using the [support form](#) on our website.

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## INTEGRATION OPPORTUNITIES

EasyCatalog has been designed for easy integration into third- party database and asset management systems. Systems integrators who are interested in integration opportunities should contact us at [sales@65bit.com](mailto:sales@65bit.com)

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## RESELLERS

Please contact [sales@65bit.com](mailto:sales@65bit.com) if you are interested in reselling EasyCatalog, or are considering including EasyCatalog as part of your solution.

## CHAPTER 2

# IMPORTING YOUR DATA

## INTRODUCTION

The first stage in the process, importing your data is the most critical and key area when using EasyCatalog. The quality of your source data has a direct impact on the quality of the results that can be achieved using EasyCatalog.

By directly importing your data into InDesign, you eliminate re-keying errors and significantly reduce the amount of time required to produce your publication.

## SUPPORTED DATA SOURCES

EasyCatalog uses *Data Providers* - other InDesign plug-ins written to interface with EasyCatalog - to import your data. Examples of data sources are CSV (comma separated) files, a Google Docs Spreadsheet, or a MySQL database.

*Data Providers* are provided as separate modules that must be installed alongside EasyCatalog. All of the Data Provider plug-ins are available for installation during the EasyCatalog installation process.

Once your data has been imported, it is shown in a spreadsheet-style panel that sits alongside your other InDesign panels. Multiple EasyCatalog panels can be open at any time, allowing you to work on publications that use data from multiple sources.

Each of the available *Data Providers* are shown on the *File*→*New*→*EasyCatalog Panel* menu. This menu is split into two sections: the top half allows you to import data from a new source; the bottom allows you to create a new panel from an existing data snapshot.

The configuration required to import your data depends on the type of data you are importing:

### ► Delimited Files

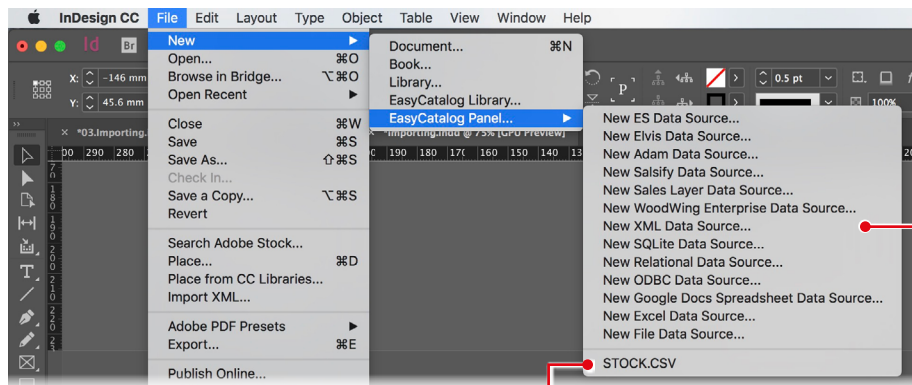
Delimited files include comma and tab delimited files. These types of files can typically be exported from most databases and applications such as Microsoft Excel. Further information on importing delimited files can be found on page 15.

### ► Excel Spreadsheets

EasyCatalog can directly import Microsoft Excel files (either .xls or .xlsx files). Only the textual content of the file is imported; any formatting is ignored. Further information on importing Excel spreadsheets can be found on page 17.

### ► Google Docs Spreadsheets

If your data is stored in the cloud in a Google Docs Spreadsheet, EasyCatalog can connect directly to it and import your data in the same way as importing a local Excel file. Further information on imported data from a Google Docs Spreadsheet can be found on page 18.



*Data sources you've  
previously configured*

*Import new data  
using one of the  
installed Data  
Providers*

### ▶ Data from an ODBC-compliant Database

The optional *ODBC Data Provider* module enables EasyCatalog to connect directly to an ODBC database such as MySQL, Microsoft SQL Server, FileMaker or Access. An appropriate ODBC driver is required. On Windows, these are typically provided by the database vendor; on Macintosh, you may need to purchase a driver from a third-party vendor such as [Actual Technologies](#) or [OpenLink Software](#). Further information on importing from an ODBC database can be found in the “*ODBC Data Provider User Guide*” which can be [downloaded from our website](#).

### ▶ XML

Using the optional *XML Data Provider* module EasyCatalog can import an XML structure either from a local file or by connecting to a URL endpoint. The location of each record and field within the XML structure is defined using XPath. Please see the *XML Data Provider User Guide* for further information on importing XML data.

**Support for the following data types is provided by the optional Enterprise Data Provider module. Further information on configuring the Enterprise Data Provider module can be found in the “Enterprise Data Provider User Guide” which can be [downloaded from our website](#).**

### ▶ Elvis

Assets stored in your Elvis DAM can be directly imported into EasyCatalog. Images are downloaded on demand via HTTP, and all metadata for the assets is shown in the EasyCatalog data panel.

### ▶ ADAM

Connect directly to your ADAM PIM database.

### ▶ Salsify

Import data from Salsify channel directly into EasyCatalog.

### ▶ Sales Layer

Import data directly from Sales Layer into EasyCatalog.

Additionally, the optional Relational Module can be used to join multiple EasyCatalog data sources together in a single panel. It also has the ability to import data from an SQLite database.

For System Vendors, Custom *Data Providers* can be written and tailored to your requirements - please [contact us](#) for further information.

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## DATA CONCEPTS

Regardless of the source of your data, there are a number of concepts that are common to all data that is imported into EasyCatalog:

### ▶ Fields

A field is a singular piece of information, such as a person’s name, job title or zip code. Analogous with a cell in an Excel spreadsheet.

### ▶ Records

A record is a collection of related fields which, when combined, describe something or someone. For example, a ‘customer’ record would contain ‘name’, ‘address’, and ‘telephone’ fields. Combined, these fields describe a single customer.

### ▶ Rows and Columns

When arranged in a grid, or spreadsheet-style view, each record is represented by a row in the table; each field is a cell. Therefore, a column is a collection of fields and all fields in the column contain the same type of information (i.e. all fields in the ‘address’ column will contain address information).

### ▶ Field Types

Each field that is imported into EasyCatalog has a ‘type’ that determines both how it appears in the document and how it is treated when it is sorted, grouped, etc. Field types are defined on a column-by-column basis, so all fields in the same column will share the same type information.

Field types typically fall in to one of two categories, each with further refinements.

Alphanumeric fields can contain both text and numeric information, and will be sorted alphabetically on a character-by-character basis.

Numeric fields can only contain numeric information, although additional formatting can be applied to show currency symbols, thousands and decimal separators, etc. Numeric fields are sorted based on their numeric content.

### ► Key Fields

To keep track of each record in your data source, EasyCatalog needs a way to uniquely identify each record. To do this, we use a 'key field'.



**The choice of key field is critical to the operation of EasyCatalog. The key field is used to uniquely identify each record from the data source and must never change.**

The content of the key field must uniquely identify each record and must never change for the life of the record. Typically key field candidates can be a stock code, SKU, etc.

If the key field value for a record changes, EasyCatalog will determine that a record has been deleted (with the old key field value) and a new one created (with the new key field value). Fields placed in a document linked to the old key field value will be shown as 'in error'.

More than one field can be selected as the key field. In this case, the combination of all of the chosen fields is used to determine the uniqueness of each record. As with a single key field selection, the content of all key fields must remain constant for the life of the record.

Choosing multiple fields can sometimes be necessary if the same record appears more than once in the data. In this case, it is necessary to identify an instance of each record using a combination of fields.

## IMPORTING FROM A CSV/DELIMITED FILE

① The process begins by selecting 'New File Data Source' from the *File*→*New*→*New EasyCatalog Panel* menu option.

② Select your data file using the standard InDesign file selection dialog.

EasyCatalog will now examine the file to determine the best settings for importing your data - these will be presented in the configuration dialog. Don't panic! This is by far the most complex stage in configuring EasyCatalog - for the majority of users, the settings determined by EasyCatalog will suffice.

### Example File

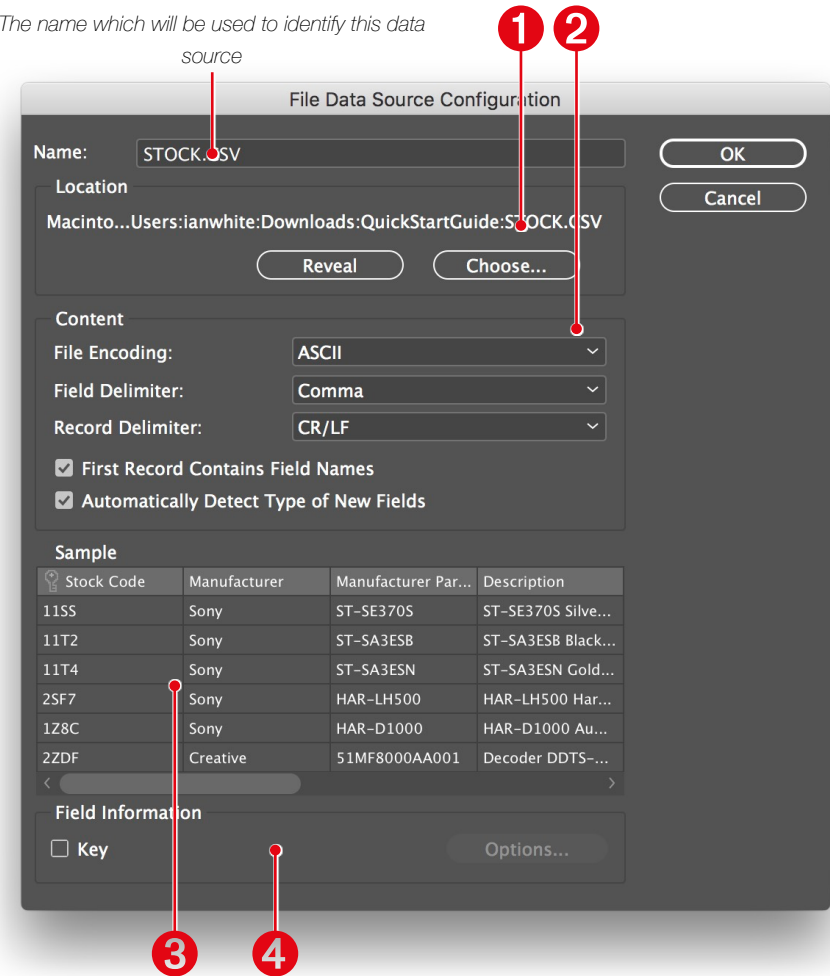
The first row in this file contains the names of each of the columns, so the 'First Record contains field names' check-box should be set.

```
"Quicklinx","Manufacturer","Manufacturer Part Number","Inc. VAT Price","Availability"
"11SS","Sony","ST-SE370S","ST-SE370S 2 days"
"11T2","Sony","ST-SA3ESB","ST-SA3ESB 1d Upon Request"
"11T4","Sony","ST-SA3ESN","ST-SA3ESN 1d Upon Request"
```

The Field Delimiter: the character used to separate each field in the file (in this example, a comma)

The Record Delimiter: the character used to separate each record in the file (in example, a carriage-return)

The name which will be used to identify this data source



### ① Location

Shows the path to the selected file, and allows a new file to be chosen. Use the 'Reveal' button to go to the file in Windows Explorer (Windows) or the Finder (Macintosh).

## 2 Content

The menus in this area allow you to specify how the file is structured. When importing a file for the first time, EasyCatalog will attempt to automatically determine the correct settings for each of these pop-ups by inspecting a sample of the file.

Setting	Description
File Encoding	Specify the type of file being used - either ASCII or Unicode. EasyCatalog provides full support for importing unicode files and can import UTF-8 and UTF-16 encoded Unicode files.
Field Delimiter	Specify the character that's used to separate each field in the file
Record Delimiter	Specify the character that's used to separate each record in the file
First record contains field names	Typically, most data files contain the names of the columns in the first row/record. If your data file does not contain this information, un-check this box. Default field names will be assigned to each column when the data is imported. It is strongly recommended that field names are included in your data file to ensure the links to fields in the document are not broken if extra columns are added to your data at a later date.
Automatically Detect Type of New Fields	When this option is set, EasyCatalog will attempt to determine the type (whether the field is alphanumeric, numeric, etc) of each field. Turn this option off to default all fields to alphanumeric.

## 3 Sample

Each time any of the '*Content*' settings are changed, the '*Sample*' pane will change to show how the file will be imported using the current configuration. If you are unsure of the settings to specify, you can experiment until the desired results are shown in the '*Sample*' pane.

The *Sample* pane is also used to allow columns to be selected to specify column data type/content information. Select a column in the table to activate the settings in the '*Field Information*' pane. Note that clicking anywhere in the column will highlight the entire column.

## 4 Field Information

Select a column in the Sample pane to enable the Field Information options.

### Key

Before importing your data, you need to define a '*key*' column. The content of this column determines the uniqueness of each records being imported, and the choice of key field is critical to the successful operation of EasyCatalog. EasyCatalog will

attempt to automatically determine which of the columns could be used as a key by looking for columns containing unique values. However, **it is critical that you confirm that the correct column has been chosen** before working with your data source.

For further information, see '*Key Fields*' on page 14.

To define a key field, select the column in the '*Sample*' panel and check the 'Key' checkbox.

### Formatting Fields

Wherever possible EasyCatalog attempts to set the type of each field by looking at the content of each column. The field type can be adjusted using the '*Options...*' button.

Further information on formatting data using the *Field Options* dialog can be found on page 22.

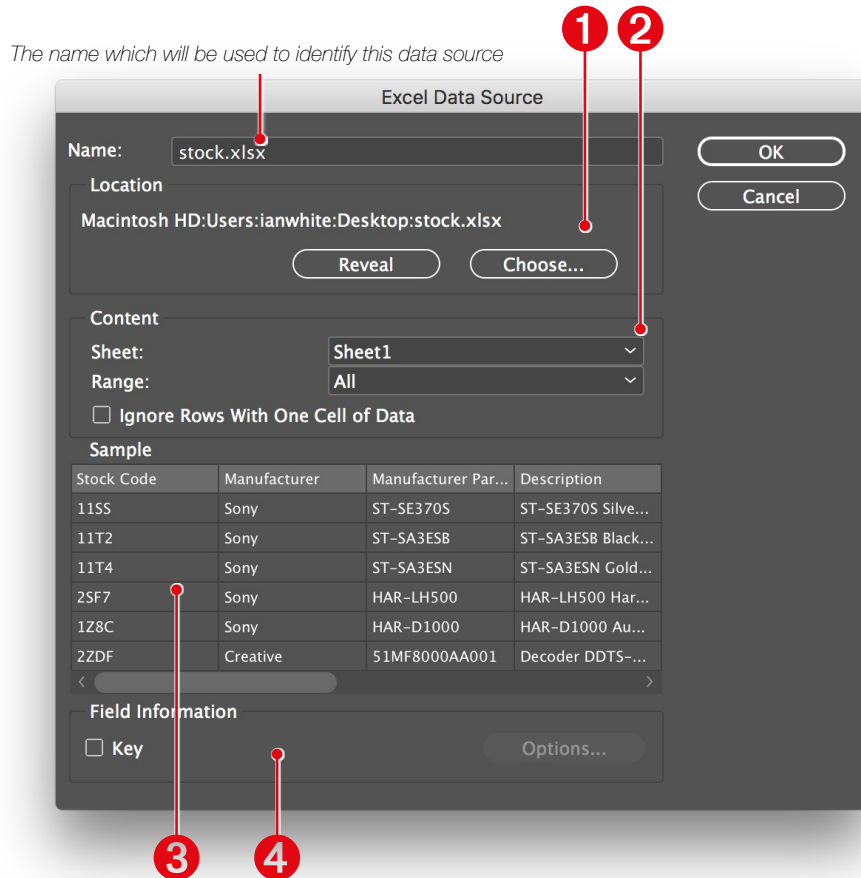
Once you are happy with the configuration options, press the OK button to import the file. If the configuration is correct, a new EasyCatalog panel will open showing a spreadsheet-style view of your data. Further information on working with the EasyCatalog data panels can be found in the '*Panels*' chapter.



## IMPORTING FROM AN EXCEL SPREADSHEET

① The process begins by selecting 'New Excel Data Source' from the *File*→*New*→*New EasyCatalog Panel* menu option.

② Select your data file using the standard InDesign file selection dialog.



### ① Location

Shows the path to the selected file, and allows a new file to be chosen. Use the 'Reveal' button to go to the file in Windows Explorer (Windows) or the Finder (Macintosh).

### ② Content

Choose which sheet to import from the Excel workbook using the 'Sheet' pop-up. Alternatively, select 'All sheets' to import data from all sheets in the workbook. EasyCatalog will create a unique list of field names from across all sheets and create a 'Sheet Name' field for each record that will be populated with the name of the sheet that the record belongs to.

The 'Range' popup shows the data ranges defined in the Excel worksheet and allows a portion of the records and fields in the sheet to be imported.

'Ignore Rows With One Cell of Data' will ignore any rows in the spreadsheet where only a single cell is populated. This setting is generally used for spreadsheets where headers have been inserted amongst the data in Excel.

### ③ Sample

The sample pane shows a preview of the data as it will be imported by EasyCatalog. When a column is selected in this area the Field Information pane will be available.

### ④ Field Information

Before importing your data, you need to define a 'key' column. The content of this column determines the uniqueness of each records being imported, and the choice of key field is critical to the successful operation of EasyCatalog. For further information, see 'Key Fields' on page 14.

To define a key field, select the column in the 'Sample' panel and check the 'Key' checkbox.

#### Formatting Fields

Wherever possible EasyCatalog attempts to set the type of each field based on the format of the cells in Excel.

For example, fields that are numeric in Excel will also be numeric in EasyCatalog. To change the format of a column, select it in the 'Sample' pane and use the 'Options...' button to display the *Field Options* dialog. Further information on formatting data using the *Field Options* dialog can be found on page 22.

Once you are happy with the configuration options, press the OK button to import the file. If the configuration is correct, a new EasyCatalog panel will open showing

a spreadsheet-style view of your data. Further information on working with the EasyCatalog data panels can be found in the *'Panels'* chapter.

## Common Errors and Warnings

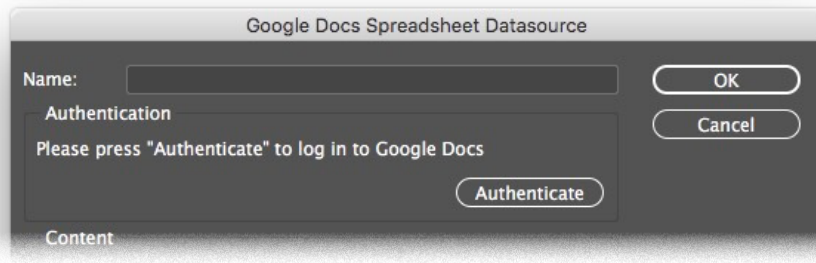
Common Errors and Warnings can be found on page 20.

## IMPORTING FROM A GOOGLE DOCS SPREADSHEET

① The process begins by selecting *'New Google Docs Spreadsheet Data Source'* from the *File*→*New*→*New EasyCatalog Panel* menu option.

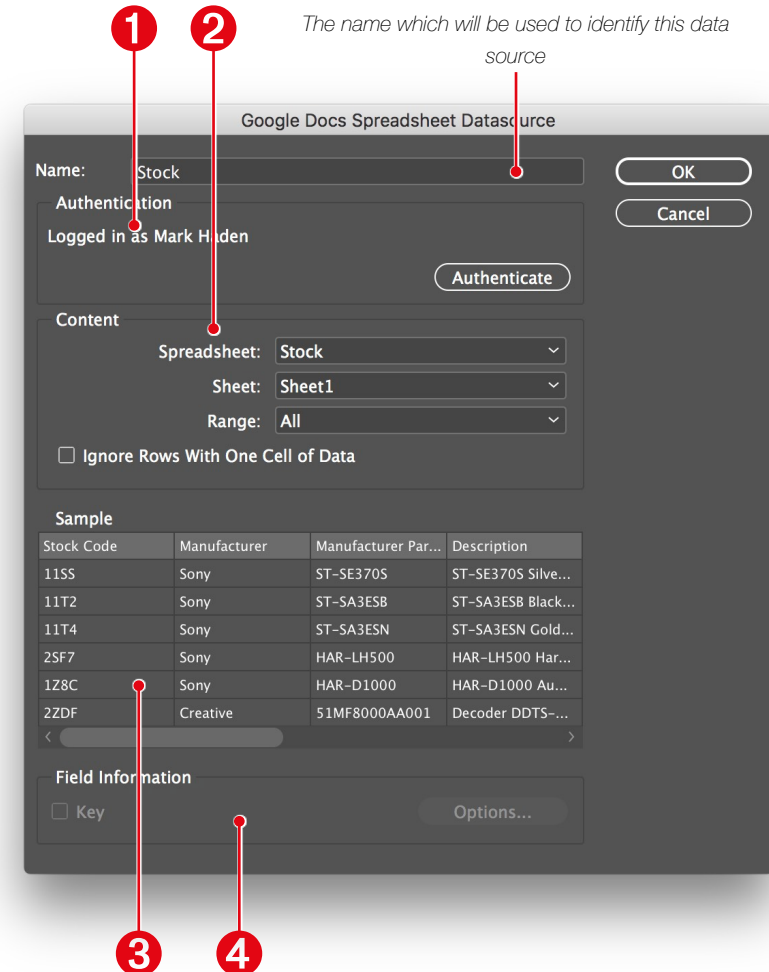
② Press the *'Authenticate'* button on the configuration that appears.

To connect to your Google Docs account you must first authorize EasyCatalog to access it by pressing the *"Authenticate"* button. This needs to be done for each Google Doc Spreadsheet data source you configure. As authentication is required for each new data source, it is possible to import data from multiple Google Docs accounts.



Authentication is via a web browser using the standard Google Docs authentication mechanism. On the web page that appears you will be shown the information EasyCatalog is attempting to access. If at any time you need to prevent EasyCatalog from accessing your Google Docs account, you can remove EasyCatalog from "My Account" in Google Docs.

After pressing the *"Authenticate"* button, EasyCatalog will wait for a response from Google. During this time, a *"Waiting for Authorization"* dialog will appear: **do not cancel this dialog until you have logged in via the browser window, or unless you want to cancel the log-in.** You should be switched back in to InDesign once you've completed the authorization process in your browser.



## 1 **Authentication**

Once authenticated, your Google Docs user name will be shown here. Occasionally it is necessary to re-authenticate: this can happen, for example, if you remove EasyCatalog's access to your Google Docs from your Google account.

## 2 **Content**

Select the name of the spreadsheet you would like to import using the "**Spreadsheet**" pop-up. You can then choose to import an individual sheet from inside of the spreadsheet using the "**Sheet**" pop-up. Alternatively you can select "**All Sheets**" to import data from all sheets within the spreadsheet. A '**Sheet Name**' field will also be created and populated with the name of the sheet that the record belongs to.

The '**Range**' popup shows the data ranges defined in the spreadsheet using the '**Data→Named Ranges**' menu option in Google Docs. Only data defined by the selected range will be imported into your new data source.

## 3 **Sample**

The sample pane shows a preview of the data as it will be imported by EasyCatalog. When a column is selected in this area the Field Information pane will be available.

## 4 **Field Information**

Before importing your data, you need to define a '**key**' column. The content of this column determines the uniqueness of each records being imported, and the choice of key field is critical to the successful operation of EasyCatalog. For further information, see '**Key Fields**' on page 14.

To define a key field, select the column in the '**Sample**' panel and check the 'Key' checkbox.

### **Formatting Fields**

The field type for all fields imported from Google Sheets is set to 'Alphanumeric'. To change the format of a column, select it in the 'Sample' pane and use the '**Options...**' button to display the **Field Options** dialog. Further information on formatting data using the **Field Options** dialog can be found on page 22.

---

## COMMON ERRORS AND WARNINGS

Common import problems, along with possible resolutions are shown below:

***A data source of this name already exists in your workspace folder. Do you want to overwrite it?***

You are attempting to open a data source with the name of a data source that already exists. You may continue by answering 'yes' to this dialog, but the previous version of the data source will be deleted.

***A data source of the same name is already open. Please use another name or close all related panels and try again.***

You are attempting to open a new data source using the name of a data source that already exists. Although similar to the above error message, you cannot continue as panels for the old data source are still open. To overwrite the old data source, close its data panels using the '**Close Panel**' menu option - you may need to show hidden data panels using the '**EasyCatalog Panels**' menu on the Window menu.

***A duplicate key was detected (value). Please check your data provider configuration and try again.***

EasyCatalog identifies each field in the document using a combination of the data source name, field name and key field value. Therefore, each of these elements must be unique in order to identify every placed field.

In the column(s) you have nominated as the key field(s), you have duplicate values (the value that is duplicated is shown in the error). To overcome this, remove duplicate keys from the source data or check that your key field configuration is correct.

***Field names must be unique - '(field name)' appears more than once***

EasyCatalog identifies each field in the document using a combination of the data source name, field name and key field value. Therefore, each of these elements must be unique in order to identify every placed field.

In your configuration you have selected 'First record contains field names', but the first record contains multiple fields with the same name (shown in the error). To remedy this you must change your source data so that it does not include duplicate field names.

***Field names must be unique - '' appears more than once***

Where no field name is shown in the above error, this usually indicates that your records contain more fields than there are field names. This error will only occur when 'First record contains field names' is selected.

To rectify this problem, ensure that each record in the file contains the same number of fields, and that the number of fields matches the number of field names supplied in the first row/record of the file.

***Duplicate records were found and have been removed***

Records that contain exactly the same content cannot be imported, as each would have the same key field values. This error is informative, and the duplicate records will be removed and the file imported. You should check to see whether you need to import these missing records and, if so, include extra information in the source data to differentiate between each record.

***Data cannot be loaded because blank field names were found***

All fields imported must have a name, and this error is indicating that one or more have empty names. This error will only occur when 'First record contains field names' is selected. Check the source data to ensure that each field has a name, and that the number of fields in each record does not exceed to number of field names specified in the first record/row of the file.

## DATA CACHING AND THE WORKSPACE FOLDER

EasyCatalog does not require a permanent connection to your data - by caching your data in a local 'workspace' folder, you are able to continue working with EasyCatalog even when your data source is unavailable.

Your workspace folder also contains all of the settings for each data source you create, allowing you to close and re-open data sources without having to re-configure them each time.

Caching the data locally also offers other benefits, including highlighting differences in the data when new data is retrieved.

By default, your workspace folder will be configured to be:

**Macintosh:** Documents:EasyCatalog Workspace

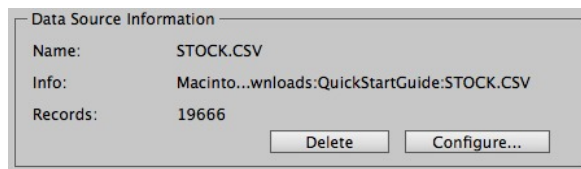
**Windows:** My Documents/EasyCatalog Workspace

## SPECIFYING A WORKSPACE FOLDER

The location of your workspace folder can also be changed - this can be anywhere on your local machine, provided that EasyCatalog always has access to it.

See the '*Application Preferences*' chapter for further information on how to specify the EasyCatalog workspace folder.

Once you have finished with a data source, it can be deleted using the 'Delete' button from the Information dialog. To access the 'Information' dialog, hit the 'info' button at the bottom of one of the data panels.



*Use the Delete button on the Information dialog to permanently delete a data source from your workspace folder.*

## CHAPTER 3

# FIELD OPTIONS

## INTRODUCTION

EasyCatalog provides facilities for fields to be formatted before placement in a document. By setting Field Options you can, for instance, ensure that your price fields are formatted to use the correct currency symbol and number of decimal places.

In addition to text fields, EasyCatalog can also import pictures. Using the Field Options dialog, you can specify whether a picture should be scaled, aligned, etc. when imported.

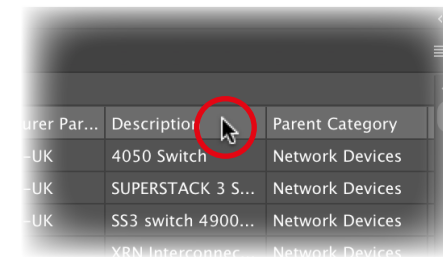
## OPENING THE FIELD OPTIONS DIALOG

The *Field Options* dialog can be accessed in a number of ways:

- ▶ When creating a new data source

Select a column in the '*Sample*' pane on the Data Source Configuration dialog and press the '*Options...*' button at the bottom of the dialog.

- ▶ From the '*Field Options*' menu on the data panel's pop-out menu
- ▶ By holding the *Alt* key while double-clicking on the field's column header.



## AVAILABLE FIELD OPTIONS

The Field Options dialog is split into a number of sections:

- ▶ **Format**

The Format pane allows you to define the field type, or how it is formatted when it appears on the page. Fields can be defined as Alphanumeric or Numeric, with additional options such as importing HTML-formatted text available. See page "The Format Pane" on page 23.

- ▶ **General**

Options such as 'prefix' and 'suffix' can be found here, in addition to 'cleansing' which can be used to clean-up data before it is formatted. For further information see page "The General Pane" on page 28.

- ▶ **Picture Content**

In addition to importing textual content, EasyCatalog can also import pictures either from a folder or from a URL. Additional options such as how the image should be scaled and aligned can also be found on the Picture Content pane. For further information see page "Picture Content Pane" on page 30.

- ▶ **Advanced**

Advanced field options generally don't need to be configured as the defaults are generally correct. However, options such as the ability to exclude the field from certain operations (such as "Update Document") can be found on this pane. For further information go to page "Advanced Pane" on page 33.

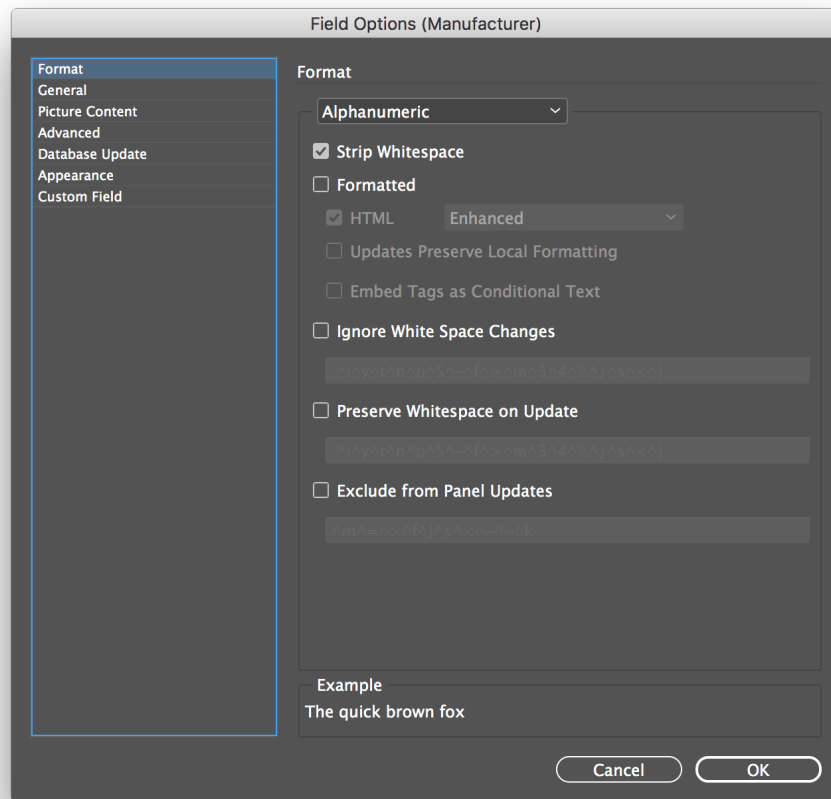
## ► Database Update

The settings used here are only used when working with a data source that has been created using the *ODBC Data Provider*. This pane enabled you to specify an 'update' statement that is used to update your database (when data has been changed in InDesign). Please refer to the *ODBC Data Provider* manual for further information on this pane.

## ► Custom Field

Custom Fields are fields that only exist within EasyCatalog and are populated using one of our inbuilt functions. Please refer to the "Custom Fields" chapter on page 124 for further information.

## THE FORMAT PANE



The Format pane allows you to specify the field's type. The type of the field determines how, for example, a field will appear on the page and also how its content is sorted. The field type can be selected in the pop-up at the top of the Format pane:

## ► Alphanumeric

Fields that are defined as being '*Alphanumeric*' will be output to the document unchanged - use this option if your field is being formatted correctly by the original source of the data, such as a database.

## ► Strip Whitespace

White space, such as tabs, spaces, etc will be stripped from the start and end of the field's content.

## ► Formatted

If your source data contains formatted text (text with formatting tags such as <b>, <i>, etc) turn on the Formatted check box. For further information see 'Formatted Text' on page xxx.

## ► Ignore Whitespace Changes

Selecting this option allows minor modifications to be made to the field in the document without it being shown as 'in error' in the panel.

When checked, this option allows white space to be inserted into the field in the document, such as additional carriage-returns, tabs, etc. Additionally, the '*Update Panel*' menu option will only update the field in the panel when non-white-space characters have been modified.

The list of characters to ignore is can be defined in the text field beneath the check box. InDesign metacharacters can be used for characters such as carriage return, etc. For a full list of supported metacharacters see page "InDesign Metacharacters/Special Characters" on page 30.

### ▶ Exclude from Panel Updates

The characters listed in the edit field will not appear in the field content when using the '*Update Panel*' menu option. This is useful, for example, if you need to exclude characters used only by InDesign from appearing in your data source content.

### ▶ Preserve Whitespace on Update

EasyCatalog will attempt to keep the characters listed in the edit field during an '*Update Document*' operation. This can be used in instances where you need to manually insert characters that affect the formatting of the text in the document that you would not want to be removed when you update the field. Note that depending on how the source data changes and what needs to be updated it's not always possible to correctly preserve the position of these characters.

### ▶ Number

Specify the number of decimal places required using the '*Format*' pop-up.

### ▶ Percentage

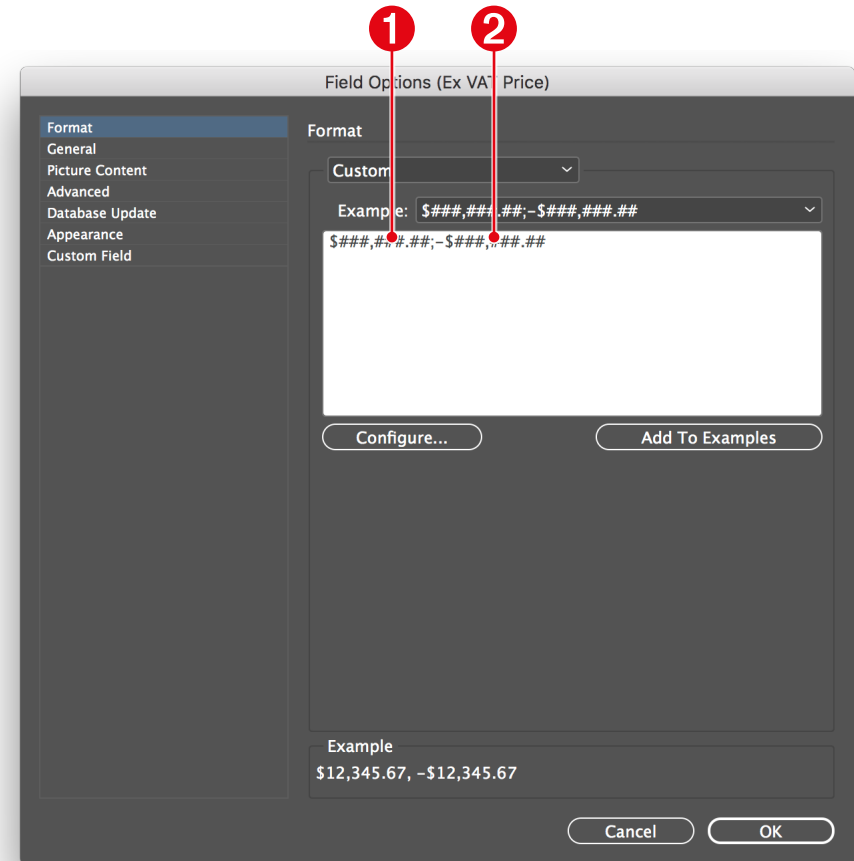
Decimal values will be converted to percentages with the number of decimal places specified by the '*Format*' pop-up. For example, '0.1' will be output as 10%.

### ▶ Currency

A number of pre-defined currency formats are available in the '*Format*' pop-up. For those currencies not listed, please use the 'Custom' field type where you can specify currency symbols, the decimal separator to use, etc.

### ▶ Custom

Where your needs are not met by any of the available options, the '*Custom*' option allows a number format to be specified either through the use of a formatting string or using special keywords.



Common formatting strings are defined in the '*Example*' pop-up. Where none of the examples are suitable you can define your own in the text field below.

A formatting string should be defined for when the field contains ❶ a positive number and ❷ a negative number. The two formatting strings are separated by a semi-colon.

The following characters have special meaning in format strings, all other characters will appear untranslated in the output.

Character	Meaning
#	The most used character, the '#' indicates where digits from the source data should appear.
.	Decimal point. Specifies where the decimal point should appear and, by the use of the '#' character after the point, how many decimal places the number should be formatted to. No rounding will be performed on the value.



Character	Meaning
,	May or may not be present as a divider between groups of digits, such as thousands, millions, etc.
*	Used after the decimal point, this character indicates the minimum number of characters that must appear. For example, you can specify that a field must appear with at least two decimal places, but more will be output if required.

## Examples

The use of the formatting string is best explained by the use of examples:

Format String	Your data source contains...	Field will be formatted in the document as...
\$#.##	123456.123456	\$123456.12
Only two positions are available after the decimal point.		
####,###	123456.123456	\$123,456
The comma may be used to separate groups of digits. No decimal point is provided in the format string, therefore the value will appear as a whole number.		
\$.####	123456.123456	\$123456.1234
Four places are available after the decimal point – the output value is truncated, not rounded.		
# USD	123456.123456	123456 USD
As the characters 'USD' do not have any special meaning, they appear untranslated in the output.		
###.##*	123456.1	123456.10
	123456.1234	123456.1234
Here, the position of the '*' character specifies that a minimum of two decimal places are required.		

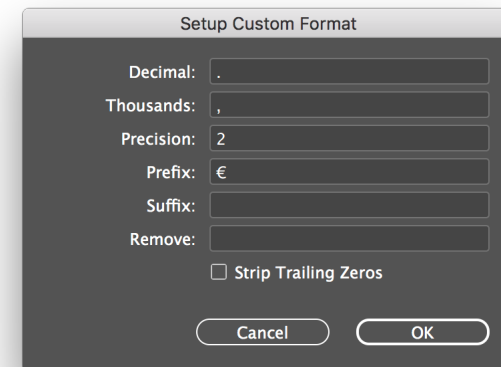
## Custom Formatting Keywords

Instead of the custom formatting string, keywords can also be included to control characteristics such as the character(s) used as a decimal point.

Keyword	Description	Example
PREFIX	Specifies the characters to be inserted before the numeric content of the field.	[PREFIX=€] The field will be prefixed with the euro symbol
SUFFIX	Specifies the characters to be appending to the numeric content of the field.	[SUFFIX=¢] The field will have a ¢ suffix

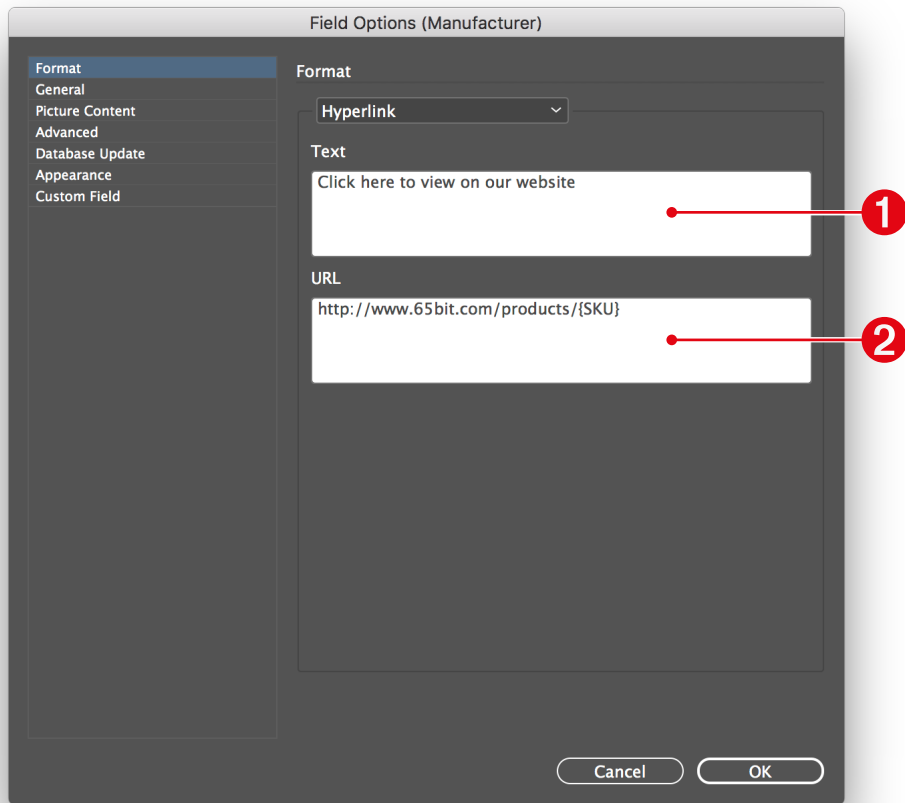
Keyword	Description	Example
DECIMAL	Specifies the decimal separator (radix point) character(s) to use.	[DECIMAL=,] The decimal separator will be the comma - e.g. 199,99
PRECISION	Specifies the number of digits that will appear after the decimal point.	[PRECISION=2] Values will be formatted to two decimal places
THOUSANDS	Specifies a character or characters to use to as the thousands separator. The thousands separator is used to divide the value into groups of three, right-to-left from the decimal point.	[THOUSANDS=,] Values greater than a thousand will use a comma as a thousands separator - e.g.: 1.234.567
REMOVE	Characters can be optionally removed when the content of the field matches the specified criteria.	[REMOVE=0.<1)] For values less than 1, remove "0."

The '*Configure...*' button can also be used to automatically enter these formatting keywords.



## ► Hyperlink

EasyCatalog can also insert text and image hyperlinks into the document which will be included when exporting to document to an interactive PDF.



The Hyperlink pane is split into two sections:

### 1 Text

When inserting a text-based hyperlink, the contents of this edit field will appear in the document. You can either use static text, as shown in the example here, or include the content of other fields (see below). This setting is ignored when inserting a hyperlink on an image box.

### 2 URL

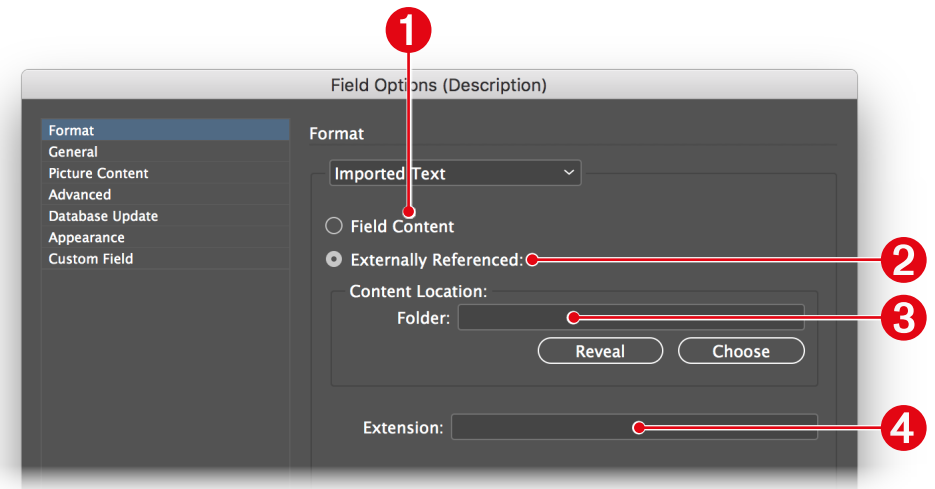
The URL to hyperlink to is specified in this box. This hyperlink can include values from other fields by including the field name in { brackets }. In the example shown here the contents of the SKU field will be included at the end of the hyperlink. You can also use Custom Field commands to build the URL. Further information on these commands can be found on page 124.

### ► Imported Text

EasyCatalog can also import formatted text such as RTF or InDesign Tagged Text from a file or from the content of a field by setting the field type to '*Imported Text*'. EasyCatalog supports all of the text import types provided by InDesign.



**Fields of type '*Imported Text*' will not be updated as part of the '*Update Panel*' operation.**



### 1 Field Content

If the contents of the field contains the formatted content select the '*Field Content*' radio button.

## 2 Externally Referenced

If the field contains the name of a file to import, or a full path to a file, select the 'Externally Referenced' radio button.

### ► If the field contains a full path to the file to import:

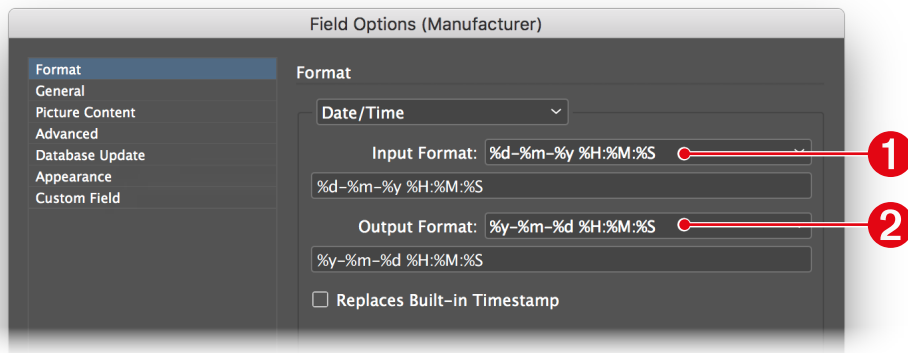
No further configuration in 3 or 4 is required.

### ► If the field contains only the filename of the file to import:

Specify the folder than contains the file in 3. If the content of the field does not contain the file extension, specify this in 4.

### ► Date/Time

EasyCatalog also supports the re-formatting of date and time fields. By changing a field's type to be 'Date/Time', EasyCatalog is able to sort data correctly in the panel. In some situations the output format should be the same as the input format: this is useful when the panel should be sorted by date or time.




1 The 'Input Format' defines the format of the date in your source data. The required date output format is specified in 2. Common formats are shown in the pop-ups.

Specifier	Description	Example
%a	Abbreviated weekday name	Thu
%A	Full weekday name	Thursday
%b	Abbreviated month name	Aug
%B	Full month name	August

Specifier	Description	Example
%c	Date and time representation	Thu Aug 23 14:55:02 2001
%C	Year divided by 100 and truncated to integer (00-99)	20
%d	Day of the month, zero-padded (01-31)	23
%D	Short MM/DD/YY date, equivalent to %m/%d/%y	08/23/01
%e	Day of the month, space-padded ( 1-31)	23
%F	Short YYYY-MM-DD date, equivalent to %Y-%m-%d	2001-08-23
%g	Week-based year, last two digits (00-99)	01
%G	Week-based year	2001
%h	Abbreviated month name (same as %b)	Aug
%H	Hour in 24h format (00-23)	14
%I	Hour in 12h format (01-12)	02
%j	Day of the year (001-366)	235
%m	Month as a decimal number (01-12)	08
%M	Minute (00-59)	55
%n	New-line character ('\n')	
%p	AM or PM designation	PM
%r	12-hour clock time	02:55:02 pm
%R	24-hour HH:MM time, equivalent to %H:%M	14:55
%S	Second (00-61)	02
%t	Horizontal-tab character ('\t')	
%T	ISO 8601 time format (HH:MM:SS), equivalent to %H:%M:%S	14:55:02
%u	ISO 8601 weekday as number with Monday as 1 (1-7)	4
%U	Week number with the first Sunday as the first day of week one (00-53)	33
%V	ISO 8601 week number (00-53)	34
%w	Weekday as a decimal number with Sunday as 0 (0-6)	4
%W	Week number with the first Monday as the first day of week one (00-53)	34
%x	Date representation	08/23/01
%X	Time representation	14:55:02
%y	Year, last two digits (00-99)	01
%Y	Year	2001

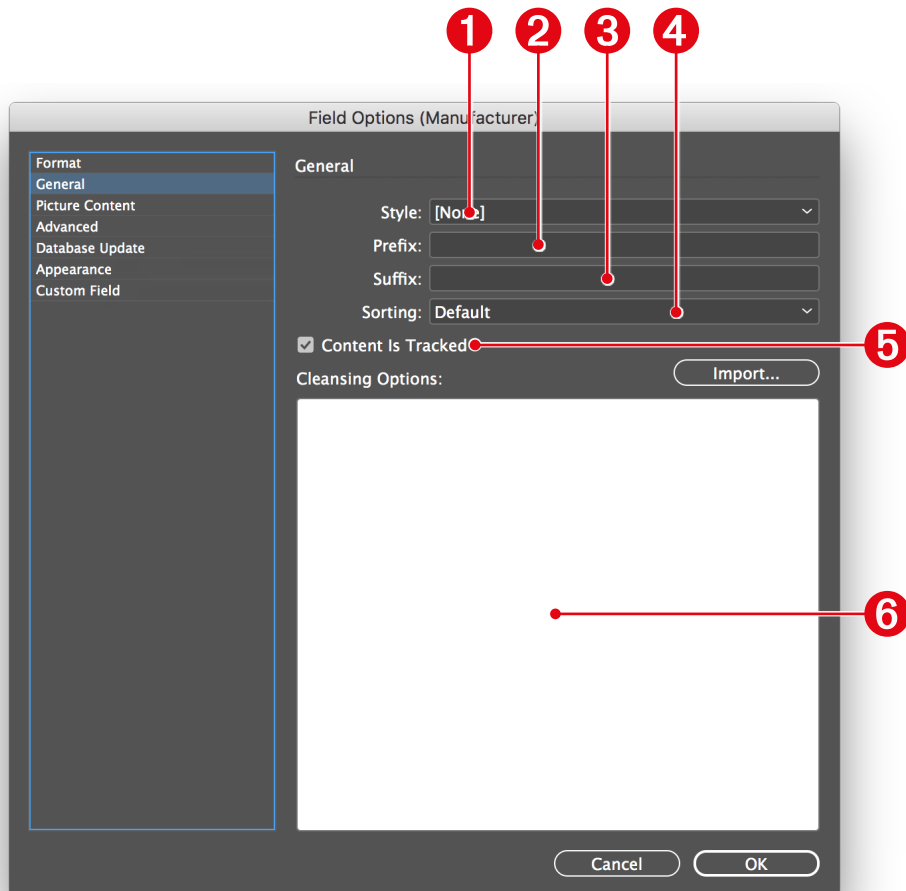
Specifier	Description	Example
%z	ISO 8601 offset from UTC in timezone (1 minute=1, 1 hour=100) If timezone cannot be determined, no characters	+100
%Z	Timezone name or abbreviation If timezone cannot be determined, no characters	CDT
%%	A % sign	%



**If the incorrect Input Format is specified, the field's content will be set to '???'**

## THE GENERAL PANE

The 'General' pane contains options that apply to fields regardless of their type. For example, a field prefix or suffix can be applied here.



### 1 Style

The **character style sheet** specified in this pop-up is applied to the field when it is inserted into the document. The Character Styles for the current document, or the default character style sheets if there is no document open, will be listed in this popup.

When inserting the field into the document, you must ensure that the character style sheet is available. A warning will be displayed if it is not, and the field will be inserted without applying the style sheet.

### 2 Prefix

### 3 Suffix

Any characters that should be included before the content of this field should go in the 'prefix' field; any that should be included after should go in the 'suffix' field. The prefix and suffix is only applied to non-empty fields.

### 4 Sorting

Where your data contains non-English data, select the language in the 'Sorting' pop-up. This will force EasyCatalog to use a linguistic sort when sorting this field, but should only be used when necessary as it can have a significant impact on performance.

## 5 Content Is Tracked

Turn this check box off if you do not want the content of this field to be tracked in the document. When off, the field will not be enclosed inside of our field marker characters in the document and so cannot be updated with new data.

## 6 Cleansing Options

EasyCatalog allows the content of each field to be 'cleansed' before it is used in the document. 'Data Cleansing' is a simple search-and-replace that is applied to the data during import and before any formatting options are applied.

The cleansing options are specified by way of a string in the following format:

*{replace this}={with this};*

*#=£;*

All of the '#' characters will be replaced with '£'

Multiple cleansing options may be also specified:

*#=£;\*=-•;*

Multiple cleansing options are separated by a semi-colon

Characters may also be stripped by not specifying a replace-with character:

*#=;*

Specify nothing on the right-hand side of the cleansing option to strip the character on the left.

Character strings can also be cleansed:

*ESY=EasyCatalog;*

All occurrences of 'ESY' will be replaced with 'EasyCatalog'

If ';' or '=' appears in either the left or right part of the cleansing string, double them up:

*a==b=a equals b;*

Replaces all occurrences of a=b with 'a equals b'.

## Regular Expressions

For advanced users, regular expressions can be specified in the Cleansing Options window:

*REGEX: ^p\$=;*

All 'new paragraph' characters at the end of the field will be stripped (replaced with nothing).

Note that the ^ character is interpreted as an InDesign meta-character, so ^^ should be used for the regular expression ^ character:

*REGEX: ^^a=b;*

Replace 'a' at the start of the string with 'b'.

Further information on regular expressions can be found on the internet, using a reference such as:

[http://en.wikipedia.org/wiki/Regular\\_expression](http://en.wikipedia.org/wiki/Regular_expression)

## Importing Cleansing Options

Commonly-used cleansing options can be stored in a plain text file and imported using the 'Import' button above the cleansing text area.


## INDESIGN METACHARACTERS/SPECIAL CHARACTERS

InDesign metacharacters, such as those used in the Find/Change dialog, can also be used as part of the cleansing statement and within the prefix and suffix fields. Metacharacters begin with a caret (^) and represent special characters in InDesign, such as a bullet point.

\*=<sup>^</sup>8;

All instances of the asterisk (\*) will be replaced with the InDesign bullet character.

A full list of metacharacters supported by EasyCatalog is shown on the in the table below.



**Some InDesign metacharacters refer to formatting rather than content. Only the metacharacters shown in the list below are supported by EasyCatalog.**

Code	Description	
^#	Auto Page Numbering	
^x	Section Marker	
^8	Bullet	•
^^	Caret	^
^2	Copyright Symbol	©
^p	End of Paragraph	
^n	Forced Line Break	
^7	Paragraph Symbol	¶
^r	Registered Trademark Symbol	®
^6	Section Symbol	§
^t	Tab	
^\ ^y ^i ^_	End Nested Style Right Indent Tab Indent to Here Em Dash	

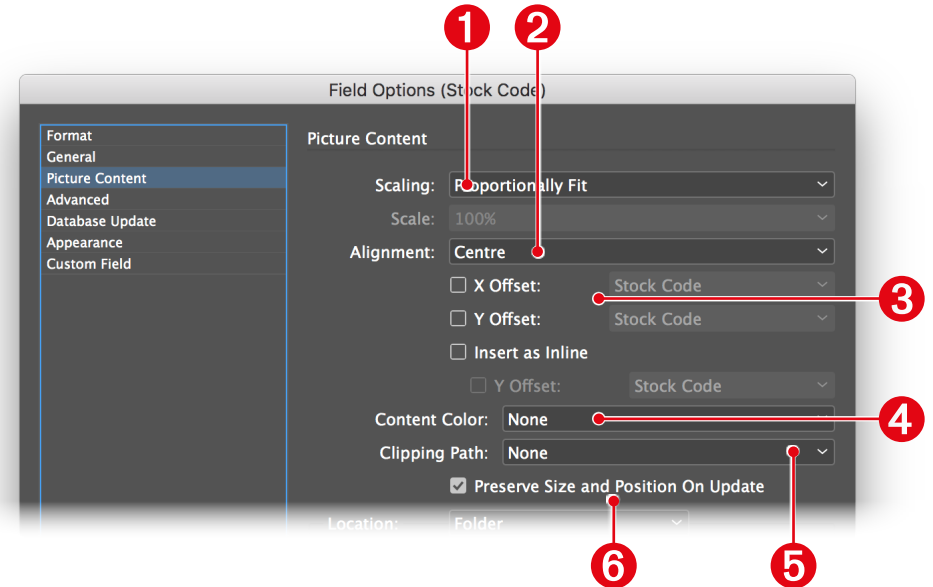
continued....

Code	Description	
^m	Em Space	
^=	En Dash	–
^>	En Space	
^f	Flush Space	
^	Hair Space	
^s	Nonbreaking Space	
^<	Thin Space	
^-	Discretionary Hyphen	
^~	Nonbreaking Hyphen	-
^{	Double Left Quotation Mark	“
^}	Double Right Quotation Mark	”
^[	Single Left Quotation Mark	‘
^]	Single Right Quotation Mark	’
^k	Discretionary line break	

## PICTURE CONTENT PANE

In addition to inserting textual field content into an InDesign text flow, EasyCatalog can also be configured to import images into picture boxes. The picture to import is specified by the content of each field.

The 'Picture Content' pane is split into two sections: how the image will be imported and where it will be imported from.



### 1 Scaling

This option determines how the image will be scaled to fit into its containing box.

Scaling	Description
None	The picture will not be scaled when it is imported
Proportionally Fit	The picture will be proportionally scaled to fit its containing picture box. There may be white space around the image if the image frame has a different aspect ratio to the image.
Fill Frame	The picture will be scaled to fit the picture box but, unlike 'Proportionally Fit', it will completely fill the box ensuring there is no white space around the image. <b>The aspect ratio of the original image will not be maintained when using this option.</b>

continued....

Scaling	Description
Fill Proportionally	The picture will be proportionally scaled to fill the picture box but, unlike 'Proportionally Fit', it will completely fill the box ensuring there is no white space around the image. Some of the image may be outside of the box.
Fixed Scale	Pictures will always be imported and scaled to the percentage specified by the 'Scale' pop-up.
Field Specified	If your data also contains picture scaling information, this option can be used to nominate the field containing this value.

## 2 Alignment

After the image has been imported into the frame, it can be aligned to any of its containing frame's corners or edges.

## 3 X Offset / Y Offset

These options are used to offset the image within its containing frame by an amount specified in the selected field. Specify the name of a field containing the X and/ or Y offset that must be applied to the image. The field should also contain the measurement system (e.g. 'mm') to ensure the offset is applied correctly.

## 4 Content Color

Monochrome TIFF images can be recoloured when imported: specify a field that contains the name of a swatch to apply to the image.

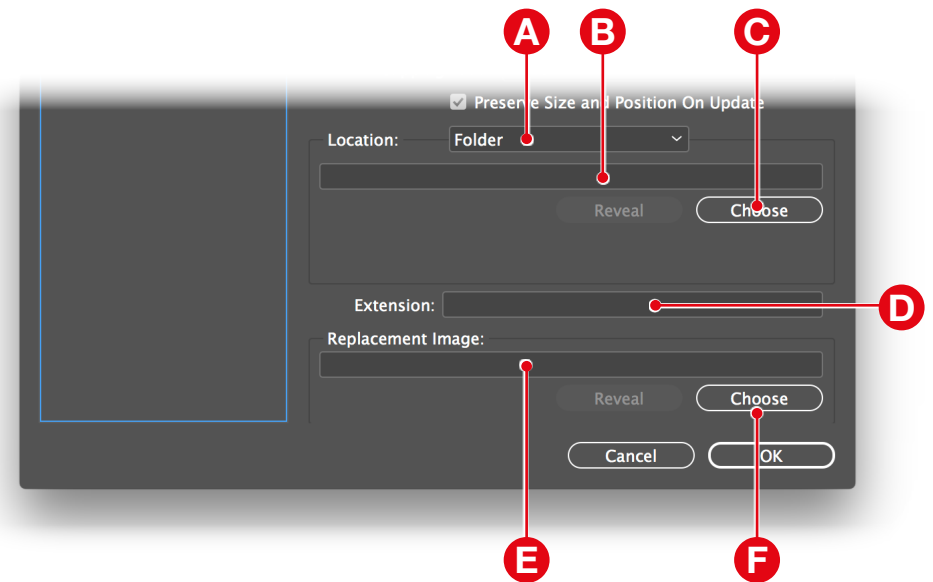
## 5 Clipping Path

A clipping path can be automatically applied to the image when it is imported.

Clipping Path	Description
None	No clipping path will be applied.
Default	The default clipping path settings will be used - i.e. the settings that were selected during the last import on the 'Show Image Import Options' dialog.
Photoshop	The first Photoshop clipping path will be applied to the imported image.

## 4 Preserve Size and Position On Update

By default when re-importing an image during an "Update Document" operation the alignment, scale, etc will all be re-applied. When this option is selected the new image will be imported into the box but the options specified above will be ignored.



## A Location

Images can be imported from either a folder on a file system or by downloading them from a URL. Select either 'Folder' or 'URL' in the 'Location' pop-up.

### ► Folder

#### ► If the field contains a full path to the file to import:

No further configuration in B or D is required.

#### ► If the field contains only the filename of the file to import:

Specify the folder that contains the file in B. If the content of the field does not contain the file extension (e.g. '.jpg', '.gif', etc), specify this in D.

The path to the folder containing the images can be selected using the 'Choose' button C. It can also be dynamically built using one of EasyCatalog's inbuilt Custom Field functions (see page "Custom Fields Reference" on page 124). For example, the following example will pick out the fourth and fifth character from the 'code' field:

Macintosh HD:Images:SUBSTR(code, 4,2):

Specify multiple file extensions in D by separating them with semi-colons:

.jpg;.pdf;.eps;.gif

Where multiple file extensions are specified, EasyCatalog will attempt to import a file with each file extension in turn. In this example it will look for a *.jpg* file, then a *.pdf* file. This can be useful in situations where multiple files exist with different file extensions: specify the order you would like to search with the most preferred format first in the list.

#### ► URL

EasyCatalog can also download images from a URL. Images that are downloaded are cached in the EasyCatalog Workspace folder.

Images will be automatically downloaded as required, so an attempt to insert a picture that has not previously been cached will result in the image being downloaded. If you're using the optional *Pagination Module*, all images required will be downloaded before the pagination commences.

The *'extension'* option **D** is ignored when importing from a URL.

#### ► If the field contains a full path to the file to import:

No further configuration in **B** is required.

#### ► If the field contains a partial URL, or the URL needs to be built from the contents of one of the record's other fields:

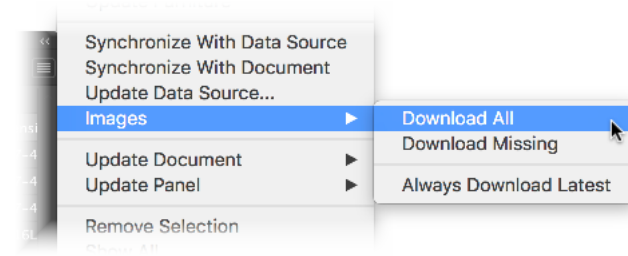
The Image URL field can also be built from the contents of the record's other fields using EasyCatalog's Custom Field functions (see page "Custom Fields Reference" on page 124). For example:

http://www.65bit.com/images/FIELDSTR(key).jpg

*'FIELDSTR(key)'* will be replaced with the contents of the *'key'* field.

## DOWNLOADING IMAGES

EasyCatalog will download images on demand and cache them in your EasyCatalog workspace folder. When one of the fields in the data source has *'URL'* based images a new sub-menu will be available on the data panel's pop-out menu: *'Images'*.



#### ► Download All

Download and cache all images referenced in the panel.

#### ► Download Missing

Download images referenced in the panel that have not previously been downloaded.

#### ► Always Download Latest

Once an image has been downloaded and cached in your workspace folder, it will never be downloaded again unless this menu item is checked. It is advisable to enable this option prior to running the *'Update Document'* operations to ensure the images you have cached locally are the latest available from the server.

#### **B** Replacement Image

When an image cannot be found (or downloaded), the image specified in the *'Replacement Image'* field will be used instead. The *'Replacement Image'* is often used as a placeholder in the document to indicate that an image isn't yet available.

The field will be shown as *'in error'* in the panel to indicate that the correct image is not being used.

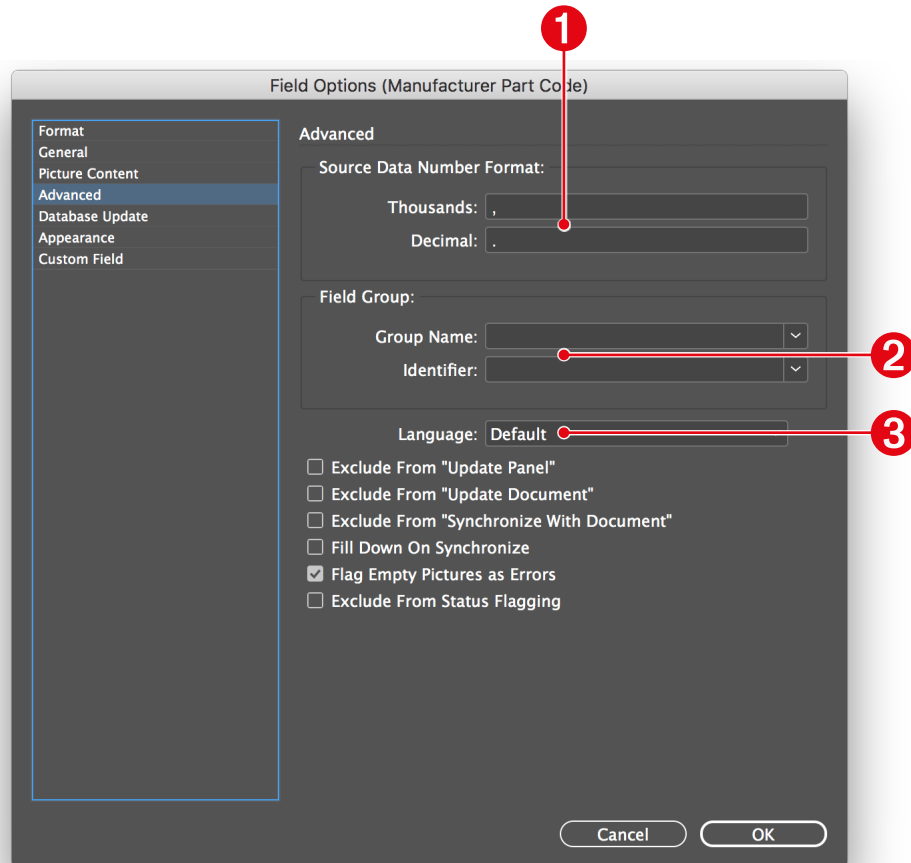
## DATABASE UPDATE PANE

The options shown here are used in conjunction with the *ODBC Data Provider*, and are covered separately in the *ODBC Data Provider* manual.



## ADVANCED PANE

The 'Advanced Options' pane contains settings that ordinarily will not require any adjustment.



### 1 Source Data Number Format

This option allows you to specify the thousands and decimal separators used in your source data. For example, if your data source outputs numeric data using a ‘.’ as a thousands separator and a ‘,’ as the decimal separator, these should be specified on the ‘Advanced’ pane.

When first configured, fields will default to the settings specified in the ‘Regional and Language Options’ control panel on Windows, or the ‘International’ System Preference on Macintosh.

### 2 Field Group

The ‘Field Group’ parameters are used to group fields together so that some operations can operate on multiple fields simultaneously. For example, if you have sets of fields for English, French and German text, three groups could be created that contain the relevant fields for each language. ‘Replace Fields’, for example, can use these Field Groups to replace all fields in a group with fields from another group.

‘Group Name’ is the name of the group (e.g. ‘English’); ‘Identifier’ is used to specify part of a field name that all fields in the group have in common. For example, if all English fields begin with ‘en\_’, enter ‘en\_’ as the Identifier. When replacing field content, this identifier will be used to determine which fields relate to one another (e.g. EasyCatalog will identify that en\_Description equates to de\_Description).

### Language

This option is used to identify the language of the field content. The language specified here will be set on the text that’s inserted into InDesign, and will affect hyphenation, spell checking, etc.

### Exclude from ‘Update Panel’

This field will not be updated in the panel when using the ‘Update Panel’ function from the data panel’s pop-out menu.

### Exclude from ‘Update Document’

This field will not be updated in the document when using the ‘Update Document’ functionality.

### Exclude from ‘Synchronize with Document’

This field will not be included during a ‘Synchronize with Document’ operation, and so will not show as red or green in the panel. This field’s content can still be updated using the ‘Update Document’ menu option.

## Fill Down On Synchronize

This option will populate any empty fields in the column with data from the first non-empty field above it in the data. This option is commonly used when only the first record in a group contains the grouping information:

C	D	E	F	G
Manufacturer Part Code	Description	Parent Category	Child Category	Ex VAT Price
705	ST-SE3705 Silver E-Line Tuner	Audio Separates	Analogue Radio Tuners	76.6
5C	ST-SA3ESB Black Tuner			237
1500	HAR-LH500 Hard Drive Recorder		Audio Hard Disk Recorders	277.44
000	HAR-D1000 Audio Hard Drive Recorder/CD Deck			399
00AA001	Decoder DDT5-100		AV Amplifiers & Receivers	85
900	STR-LV500 Receiver			187
95B	STR-DE695B Receiver Black			187
95S	STR-DE695S Receiver Silver			187
790B	STR-DB790B QS Receiver Black			209
790S	STR-DB790S QS Receiver Silver			209
2000S	STR-DB2000S QS Receiver Silver			325
3000ESB	STR-DA3000ESB ES Receiver Black			555
3000ESN	STR-DA3000ESN ES Receiver Gold			555
5000ESB	STR-DA5000ESB ES Receiver			694
5000ESN	STR-DA5000ESN ES Receiver Gold			694
1	STR-LSA1 LISSA Receiver			285
ESN	TC-KA6ESN ES Cassette Deck		Cassette Decks	485.11

In this data set, the Parent Category and Child Category fields are only populated for the first record in the group. It would not be possible to group the data using these fields as the "Group" function relies on all records in the group sharing the same value.

When "Fill Down On Synchronize" is selected for a field, if an empty field is encountered the last non-empty value will be used instead:

C	D	E	F	G
Manufacturer Part Code	Description	Parent Category	Child Category	Ex VAT Price
705	ST-SE3705 Silver E-Line Tuner	Audio Separates	Analogue Radio Tuners	76.6
5C	ST-SA3ESB Black Tuner	Audio Separates	Analogue Radio Tuners	237
1500	HAR-LH500 Hard Drive Recorder	Audio Separates	Audio Hard Disk Recorders	277.44
000	HAR-D1000 Audio Hard Drive Recorder/CD Deck	Audio Separates	Audio Hard Disk Recorders	399
00AA001	Decoder DDT5-100	Audio Separates	AV Amplifiers & Receivers	85
900	STR-LV500 Receiver	Audio Separates	AV Amplifiers & Receivers	187
95B	STR-DE695B Receiver Black	Audio Separates	AV Amplifiers & Receivers	187
95S	STR-DE695S Receiver Silver	Audio Separates	AV Amplifiers & Receivers	187
790B	STR-DB790B QS Receiver Black	Audio Separates	AV Amplifiers & Receivers	209
790S	STR-DB790S QS Receiver Silver	Audio Separates	AV Amplifiers & Receivers	209
2000S	STR-DB2000S QS Receiver Silver	Audio Separates	AV Amplifiers & Receivers	325
3000ESB	STR-DA3000ESB ES Receiver Black	Audio Separates	AV Amplifiers & Receivers	555
3000ESN	STR-DA3000ESN ES Receiver Gold	Audio Separates	AV Amplifiers & Receivers	555
5000ESB	STR-DA5000ESB ES Receiver	Audio Separates	AV Amplifiers & Receivers	694
5000ESN	STR-DA5000ESN ES Receiver Gold	Audio Separates	AV Amplifiers & Receivers	694
1	STR-LSA1 LISSA Receiver	Audio Separates	AV Amplifiers & Receivers	285
ESN	TC-KA6ESN ES Cassette Deck	Audio Separates	Cassette Decks	485.11



Changes to this flag only take effect at the next 'Synchronize with Data Source' operation.

## Flag Empty Pictures As Errors

When checked, the *Replacement Image* will not be imported for image fields that have no content and the field will not be shown as 'in error' in the panel.

## Exclude From Status Flagging

When checked this field will not affect the record's status flag (shown in the status column in the data panel) after a 'Synchronize with Data Source'. So, for example, if this field is updated during the 'Synchronize with Data Source' the record will not be shown as 'updated' (unless other fields have also been updated).

This option can be useful for fields that frequently change but are not important to the layout (e.g. time stamps).

## CUSTOM FIELD PANE

This pane is only available when creating or editing *Custom Fields*. For further information please see page "Custom Fields Reference" on page 124.

## CHAPTER 4

# EASYCATALOG DATA PANELS

## INTRODUCTION

The EasyCatalog panel is your view on the snapshot of data acquired by a Data Provider. Using a spreadsheet-style appearance, the data in the panel can be sorted, grouped and filtered to make working with large volumes of data easy.

Multiple panels can be open for the same data source, each with different filters, columns, sort orders and groups applied to the same source data.

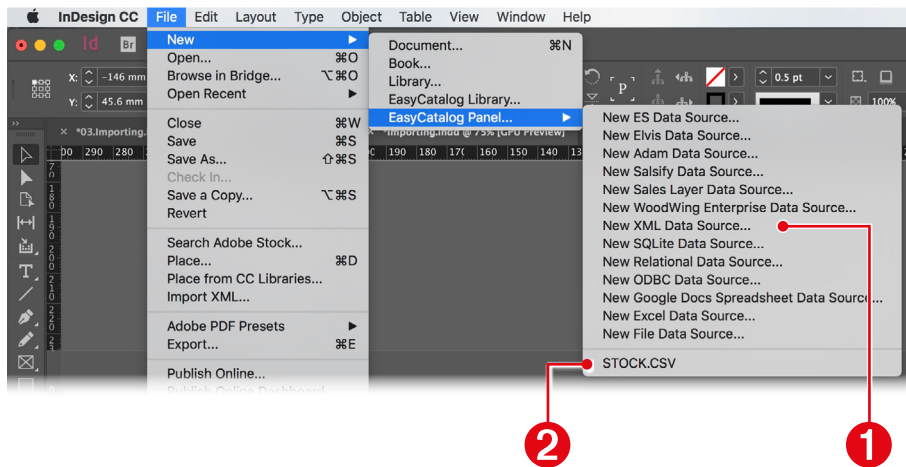
Multiple data sources can also be open at once, allowing you to work on publications that require data from a number of sources.

Each EasyCatalog data panel sits alongside your other InDesign panels and may be docked, resized and hidden in the same way.

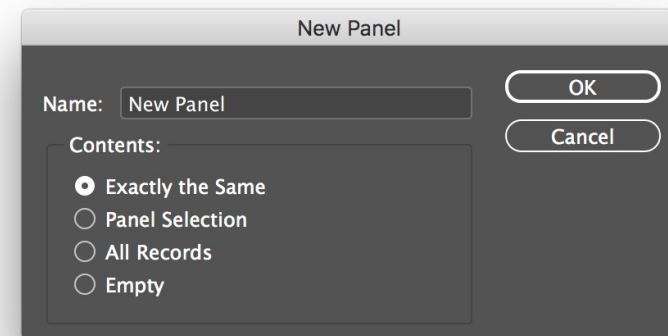
## OPENING A NEW EASYCATALOG DATA PANEL

❶ A new EasyCatalog data panel will be opened after creating a new data source from the *File*→*New*→*EasyCatalog Panel* menu.

❸ A new panel for the data source you're currently working with can be opened using the '*New Panel*' menu option from the data panel's pop-out menu.



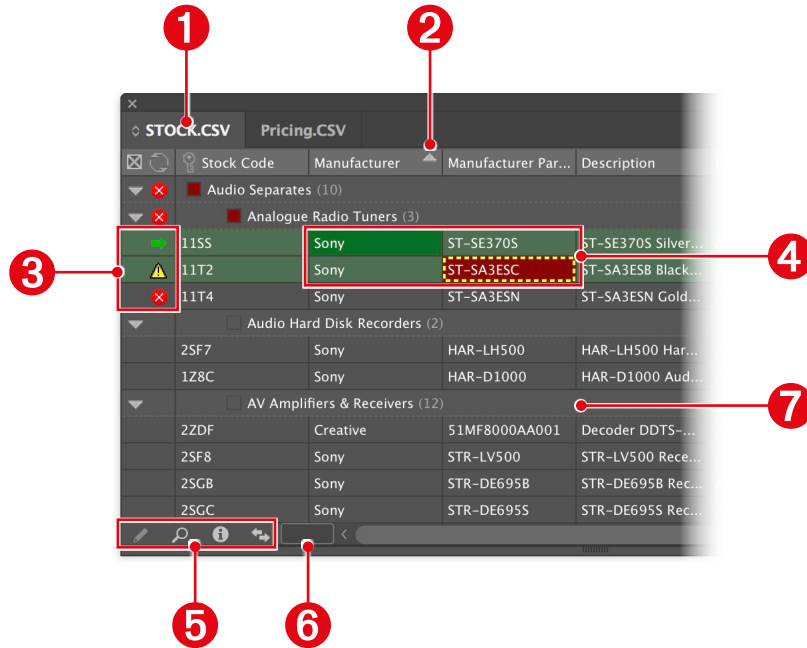
❷ A new panel for an already-configured data source can be opened by selecting the data source in bottom section of the *File*→*New*→*EasyCatalog Panel* menu.



Option	Description
Exactly the Same	A new panel will be created containing the same records and grouping as the existing panel.
Panel Selection	Only the records selected in the panel will be present in the new panel.
All Items	The new panel will contain all of the records for this data source.
Empty	A new, empty, panel is created. To populate this panel, drag records from an existing panel to it or use the subset options to specify the data that should be used to populate it.

## PANEL OVERVIEW

The EasyCatalog panel shows a wealth of information and offers a variety of ways to manipulate your data. In addition to showing your data, each EasyCatalog panel shows status information for each field and offers sorting, filtering and grouping options.



### 1 Work with multiple data panels


Each EasyCatalog data source is in its own panel, and multiple panels can be open for a single data source. This enables you to have multiple views of the same data, each sorted, grouped and filtered independently of the others.


### 2 Reorder the data in the panel.


Sort the fields in the panel by clicking in the column header. The first click will sort the column in ascending order; the second click will sort in descending order and a third click will sort the records into the order they appear in the data source. The panel can be sub-sorted by holding shift while clicking in the column header.

### 3 Quickly see what changed in your data.

The status column shows information about what happened to a record during the last 'Synchronise with Data Source' operation.

 This record has been inserted.

 This record has been removed from the source data, and has effectively been deleted. This record should be removed from the document.

 This record was updated in the source data. The fields that have changed will be shown in the red dotted outline.

### 4 Check the status of your document

The status of individual fields is indicated by their background colour.



One of the fields for this record, is placed.



The field is placed in the document and its content matches the source data.



The field is placed in the document but its content differs to the source panel.



This field was updated when the data was last retrieved from the data source.



The field in the panel has been updated from the document and needs updating in the data source.



The field is placed in the document but its content differs to the source panel and the field was updated when data was last retrieved.

5 The buttons at the bottom of the panel provide fast access to the most commonly-used EasyCatalog functions:




Inserts the current panel selection into the document. A text insertion point, or a picture box selection, is required.



Filter the panel based to show only records that satisfy specified criteria. See "Filtering Based On Field Content" on page 54.

 Display the 'Data Source Information' dialog.

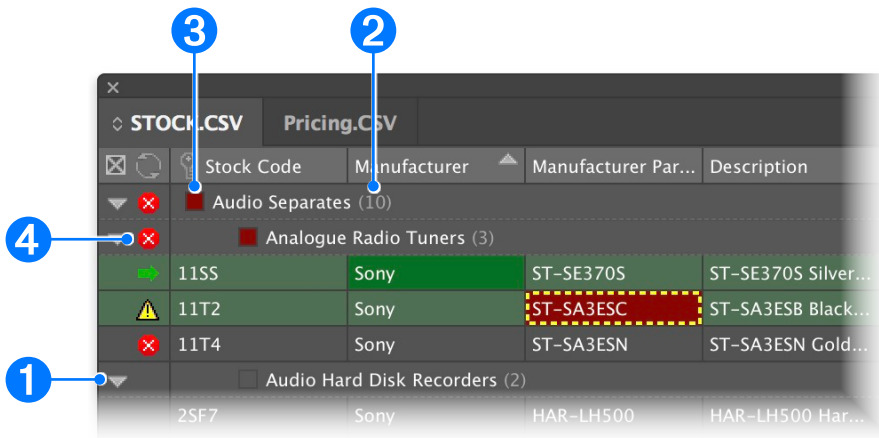
 Compare the content of the document with the field content shown in the panel. Any mismatches will be shown in red.

## 6 Quickly search your data

The Quick Search text box can be used to filter the panel quickly. Click in the box and begin typing to filter the panel.

## 7 Structure your data

Records can be grouped together in the panel so that they can be paginated at the same time. Grouping the panel also allows the structure of the data to be defined, enabling headers, for example, to be inserted on each change of group. See "Grouping Your Data" on page 39.



1 Click on the disclosure triangle to show the sub-groups and records within the group.

2 The number of sub-groups or records immediately beneath is shown in brackets.

3 If any of the fields in the group are 'in error', the status of the group will also be 'in error'. Otherwise, if all records have at least one field placed the status will be dark green; if only some records have at least one field placed the status will be light green.

4 The number of sub-groups or records immediately beneath is shown in brackets.

## FINDING FIELDS IN THE DOCUMENT

Double-click on a placed field to find it in the document. Only fields on visible, unlocked, layers will be shown.

### ► Placed Fields

If the field is shown as placed and not in error (indicated by a green field in the panel), double-clicking will locate the first occurrence of the field in the document.

### ► Errors

If the field is placed but shown as being in error (indicated by a red field in the panel), double-clicking will locate the first erroneous occurrence of the field in the document.

## EDITING DATA IN THE PANEL

Fields can be edited directly in the panel by right-clicking on the field and using the 'Edit Field Content' option from the contextual menu that appears. Once edited the field will be shown with a blue dotted outline to indicate that your source data should be updated.

Fields can not be edited if they are:

### ► Key Fields

A key field cannot be modified as this would break any links already placed in the document. It would also not be possible to update your data source with a modified key field.

### ► Custom Fields with a custom field function

The custom field function (see "Custom Fields Reference" on page 124) determines the content of the entire column, so it is not possible to edit an individual field's content. Custom fields that have been created without a function specified can be edited manually.

## REORDERING ROWS AND COLUMNS

Reordering the data in your panel can assist when paginating, as the order of the records in the panel will determine the order they are placed in the document.

### SORTING COLUMNS

To sort the records by the data in a single column click in the column header. Click once to sort the records in ascending order; click again to sort in descending order; click again to revert the sort records in the order they appear in the data source.



**The records will be sorted according to the field's type, so it is important to ensure that you have configured numeric fields as being on of the 'number' field types in Field Options. See "Field Options" on page page 22.**

### SUB-SORTING COLUMNS

Hold the shift key while clicking on the column header to sub-sort the data.

Stock Code	Manufacturer	Ex VAT Price	Manufacturer P
27TX	3Com (Comms & N...	\$7,389.00	3C17708-UK
22PY	3Com (Comms & N...	\$3,929.00	3C17706-UK
T57	3Com (Comms & N...	\$3,500.00	3C17702-UK
2M2W	3Com (Comms & N...	\$3,199.00	3C17715
X4Y	3Com (Comms & N...	\$2,959.00	3C17712

A number under the sort direction icon shows the order that the columns will be sorted in.

### MANUALLY REORDERING ROWS

Rows in the table may be reordered by dragging them into position. Table rows may also be dragged between panels – this is useful after creating a new, empty, panel.

**Note** that the automatic filtering will be removed from a panel once a row has been dragged – the filter is removed, although only the records that were visible when the filter was applied will remain.

### REORDERING COLUMN POSITIONS

The positions, or order, of columns may be changed for each panel.

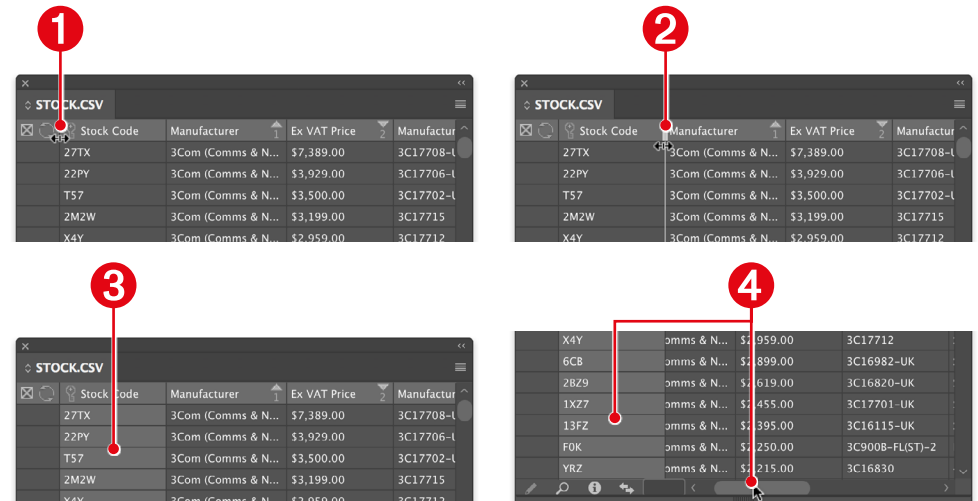
To reorder columns, simply drag them into position: click and hold the mouse button in the header area of the column you want to move. Drag the column into its new position – the position of the drop will be shown whilst dragging.

#### Reordering Columns Alphabetically

To sort the columns into order alphabetically, right (or Ctrl) click in the panel data area and select 'Reorder Columns Alphabetically' from the contextual menu that appears.

### PREVENTING COLUMNS FROM SCROLLING

Columns can be prevented from scrolling horizontally allowing, for example, your key fields to be permanently visible in the panel. Fixed columns are always shown at the left of the panel.



- ❶ Hold the Shift key while hovering over the divider between the status column and the first column.
- ❷ Drag the divider to the right.
- ❸ All columns to the left of the divider will be fixed at the left of the panel and will be shown with a grey background.
- ❹ When scrolling the panel horizontally the fixed column will not move.

## GROUPING YOUR DATA

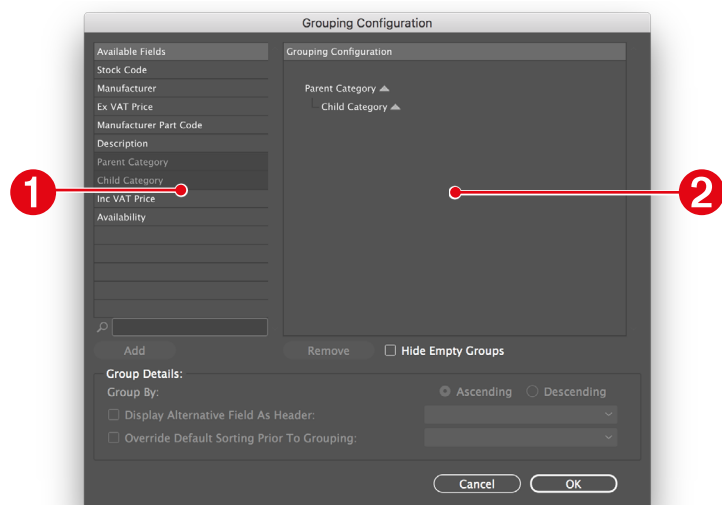
Grouping enables you to group related items of data within the panel and define complex group and sub-group relationships which can either be used to make your data more manageable, or represent the physical layout of your publication.

Groups are a powerful feature of EasyCatalog and are used extensively during pagination.

To group your data, select the “*Group*” menu form the data panel’s pop-out menu.

## GROUPING CONFIGURATION DIALOG

The dialog is split into two sections. ❶ The left shows a list of all fields from the current data source; ❷ the right shows the current grouping configuration.



Grouping works by looking for common values in the fields shown in the “Grouping Configuration” list. In the above example, all records with the same Parent Category and Child Category field content will appear in the same group in the panel.

## ADDING A GROUP LEVEL

To add a field to the “Grouping Configuration”, either:

- ▶ Double click on the field in the “Available Fields” list, or
- ▶ Select a field in the “Available Fields” list and click the “Add” button.

New fields to group by can only be added at the bottom of the configuration.

## REMOVING A GROUP LEVEL

To remove a field from the “Grouping Configuration”, either:

- ▶ Double click on the field in the “Grouping Configuration” list, or
- ▶ Select a field in the “Grouping Configuration” list and click the “Remove” button.

Any fields below in the grouping configuration will move up.

## SORTING GROUPS IN THE PANEL

By default the groups in the panel will appear in ascending order - either alphabetically if the field you’ve grouped by is alphanumeric or numerically when the field is one of the ‘number’ field types.

The order of the groups can be modified by:

### ► Using the “Ascending” or “Descending” radio button

Select a field in the “Grouping Configuration” list and select either the ‘Ascending’ or ‘Descending’ radio button.

### ► Using the “Override Default Sorting Prior To Grouping” option

The contents of another field in your data can be used to determine to the order of the groups in the panel. For example, you may want to group by the ‘Category’ field in your data, but want the groups to be ordered by a ‘Category Order’ field. If this is the case, select the name of the field that should be used to order the data in the ‘*Override Default Sorting Prior To Grouping Menu*’ pop-up menu.

## LOCKING A PANEL

Panels can be locked to prevent any records being added, removed or reordered. *Advanced Filters* are also removed from the panel to prevent the content of the panel being affected by a field’s status changing.

To lock a panel, select ‘*Lock Panel*’ from the panel’s pop-out menu. Locked panels are shown with a padlock icon in the top right corner or the header.



The order of the groups as they are presented in the source data can be preserved by selecting the ‘*Data Source Order*’ option.

## DISPLAY ALTERNATIVE FIELD AS HEADER

Use this option when you are grouping by a field, such as a group code or a sort-order, but require a more meaningful field to be displayed in the panel. For example, you may want to group the data using a group code field but need a more meaningful ‘group name’ field to be displayed in the panel.

Once a panel is locked the following options are no longer available:

- Reordering records by sorting columns
- Grouping/Ungrouping the panel
- Advanced Filters

A locked panel can be unlocked by selecting ‘*Unlock Panel*’ from the pop-out menu. Note that filters will need to be reapplied to the panel after unlocking.

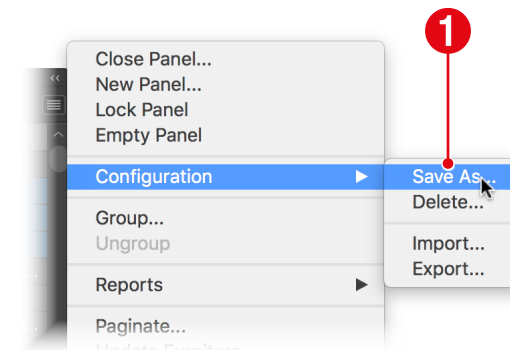
## PANEL CONFIGURATIONS

### SAVING A PANEL CONFIGURATION

The configuration of your panel, such as the way it is grouped, sorted, etc can be saved. Using configurations it is possible to define different views of the data which can be reapplied when required.

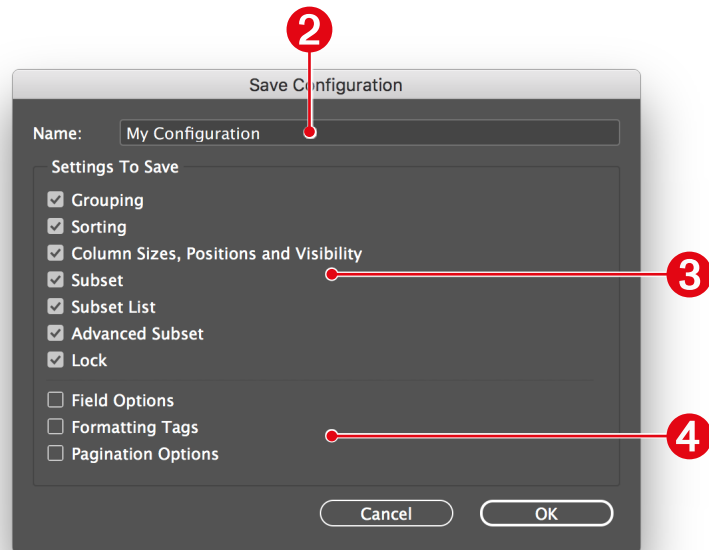
Configurations can either be stored as part of the data source or exported to a file to be applied to a different data source. See ‘*Exporting and Importing Configurations*’ below.

- 1 Select ‘*Save As...*’ from the Configuration sub-menu on the data panel’s pop-out menu.



- 2 Give the configuration a name at the top of the dialog that appears.






③ Select the configuration options you would like to save in this configuration. The options in this section affect the view of the data, so applying a configuration with this options will only affect the panel it is being applied to. When applying the configuration only the attributes selected here will be applied.

Option	Configuration options stored:
Grouping	The options specified in the ' <i>Grouping Configuration</i> ' dialog.
Sorting	The columns that are being used to sort the panel.
Column Sizes, Positions and Visibility	The position, size and visibility of the columns in the panel.
Subset	Any filter/subset currently applied to the panel.
Subset List	The list of filters/subsets shown in the ' <i>Saved Subsets</i> ' menu.
Advanced Subset	The <i>Advanced Subset</i> options currently applied to the panel.
Lock	The current lock/unlocked status of the panel.

③ The configuration options in this section apply to the data source, rather than the panel view. Therefore by applying a configuration that has these setting stored, all panels for the data source may be affected.

Option	Configuration options stored:
Field Options	The options specified in the <i>Field Options</i> dialog for all of the fields in the data source.
Formatting Tags	The custom formatting tags that have been defined using the <i>Formatting Tags</i> dialog.
Pagination Options	The options specified on the " <i>Paginate</i> " dialog.

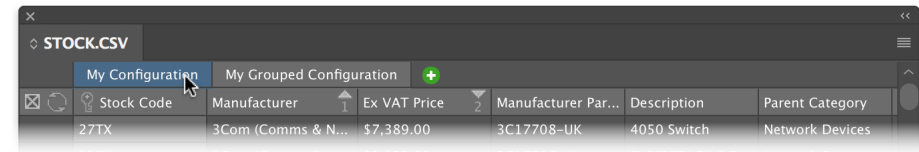
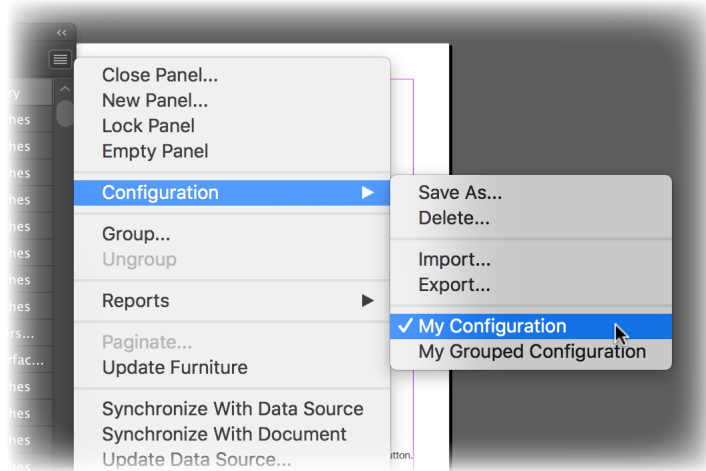


**Custom field definitions will also be saved when 'Field Options' are stored in a Configuration. Applying a configuration containing Field Options will remove any custom fields that are not part of the configuration.**

## LOADING A PANEL CONFIGURATION

The configurations you have saved will be shown at the bottom of the 'Configuration' sub menu from the data panel's pop-out menu.

Configurations that are applied to the current panel will be shown with a check mark. It is possible to have multiple configurations applied to the same panel at the same time. For example, if one configuration only defines column sorting option and another defines grouping EasyCatalog will show them as both being applied if the panel is grouped and sorted correctly.



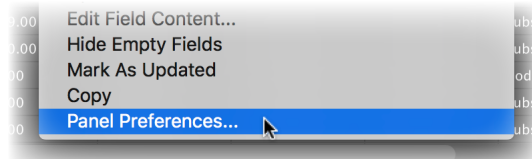
## EXPORTING AND IMPORTING A PANEL CONFIGURATION

The Configuration sub menu also contains options to export the current panel configuration to a file (using the 'Export...' menu option), which can later be imported to a different data source (using the 'Import...' menu option).

As with '*Saving a Panel Configuration*' (above) you can decide which attributes to include in the configuration file.

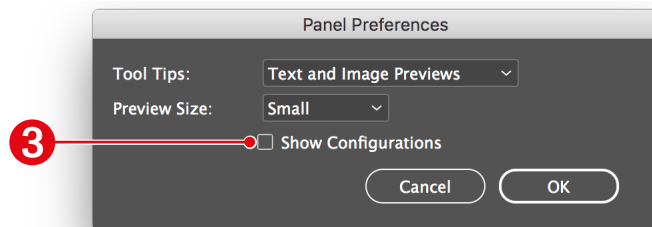
It is also possible to show the available Configuration across the top of the panel to make switching between them easier:

- 1 Right click in the data area of the panel.



- 2 Choose '*Panel Preferences*' from the contextual menu that appears.

- 3 Check the '*Show Configurations*' check box on the Panel Preferences dialog.

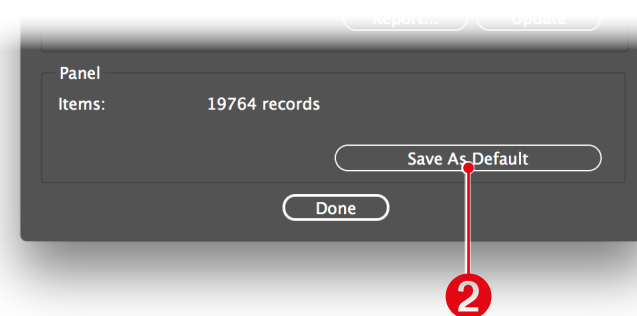


- 4 The available configurations are shown in tabs along the top of the panel. If the attributes of the configuration are applied to the panel the tab will be highlighted. Change to a different configuration by clicking on the relevant tab.

## DEFINING A DEFAULT CONFIGURATIONS

When a new panel is opened for a data source, EasyCatalog will simply display a list of records in their default order. No sorting or grouping will be used as, by default, these options are panel specific. However, a default configuration can be specified so that if a panel for the data source is opened in the future it will be sorted and grouped correctly.

- 1 Once you have applied your grouping, sorting, etc options press the information button at the bottom of the panel.
- 2 Use the '*Save As Default*' button to save the current panel configuration as the default for this data source. Any new panels that are opened will use these settings.



---

## CLOSING PANELS

### HIDING A PANEL

Use the close button in the top-left corner (Macintosh) or top-right corner (Windows) of the panel to hide the panel from view. The panel is only hidden, and can be shown again using the '*Window*→*EasyCatalog Panels*' menu option. The panel configuration, such as sorting, grouping, etc, is retained while the panel is hidden.

### CLOSING A PANEL

When you have permanently finished with a panel, use the '*Close Panel*' pop-out menu option. Once closed, the panel's configuration (such as sorting, grouping, etc) will be lost unless you have saved it as the default configuration for the data source, or as a named configuration (see above).

## CHAPTER 5

# INSERTING DATA

## INTRODUCTION

EasyCatalog offers a number of pagination options - from the simple insertion of single fields into text, right through to designing complex '*Product Styles*' and the automatic creation of page content.

'*EasyCatalog Libraries*' extend the functionality of InDesign libraries, and allow dynamic content to be used in the design. When an item is dragged from an EasyCatalog Library to the page, the content for the selected record is used to paginate it.

Through intelligent tracking of content, EasyCatalog can identify those fields that are placed, if their content is up-to-date and, if not, update it.



Using the '*insert*' button at the bottom of the panel, EasyCatalog can insert:

## SINGLE FIELD INSERTION

The simplest of all pagination options, a single field can be inserted by simply selecting the desired field in the EasyCatalog panel and hitting the '*insert*' button.

Only one field can be selected in the EasyCatalog panel, as a multiple-field selection will insert a simple table (see below).

## INSERTING TEXT

If you have a text insertion point in the document, the field content will be inserted. This method is useful for constructing documents where records do not appear in a structured manner and field text must be inserted into normal text runs.

The character style sheet which has been defined for a field (in '*Field Options*') will be applied to the field text.

Green '*Field Marker*' characters will also be inserted around the field content - these markers are non-printing and are used to designate where the field content is in the document. After a document synchronization, these field markers will appear in red when the document content does not match the data source content (see '*Synchronizing*').

### ▶ A text field into the document

If a single field is selected in the panel, and you have a text insertion point, EasyCatalog will insert the selected field content as text.

### ▶ Picture content into a picture box

If a single field is selected in the panel and you have a picture box selected in the document, EasyCatalog will import picture content.

### ▶ Tabular data

When multiple fields are selected in the panel and you have a text insertion point, EasyCatalog will insert a table into the document.

Text insertion point

Stock Code: |

My Configuration	My Grouped Configuration	Stock Code	Manufacturer	Manufacturer Pa
		1155	Sony	ST-SE3705
		11T2	Sony	ST-SA3ESC
		25F7	Sony	HAR-LH500
		1Z8C	Sony	HAR-D1000
		2ZDF	Sony	51MF8000A00
		25F8	Sony	STR-LV500
		15C8B	Sony	STR-DE695B

Single field selection

Stock Code: {2SF8}

A screenshot of a CSV table titled 'STOCK.CSV'. The table has columns for 'Stock Code', 'Manufacturer', and 'Manufacturer Part Number'. The row for '2SF8' is highlighted in green. The field marker '{2SF8}' is shown in the text to the left of the screenshot, indicating its position in the document.

Stock Code	Manufacturer	Manufacturer Part Number
115S	Sony	ST-SE370S
11T2	Sony	ST-SA3ESC
2SF7	Sony	HAR-LH500
1Z8C	Sony	HAR-D1000
2ZDF	Sony	51MF8000AA00
2SF8	Sony	STR-LV500
2SCB	Sony	STR-DE695B

The field has been inserted, enclosed in Field Markers

Stock Co{F8}

A screenshot of a CSV table titled 'STOCK.CSV'. The table has columns for 'Stock Code', 'Manufacturer', and 'Manufacturer Part Number'. The row for '2SF8' is highlighted in green. The field marker '{F8}' is shown in the text to the left of the screenshot, indicating its position in the document.

Stock Code	Manufacturer	Manufacturer Part Number
115S	Sony	ST-SE370S
11T2	Sony	ST-SA3ESC
2SF7	Sony	HAR-LH500
1Z8C	Sony	HAR-D1000
2ZDF	Sony	51MF8000AA00
2SF8	Sony	STR-LV500
2SCB	Sony	STR-DE695B

### Working with Field Markers

Field markers are non-printing and zero-width, and are used to track the content of fields in the document.

Individual field marker characters can not be deleted - they can only be removed if both the start and end marker characters are included in the selection.

Stock Code: {2SF8}

A screenshot of a CSV table titled 'STOCK.CSV'. The table has columns for 'Stock Code', 'Manufacturer', and 'Manufacturer Part Number'. The row for '2SF8' is highlighted in green. The field marker '{2SF8}' is shown in the text to the left of the screenshot, indicating its position in the document.

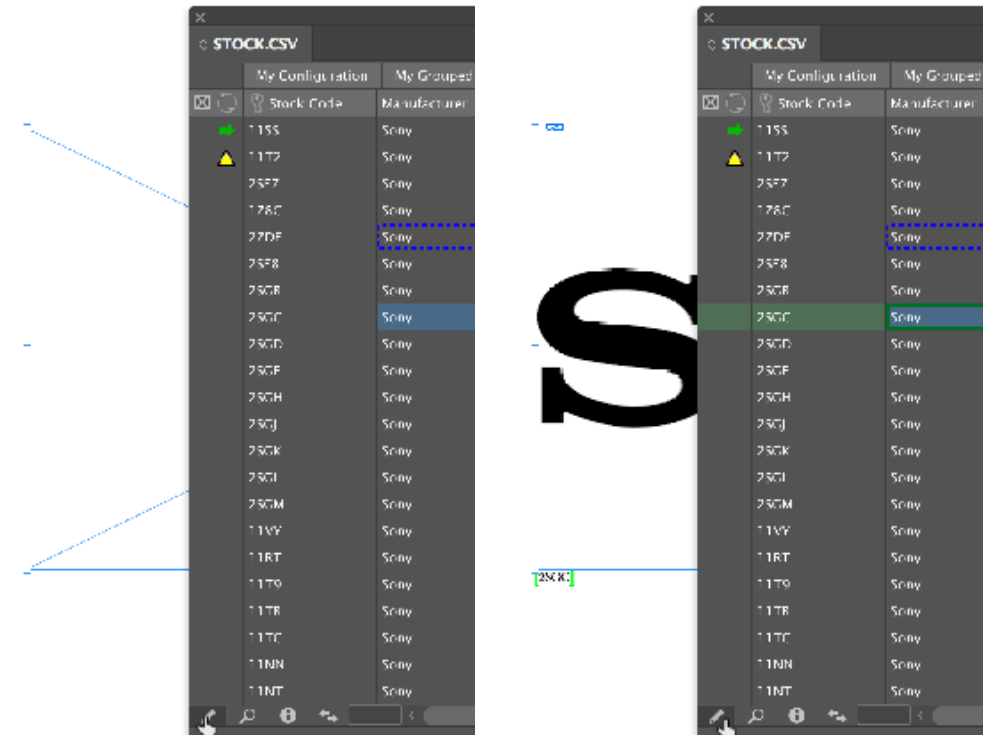
Stock Code	Manufacturer	Manufacturer Part Number
115S	Sony	ST-SE370S
11T2	Sony	ST-SA3ESC
2SF7	Sony	HAR-LH500
1Z8C	Sony	HAR-D1000
2ZDF	Sony	51MF8000AA00
2SF8	Sony	STR-LV500
2SCB	Sony	STR-DE695B

Field markers must always be deleted in pairs. In this example, only the start of field marker is included in the selection.

InDesign will not allow the start of field marker to be deleted without the end of field marker to ensure the integrity of the data in the document.

### Inserting Pictures

If an empty picture frame is selected, the picture will be imported for the selected field.



If an empty picture frame is selected, the picture will be imported for the selected field using the setting from the "Picture Content" pane in the field's Field Options dialog.

The content of the field determines the name of the picture file that will be imported. To find the picture file, EasyCatalog will attempt to import the image from the following locations:

▶ **If the field contains a full path**

The image will be imported from the path stored in the field content.

▶ **If the field contains only a filename**

If the filename in the field does not have an extension (e.g. '.jpg'), the extensions specified in the 'Extensions' field will be added. EasyCatalog will then attempt to import the image from the folder specified in the 'Content Location' path. If the image does not exist there, EasyCatalog will attempt to import the file from the 'Images' folder inside of the data source folder.

▶ **If the field is empty**

If the field is empty, the Replacement Image will be imported if the '*Flag Empty Pictures As Errors*' Advanced field option is on. If this option is off, the image box will remain empty and the field will not be shown as '*in error*'.

Once successfully imported, EasyCatalog will show the key field value of the record at the bottom left of the image frame. The picture will be scaled and aligned according to the values specified on the "*Picture Content*" pane in Field Options. See page xxx.

## Missing Images

In the event of the image file not being found in any of the above locations, the '*Replacement Image*' image will be imported (if specified in *Field Options*). In the event of the '*Replacement Image*' being imported, the field will be shown as being in error in the document and in the panel.



**If the correct image for a field can not be found, the '*Replacement Image*' specified in Field Options will be used.**

## SHOWING AND HIDING FIELD MARKERS

The appearance of the field markers when designing your document can be specified via the '*Show/Hide Field Marker*' panel menu option. This viewing preference is a document-based preference - therefore, the visibility setting of the markers will remain with the document.

The visibility of the field markers does not affect EasyCatalog's ability to update document content, or the user's ability to delete them - the markers are there, but invisible.

Field Markers will also not show when viewing your document in '*Preview*' mode.

## RELINKING FIELDS TO NEW DATA SOURCES

*Field Adoption* allows fields on a document to be associated to a new data source. All fields in a document, or only fields on the 'active' layer, can be relinked to a new data source.

As fields are re-linked based on their names, it is important that your new data source contains fields of the same name as the data source that was used to create the document. Also note that fields are associated to new records based on their key, so it is also a requirement that the new data source contains data with the same key fields.

### Relinking Fields

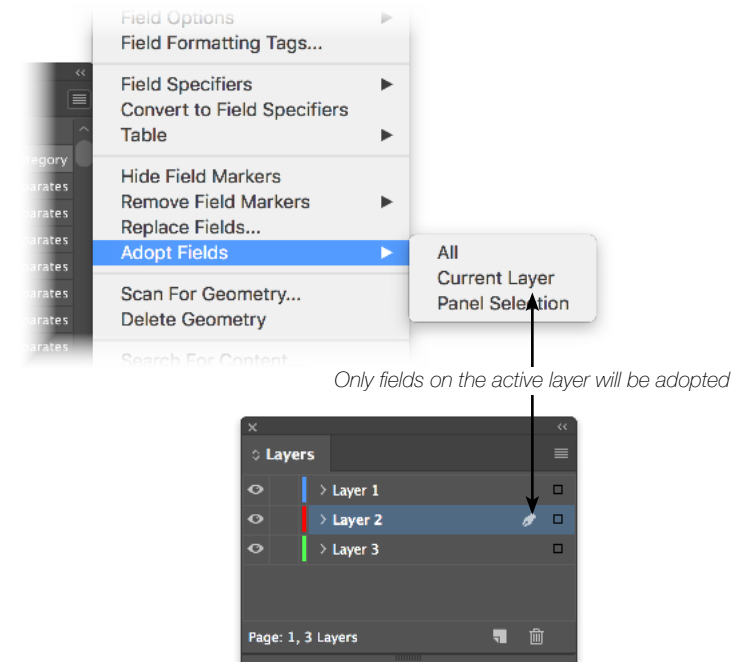
#### ► Create your new Data Source

Either create your new data source, or open the panel for the datasource that you want to link the document to.



**Records in the new data source should contain fields with the same names as the original data source, and use the same key field values.**

#### ► Select 'Adopt Fields' from the panel's popup menu



Option	Description
All	All fields in the document will be linked to the new data source
Current Layer	Only fields on the 'current' layer shown in the Layers panel will be relinked. The active layer is represented with a pen icon in the Layers panel.
Panel Selection	Only fields that can be relinked to the fields selected in the panel will be relinked.

Fields in the document will be linked to the new data source - fields which were relinked correctly will be shown as green or red in the new panel.

Fields shown in red need updating in the document, so you should either correct them manually or use one of the '*Update Document*' options.

If a record is found in the document that is not in the data source you're adopting to, you will be given the following three options:

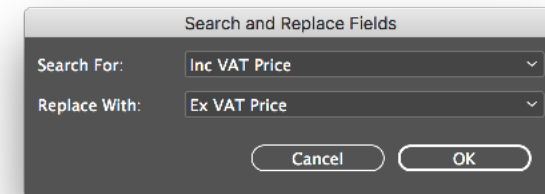
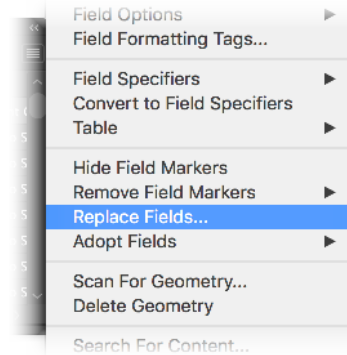
Option	Description
All	All fields in the document will be linked to the new data source
Ignore	The fields that cannot be found in the new data source will be ignored.
continued....	

Option	Description
As New	The fields will be added to the data source as 'new' records (shown with a green arrow icon in the status column)
As Deleted	The fields will be added to the data source as 'deleted' records (shown with a red 'deleted' icon in the status column).

## REPLACING FIELDS

EasyCatalog allows the content of one field to be substituted with the content of another from the same data source. Field replacement is useful for producing multiple versions of the same document, using different pricing for instance.

► *Replacing Fields* Select 'Replace Fields...' from the panel's popout menu.



► Specify the field to search for and the field to replace it with.

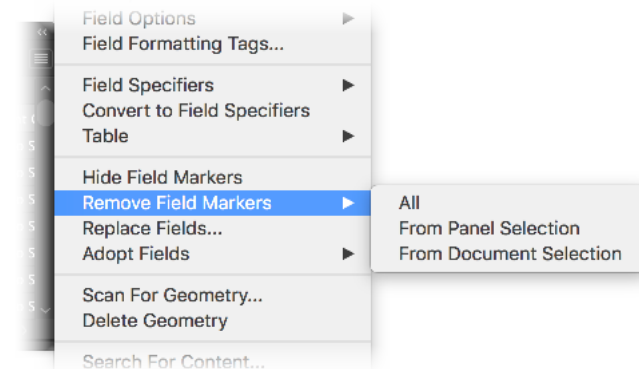
The panel will update to show that the old field (the 'Search For' field) has been replaced with the new field (the 'Replace With' field). Only fields on unlocked layers will be replaced.

## REMOVING FIELD MARKERS

To remove field markers from the document - effectively unlinking it from the data - use the 'Remove Field Markers' menu.



**Records in the new data source should contain fields with the same names as the original data source, and use the same key field values.**





Option	Description
All	All of the fields in the document will be unlinked.
	continued....

Option	Description
From Panel Selection	Only the fields that are selected in the panel will have their field markers removed from the document
From Document Selection	Only the fields selected in the document will have their field markers removed.

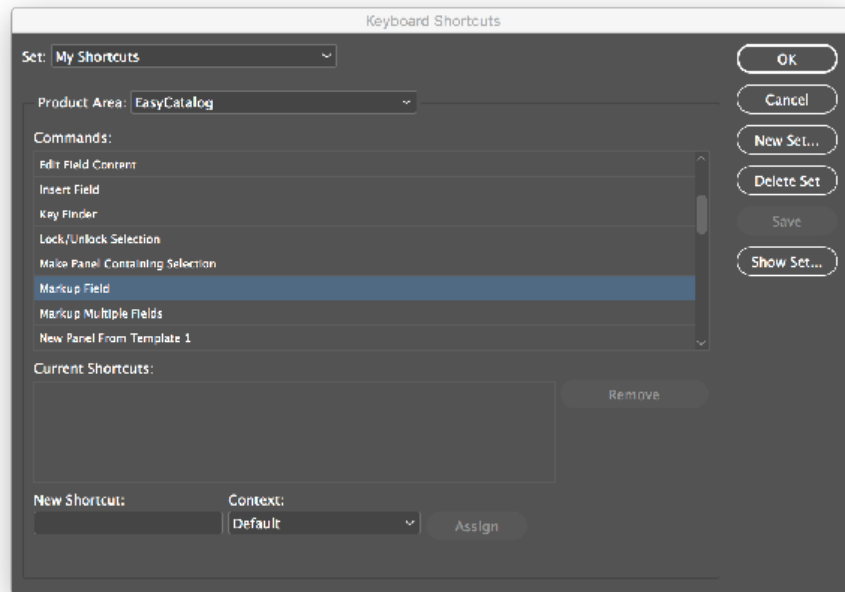
## TAGGING EXISTING CONTENT

### MANUALLY

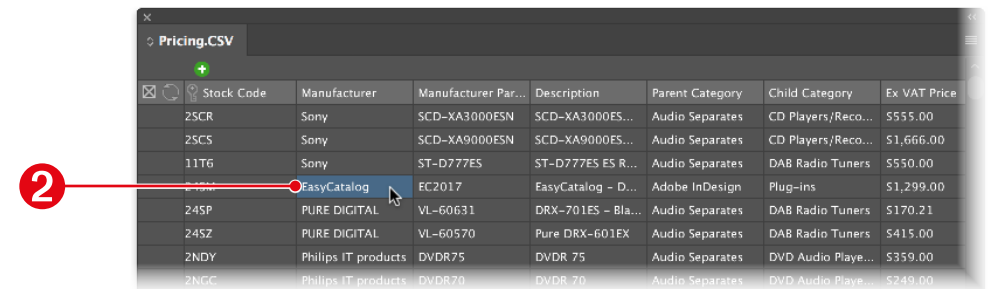
If you have an existing document document that you would like to link to a data source, use the *'Markup Field'* keyboard shortcut.

- ▶ Assign a shortcut key to the "Markup Field" option in InDesign's keyboard shortcut editor.

Use the InDesign *Edit* → *Keyboard Shortcuts* menu option:



- ▶ Highlight the document content you would like to mark up
- ▶ ❶ Select the field in the panel you want to link to



- ▶ 2 Press the keyboard shortcut you assigned above

3 [EasyCatalog] \$1299.00

Stock Code	Manufacturer	Manufacturer Par...	Description	Parent Category	Child Category	Ex VAT Price
25CR	Sony	SCD-XA3000ESN	SCD-XA3000ES...	Audio Separates	CD Players/Reco...	\$555.00
25CS	Sony	SCD-XA9000ESN	SCD-XA9000ES...	Audio Separates	CD Players/Reco...	\$1,666.00
11T6	Sony	ST-D777ES	ST-D777ES ES R...	Audio Separates	DAB Radio Tuners	\$550.00
24SM	EasyCatalog	EC2017	EasyCatalog - D...	Adobe InDesign	Plug-ins	\$1,299.00
24SP	PURE DIGITAL	VL-60631	DRX-701ES - Bla...	Audio Separates	DAB Radio Tuners	\$170.21
24SZ	PURE DIGITAL	VL-60570	Pure DRX-601EX	Audio Separates	DAB Radio Tuners	\$415.00
2NDY	Philips IT products	DVDR75	DVDR 75	Audio Separates	DVD Audio Playe...	\$359.00
2NCC	Philips IT products	DVDR70	DVDR 70	Audio Separates	DVD Audio Playe...	\$249.00

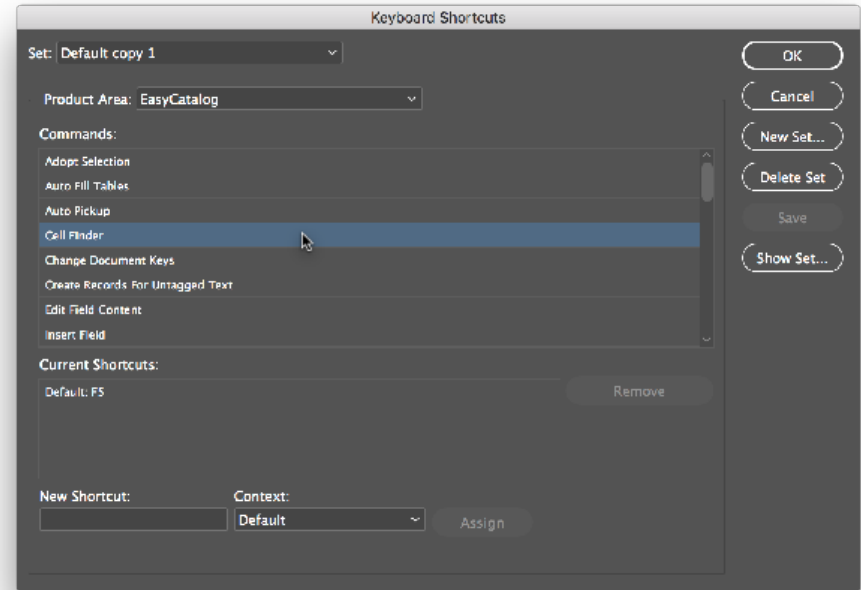
- ▶ 3 The content in the document will be linked to the field selected in the panel.

### AUTOMATICALLY, FROM TABLE CONTENT

If you have an existing document containing tabular data that you would like to link to a data source, use the 'Cell Finder' keyboard shortcut.

- ▶ Assign a shortcut key to the "Cell Finder" option in InDesign's keyboard shortcut editor.

Use the InDesign *Edit* → *Keyboard Shortcuts* menu option:



- ▶ 1 Select the table in the document that you would like to mark up

1

Stock Code	Manufacturer	Ex VAT Price
2SCR	Sony	\$555.00
2SCS	Sony	\$1,666.00
11T6	Sony	\$550.00
24SM	EasyCatalog	\$1,299.00

2

Stock Code	Manufacturer	Manufacturer Par...	Description	Parent Category	Child Categ
	Sony	ST-SE3705	ST-SE3705 Silver...	Audio Separates	Analogue R
	Sony	ST-SA3ESC	ST-SA3ESB Black...	Audio Separates	Analogue R
	Sony	HAR-LH500	HAR-LH500 Har...	Audio Separates	Audio Hard
	Sony	HAR-D1000	HAR-D1000 Aud...	Audio Separates	Audio Hard

- ▶ 2 Select a field in your data panel so that EasyCatalog knows which data source you're attempting to link to.

- ▶ 3 Press the keyboard shortcut you configured above to show the 'Cell Finder' dialog.

The dialog is split into three sections

- ▶ 4 A record identifier

EasyCatalog will search the table for the contents of the field specified in the '*Contents of Field*' text box. This should be the name of the field that can be used to uniquely identify the record to link to (typically this would be the key field for the data source, but it can be any field whose content is in the table that will correctly identify the record we want to mark up).

- ▶ 5 Whether we want to add or remove content when cells are found

When a field is found in a cell, content can optionally be added before or after it.

- ▶ 6 How to find identify where the other fields in the table are

Once EasyCatalog has found the unique identifier for a record in the table row, it then needs to know how to find the fields you would like to mark up.

Update	Description
Each Row As Specified By The Header	EasyCatalog will use the content of the table header cells to determine the names of the fields to mark up. This is the most common form of pick-up, although this will only work if the content of the header cells match your field names exact
Entire Row	Specify a comma separated list in the 'Like' field to specify the name of the field in each column, starting from the left of the table.
Entire Column	This option assumes that the table has been configured vertically (so fields for an individual record run down the table, rather than across). Therefore in the "Like" field, the names of the fields used in each row are specified.
Adjacent Cells	Specify a comma separated list of field names in the "Like" field which specify the columns immediately to the right of the record identifier field.
Columns on the Right	Specify a comma separated list of field names in the "Like" field that specify columns relative to the right of the table. For example, if two fields are specified in the "Like"

### Horizontal Table Example

Stock Code	Manufacturer	Ex VAT Price
2SCR	Sony	\$555.00
2SCS	Sony	\$1,666.00
11T6	Sony	\$550.00
24SM	EasyCatalog	\$1,299.00

The field specified in the '*Contents of Field*' would be 'Stock Code', as this field can be used to identify the record used in each row of the table.

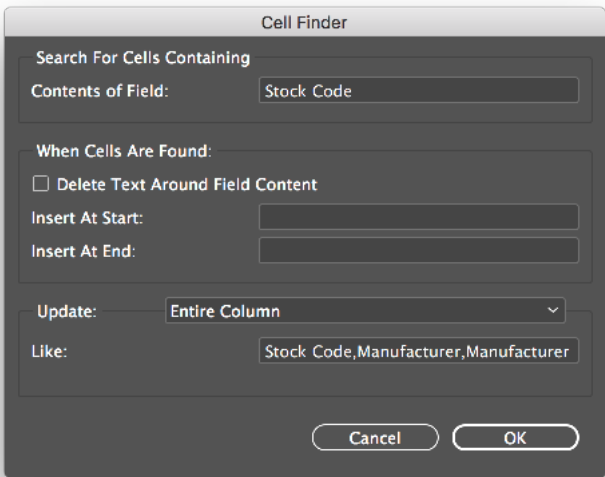
Update Option	Like	Result
Each Row As Specified By The Header	Nothing is required in the 'Like' field as the table column headers define the fields used in each column.	As the contents of the table column header cells match the field names used in the data source exactly, the field in each column will be marked up automatically.
Entire Row	Stock Code,Manufacturer,Ex VAT Price	The contents of the 'Like' column determines the names of the fields used in each column.
Entire Column		This option is only used when marking up tables that have been populated vertically (fields for each record run down the table rather than across). See the example below.
Adjacent Cells	Manufacturer, Ex VAT Price	Specify the fields in the cells to the right of the 'Contents of Field' field. In this example we specified the 'Stock Code' field as the field we're looking for in the table, so the fields in the cells to the right are "Manufacturer" and "Ex VAT Price".
Columns on the Right	Ex VAT Price	Here we've only specified a single field - 'Ex VAT Price'. The 'Columns on the Right' option expects a list of fields relative to the right edge of the table. In this example, just the 'Ex VAT Price' field will be marked up.

### Vertical Table Example

In this example, the fields for each record are vertically down the table rather than horizontally.

Stock Code	11SS	11T2	2SF7	1Z8C
Manufacturer	Sony	Sony	Sony	Sony
Part Code	ST-SE370S	ST-SA3ESC	HAR-LH600	HAR-D1000
Ex VAT Price	\$76.60	\$237.00	\$277.44	\$339.00

In this situation the Entire Column "Update" option is used. The "Like" field defines the names of the field in each cell of every column. In this example we enter "Stock Code,Manufacturer,Manufacturer Part Code,Ex VAT Price".



Stock Code	[11SS]	[11T2]	[2SF7]	[1Z8C]
Manufacturer	[Sony]	[Sony]	[Sony]	[Sony]
Part Code	[ST-SE370S]	[ST-SA3ESC]	[HAR-LH500]	[HAR-D1000]
Ex VAT Price	[76.60]	[237.00]	[277.44]	[399.00]

The cells in each column have been linked to the same record, as identified by the Stock Code field.

## CHAPTER 6

# FILTERING DATA

## INTRODUCTION

EasyCatalog makes working with large volumes of data easy - using a simple query builder from within EasyCatalog, your data can be filtered to show only the records you need to use.

Filters are applied to each EasyCatalog panel, so you can have multiple panels open for the same data source each with their own filter applied.

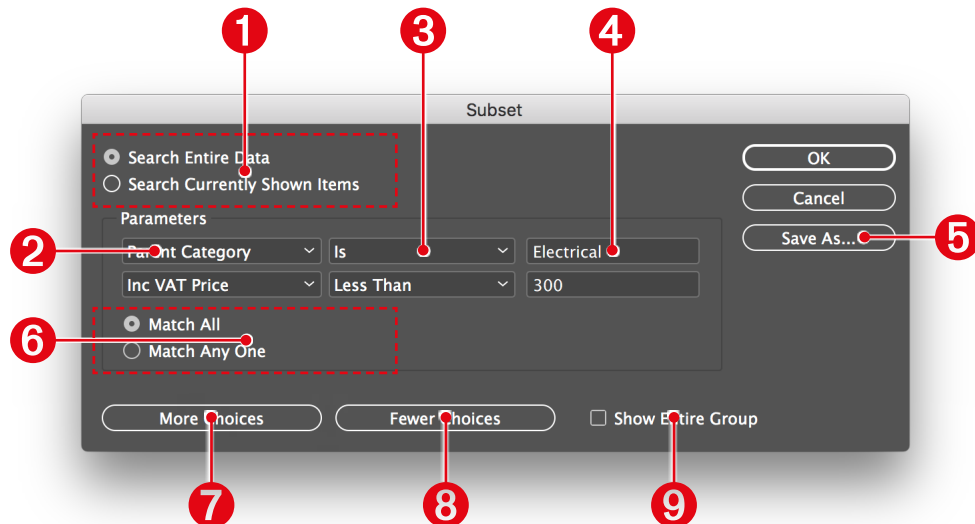
In addition to filtering on field content, Advanced queries can also be configured to show records and fields based on their current status (such as whether the record is placed, in error, etc).

Filter definitions can also be saved and re-applied as required.

## FILTERING BASED ON FIELD CONTENT

Queries are defined by a simple field, operator, value configuration dialog - to apply a simple filter to a dialog, select '*Show Subset...*' from the panel menu.

The use of filters is essential when dealing with large numbers of records, or when creating tables in InDesign (as the records, columns and ordering affect the way in which tables are populated or created on the page).



### 1 Search Entire Data / Search Currently Shown Items

When 'Search Entire Data' is selected, all data from the data source will be searched using this Subset; when 'Search Currently Shown Items' is selected only the records currently shown in the panel will be searched.

Filters are defined using a simple **2** field, **3** operator, **4** value set up. The available operators ('Less than', 'Greater than', etc) shown in **3** the operator menu are determined by the field type (as defined in *Field Options*) for the field selected in the field pop-up.

### 5 Save As...

The filter definition can be saved and re-applied later from the data panel's pop-out menu.

You will be prompted for a name, which is the one that will be used on the 'Saved Subsets' menu on the EasyCatalog panel.

### 6 Match All (logical 'and')

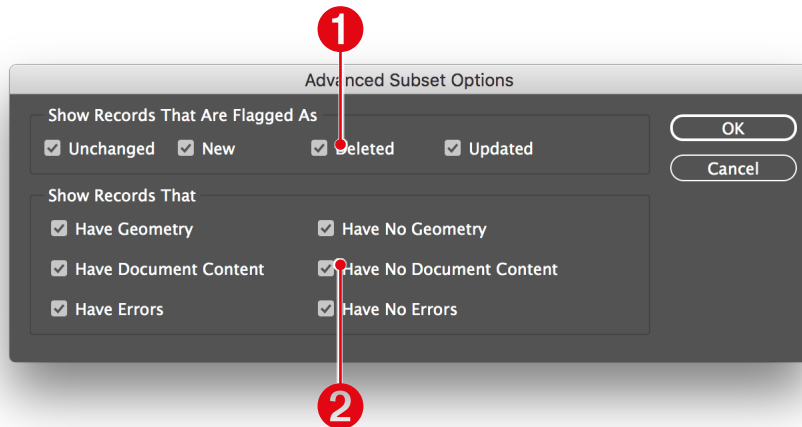
All of the search criteria must be satisfied to allow the record to pass through the filter. In the example above, '*Parent Category*' must be equal to '*Electrical*' and '*Inc VAT Price*' must be less than 300.

## 6 Match Any One (logical 'or')

Any of the search criteria must be satisfied to allow the record through. In the above example, 'Parent Category' must be equal to 'Electrical' **or** 'Inc VAT Price' must be less than 300.

## FILTERING BASED ON STATUS

In addition to simply filtering by the value of field from the data source, 'Advanced Subsets' can be defined which include information about each record's status, and are applied in addition to any other filters already applied to the panel.



### 1 Show Records That Are Flagged As

The top part of the dialog allows records to be filtered based on their status after the last 'Synchronize with Data Source' operation (see "Getting the Latest Data" on page 57).

Option	Description
Unchanged	Show records that were not modified
New	Show the records that were created as a result of the synchronisation process - i.e. they were not present in the data snapshot before synchronisation, but are now.

### 1 More Choices / 8 Fewer Choices

Query criteria can be added or removed using these buttons. Up to a maximum of five criteria can be defined for a single subset.

### 9 Show Entire Group

This option is only available for grouped panels. When checked, the entire group will be displayed if **any** of the records within the group match the criteria specified.

Option	Description
Deleted	Show the records that were removed during the synchronisation - i.e. records that were present in the data snapshot, but are not now. Note that records are not removed from the snapshot during synchronisation - they are marked for deletion until purged by the user.
Updated	Show the records that changed during synchronisation.

### 2 Show Records That

The bottom part of the dialog mainly concerns filtering records based on their document status (for example, whether the record is placed in the document).

Option	Description
Have Geometry	Show the records that have geometry associated with them - see ' <i>Templates and Libraries</i> '.
Have No Geometry	Show the records that do not have geometry associated with them - see ' <i>Templates and Libraries</i> '.
Have Document Content	Show the records that are placed on the current, front-most, document.
Have No Document Content	Show the records that are not placed on the current document.
Have Errors	Show the records that are placed in the document, and whose content is different in the document to the data source.
Have No Errors	Show the records whose content is the same in the document and in the data source.

## SAVING FILTERS

Save a filter definition using the 'Save As...' button on the 'Subset' dialog. The '*Saved Subsets*' menu option shows all previously saved filter definitions. Filters can also be saved and exported as part of a panel configuration. For further information see "Panel Configurations" on page 40.

### Applying a saved filter

To apply one of the definitions, select it from the menu. Note that any existing filter will be replaced with the saved definition.

### Deleting filter definitions

All saved filter definitions can be removed by selecting the '*Remove All*' menu option from the '*Saved Subsets*' menu.

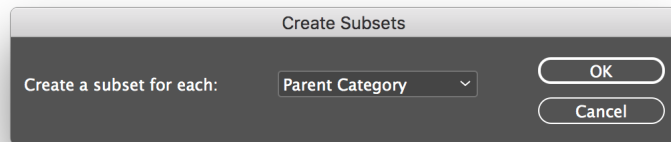
## REMOVING A FILTER FROM A PANEL

A filter can be removed from a panel by selecting the '*Show All*' menu option. Note that any filter definition will be lost, so be sure to save it before selecting '*Show All*'.

## AUTOMATICALLY CREATING SUBSETS

Subsets can also be automatically generated using the "*Create...*" option on the "*Saved Subsets*" menu.

between "*Parent Categories*". The filters that are created can be found on the "*Saved Subsets*" menu:



This option will create a new subset for each unique value in the field selected in the pop-up. This option is useful if, as shown in this example, you need to quickly switch



## REMOVING A FILTER FROM A PANEL

A filter can be removed from a panel by selecting the '*Show All*' menu option. Note that any filter definition will be lost, so be sure to save it before selecting '*Show All*'.



## CHAPTER 7

# SYNCHRONIZING

## INTRODUCTION

EasyCatalog offers bidirectional linking of data to the InDesign document - any changes made to the source data can be reflected to the document, and any changes made to the document can be sent back to the source of the data.

## GETTING THE LATEST DATA

EasyCatalog works with snapshots of data - an internal picture of the data that was taken at a moment in time. When data changes at its source the snapshot needs updating.

By storing a snapshot of data, EasyCatalog can identify those records and fields that have changed through successive updates of the snapshot. This information is shown in the EasyCatalog panel to assist the user in making decisions on how to update the document.

To update the data snapshot, choose *'Synchronize with Data Source'* from the EasyCatalog panel menu.

The data will be retrieved from its original source and compared against the existing snapshot. All changes will be shown in the data source's panels, and will remain until the next *'Synchronize with Data Source'* operation.

Stock Code	Manufacturer	Manufacturer Par...	Description	Parent Category	Child Category	Ex V
1Z8C	Sony	HAR-D1000	HAR-D1000 Aud...	Audio Separates	Audio Hard Disk...	3990
2ZDF	Creative	51MF8000AA001	Decoder DDT5-...	Audio Separates	AV Amplifiers &...	8500
11SS	Sony	ST-SE370S	ST-SE370S Silver...	Audio Separates	Analogue Radio...	7660
2SF8	Sony	STR-LV500	STR-LV500 Rece...	Audio Separates	AV Amplifiers &...	1870
11T2	Sony	ST-SA3ESC	ST-SA3ESB Black...	Audio Separates	Analogue Radio...	2370
25GB	Sony	STR-DE695B	STR-DE695B Rec...	Audio Separates	AV Amplifiers &...	1870
11T4	Sony	ST-SA3ESN	ST-SA3ESN Gold...	Audio Separates	Analogue Radio...	2370
25GC	Sony	STR-DE695S	STR-DE695S Rec...	Audio Separates	AV Amplifiers &...	1870
25GD	Sony	STR-DB790B	STR-DB790B QS...	Audio Separates	AV Amplifiers &...	2090
25GF	Sony	STR-DB790S	STR-DB790S QS...	Audio Separates	AV Amplifiers &...	2090
25GH	Sony	STR-DB2000S	STR-DB2000S Q...	Audio Separates	AV Amplifiers &...	3250

EasyCatalog can also ensure that the content in the document matches the content shown in the panel.

The status column in the panel will update to show what happened to each record during the last *'Synchronize with Data Source'* operation. Records that were ❶ inserted and ❸ deleted are represented by an icon in the status column; records that were updated show the ❷ updated icon and the updated fields have a red dashed outline.

The status column is reset each time a *'Synchronize with Data Source'* is run. Deleted records will remain flagged as 'deleted' until the *'Purge'* button is used on the *'Data Source Information'* dialog.

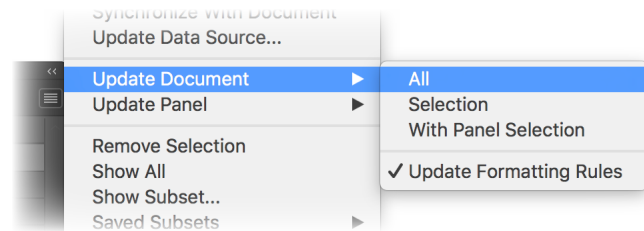
## SYNCHRONIZING WITH A DIFFERENT FILE

### File-based Data-sources Only

If the location of your data-file has changed, or you would like to select a new file, hold the shift key while selecting *'Synchronize with Data Source'*. A file chooser dialog will appear which will allow you to re-specify the location of your data file.

## UPDATING THE DOCUMENT

The document can be updated with a single click - each EasyCatalog panel offers various options for updating the entire document, or parts of the document.



Each of these options will only update fields on current, front-most, document that differ to the data in the panel.

Any fields that are updated will have their field markers changed back to green to indicate that the field is no longer in error.



**Only fields on unlocked layers will be updated. Fields on hidden, unlocked, layers will be updated.**

Option	Description
All	All fields in the document will be updated
Selection	Only update the selected fields in the document.
With Panel Selection	Only update the fields in the document that are selected in the panel

## RE-APPLYING PAGINATION RULES

Hold down the shift key whilst selecting any of the above menu options to re-apply pagination rules such as '*Fit Box to Text*'. This option is only available when the *Pagination Module* is loaded.

## UPDATING A SINGLE COLUMN

Right click (or Ctrl-click on Macintosh) in the column you would like to update in the document and select the '*Update All (field name) Fields In The Document*' menu option.

## UPDATING AN INDESIGN BOOK

EasyCatalog also supports updating all of the documents in an InDesign book.

The '*Update Document* → *All*' menu can be found on a new '*EasyCatalog*' menu option is provided from the book panel's pop-out menu. This option behaves in the same way as other book operations - any open documents will be updated but not saved; any unopen documents will be opened, updated, saved and closed.

## CHECKING FOR ERRORS

The content of the document can be checked to ensure that its content matches the data from the data source.

Any discrepancies found will be highlighted in the document with red field markers, and the field will also be shown in the red in the EasyCatalog panel.


Document content will be checked automatically when:

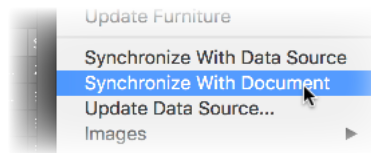
- ▶ Opening a document
- ▶ Switching between documents
- ▶ After editing Field Options

This automatic checking can be disabled by turning off the '*Dynamically Update Panel*' option in EasyCatalog's general preferences.

- ▶ After updating the panel with new content

The document content will be checked after a '*Synchronize with Data Source*', '*Update Panel*', or '*Edit Field Content*' operation. This can be disabled by turning off the '*Synchronize Panel After Updating Content*' option in EasyCatalog's general preferences.

To manually check for errors, use the '*Synchronize*' button  on the EasyCatalog panel, or use the *Synchronize with Document* menu option.



## TEXT CONTENT

Text content must match exactly the content from the data source - numeric fields must also be in the correct format.

Text fields will be shown as being in error if:

- ▶ The content in the document doesn't match the content in the panel

Minor modifications to the text, such as the insertion of additional carriage returns, tabs, etc, are allowed if the '*Ignore White Space Changes*' alphanumeric field option is enabled for the field. See "The Format Pane" on page 23.

- ▶ All or part of the field is overset

**Note:** A field is not reported as being in error if the incorrect character style sheet is applied.

Price: \$90.00

	My Configuration	My Grouped Configuration	
category	Ex VAT Price	Inc VAT Price	Availability
ue Radio...	\$76.60	\$90.00	1-2 days
ue Radio...	\$237.00	\$278.47	Ordered Upon R...
Hard Disk...	\$277.44	\$325.99	Temporarily Una...
Hard Disk...	\$399.00	\$468.82	Ordered Upon R...
plifiers &...	\$85.00	\$99.87	Now
plifiers &...	\$187.00	\$219.72	3-4 weeks

Price: \$89.99

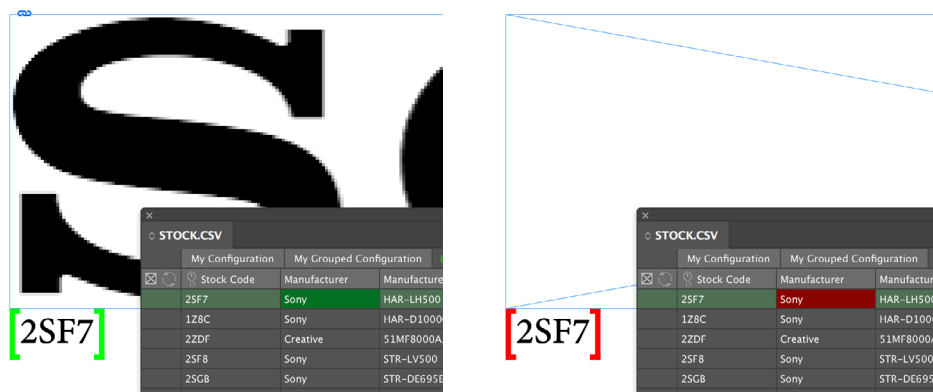
	My Configuration	My Grouped Configuration	
category	Ex VAT Price	Inc VAT Price	Availability
ue Radio...	\$76.60	\$90.00	1-2 days
ue Radio...	\$237.00	\$278.47	Ordered Upon R...
Hard Disk...	\$277.44	\$325.99	Temporarily Una...
Hard Disk...	\$399.00	\$468.82	Ordered Upon R...
plifiers &...	\$85.00	\$99.87	Now
plifiers &...	\$187.00	\$219.72	3-4 weeks

Field Markers are changed to red to enable erroneous fields to be identified in the document. The Field Markers are changed back to green when the document is updated via the '*Update Document*' menu.

## PICTURE CONTENT

Pictures will be shown as being in error if:

- ▶ There is no image in the box (provided that the 'Flag Empty Pictures As Errors' Advanced Field Option is switched on (see "Advanced Pane" on page 33)).
- ▶ An incorrect image is imported into the box
- ▶ The image content has changed (the link needs updating)
- ▶ The 'missing image' has been used, as the correct image for a field was missing.

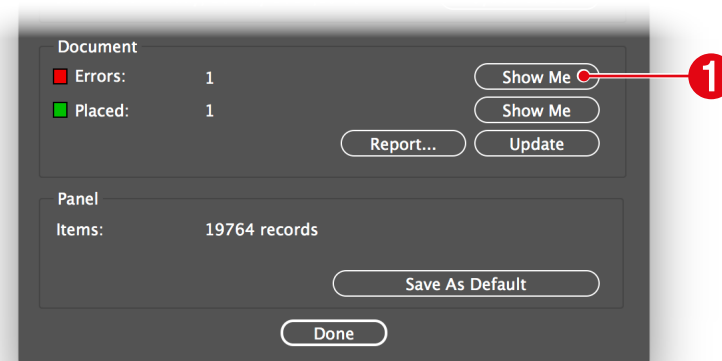


The field markers at the bottom right of the image frame will be green when the correct image is imported into the box; red when an incorrect, out-of-date, or missing image is placed.

## QUICKLY FINDING ERRORS IN THE PANEL

The panel can be filtered to show only records containing fields that are 'in error' using an *Advanced Filter* (see "Filtering Based on Status" on page 55).

Alternatively, press the **1** 'Show Me' button on the Data Source Information dialog (available from the **1** button at the bottom of the panel).

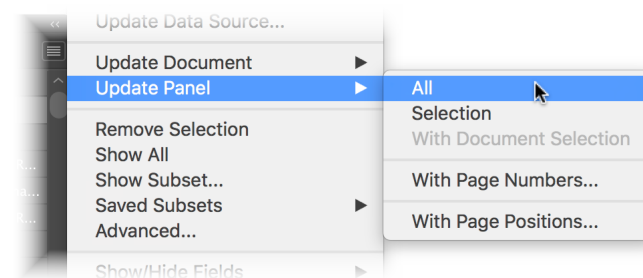


## UPDATING THE PANEL FROM THE DOCUMENT

The link between document and data is bidirectional - therefore, any changes made to the document can be reflected back to the panel (and the original source of the data, such as the database).

**Note** that if a field is placed in the document twice, the last occurrence of the field will be used as the content for the field. The front-most, current, document will be used to update the panel.

As with updating the document, updating the panel offers three options that determine the scope of the changes.



Option	Description
All	All fields placed in the document will be used to update the data in the panel.
Selection	Only the fields selected in the panel will be updated.
With Document Selection	Only the fields selected in the document will be updated in the panel.

Fields that are updated in the panel will be shown with a blue dashed outline.

2SF7	Sony	HAR-LH500	HAR-LH500
1Z8C	Sony	HAR-D1000	HAR-D1000
2ZDF	Sony	51MF8000AA001	Decoder DD'
2SF8	Sony	STR-LV500	STR-LV500 I
25GB	Sony	STR-DE695B	STR-DE695B

## UPDATING A SINGLE COLUMN

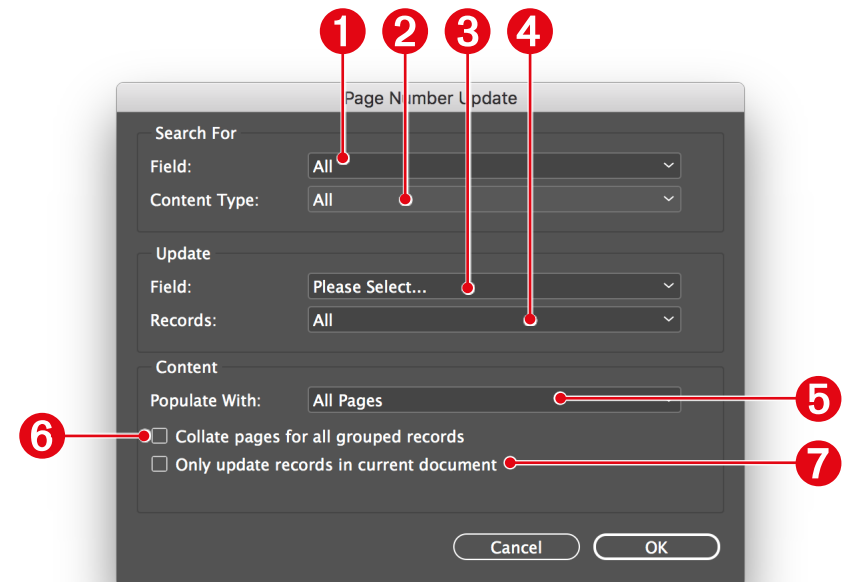
Right click (or Ctrl-click on Macintosh) in the column you would like to update in the document and select the '*Update All (field name) Fields In The Panel*' menu option.

## UPDATING THE PANEL WITH PAGE NUMBERS

The page number(s) where each record appears can be stored in one of the datasource's fields using the '*Update Panel → With Page Numbers*' menu option.



**Section page numbers are used to update the field content. Therefore, the format of the page numbers used will be defined by the document's 'Numbering & Section' options.**



## 1 Search For: Field

Define which field(s) for a record should be used to determine the page a record is placed on, and whether only text fields, picture fields or both types should be searched for. For example, if a single record spans multiple pages you may only be interested in the page number that the 'Price' field is placed on.

Option	Description
All	All fields for a record will be searched for in the document. When one is found, its page number will be used to update the 'Update' field.
Field Name	The document will be searched for the specified field, and the page this field is placed on will be used to update the 'Update' field.

## 2 Search For: Content Type

Option	Description
All	Both text and picture boxes will be searched for a field in the document for each record.
Text	Only text-based fields will be searched in the document.
Picture	Only picture boxes will be searched in the document.

## 3 Update : Field

Nominate the field that should be updated with the page number the record is placed on.

## 4 Update : Records

Option	Description
All	All records in the data source will be updated.

Option	Description
Panel Selection	Only the records selected in the panel will be updated.

## 5 Populate With

Option	Description
First Page	The page number that the record first appears on will be used.
Last Page	The page number for the last occurrence of the record will be used.
All Pages	A list of all pages numbers for all instances of the record will be stored in the field. For example, if a record appears on pages 1,2,3 and 5 the field will be updated with "1-3, 5".

## 6 Collate pages for all grouped records

If your data panel is grouped, this option will update all records in each group with a list of the page numbers for every record in the group. This option would be used, for example, to get a list of pages that all records in a particular category appear on.

## 7 Only update records in current document

By turning this option on, only the records placed in the current document will have their page numbers updated. If this option is off, any records not placed in the current document will have their page number fields emptied.

## UPDATING PAGE NUMBERS FROM MULTIPLE DOCUMENTS

Page numbers from multiple documents can be updated to the panel by storing them in an InDesign book:

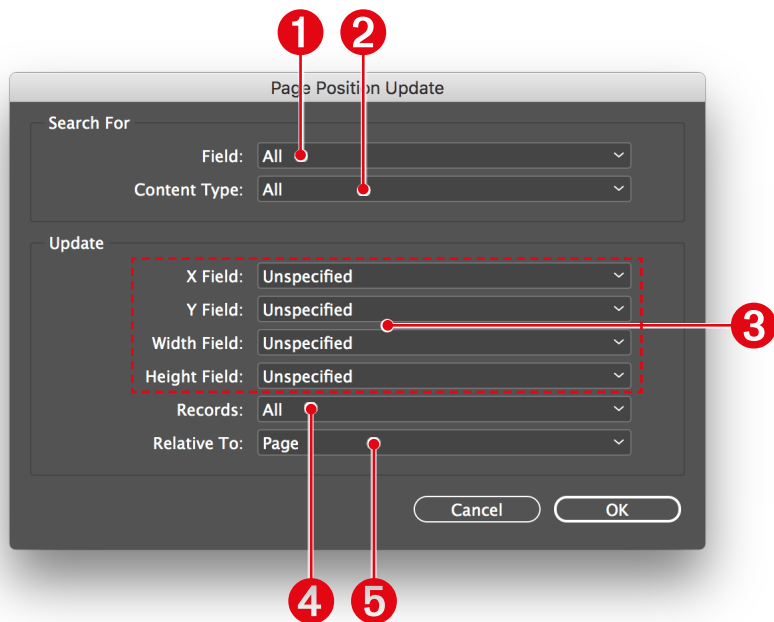
- 1 Select any field or record in the panel you would like to update.
- 2 From your InDesign book's menu, use the '*Update EasyCatalog Fields with Page Numbers*' menu option.

## UPDATING THE PANEL WITH PAGE POSITION DATA

Each record in the panel can be updated with X and Y position and the Width and Height of each record in the document using the '*Update Panel → With Page Positions*' menu option.



The X and Y position of the frame containing the field will be used to update the panel (not the position of the field within the frame).



Option	Description
Text	Only text-based fields will be searched in the document.
Picture	Only picture boxes will be searched in the document.

### 1 Search For: Field

Limit the update to searching for a specific field (rather than any field for the record) and whether only text fields, picture fields or both types should be searched for.

Option	Description
All	All fields for a record will be searched for in the document. When one is found, its position will be used to update the 'Update' field.
Field Name	The document will be searched for the specified field, and its position be used to update the 'Update' field.

### 2 Search For: Content Type

Option	Description
All	Both text and picture boxes will be searched for a field in the document for each record.

### 3 Update : X Field, Y Field, Width Field, Height Field

Nominate the fields that should be updated with the position of the 'Search For' field.

### 4 Update : Records

Option	Description
All	All records in the data source will be updated.
Panel Selection	Only the records selected in the panel will be updated.

### 5 Relative To

Option	Description
Page	The co-ordinates used to update the X and Y fields will be relative to the top-left of the page the box is placed on.
Origin	The co-ordinates used to update the X and Y fields will be relative to origin point of the ruler.

## UPDATING YOUR SOURCE DATA



**Before updating your data source, you must first update the contents of the panel (see above).**

Once the panel has been synchronized with the document, the original data source can be updated. The type of data source used will determine how it is updated.

Select '*Update Data Source*' to update the original source of the data.

### FILE-BASED DATA

A file '*Save As*' dialog will be displayed. Enter a file name and select where you would like the file to be saved. The format of the file will be the same as the original input format.



**A new file will be created, rather than updating the old file. When using an Excel spreadsheet, formatting, formulas, etc will not be output and could be lost.**

### DATABASE (ODBC) DATA

EasyCatalog also tracks the fields that have been updated - those that were changed in the data snapshot. The fields that will be updated are shown with a blue dashed outline in the EasyCatalog data panel.

Only the fields that have been changed will be updated on the database - resulting in faster update times through fewer transactions.



**Only fields that have an update statement configured will be updated on the database. Ensure that the '*Update Using Statement*' check box is set in the Field Options.**

An update SQL statement must be configured for each of the fields that will be updated. Further information on this can be found in the manual that accompanies the *ODBC Data Provider*.



## CHAPTER 8

# DYNAMIC CONTENT

## INTRODUCTION

You have already seen how EasyCatalog can add data into to documents by inserting fields into text, tables and picture boxes.

For publications that require templates to be designed in advance and for automatic pagination, EasyCatalog can also help - by showing where fields should appear and the style in which they should appear, EasyCatalog can automatically import and formatted data content.

## DATA PLACEHOLDERS (FIELD SPECIFIERS)

EasyCatalog uses 'Field Specifiers' - special fields in templates and libraries that define where, and how, a field should appear when paginated.

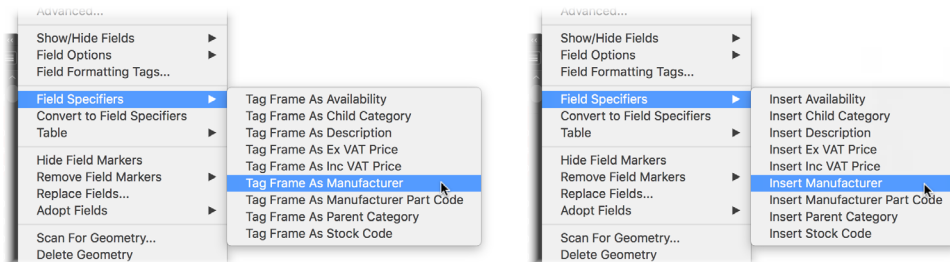
During the pagination process, Field Specifiers are replaced with field content - any styling information that has been applied to the Field Specifier will be retained in the paginated field content. Populated Field Specifiers are then tracked in the same way as normal fields.

Field Specifiers are not linked to a data source - they simply specify the name of a field to use. Therefore, templates and libraries can be used with multiple data sources, providing the field names exist in each of the data sources.

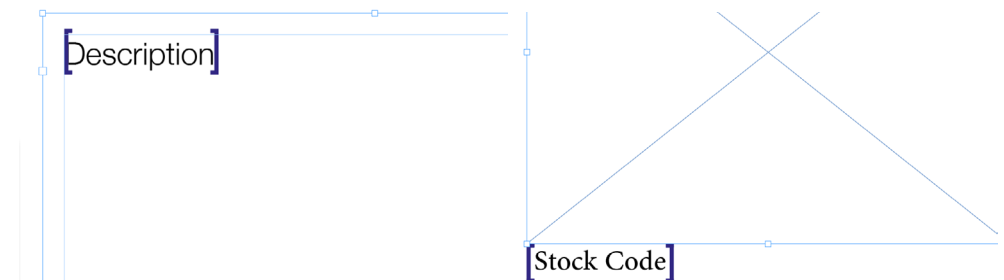
Field Specifiers have been designed to have as little impact as possible on the design process.

## INSERTING FIELD SPECIFIERS

To insert a Field Specifier, select the required field from the 'Field Specifiers' menu on the EasyCatalog panel. Field Specifiers can be inserted into a text box, or an image frame can be tagged.



To quickly insert Field Specifiers, hold the **CTRL** key (Windows) or **Cmd ⌘** key (Macintosh) whilst double-clicking on the field's column header in the panel.

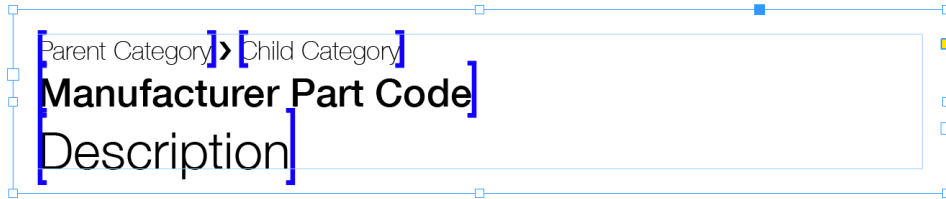


## TEXT FIELD SPECIFIERS

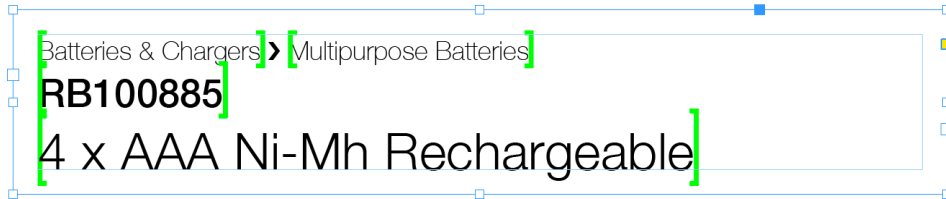
A text-based '*Field Specifier*' will be inserted into the text at the current insertion point.

*Field Specifiers* behave in exactly the same way as normal fields, except they are surrounded by blue Field Marker characters. The Field Marker characters can not be deleted in isolation - the entire '*Field Specifier*' must be removed from the document.

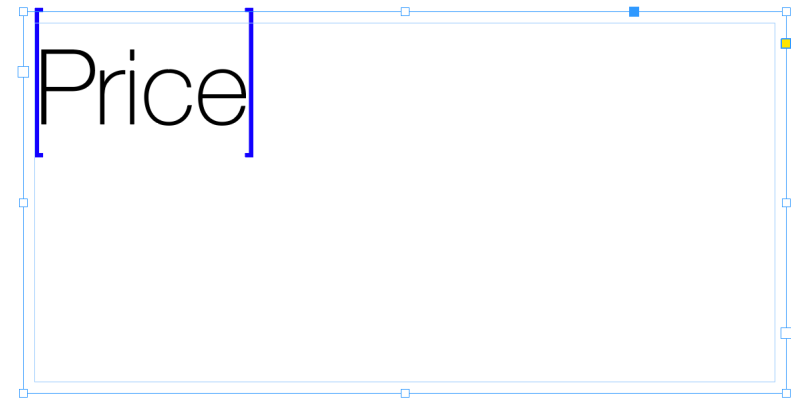
The default content of a text-based Field Specifier is the field's name, and its default style is the Character Style sheet that has been defined in the field's Field Options.



When populated, the text content of the Field Specifier tag will be merged with the field that is being placed. Any formatting that has been applied to the Field Specifier will also be retained where possible, unless the field is a 'Formatted' (e.g. HTML) field.



This merging process offers a further powerful level of control over formatting, which is best explained using the example shown below.



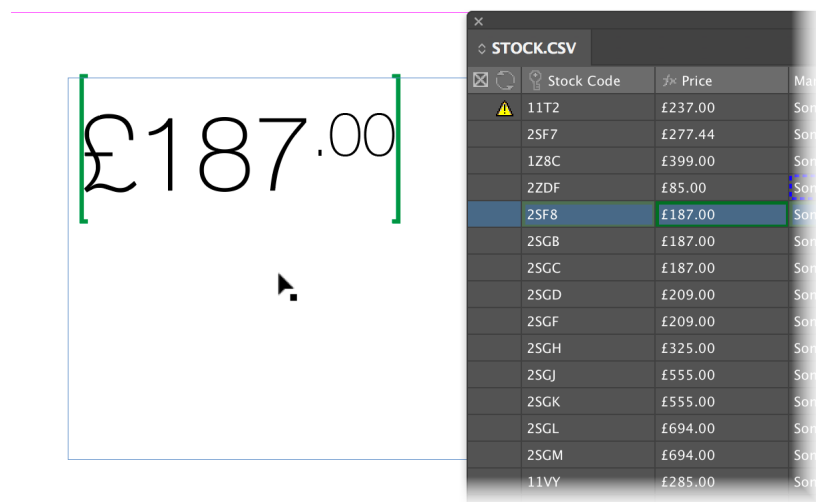
By default, when inserting a field specifier, the field name will be used as the content between the blue marker characters. However, this content can be changed to whatever we need (sometimes, for example, the name of the field is too long to fit in the available space).

Because the content of the field data is merged in to the document content, we can use this to show EasyCatalog how to format certain fields. In this example, we want to format the decimal part of the 'Price' field as superscript. To do this, we can show EasyCatalog what a price typically looks like by changing the content between the markers and applying to correct formatting:



Stock Code	Price	Manufacturer
11T2	£237.00	Sony
25F7	£277.44	Sony
1Z8C	£399.00	Sony
2ZDF	£85.00	Sony
25F8	£187.00	Sony
25GB	£187.00	Sony
25GC	£187.00	Sony
25GD	£209.00	Sony
25GF	£209.00	Sony
25GH	£325.00	Sony
25GJ	£555.00	Sony
25GK	£555.00	Sony
25GL	£694.00	Sony
25GM	£694.00	Sony
11VY	£285.00	Sony

Now, if we populate the field specifier with data from the panel, EasyCatalog will attempt to merge the data (£187.00) with the document content:



To achieve this EasyCatalog looks for common characters in the document content and the data source content. In this case, the decimal point is present in both. EasyCatalog will therefore determine that the characters before the decimal point need to be replaced with '£187', and the characters after the decimal point '00'. The formatting shown in the document has also been preserved, resulting in a superscript decimal part.

## PICTURE FIELD SPECIFIERS

If a picture frame is selected, the frame will be tagged with the name of the field. As with text-based *Field Specifier*, the field name will be shown with blue field marker characters to distinguish it from placed field data.



## REMOVING FIELD SPECIFIERS

Field Specifiers can be removed from the document by using the "*Remove Field Markers*" menu option on the data panel's pop-out menu.

"*Remove Field Markers*" will remove the Field Specifier from image frames; for text Field Specifiers only the blue markere characters will be removed, leaving the name of the field in the text.

## CONVERTING FIELD MARKERS TO FIELD SPECIFIERS

Field Specifiers that have been populated with data can be converted back to Field Specifiers using the "*Convert To Field Specifiers*" menu option from the data panel's pop-out menu. This menu option is useful when you're unsure which field in the panel a field in the document is linked to.

### ► Text-based Field Specifiers

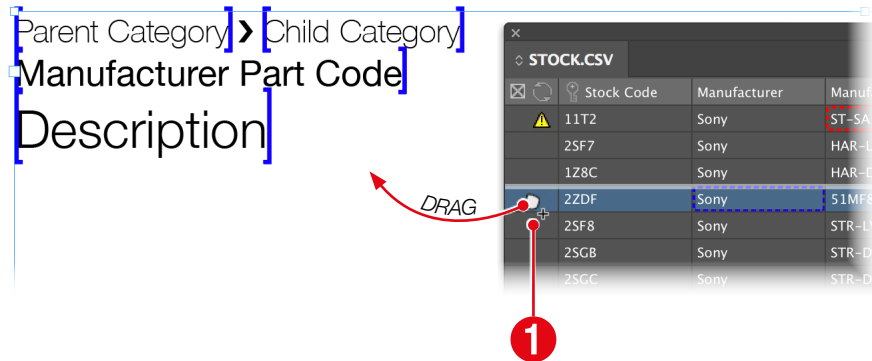
The field's text will be replaced with the name of the field that the Field Specifier represents.

### ► Picture Field Specifiers

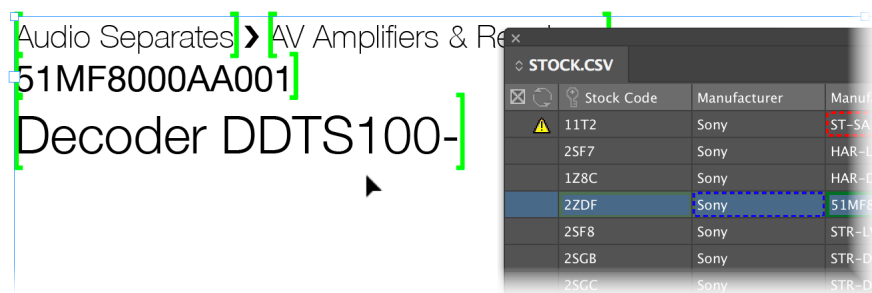
The picture content will be removed from the box and the name of the field will be shown between blue Field Specifier markers at the frame's bottom-left corner.

## POPULATING FIELD SPECIFIERS

Field Specifiers are populated by dragging and dropping data from the data panel to the box(es) containing Field Specifiers. If boxes are grouped on the page, all boxes in the group will be populated with data from the record that is dragged.



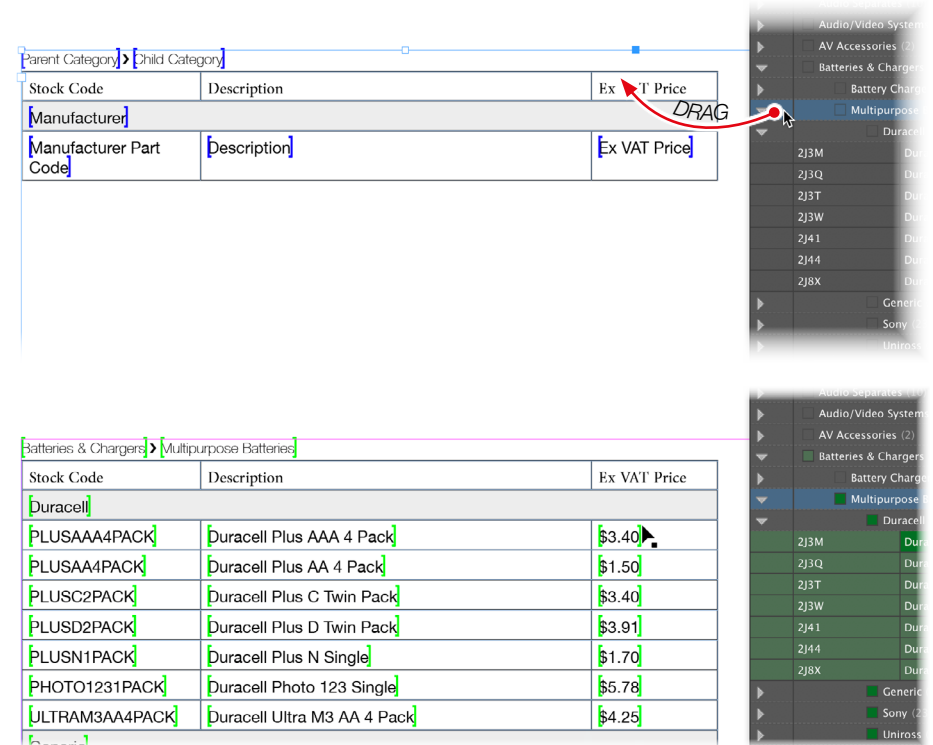
1 Data can be dragged by clicking and dragging from the left-most, status, column in the panel.



Formatting, such as font style and size, is retained wherever possible when populating the Field Specifier.

## TABULAR DATA

Field Specifiers inside of tables are populated differently to regular text-based Specifiers. When EasyCatalog encounters a table, it will attempt to populate it one-row-per-record that's selected in the panel. There are a number of options available that control how tabular data is presented in InDesign, and further information on these can be found in the Tables chapter starting on page 101.



## EASYPAGE LIBRARIES

EasyCatalog brings dynamic content to InDesign libraries by allowing Field Specifiers to be used in library designs. When dragging a library item to the page, the Field Specifiers will be replaced with the content for the currently-selected record(s) in the EasyCatalog panel.

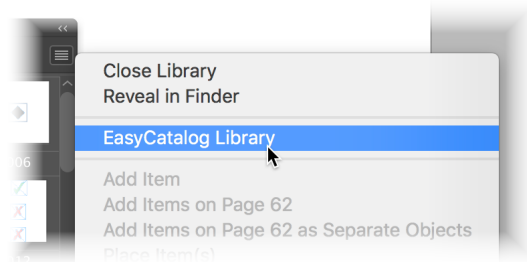
EasyCatalog Libraries allow a number of Product Styles to be defined and stored in standard InDesign libraries. Using EasyCatalog libraries allows complex, module-based pages to be created quickly. The selection of each individual module can be made by the user at production time.

### CREATING AN EASYPAGE LIBRARY

An EasyCatalog Library can be created by:

- ▶ Selecting 'New EasyCatalog Library' from the *File*→*New* menu.
- ▶ Creating a standard InDesign library, or opening an existing one, and setting the 'EasyCatalog Library' menu option.

When EasyCatalog is loaded a new menu option, 'EasyCatalog Library' will be shown on each library's panel menu.



The 'EasyCatalog Library' setting will be preserved with the library file.

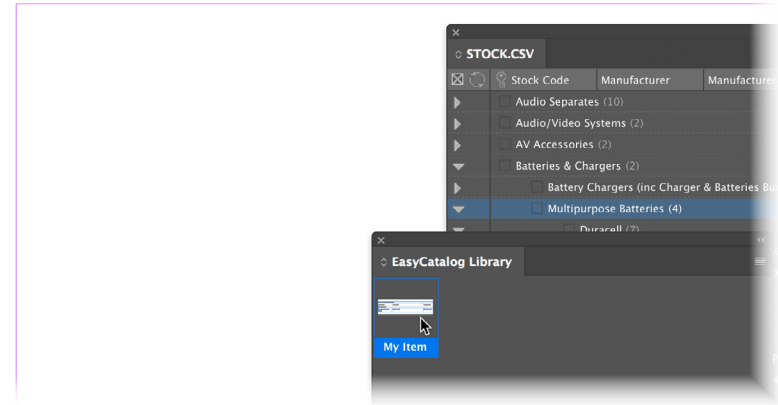
- ▶ Drag your page items into the EasyCatalog Library

### POPULATING AN EASYPAGE LIBRARY WITH DATA

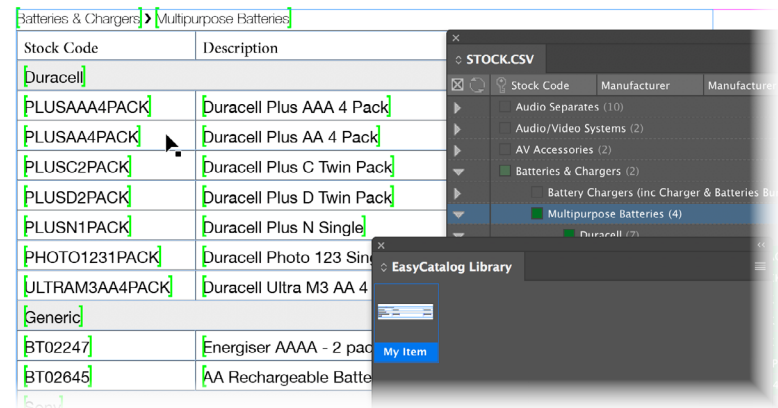
When items stored in an EasyCatalog Library are dragged to the document they will be populated with data from the selected record(s) in the panel. All of the boxes inside of the library item will be populated with data from the same record(s). With the

optional *Pagination Module* loaded, additional attributes can be specified on each box to control which record(s) will be used from the selection.

- ▶ Select the record(s) to populate the library item with in your data panel
- ▶ Drag the library item to the page



- ▶ The Field Specifiers in the library item will be replaced with data from the selected record(s)



Further information on how tables inside of EasyCatalog Library items are handled can be found in the Tables chapter, starting on page 101.

## EDITING A LIBRARY ITEM

To prevent the library item from being populated with data, hold the Alt key when dragging it to the document. Once edited, update the item in the library using InDesigns "*Update Library Item*" menu option from the library panel's pop-out menu.

## CHAPTER 9

# AUTOMATIC PAGINATION



The automatic pagination features shown in this chapter are provided by the "*Pagination Module*" which is an optional module that is purchased separately.

## INTRODUCTION

EasyCatalog provides advanced pagination features to allow thousands records to be paginated into the document in one operation.

By providing an EasyCatalog Library of Product Styles, along with a series of simple rules, EasyCatalog is able to make decisions during pagination to determine which Product Style to use.

## PREPARING FOR PAGINATION

Configuring EasyCatalog for automatic pagination requires three stages, each of which is covered in further detail later:

### 1 **Configure the panel to reflect the structure of your publication, including defining the correct hierarchy**

- ▶ Acquire or import your source data

Optionally:

- ▶ Filter your data to show only the records you would like to paginate
- ▶ Group your data so that the panel represents the logical structure of your publication. For example, if your publication is arranged by Manufacturer,

Make, and Model for instance, you would group the panel by Manufacturer, Make, and Model

- ▶ Sort your data so that the records are shown in the order that you would like them to flow into the document

For more information see "EasyCatalog Data Panels" on page 35.

### 2 **Create your Product Styles**

Create an EasyCatalog Library that contains the Product Styles to use during pagination. Multiple library items can be included in this library – for example, you could have a Product Style for a Manufacturer heading, a Product Style header for Make, etc.

For more information see 'Create Your Product Styles' on page 73.

## ➤ **Paginate**

Use the 'Paginate...' menu to begin the automatic pagination. Five different pagination types are available, depending on the type of publication being produced and the available data.

## ❶ **CONFIGURE THE PANEL**

By utilising EasyCatalog's filtering, grouping and sorting features, you can configure an EasyCatalog panel to show both the structure and running order of records in the document. By thinking of the EasyCatalog panel as a preview of your final publication, you can experiment with grouping, sorting and filtering to determine the flow of records into the document.

### ACQUIRE OR IMPORT SOURCE DATA

Import your data using 'File→New→EasyCatalog Panel'. This is covered in detail in "Importing Your Data" on page 12.

The level of automation that is possible with EasyCatalog Pagination largely depends on the quality of the source data – for example, it should be possible from your data to correctly group the panel (if necessary) to reflect the structure of your publication. Also, EasyCatalog can only automatically choose the correct *Product Style* to use if this information is available in your data.

### FILTER YOUR DATA

Use the 'Subset...' menu (See "Filtering Data" on page 54)) to show only the records that you would like to paginate. This stage is optional, although it makes pagination easier when your data snapshot contains thousands of records.

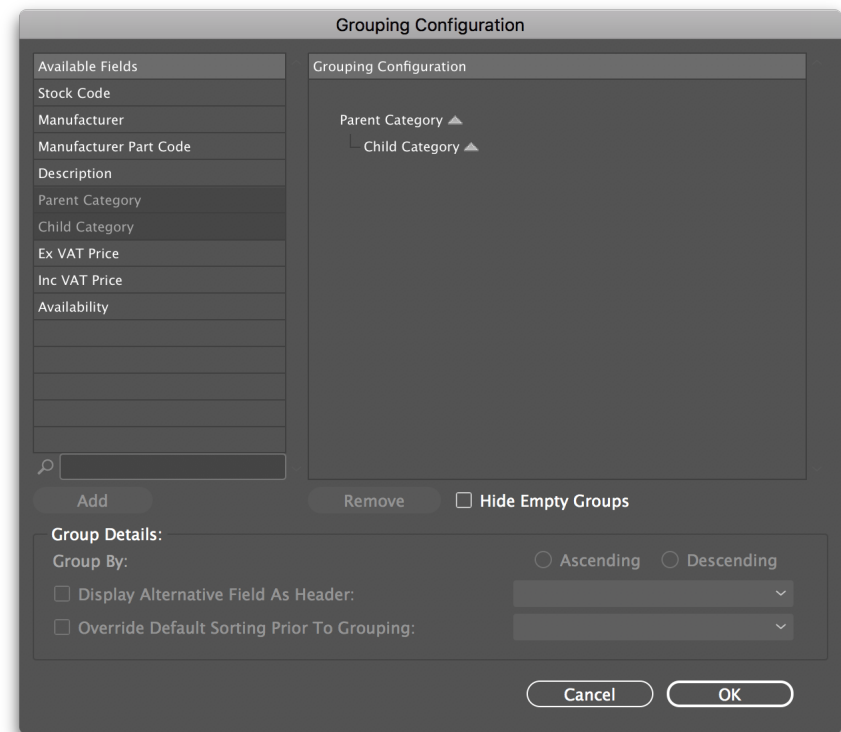
### GROUP YOUR DATA

This stage is also optional, and should be used when your data should appear hierarchically in the publication. If your data is not hierarchical, you may skip this step.

Use the 'Group...' menu option to create a grouping that represents the logical structure of your document. For example, if you require:

- ▶ **Parent Category Heading**
- ▶ **Child Category Heading**
- ▶ **Products**

Use the 'Group Configuration' (see Chapter 4, 'EasyCatalog Data Panels') dialog to construct a hierarchy of *Parent Category*, *Child Category*.



As will be shown later, it is possible to create *Product Styles* that will be used at each level in the grouping hierarchy – so, for example, you could create a *Product Style*



for a *Manufacturer* heading, one for a *Make* heading, etc. It is also possible to use a different heading style based on an indicator in your data.

## 2 CREATE YOUR PRODUCT STYLES

*Product Styles* used during automatic pagination are created in the same manner as normal, drag and drop *Product Styles* (see Chapter 7, '*Dynamic Content*'). When using *Product Styles* during automatic pagination however, further attributes need to be applied that identify when a *Product Style* should be used (at what level in the grouping hierarchy, for example) and whether any post-processing should occur, such as resizing boxes. These attributes are applied to the Product Style using the '*Pagination Rules*' panel which is available from the '*Window*' menu.

The most important Pagination Rule to apply is the "Paginate" rule. This determines where in the grouping hierarchy the library item should appear. For example, in the grouping shown above we may want to have a heading appear at the "Parent Category" grouping level.

### USING THE PAGINATION RULES PANEL

The Pagination Rules panel is used to apply three types of attributes:

#### ► When a Product Style should appear

For example, where in the panel's grouping hierarchy the Product Style should appear. It's possible, in the same library, to have multiple library items each of which have different "Paginate" attributes. During pagination EasyCatalog will evaluate this attribute to determine whether it is the correct time to insert the item.

These types of attributes are applied to the outermost group box or, if you don't want to group the boxes, all boxes in the Product Style.

#### ► Attributes that affect how the box appears on the page

The Pagination Rules panel also allows attributes to be specified on individual boxes in the Product Style, and these attributes can be used to affect how the box is processed when it appears on the document. For example, there are a number of box fitting options; there is an attribute that can delete the box when it has no content, etc.

## SORT YOUR DATA

If your data also requires further sorting, use the panel sorting options to create the correct running order of records (see Chapter 5, '*EasyCatalog Panels*')

Further information on these attributes can be found in "Pagination Rules Reference" on page 114.

#### ► Actions

An 'action' is a simple 'if this then ...' attribute, which can be triggered when the contents of your data fields match the specified criteria. For example, it's possible to specify that a box containing a "New" graphic should be deleted if one of your fields doesn't contain "New".

## PAGINATING ONE PRODUCT STYLE PER RECORD

If your Product Style consists of a single box, or multiple boxes that are grouped together, use the Pagination Rules panel to set the "Paginate" attribute to be "Once Per Record". If the Product Style consists of multiple boxes that aren't grouped together, this attribute should be set on all of the boxes in the Product Style.

If the Product Style contains a table, it will be populated with data from the record being paginated. This will result in one table per record rather than one table containing all of your records. To populate a single document table with multiple records you would need to paginate a group of records (see 'Populating One Product Style Per Group', below).

## PAGINATING ONE PRODUCT STYLE PER GROUP

If your Product Style consists of a single box, or multiple boxes that are grouped together, use the Pagination Rules panel to set the "Paginate" attribute to be "Once Per Group". When this attribute is specified, the "Group Name" attribute should also be set. The combination of these two attributes tell EasyCatalog which group level the Product Style should appear at.

A 'Group Data' Product Style will appear at the start of the specified grouping before any record data is output.

Any tables inside of the Product Style will be populated with data from all of the records in the group. How the data is used to populate the table can be controlled using a

number of table, row, column and cell options. Further information on these options can be found in the "Tables" chapter beginning on page 101.

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## ③ PAGINATE

EasyCatalog currently offers five types of pagination:

### 'INTO TEXT FLOW'

*Product Styles* are inserted, one after the other, into a text box. A *Product Style* can be inserted for each group and/or record shown in the panel's hierarchy.

These *Product Styles* are inserted as anchored boxes (where the style contains more than one box) or as text (where the style contains one text box). This type of pagination is the most widely used, and is suitable for all publications where records simply flow into the document one after another, such as a directory or price list.

### 'AT POSITIONS SPECIFIED IN THE DATA'

Where your data contains positional data, such as a page number, *x* and *y* co-ordinates, EasyCatalog can use this information to automatically position *Product Styles* in the document.

### 'AT PAGE GUIDE POSITIONS'

*Product Styles* can be automatically placed at the intersection of guides on each page. This option is useful for publications that follow a fairly rigid, grid-based, layout or where the paginated *Product Styles* will require some manual alteration once pagination has completed.

### 'USING MASTER PAGES'

'Master Pages' pagination uses *Product Styles* placed on master pages rather than in an InDesign library. The positions of the *Product Styles* are predetermined by the master page, the order that the items flow into the master page can be defined using the Pagination Rules panel.

### 'TEMPLATE DOCUMENT'

'Template Document' pagination can be used to paginate one document per record or group in the panel. This type of pagination is useful, for example, for producing technical data sheets or personalised output. Template document pagination can output PDFs and/or InDesign documents, and can also print during pagination.

## 'INTO TEXT FLOW' PAGINATION

Use this type of pagination if the data you are using contains information about exactly where on the page each Product Style is placed. This type of pagination is often used in conjunction with planning systems that are capable of outputting geometry information.

This type of pagination requires a pagination library and a document to paginate into. The content of the pagination document is not important as the library items are placed exactly at the positions specified in the data.

### Requirements

"Into Text Flow" pagination requires:

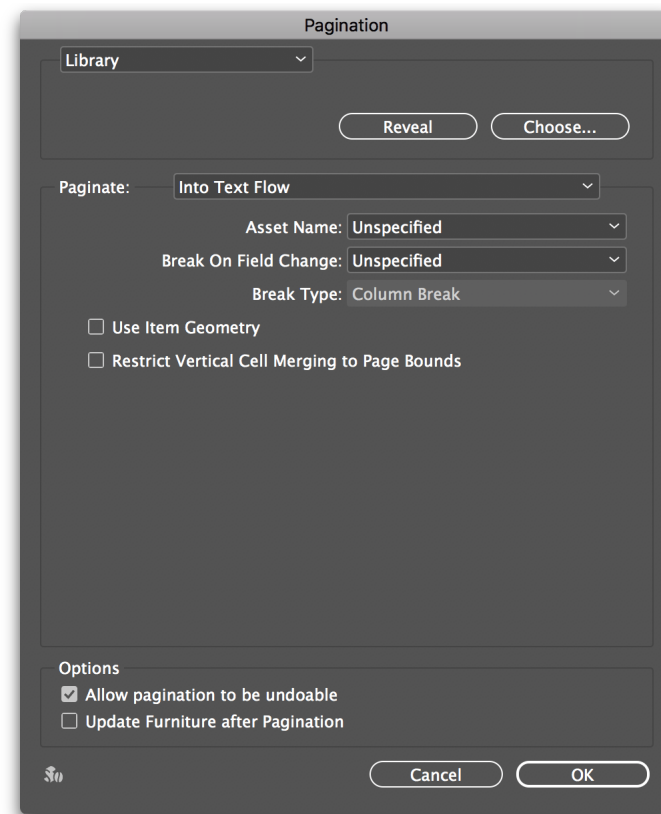
#### ▶ A Pagination Library

The Pagination Library contains the Product Styles to paginate, which are effectively templates for how each record and/or group should appear in the document. Before adding the Product Styles to the Pagination Library, use the Pagination Rules panel to set, as a minimum, the "Paginate" attribute.

#### ▶ A document to paginate into

This document requires a text frame to paginate in to, and would typically be a "Primary Text Frame" on one of the document's master pages. Using a Primary Text Frame will enable EasyCatalog to insert additional pages when required.

## Pagination Settings



### "Asset Name"

If your data contains the name of a library item to use to paginate each record or group of records, specify the field containing this information here. During pagination, EasyCatalog uses the content of the field specified here to choose a library item to use.

### "Break on Field Change" / "Break Type"

During pagination, EasyCatalog monitors the field specified in this pop-up for changes. Each time the value in the field changes, the break specified in the "Break Type" pop-up is inserted into the text flow. This option is useful, for example, for inserting page breaks each time a new "Category" starts in the data.

### "Restrict Vertical Cell Merging to Page Bounds"

If you are using any of EasyCatalog's automatic table cell merging options, this option prevents those merges from crossing page boundaries.

### "Update Furniture After Pagination"

Once pagination is complete, the "Update Furniture" operation will be performed which will populate any boxes on the document's master pages that are set to paginate with "Furniture" data.

## 'AT POSITIONS SPECIFIED IN THE DATA' PAGINATION

Use this type of pagination if the data you are using contains information about exactly where on the page each Product Style should be placed. This type of pagination is often used in conjunction with planning systems that are capable of outputting geometry information.

If your data is grouped in the EasyCatalog data panel EasyCatalog will attempt to paginate these groups by using Product Styles set to paginate at each grouping level. If the panel is not grouped (it contains only records) then a temporary grouping for the purposes of pagination will be used consisting of the page number, the X and Y co-ordinates. This is to ensure that all records that are set at the same position in the document appear in the same Product Style, rather than being placed on top of each other.

### Requirements

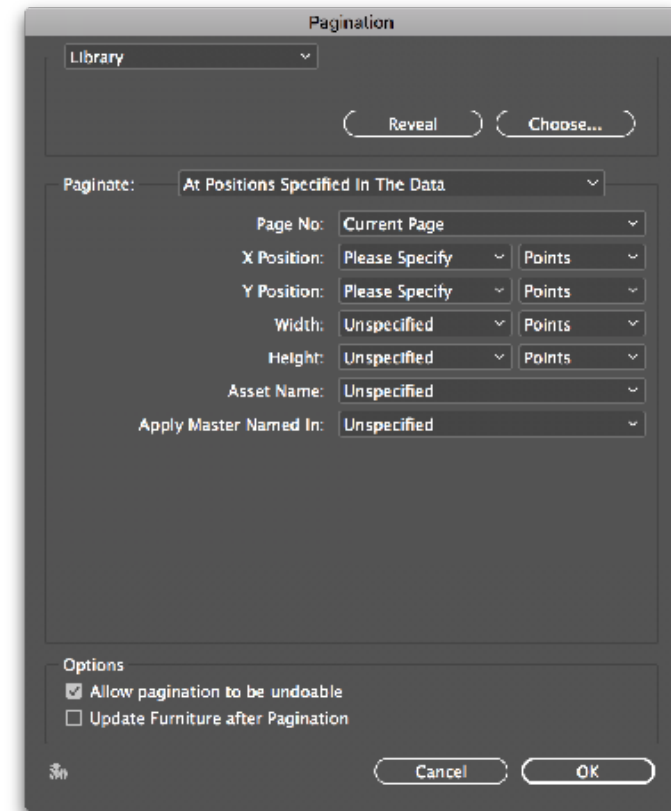
"At Positions Specified in the Data" pagination requires:

#### ▶ A Pagination Library

The Pagination Library contains the Product Styles to paginate, which are effectively templates for how each record and/or group should appear in the document. Before adding the Product Styles to the Pagination Library, use the Pagination Rules panel to set, as a minimum, the "Paginate" attribute.

#### ▶ A document to paginate into

No special configuration of this document is required as the Product Styles will be placed at the positions specified in the data.



### "X Position"/"Y Position"

Specify the name of a field that contains the left (X) and top (Y) position of the Product Style. Ensure that the correct measurement system is specified. The X and Y positions are relative to the top-left position of the page, which is at (0,0).

### "Width"/"Height"

EasyCatalog can optionally resize the Product Style to the width and height specified by the fields selected in these pop-ups. The 'binding' Pagination Rule should be used in the Product Style to determine which boxes should resize or move to conform to the specified dimensions.

### "Asset Name"

Specify the name of a field in your data that contains the name of the Product style to use. If your data does not contain this information, leave this pop-up as "Unspecified".

### "Apply Master Named In"

Specify the name of a field in your data that contains the name of a master page to apply when paginating each record or group. If your data does not contain this information, leave this pop-up as "Unspecified".

### 'AT PAGE GUIDE POSITIONS' PAGINATION

Use this type of pagination if you want your library items to be placed as single, 'floating' objects on the page after pagination. Guide-based pagination uses page or spread guides on your page to determine where library items should be placed. The intersection of these page guides is used to place your library item or, if 'Collision Detection' is enabled, they are used only as a starting point to paginate.

#### Requirements

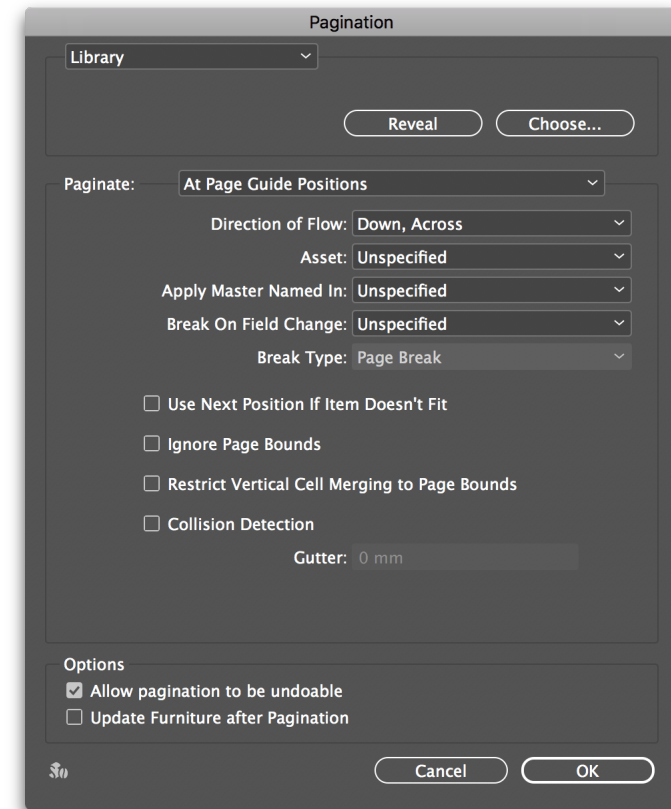
"At Positions Specified in the Data" pagination requires:

##### ▶ A Pagination Library

The Pagination Library contains the Product Styles to paginate, which are effectively templates for how each record and/or group should appear in the document. Before adding the Product Styles to the Pagination Library, use the Pagination Rules panel to set, as a minimum, the "Paginate" attribute.

##### ▶ A document to paginate into

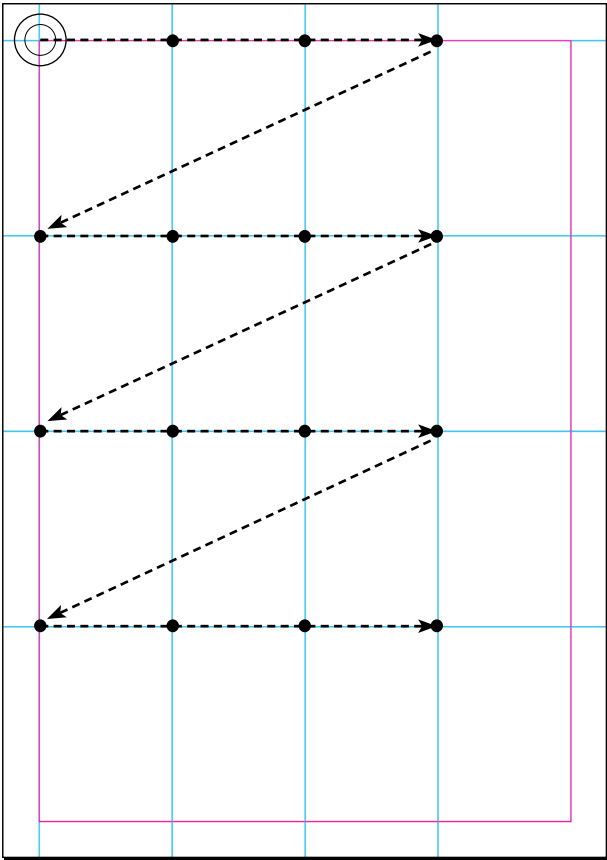
Guide-based pagination uses the intersection of page guides to define the starting point for pagination, so this document should contain page guides on its master pages. Multiple master pages, each with different page guide layouts, can be configured and applied using the "Apply Master Named In" option on the Paginate dialog.



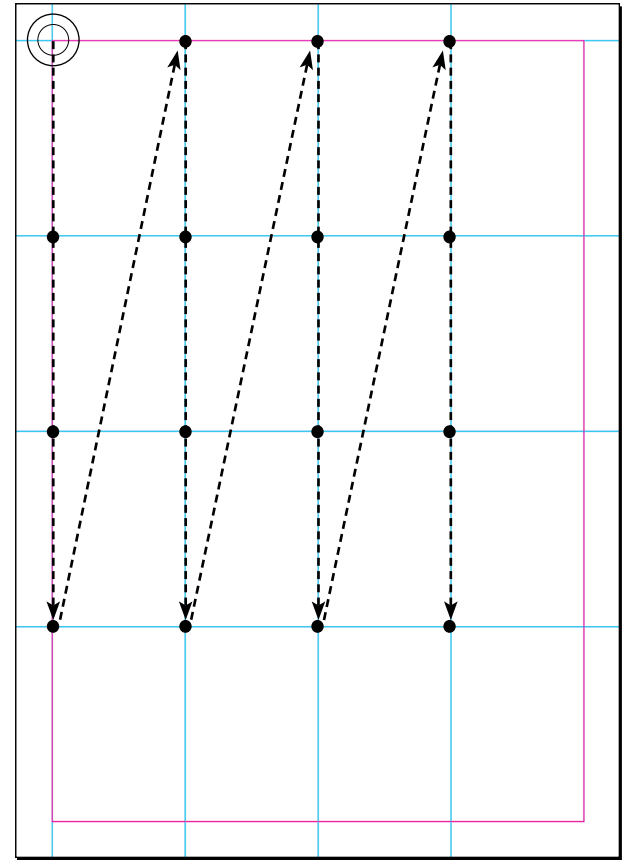
### "Direction of Flow"

Specify the order of how the Product Styles should flow onto the page.

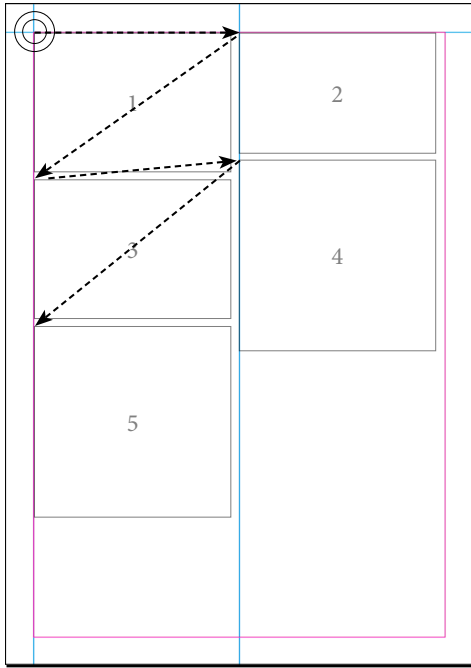
When paginating 'Across/Down', pagination will start at the top left intersection and continue to the next intersection on the right. Once the right margin is reached, pagination will continue at the next horizontal guide further down the page:



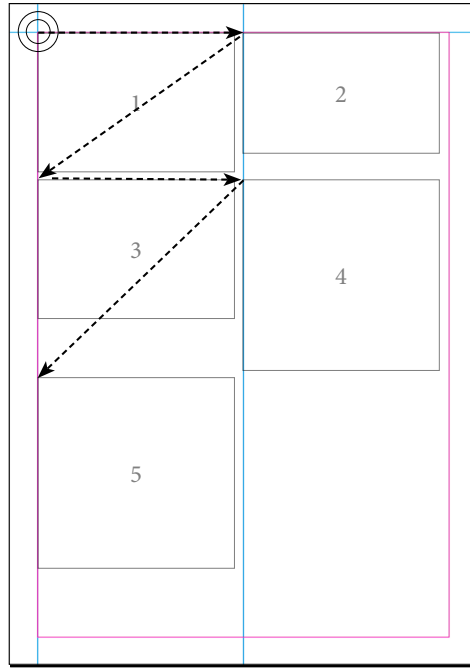
When paginating 'Down/Across', pagination will start at the top left intersection and continue to the next intersection below. Once the bottom margin is reached, pagination will return to the top of the page and continue at the next vertical guide on the page:



'Across/Down (Aligned)' will follow the same pattern as 'Across/Down' but will ensure that the top edge of each item in each row align. This option is generally used when each item being paginated can be a different height:



Across/Down Pagination



Across/Down (Aligned) Pagination

### "Asset Name"

If your data contains the name of a library item to use to paginate each record or group of records, specify the field containing this information here. During pagination, EasyCatalog uses the content of the field specified here to choose a library item to use.

### "Apply Master Named In"

When starting pagination on a new page, or inserting a new page into the document, EasyCatalog applies the master page named in the specified field. This option enables different master pages for different sections to be automatically applied.

### "Break on Field Change"/"Break Type"

During pagination, EasyCatalog monitors the field specified in this pop-up for changes. Each time the value in the field changes, the break specified in the "Break Type" pop-up is obeyed. This option is useful, for example, for inserting page breaks each time a new "Category" starts in the data.

### "Use next Position if item doesn't fit"

By default, pagination stops with an error if EasyCatalog cannot fit the library item being paginated at the current guide position. When this option is checked, pagination continues at the next guide position will be tried instead.

### "Ignore Page Bounds"

EasyCatalog always ensures that library items placed in the document are within the page's margins. When this option is enabled, pagination library items are allowed to extend outside of the right and bottom margins of the page.

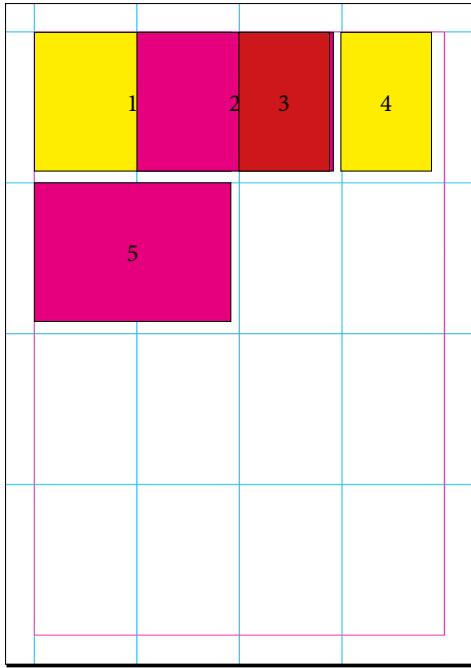
### "Restrict Vertical Cell Merging to Page Bounds"

If you are using any of EasyCatalog's automatic table cell merging options, this option prevents those merges from crossing page boundaries.

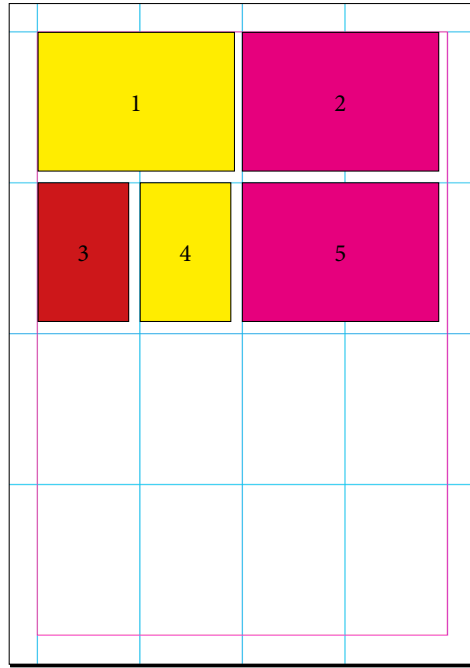
### "Collision Detection"/"Gutter"

Collision Detection prevents EasyCatalog from positioning your Product Styles over the top of existing page items, or Product Styles that have already been paginated. When Collision Detection is switched on, EasyCatalog uses the page guide intersections as a starting point for pagination and Product Styles are positioned wherever possible without overlapping other page items.

Collision Detection should also be used when paginating items that are different sizes to prevent them from overlapping. The following example shows EasyCatalog placing Product Styles on top of each other when 'Collision Detection' is off; when it's on EasyCatalog will skip over guide intersections if another page item is already there. Boxes from master pages will be ignored by collision detection unless they have been overridden on the page being paginated on to.



Collision Detection On



Collision Detection Off

The optional gutter parameter ensures that EasyCatalog leaves sufficient space between Product Styles and any obstructions found. This option is only available when 'Collision Detection' is on.

## "USING MASTER PAGES" PAGINATION

Unlike the other forms of pagination, instead of defining a series of Product Styles in a Pagination Library 'Master Pages' pagination uses Product Styles defined on the document's master pages.

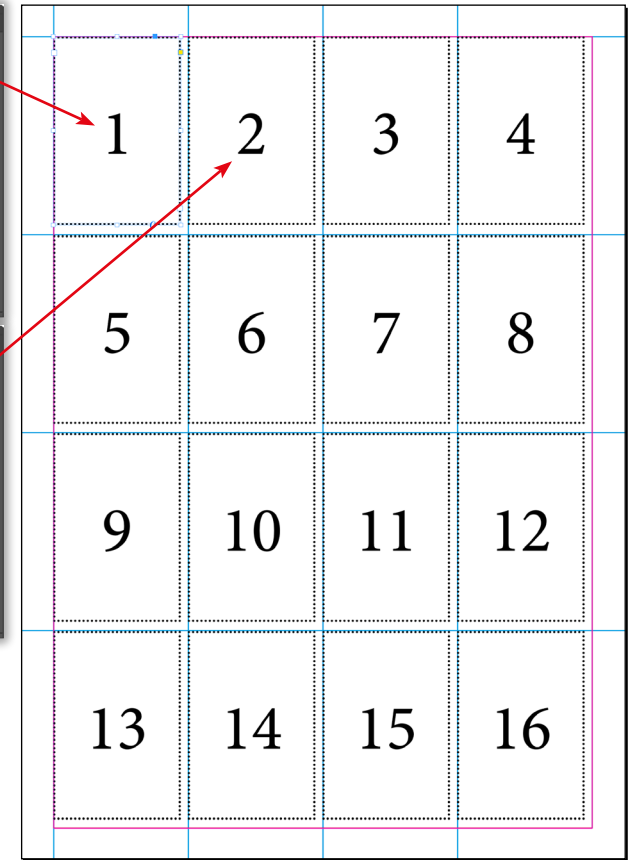
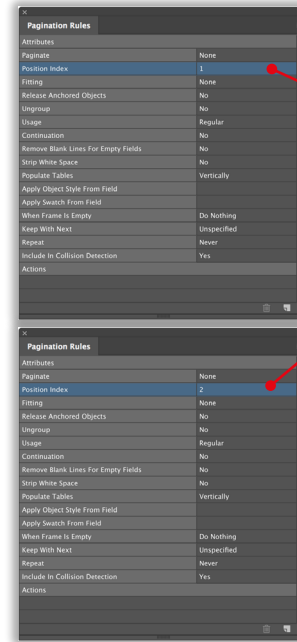
Both the Product Style - and their positions - are defined by the document's master pages. The 'Position Index' attribute applied to each Product Style is used to determine the order that the data flows into the document.

### Requirements

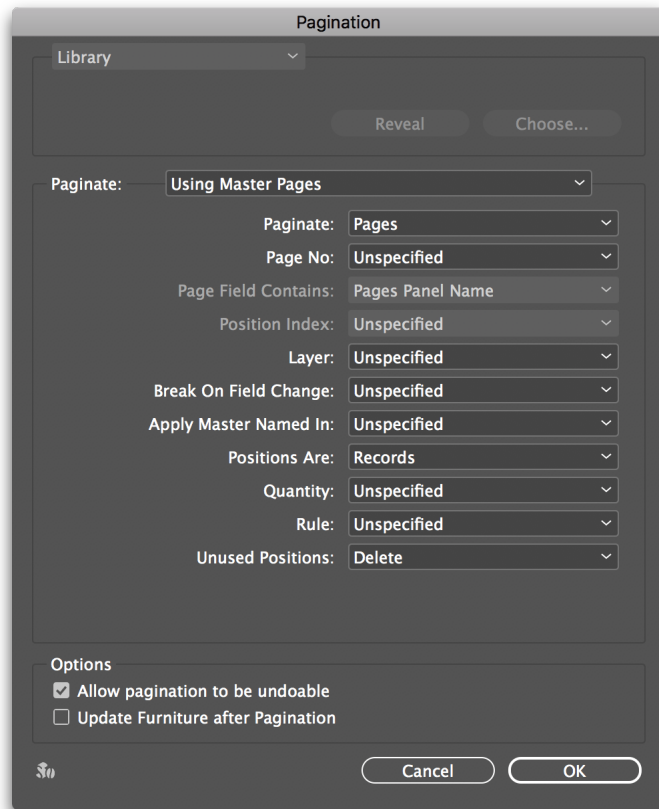
"At Positions Specified in the Data" pagination requires:

### ► A document to paginate into

The Product Styles for 'Master Pages' pagination are defined on the pagination document's master pages, so a Pagination Library is not required.







1	2	3	4	1	2	3	4
5	6	7	8	5	6	7	8
9	10	11	12	9	10	11	12
13	14	15	16	13	14	15	16

*When paginating 'Pages', the Position Indexes should start from '1' for the first record on each page.*

'Spread'-based pagination should be used when the flow of data should run across the spread.

### **Paginate**

The document can either be paginated a page or spread at a time.

'Page'-based pagination should be used when the Position Indexes of the Product Styles do not run across multiple pages on the master spread.

1	2	3	4	5	6	7	8
9	10	11	12	13	14	15	16
17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32

In this example the Position Indexes, and therefore the flow of data, go across the spread from left-to-right

### **Page No.**

By default, the data is paginated in the order shown in the panel through the document. Specify the name of a field containing the page number to place the record or group of records on in this pop-up.

### **Page Field Contains**

When using the 'Page No.' option, specify whether the content of the page number field contains page indices or section page numbers. Page indices run from 1 thru the number of pages in the document; the "Pages Panel Name" option refers to the page number shown in the Pages Panel.

### **Layer**

Each record or group of records in the panel can target a specific layer in the document. If your data contains this information, specify the name of the field containing the name of the layer to use in this pop-up.

### **Break On Field Change**

When the content of the specified field changes, pagination continues on the next page or spread (depending on the setting specified by  above).

### **Apply Master Named In**

When pagination moves to a new page or spread, the master page specified by the content of the selected field is applied.

### **Positions Are**

This pop-up defines whether each of the positions specified on the master pages is populated with record data or group data. When populating with group data select the appropriate group name in the pop-up.

### **Quantity**

Each record or group of records can be paginated multiple times. This option allows you to specify a field that contains the number of times each record or group of records should be paginated.

### **Rule**

By default the boxes on the master page will be populated with data for the records or groups being paginated. However, by specifying the name of a field that contains the name of a Formatting Rule to use, the positions become placeholders for where Formatting Rules should appear. During pagination EasyCatalog will place the specified Rule for each record or group at each position specified on the master page.

### **Unused Positions**

By default, any positions that are not populated on the page or spread will be deleted after pagination. Change this pop-up to 'Override' to override the master page item in the document but leave them unpopulated, or 'Remove Override' to any overridden positions on the page.

## **TEMPLATE DOCUMENT**

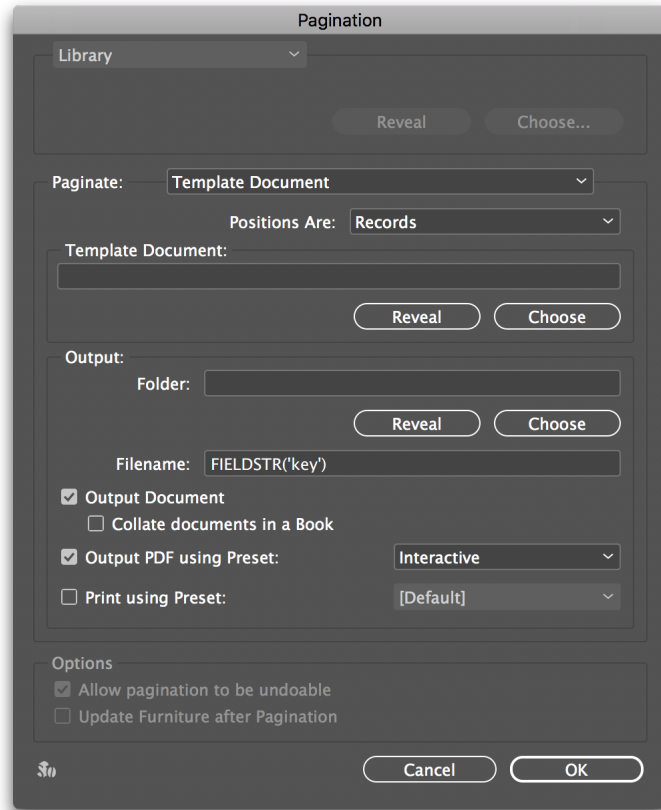
Use Template Document pagination when one document and/or PDF is required per record or group of records in the panel. This type of pagination is typically used for producing technical data sheets or personalised documents.

### **Requirements**

"Template Document" pagination requires:

► **A template document**

The Field Specifiers in this template document will be populated with data for the record or group of records being paginated. This document will be opened for each record (or group) being paginated, populated and then output.



**Positions Are**

Change this popup to specify whether one document, PDF or print should be output per record selected in or per group. When paginating with groups, any tables in the template document will be populated in the same manner as tables within Product Styles.

**Template Document**

Press the 'Choose' button to locate your template document. This document can either be an InDesign document or template document, and any Field Specifiers in this document will be populated with the data being paginated.

**Output Folder**

The folder specified here will be used during pagination when EasyCatalog is outputting either a document or PDF. Custom field commands can also be entered in to this path and will be evaluated during pagination. For example:

Macintosh HD:My Output:FIELDSTR (brand)

During pagination each PDF or document being output would be placed in a sub folder of the "Output" folder, and the name of this sub folder will be the content of the "Brand" field for the record(s) being paginated.

**Filename**

When outputting a PDF or InDesign document, EasyCatalog needs to build a unique filename for each file. Custom field commands should be used in this field to specify how the filename should be constructed - e.g.

Data Sheet FIELDSTR('Product Code')

In this example, the content of the Product Code for the record(s) being paginated will be appended to the text 'Data Sheet' to form the output's filename. A '.pdf' or '.indd' suffix will be added automatically depending on the type of output being produced.

**Output Document**

Check this option to output one document per record(s) being paginated to the output folder. Optionally check the 'Collate Documents in a Book' to automatically create an InDesign book in the output folder containing all of the documents that are produced.

**Output PDF**

Check this option to output one PDF per record(s) being paginated to the output folder. Ensure that the correct PDF profile is selected in the pop-up.

**Print using Preset**

Check this option to output each document to the default printer during pagination. Ensure that the correct print profile is selected in the pop-up.

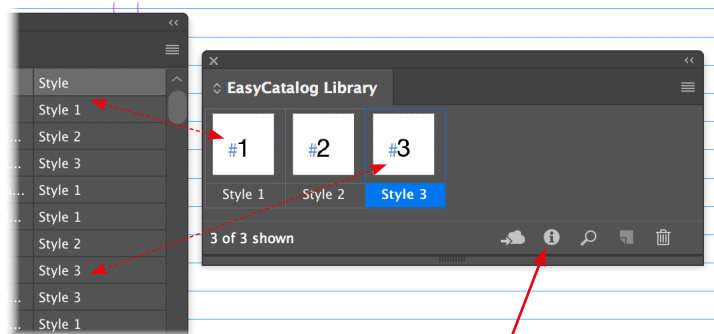
## CHOOSING PRODUCT STYLES BASED ON FIELD CONTENT

During automatic pagination, the *Pagination Module* can select which library item to use from the *Pagination Library* based on the content of one of your fields in the data.

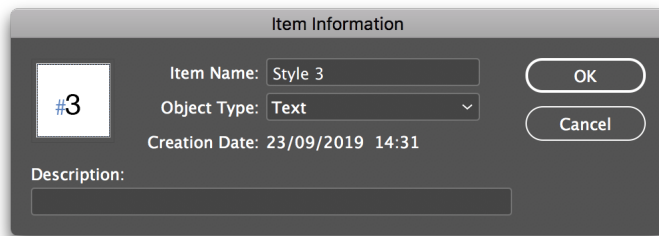
There are two ways of affecting the library item that is chosen:

### USING THE ASSET NAME FIELD ON THE PAGINATION DIALOG

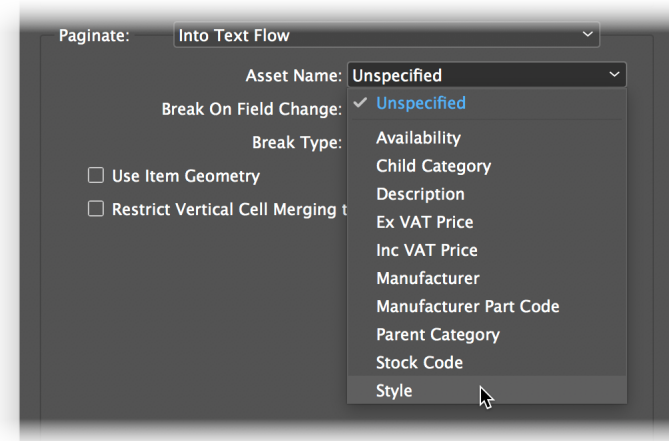
On the 'Paginate...' dialog, select the field that contains the name of the library item to use.



Name each library item using the 'Information' button on the library panel. The name of the library item should match the contents of one of your fields in the data.



Specify the name of the field containing the library style name in the *Pagination* dialog



### USING THE 'IGNORE' PAGINATION RULE

If you have the *Pagination Module* installed, the *Pagination Rule* 'Ignore' can also be used to force the *Pagination Module* to ignore a library item and choose another when paginating the document. Further information can be found in the *Pagination Reference* section.

## CHAPTER 10

# PAGE HEADERS

## INTRODUCTION

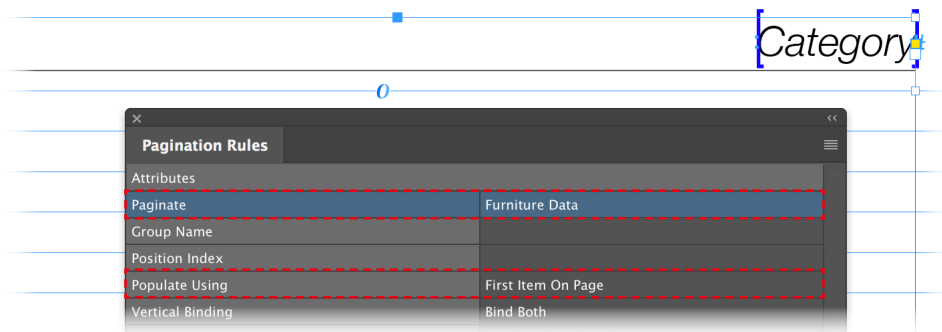
EasyCatalog supports the automatic population of page headers based on the content of each page using a Pagination Attribute called 'Furniture'.

Furniture page items are usually found on master pages, and are typically used for page headers, etc, that should contain summary information for the records placed on the page or spread.

For example, if you're paginating a directory, using Furniture it is possible to create a page header that contains details of the last entry on a spread.

## DEFINING FURNITURE

Furniture boxes are designed on the page using Field Specifiers, in exactly the same way as Product Styles are defined for EasyCatalog Libraries. Typically, furniture page items will be included as part of the master page design to ensure that they are present on each page of the document after pages have been inserted by Pagination.



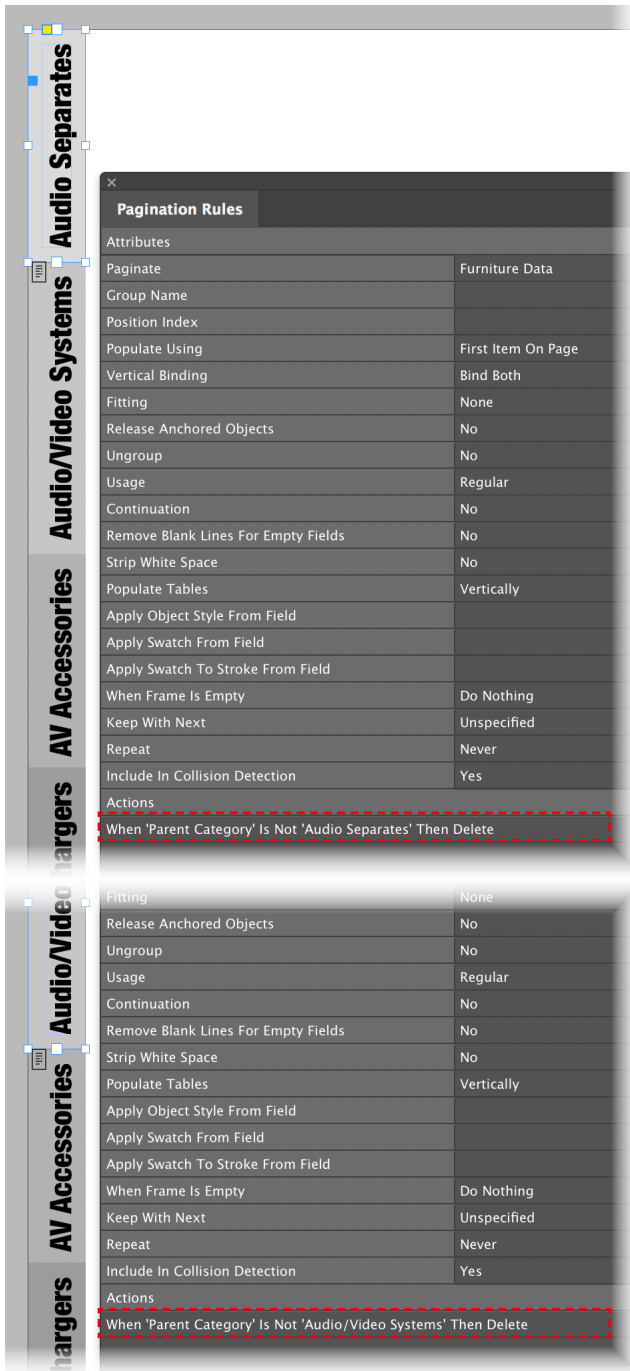
'Furniture Data' is an attribute that is applied to a page item using the Pagination Rules panel. The record data to be used to populate the page items must also be specified using the 'Populate Using' attribute.



The options shown in this chapter are only available when the *Pagination Module* is installed.

Populate Using	Description
First item on page	The box will be populated with the content of the first record on the page. The 'first' is determined to be the record that is nearest to the top-left corner of the page.
Last item on page	Populate with the content of the last record on the page. The 'last' is determined to be the record closest to the bottom-right of the page.
First item on document	Populate with the first record in the document - the record that's closest to the top-left of the first spread.
First item on spread	Populate with the first record on the spread.
Last item on spread	Populate with the last record on the spread.
Last item on document	Populate with the last record in the document - the record nearest the bottom-right of the last spread.

The 'Populate Using' attribute can also be applied to group boxes - each box in the group will be populated with the record data determined by the 'Populate Using' attribute.



## POPULATING FURNITURE

Furniture Data is usually updated after pagination or when the document is near completion as it does not automatically update if the document reflows.

### ► Updating document furniture

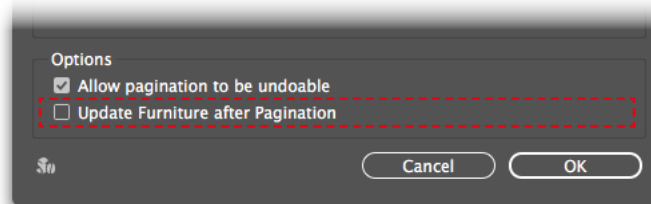
Use the *'Update Furniture'* panel menu option from your data panel's pop-out menu to populate all Furniture page items in the document.

### ► Updating Furniture in an InDesign Book

The "Update Furniture" menu option is also available from the "EasyCatalog" sub-menu on the book panel's pop-out menu.

### ► Automatically updating Furniture after pagination

Check the "Update Furniture after Pagination" option on the "Paginate" dialog to automatically update the furniture boxes once pagination is complete.



If your Furniture page items are on a master page, they will be overridden on each document page prior to being updated. If furniture boxes have previously been overridden in the document, you have the option to remove the local page overrides and override the items again.

During the population of furniture page items, EasyCatalog will examine the content of each page in the document and populate the furniture boxes with the record determined by the "Populate Using" attribute.

So, for example, if "Populate Using" is set to "First on Page", EasyCatalog will scan the page and populate the furniture box with data from the first record placed on the page.

The box will be populated in the same way as boxes in Product Styles, so it's possible to assign Pagination Rules that apply a swatch, resize to fit the content, etc. Actions can also be applied to boxes, and these will be evaluated using the record being used to populate the box. For example, tabs down the outside edge of the spread can be achieved by including all possible tabs on the master page and use an action to delete the ones that do not apply.

## CHAPTER 10

# FORMATTING RULES

## INTRODUCTION

EasyCatalog's Formatting Rules provide an alternative to traditional pagination methods and offer much more flexibility when updating the document with new data. By using Formatting Rules instead of standard InDesign libraries EasyCatalog is able to dynamically update Rules in the document if the data changes or if the design of the Rule is modified. This includes being able to automatically insert new data into the correct position in the document and delete data that should no longer be present.

Formatting Rules consists of two main configuration parts: Rules and Rule Sets. A Rule defines how an individual piece of data (such as a record or a group of records)

should appear and a Rule Set is a collection of Rules. A Rule Set is used to determine which Rules should be considered for placement in the document. the style in which they should appear, EasyCatalog can automatically import and formatted data content.



Some options shown in this chapter are only available when the *Pagination Module* is installed.

## ADVANTAGES OF USING FORMATTING RULES

Formatting Rules provide a number of advantages over using standard pagination:

- ▶ There is a link between the Rules placed in the document and the Rules shown in the Formatting Rules panel. This allows the design of a Rule to be updated and the document updated with this change.
- ▶ When placing a Rule Set, the configuration of the panel is also stored (such as how the panel is grouped, sorted, etc). This allows EasyCatalog to:
- ▶ Automatically insert new records by choosing the appropriate Rule from the Rule Set

- ▶ Automatically delete old records as the position of each record and group is tracked
- ▶ Update placed Rules, including adding or removing rows from tables in items that are populated with group data.
- ▶ Reorder placed Rules if the order of the data changes whilst retaining any formatting that has been applied.
- ▶ Formatting Rules and Rule Sets are stored in the document itself, so no external pagination library is required.
- ▶ A Pagination library can only contain one set of Product Styles, whereas Formatting Rules allows the user to define multiple Rule Sets, each containing a different combination of Rules.

## WHAT ARE RULES?

A Rule can be considered to be equivalent to a library item in an EasyCatalog Pagination library, and they define both how and when a Product Style should appear in the document.

Rules have a number of configuration options which specify:

- ▶ Where in the data structure of the panel the Rule should be used
- ▶ Whether the rule should be used selectively for only certain records or groups in the panel

► Appearance settings, such as whether the Product Style should be inserted as an anchored object.

Rules can either be dragged to the document and paginated with data in a similar manner to EasyCatalog Library items or, when included in a Rule Set, paginated into a text box.

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## WHAT ARE RULE SETS?

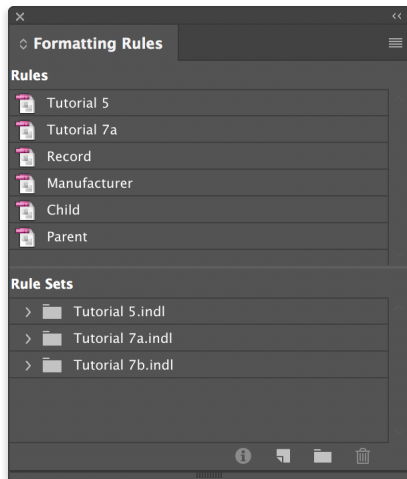
Rule Sets are collections of Rules, and can be considered to be equivalent to an EasyCatalog Pagination library.

Rule Sets can be used to automatically paginate data into the document in a similar manner to flow-based pagination. When placing data in the document, the Rule Set is used to determine which Rules can be used.

Multiple Rule Sets can be configured in the document, each containing different combinations of Rules. This allows the same Rules to be used in different situations: for example, you could have a Rule Set for the main document pagination and another to paginate the index.

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## THE FORMATTING RULES PANEL



Formatting Rules and Rule Sets are controlled from the '*EasyCatalog Formatting Rules*' panel, which can be found on the '*Window*' menu within InDesign.

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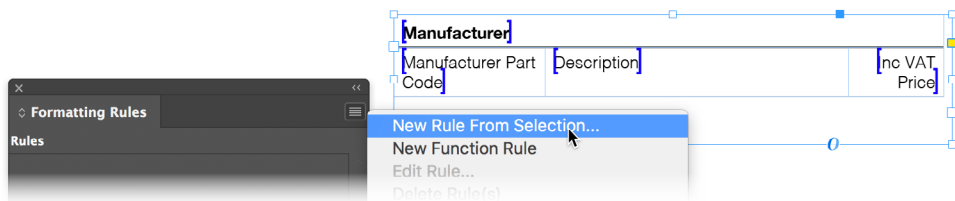
## CREATING FORMATTING RULES

The first step in creating a new Rule is to create your Product Style in the document, using the techniques shown in "Dynamic Content" on page 65. If you have already configured an EasyCatalog library, turn off the '*EasyCatalog Library*' menu option on the library panel's pop-out menu and drag each library item to the document.

To create a new rule, you can either:

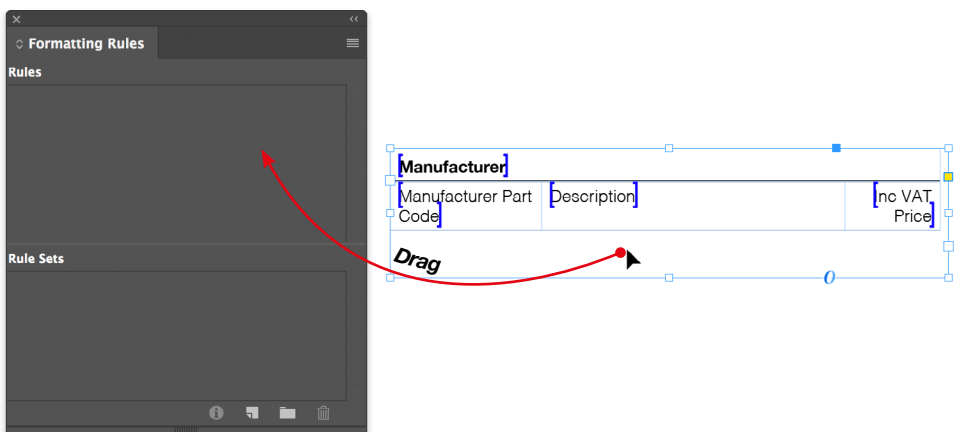


► Select all the boxes in the document that make up the Product Style and use the 'Create Rule from Selection' menu option on the *Formatting Rules*' panel pop-out menu (or press the 'Create Rule From Selection' button at the bottom of the panel).



or

► Drag the boxes the make up the Product Style to the top part of the Formatting Rules panel.



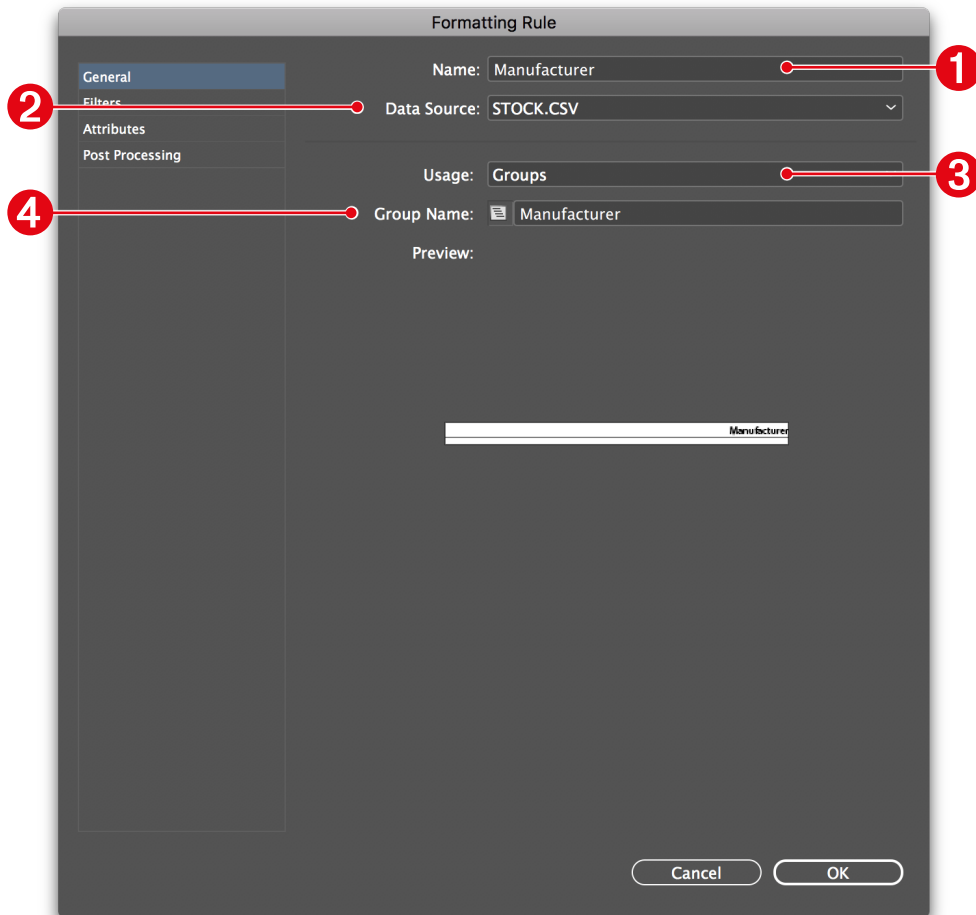
The new rule will be given a default name which can be changed by editing the Rule.

## EDITING FORMATTING RULES PROPERTIES

Rule properties can be edited by double clicking on the Rule name or by selecting the Rule in the list and using the *'Edit Rule'* option on the panel's pop-out menu.

The Rules dialog has three configuration panes:

### GENERAL



This pane shows a preview of the Product Style, and is used to determine when in the data structure this Rule should be paginated.

#### 1 **Name**

Specify the name of the Rule. This name must be unique and is used to identify the Rule.

#### 2 **Data Source**

Select the data source that you are intending to use this Rule with. This pop-up is used to ensure that the correct groups are available from the 'Group Name' pop-up.

The data source specified here does not affect the placement of data, as rules are not associated with a specific data source.

#### 3 **Usage**

This attribute specifies whether the Rule will be inserted once for every record in the panel, or it will be inserted for a specific group in the panel.

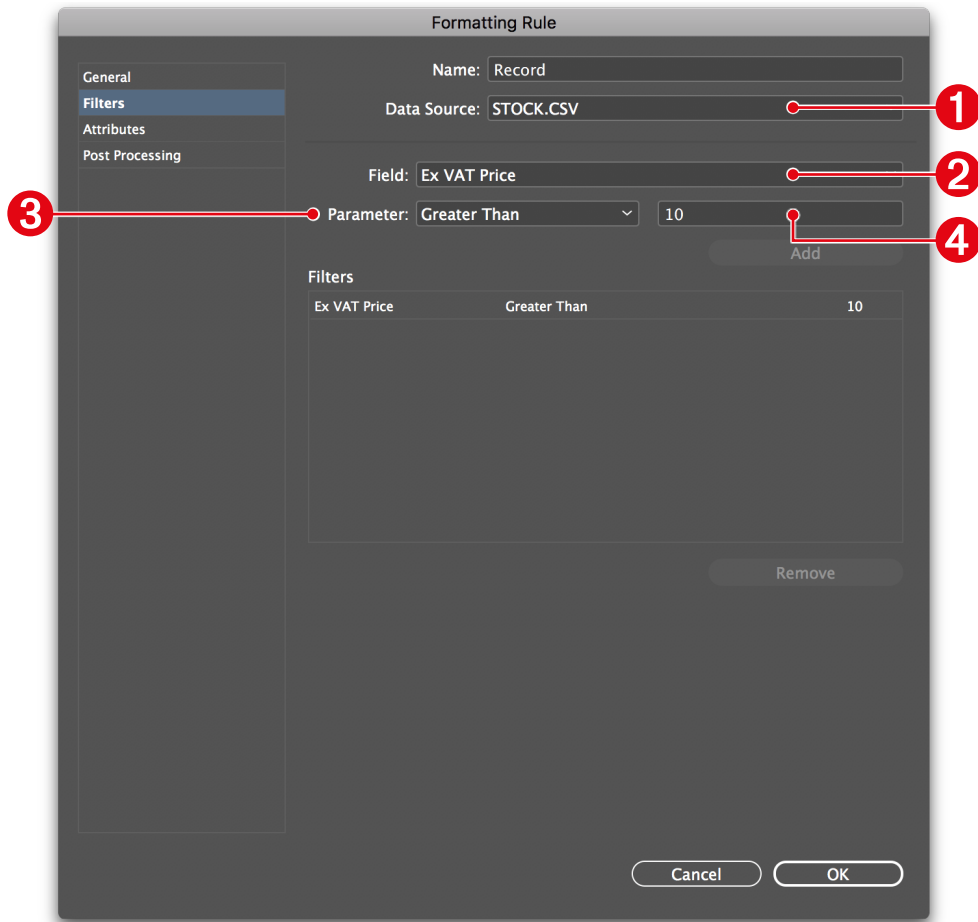
#### 4 **Group Name**

When 'Usage' is set to 'Groups', the name of the field that the panel is grouped by should be selected in the 'Group Name' field. To ensure the correct fields are listed, change the 'Data Source' pop-up to the correct data source.

### FILTERS

The Filters pane is used to specify criteria for when the Rule will appear during Rule Set pagination. Filters test the values of fields in the data source and can be used to ensure that Rules only appear when certain data conditions are met.

By default the Rule will appear for every record or group (as specified on the General pane) unless filters have been specified.



### 1 Data Source

Select the data source that you are intending to use this Rule with. This pop-up is used to ensure that the correct groups are available from the 'Field' pop-up.

Filters are specified using a series of Field, operator and value criteria:

### 2 Field

The field to be tested. Fields from the data source selected in the 'Data Source' pop-up will be shown here.

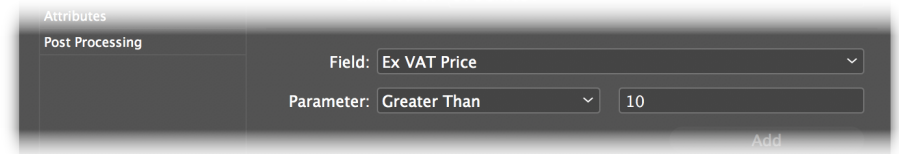
### 3 Operator

The operator here is used to determine which test will be performed on the field selected in the Field pop-up.

### 3 Field Value

The selected operator will use this value as part of the test

For example, if we only want this rule to appear when the 'Ex VAT Price' is greater than 10 the following criteria would be used:



If a Rule Set contains multiple Rules that all pass their specified filter tests, the Rule with the most parameters that matched will be chosen. In the event of a tie, the first matching rule will be used.

## ATTRIBUTES



The options shown on this dialog are only available when used with a licensed version of the *Pagination Module*.

The Attributes pane is used to specify attributes that determine how the Rule should appear when placed during Rule Set pagination, and can also be used to apply post pagination rules such as deleting boxes if they are empty. The attributes shown on this pane are covered in more detail in the 'Pagination Attribute Reference' chapter.

The screenshot shows the 'Formatting Rule' dialog box with the 'Attributes' tab selected. The 'Name' field is 'Record' and the 'Data Source' is 'STOCK.CSV'. The following table lists the attributes and their values:

Attribute	Value
Position Index	
Page Orientation	Any
Insert	Frame Contents
Fitting	None
Force Break	No Break
Prevent Break	Don't prevent breaking
Remove Blank Lines For Empty Fields	No
Strip White Space	No
Populate Tables	Vertically
Apply Swatch From Field	
When Frame Is Empty	Do Nothing
Keep With Next	Unspecified
Repeat	Never
Include In Collision Detection	Yes

## DELETING RULES

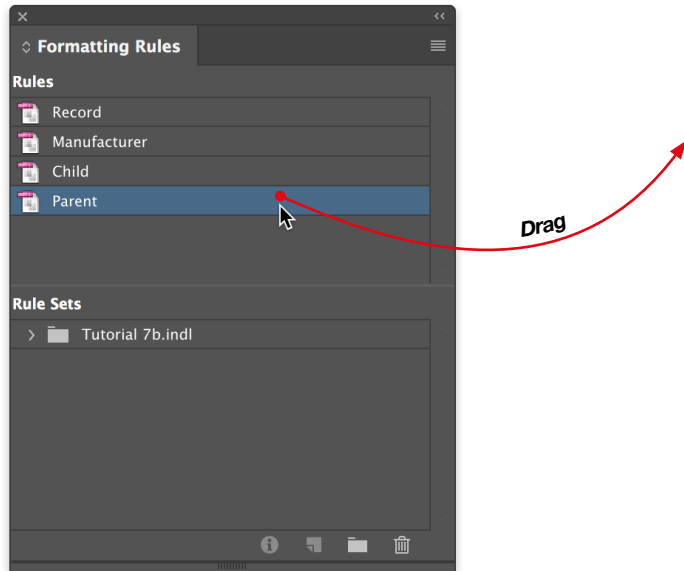
Rules can be deleted by selecting them in the list and using either the trash can button at the bottom of the panel or the '*Delete Rule*' menu option. Rules that are deleted will be removed from any Rule Sets that they are placed in, and the Rule will be deleted from the document during the next '*Update Document*' operation.

## DUPLICATING RULES

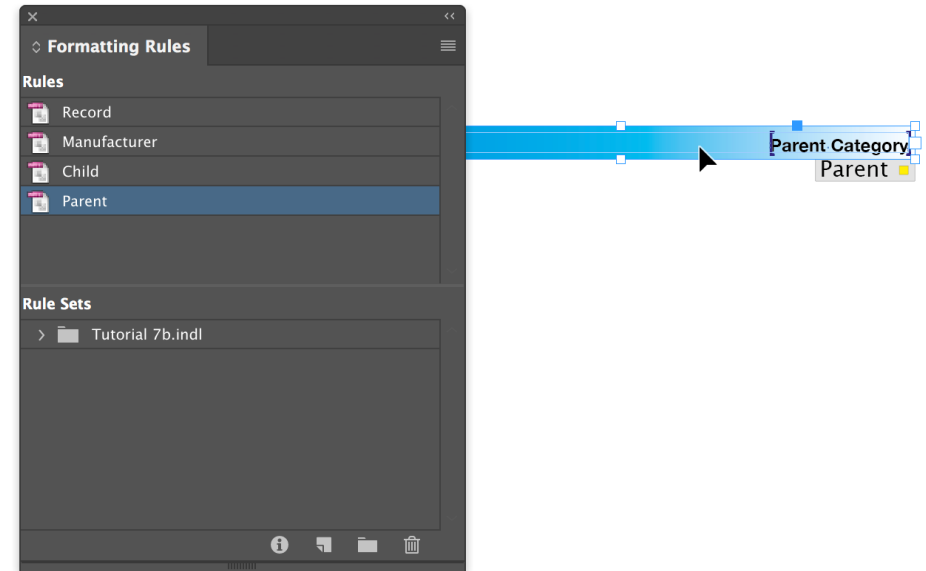
Any Rules selected in the list can be duplicated using the '*Duplicate Rule*' menu option from the panel's pop-out menu. Duplicated rules will not be associated with a Rule Set.

## MODIFYING A RULE'S PRODUCT STYLE

The Product Style for a Rule can be modified by dragging the Rule from the Formatting Rules panel to the document.



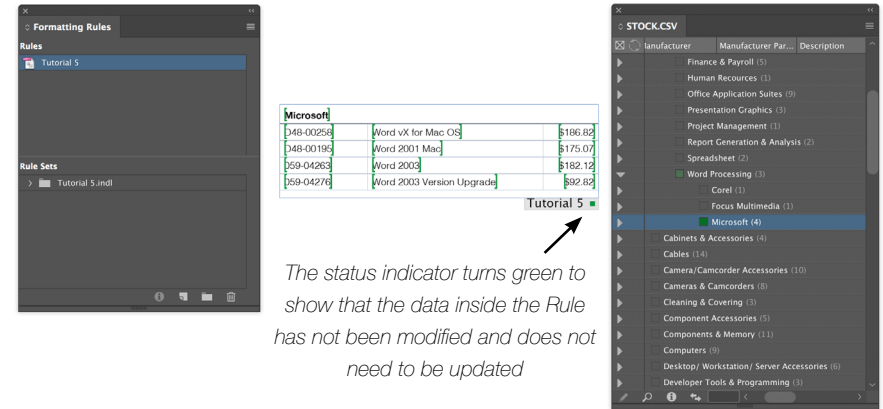
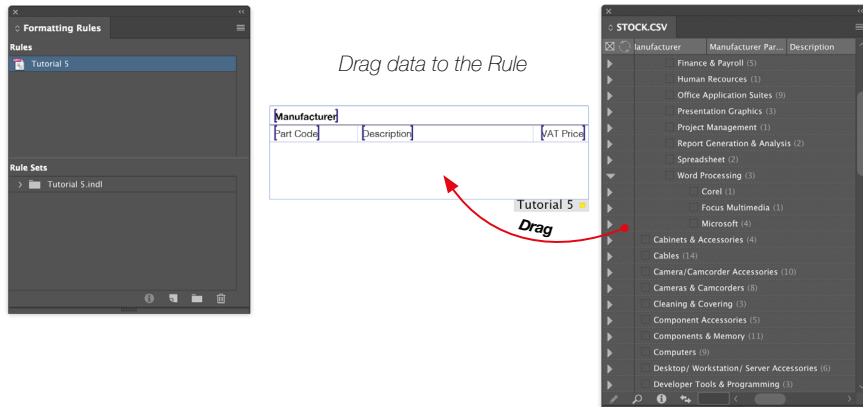
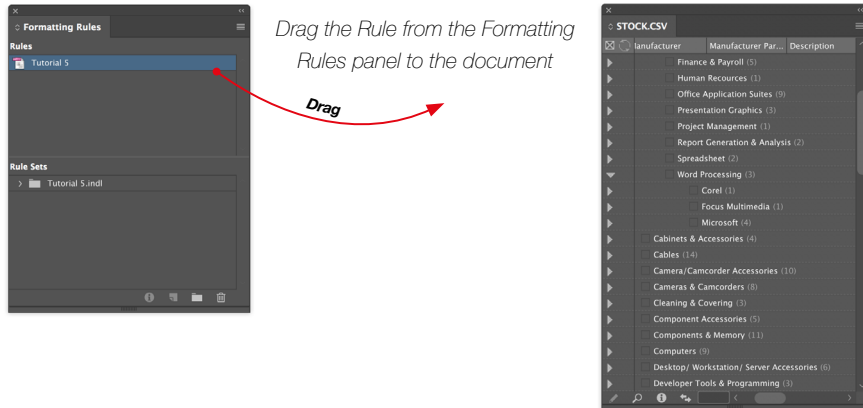
To edit the Product Style associated with a Rule, drag the Rule from the Formatting Rules panel to the document.



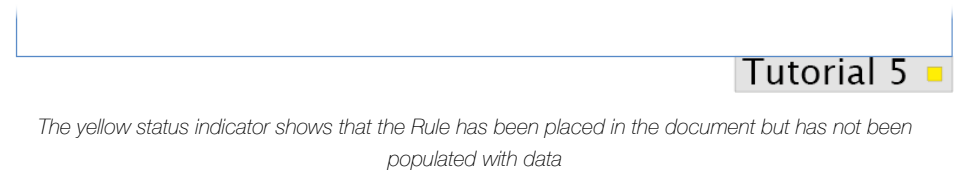
Once the changes have been made drag the Product Style from the document to the Rule in the panel or use the '*Put Rule Away*' menu option.

# POPULATING A RULE WITH DATA

Rules can be populated with data in the same manner as InDesign page objects by dragging and dropping from the EasyCatalog data panel to the document.

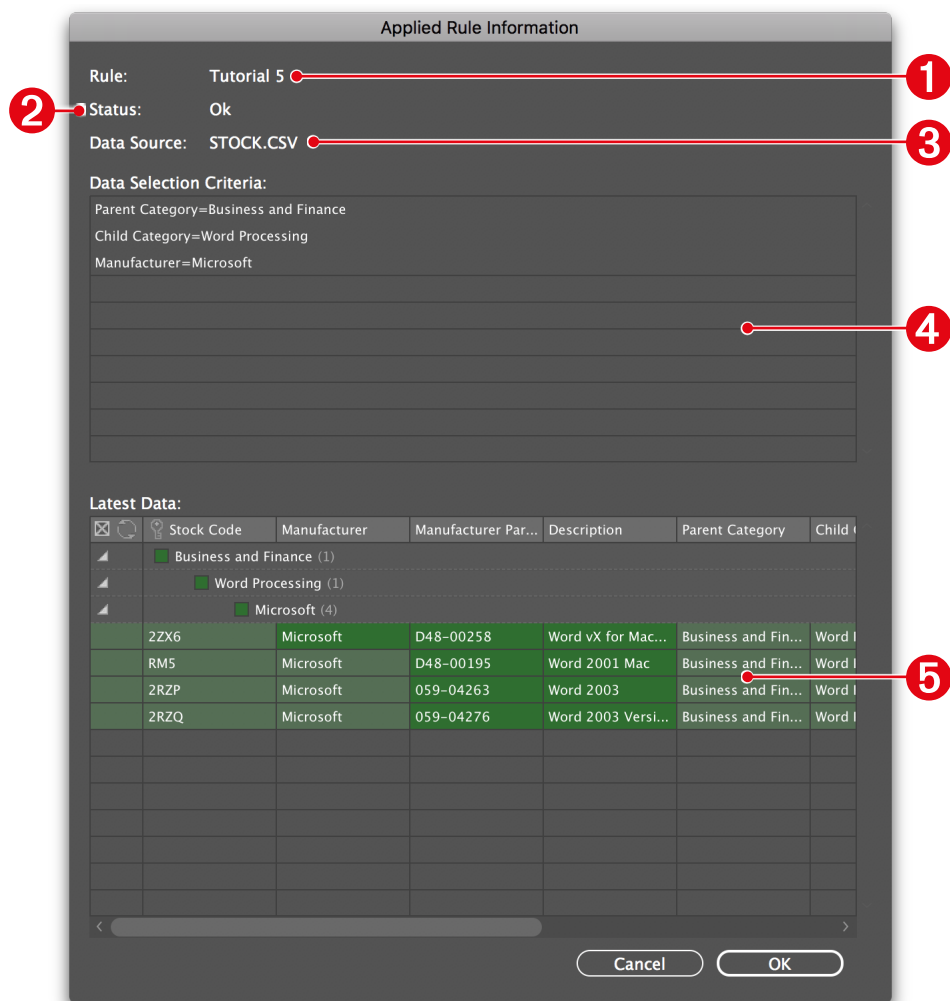


Placed Rules also show a status indicator which shows whether the Rule is up-to-date. A Rule is considered to be up-to-date when the data it contains has not been modified and the Rule itself has not been modified since it was placed. A Rule is considered to have been modified if any of its attributes have been changed in the Formatting Rules panel or if the Product Style associated with a Rule has been updated.



The Rule Status indicator will not check the content of each individual field to determine whether it matches the source data: the colour of the individual field markers should be used for this purpose.

If a Rule's status indicator is red, use the 'Inspect Rule Applied To Selection...' menu option from the Formatting Rules' pop-out menu.



### 1 Rule

The name of the placed rule

### 2 Status

The current status of the placed rule. The status will be one or more of the following values:

Status	Description
OK	Neither the data or the Rule has changed since the Rule was placed in the document.
Data Source Unavailable	The data source is no longer available: it is not open, or has been removed from the workspace folder.
Rule Out Of Date	The Rule has been modified since it was placed in the document.
Data Out Of Date	The data has been modified since the Rule was placed in the document.
No Data Assigned	The Rule has not been populated with data.
Rule Does Not Exist	The Rule has been deleted.

### 3 Data Source

The name of the data source from which the data was placed.

### 3 Data Selection Criteria

The values shown here are used to identify the data that was used to populate the Rule.

### 4 Latest Data

Using the criteria shown in 4, this preview panel shows that data that will be used to populate the Rule during an Update Document operation.

## UPDATING THE DOCUMENT

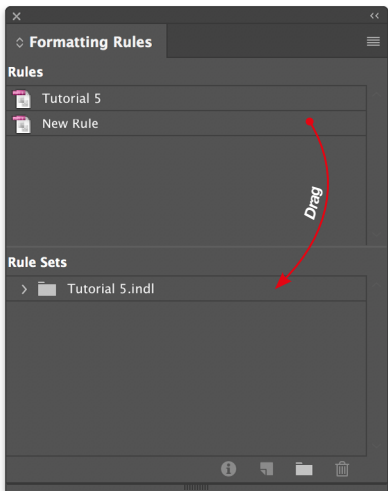
During the 'Update Document' operation Rules will be re-imported if the data for any of the records used to populate the Rule have changed or if the Rule itself has been modified. When re-importing the Rule any local formatting modifications will be lost.

## CREATING RULE SETS

New Rule Sets can be created by pressing the 'New Rule Set' button at the bottom of the panel or by selecting the 'New Rule Set' menu option on the panel's pop-out menu.

Rule Sets are shown as folders in the bottom part of the Formatting Rules panel. To show the Rules associated with a Rule Set use the disclosure triangle next to the folder icon.

## ADDING RULES TO RULE SETS



To assign a Rule to a Rule Set, drag the Rule from the Rules list to the appropriate Rule Set.

Each Rule can be assigned to multiple Rule Sets.

## REMOVING RULES FROM RULE SETS

Select the Rule in the Rule Set that you wish to remove and use the 'Remove Rule from Rule Sets' menu option. Changes to the contents of Rule Sets will be applied on the next 'Update Document' operation.



## POPULATING A RULE SET



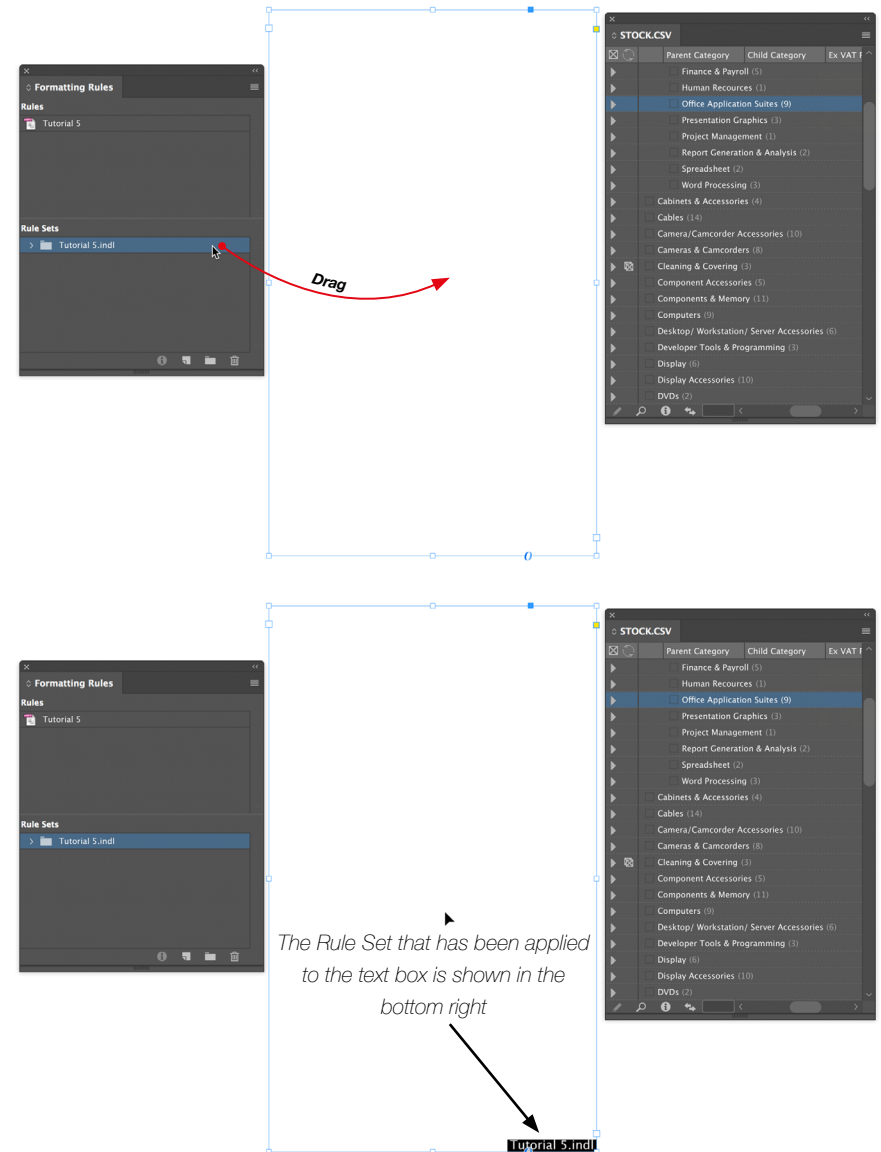
Rule Set pagination is only available when using a licensed version of the *Pagination Module*.

Once all Rules have been assigned to the Rule Set, the Rule Set can be paginated in the document. Rule Set pagination behaves in a similar manner to flow-based pagination. Rules are paginated into an InDesign text box either as anchored objects or as text (depending on the Rule's 'Insert' attribute).

Paginating a Rule Set consists of only two stages:

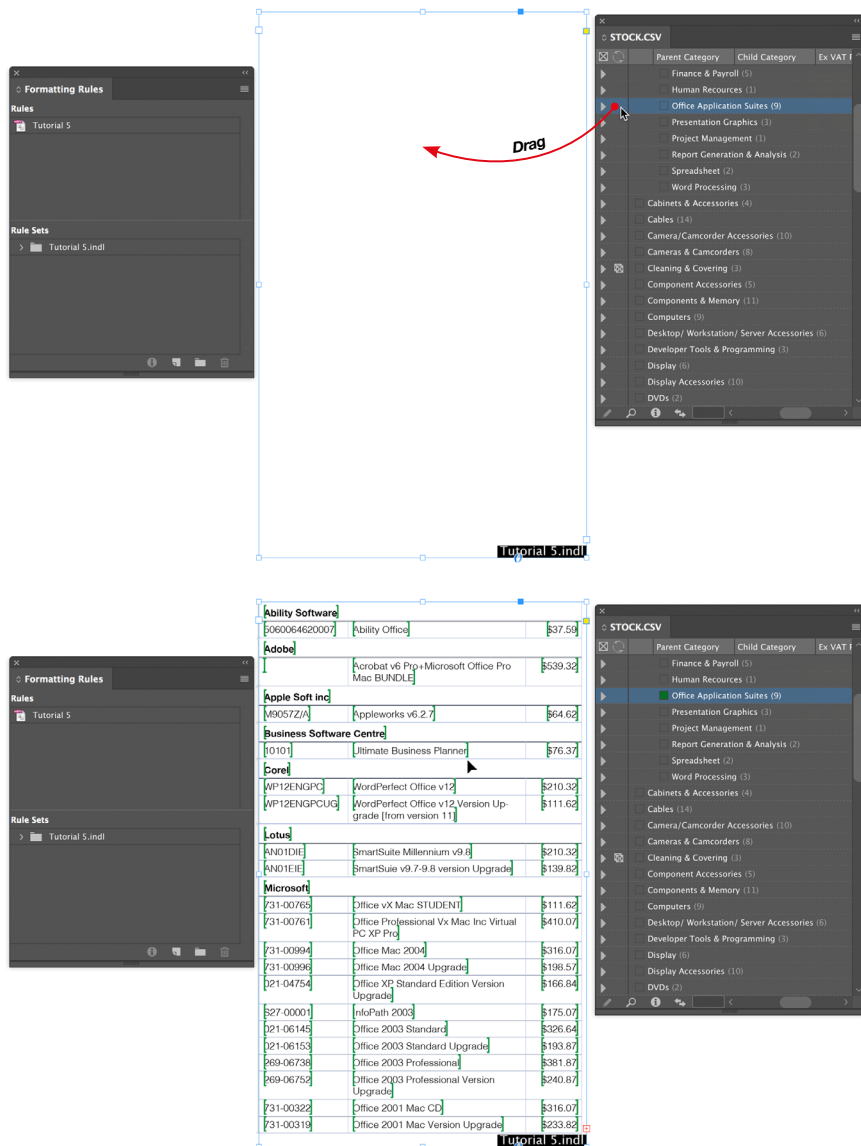
### 1 Assign the Rule Set to a text box to paginate into:

To paginate a Rule Set, drag the Rule Set from the Formatting Rules panel to a text box on the document



## 🔗 Drag the data to paginate from your EasyCatalog data panel to the text box:

Drag data from the data panel to the Rule Set box on the page to populate it



When paginating a Rule Set EasyCatalog stores both the data and its structure at the time of pagination. Modifications to the structure or order of data in the panel will not affect the order of records in the document. The 'Update Document' operation will ensure that the data remains ordered and structured in the same form as when originally paginated.

## UPDATING THE DOCUMENT

Rule Sets are updated as part of the 'Update Document' operation. However, different rules apply to what is updated and when:

- ▶ New records will be inserted in the correct position by choosing the appropriate Rule from the applied Rule Set
- ▶ Deleted records will be removed from the flow
- ▶ Updated records will be reinserted in the flow. Any local formatting made to the Rule will be lost during the update process.
- ▶ If a change to the data has resulted in the order of the data changing, the Rule will be moved into the correct position in the flow. Local modifications to formatting and content will be retained provided that the data for the Rule has not changed and the Rule has not been modified.
- ▶ If a Rule has been updated, all placed instances of the Rule will be updated. Local modifications to the formatting and content of the Rule will be lost.

---

## IMPORTING RULES

Rules can be imported from an existing EasyCatalog Library or from another document that has Formatting Rules configured.

### IMPORTING FROM A LIBRARY

Use the *'Import Library As Rule Set'* menu option from the Formatting Rules panel's pop-out menu.

When importing from a library new Rules will be created for each library item and a new Rule Set will be created. The Rules will be created with the same name as the library items; the Rule Set name will be the name of the library.

### IMPORTING FROM A DOCUMENT

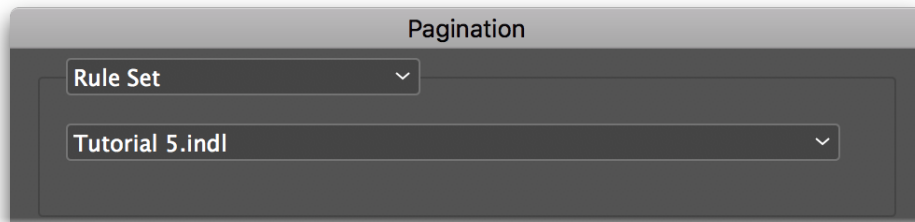
Use the *'Import From Document'* menu option from the Formatting Rules panel's pop-out menu.

---

## USING RULE SETS WITH PAGINATION

Rule Sets can also be used with Pagination instead of specifying a Pagination Library.

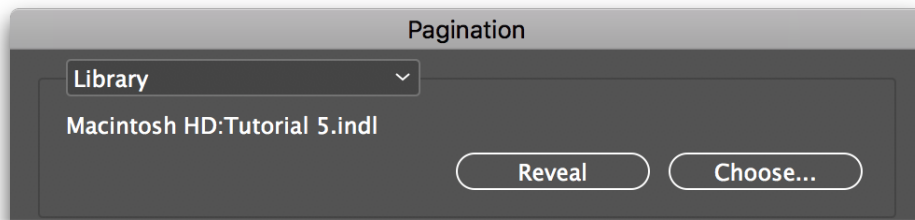
*On the 'Paginate' dialog specify whether you wish to paginate the contents of a library or a Rule Set*



assigned Rule Set, updating the document using the *'Update Document'* menu option will follow the rules listed for updating Rule Sets.

### 'AT PAGE GUIDE POSITIONS' AND 'AT POSITIONS SPECIFIED IN THE DATA' PAGINATION

The Rule Set specified in the pop-up on the *'Paginate'* dialog is used to determine which Rules to consider during pagination. As these types of pagination do not paginate into a text flow, the rules concerning the *'Update Document'* operation are slightly different:



### 'INTO TEXT FLOW' PAGINATION

Flow-based Pagination will paginate into a text box in the same manner as paginating a Rule Set. The *Pagination Module* will automatically assign the Rule Set that is selected in the pop-up to the text box being paginated into. As the text box now has an

- ▶ As pagination has not inserted into a text flow, the Rules will not reflow automatically when a new item is inserted for example.
- ▶ New Rules will not be inserted into the document automatically.
- ▶ Rules for deleted records will not be removed from the document automatically
- ▶ If a Rule has been modified in the Formatting Rules panel (or by changing the Product Style assigned to a Rule) it will be replaced in the document during the 'Update Document' operation.
- ▶ If data for a Rule changes the Rule will be replaced in the document. If the Rule has been set to paginate at a group level, for example, and the Rule contains a table it will be updated if new records have been added to the group.

#### 'TEMPLATE DOCUMENT' PAGINATION

If a Rule Set is placed inside of the template document used for 'Template Document' pagination, it will be populated with data for the record or group being paginated into the document.

## CHAPTER 11

# TABULAR DATA

## INTRODUCTION

EasyCatalog offers a number of ways of paginating tabular data - from simply manually inserting a new table where required though to building tabular data content by transforming XML or using LUA, a lightweight programming language. The type of tabular pagination you use is largely determined by the format of your source data.

### ▶ Simple Tables

A table can be created by simply selecting the fields to insert in your data panel and pressing the insert button. See page "Simple Tables" on page 101.

### ▶ Designed Tables

By including your table in a Product Style, formatting information can be applied to your table (such as cell style, row options, etc) to define how your table should

appear. Header rows for data grouping can also be included. See page "Designed Tables" on page 102.

### ▶ Tabular Fields

EasyCatalog's tabular fields allow you to store tabular data in a single field. This can be something as simple as tab delimited data, or it could be XML that is transformed using XSL into an HTML <table> structure. We also support LUA, a lightweight programming language, to enable you to write complex scripts that build the final table structure. See page "Tabular Fields" on page 109.

## SIMPLE TABLES

Simple tables are ideal for situations where you want to quickly insert a table and manually reformat it later. Inserting a simple table is as easy as selecting the records and fields to insert in the panel and hitting the 'insert' button. EasyCatalog will apply the default table style '[Basic Table]' to the inserted table.

## INSERTING A NEW TABLE

### ▶ Use the sorting and filtering options to re-order your data.

Prior to inserting your table, you need to ensure that the data in your panel is in the order you would like it to appear in the table. For example, if you want your records to be inserted in ascending price order ensure that the panel is sorted by the price field.

When inserting the table EasyCatalog will create columns of the same proportion as the columns in the panel.

### ▶ Select the fields to insert in the table

### ▶ Ensure you have a text insertion point

New tables can only be inserted when you have a valid text insertion point that is not within an existing table.

### ▶ Hit the 'Insert' button

## INSERTING INTO AN EXISTING TABLE

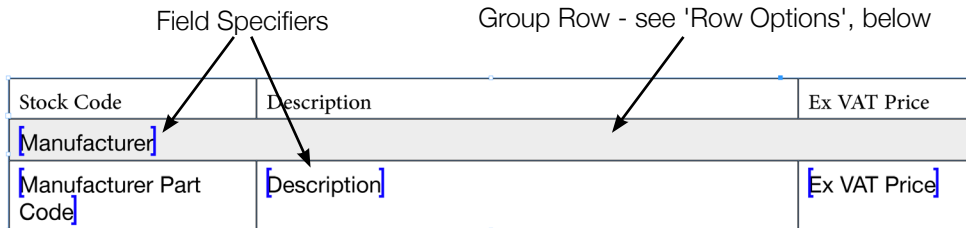
When the insertion point is within an existing document table, data from the panel will be inserted into it. As much data as possible will be inserted into the table - it will not be expanded or contracted.

## DESIGNED TABLES

EasyCatalog allows you to design your tables using standard InDesign tools -- applying table, row, cell and column formatting. By including Field Specifiers in your table, it is possible to create tables that adapt to accommodate the amount of data you're paginating.

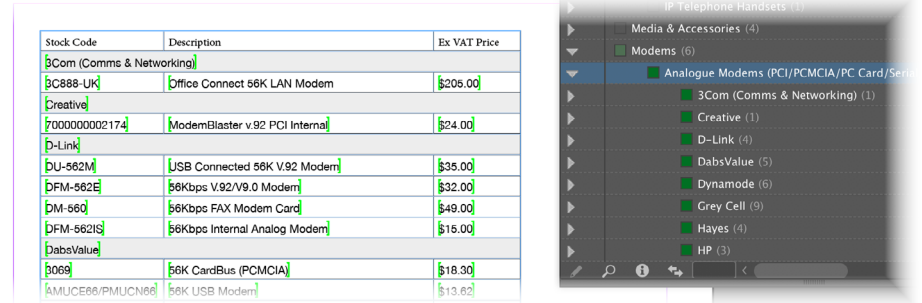
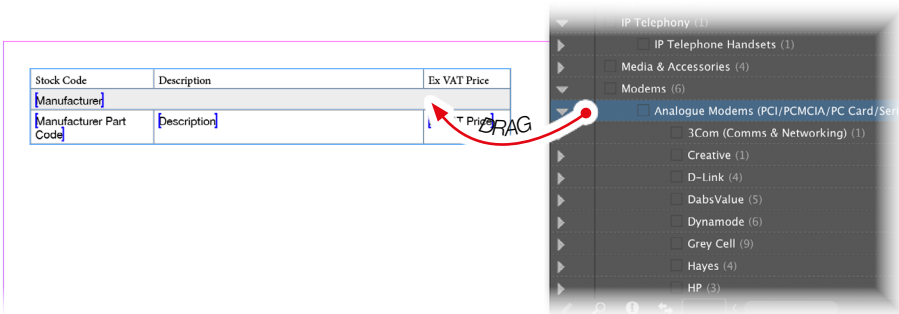
### DESIGNING THE TABLE

Create your table using InDesign's standard tools, including Field Specifiers where the data should appear in the table. By default, EasyCatalog will expand or contract the body area of the table so that there is one row per record being paginated. Field Specifiers in the header and footer area of the table will be populated with data from the first record being paginated.



### POPULATING THE TABLE

The table can be populated by dragging data from the panel to the table on the page, or by including the table in a Product Style that's stored in an EasyCatalog library.

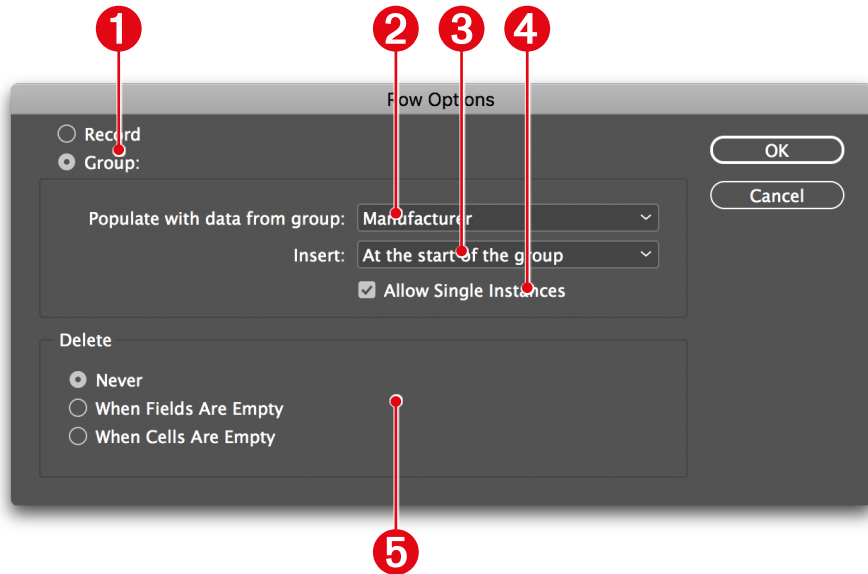


### ADJUSTING TO YOUR DATA

EasyCatalog also offers a number of options for controlling how the table presents and adapts to your data. For example, empty columns can be deleted and the width of the remaining columns adjusted to maintain the original table's width. Using these techniques, it's possible to define a single table that adapts to the data that's being paginated.

### ROW OPTIONS

The table's row options can be edited using the Table > Row Options menu from the data panel's pop-out menu.



### 1 Record/Group

Specifies whether this row should be inserted once per record (the default) or once for each group (specified in 2 below).

### 2 Populate with data from group:

Specifies the name of the group that this row should appear for. This row will be inserted each time the specified group appears in the panel. In the example above, a new row is inserted for each "Manufacturer" group in the panel.

### 3 Insert

Insert	Description
At the start of the group	This row will be inserted as a header row for the group.
Once Per Group	This row will be inserted each time the group appears in the panel. This option changes the way 'delete empty columns' operates: when a row is set to 'At the start of the group' it will not be considered when determining whether the column is empty or not; when the row is set to 'Once per group' it will.
At the end of the group	This row will be inserted as a footer row for the group.

### 4 Allow Single Instances

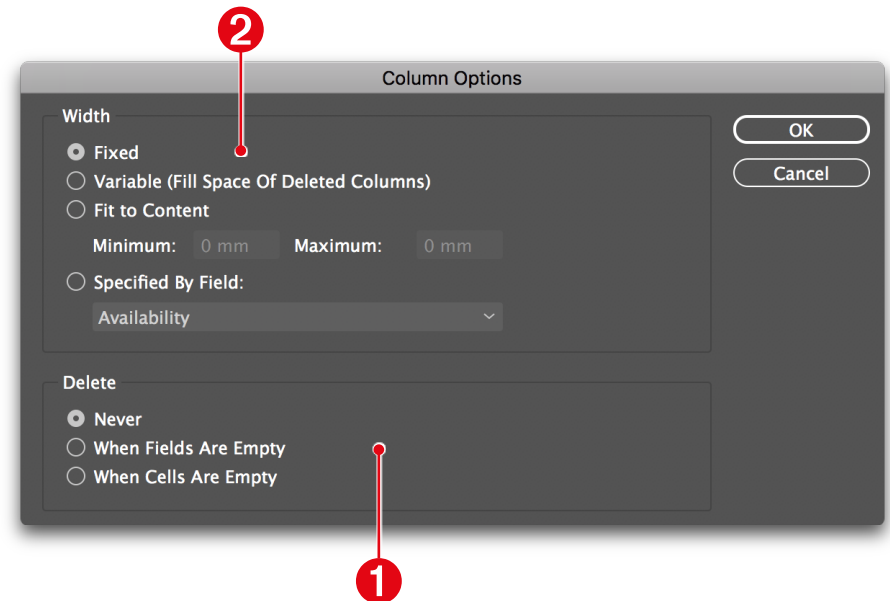
This option can be used to control whether a single instance of the nominated group can appear in the table. For instance, if populating a table with data from a single "Manufacturer" it may not be necessary to include the Manufacturer's group row in the table.

### 4 Delete

Delete	Description
Never	This row will not be deleted, regardless of whether it is empty or not
When Fields Are Empty	The row will be deleted when the fields it contains are empty. Any non-field content, such as static text will be ignored.
When Cells Are Empty	For the row to be deleted, every cell in the row must be empty. This option will check both field and non-field content in the row and only delete it if it's empty.

## COLUMN OPTIONS

The table's row options can be edited using the Table > Column Options menu from the data panel's pop-out menu.



## 1 Delete

Delete	Description
Never	This column will not be deleted, regardless of whether it is empty or not
When Fields Are Empty	The column will be deleted when the fields it contains are empty. Any non-field content, such as static text will be ignored.
When Cells Are Empty	For the column to be deleted, every cell in the column must be empty. This option will check both field and non-field content in the column and only delete it if it's empty.

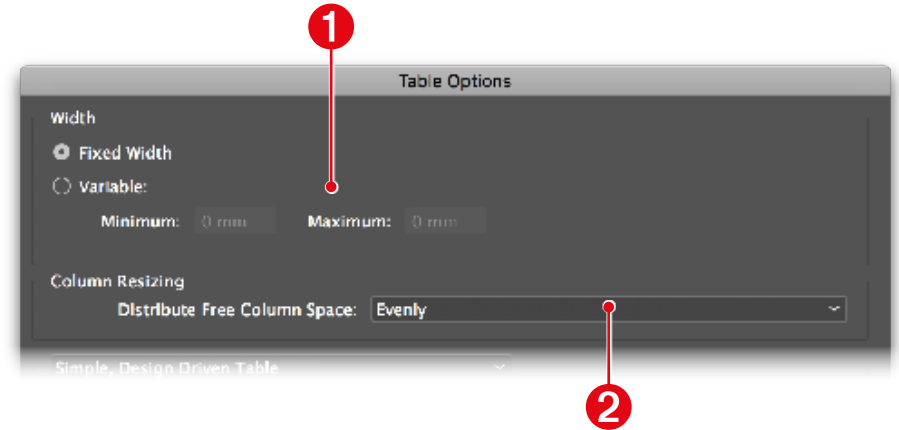
## 2 Width

The width of the selected column(s) can be adjusted to accommodate the data that has been used to populate the table. When adjusting the width of the columns, EasyCatalog will always attempt to ensure that the overall width of the table is within the parameters specified on the Table > Table Options dialog.

Width	Description
Fixed	This column will not be resized
Variable (Fill Space of Deleted Columns)	This column will be resized if other columns in the table are deleted. The width of this column will increase to fill the space that was made available by deleting other columns. By default, each 'Variable' column will receive an equal proportion of the available space. To apportion space depending on the amount of text in the column use the 'Distribute Free Column Space' option on the Table Options dialog.
Fit to Content	The width of the column will be adjusted to the width of the text within it, whilst obeying the minimum and maximum parameters specified.
Specified By Field	The width of the column will be set to the width in the specified field. The nominated field from the first record being used to populate the table.

## TABLE OPTIONS

Options that apply to the table as a whole can be edited using the Table > Table Options dialog. Complex data structures, such as XML, can also be used to populate a table, and this dialog contains the configuration options for determining where the XML data should be retrieved from and how it should be transformed.



## 1 Width

Width	Description
Fixed Width	EasyCatalog will attempt to maintain the pre-pagination width of the table
Variable	When paginating the table EasyCatalog will ensure that the final width is between the specified parameters when resizing columns.

## 2 Column Resizing

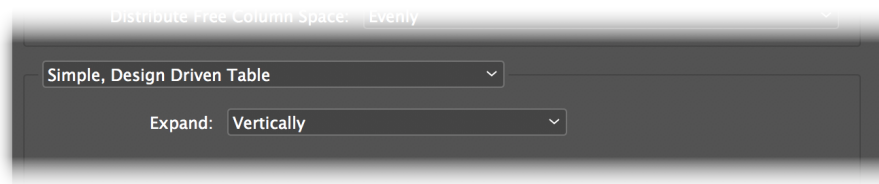
The options specified here affect how much space is allocated to each 'Variable (Fill Space of Deleted Columns)' column.

Option	Description
Evenly	Every 'Variable' width column will be treated the same, and so each will receive an equal proportion of the available space.
Proportionally, based on content	Columns will receive a portion of the available space based on how much content they have, so those columns with a lot of content will receive more space than those with less content.

## POPULATING TABLES WITH COMPLEX DATA

By default EasyCatalog will populate the table one-row-per-record, expanding or contracting the table to accommodate the amount of data being paginated. It is also possible to populate the table using complex data structures such as XML or tabular fields. The Table Options dialog allows alternative table population options to be specified:



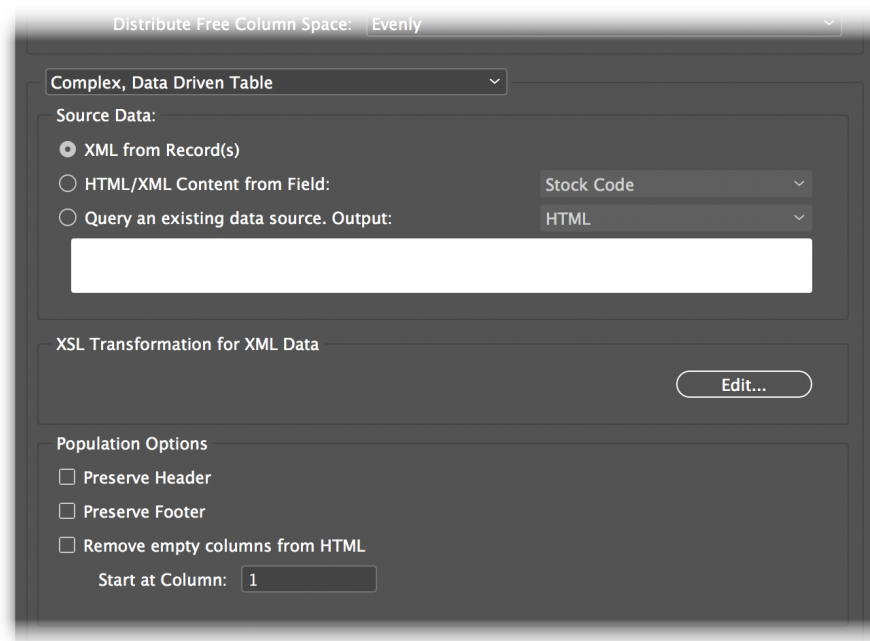


The default option for all tables is a 'Simple, Design Driven' table: that is, create one new row in the table for each record being paginated. The table will expand vertically, adding new rows if there is too much data for the table or deleting rows if there is not enough.

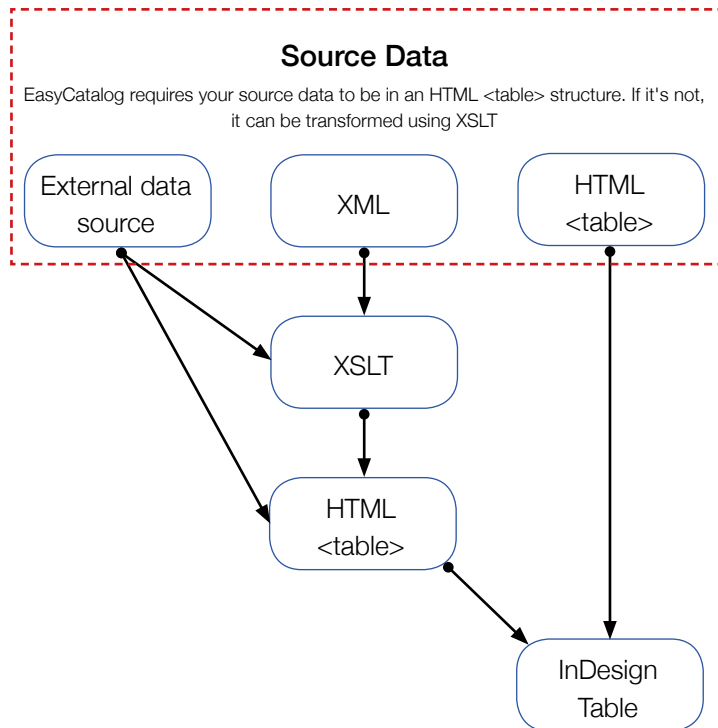
### POPULATING TABLES HORIZONTALLY

The 'Expand' pop-up can be used to specify that new columns should be created in the table for each record. If there is only a single column in your table prototype, this will be repeated for each record being paginated. If there is more than one column, EasyCatalog will assume that the left-most column is a header column. It will then create sufficient columns to paginate one column per record. The header column will be populated with data from the first record being paginated.

### POPULATING TABLES WITH XML DATA



EasyCatalog can populate the table with data formatted as in an HTML <table> structure. If your source data is not in this format, XSLT can be used to transform it. EasyCatalog is also able to generate XML from your data or from data stored in a separate data source.



**Source Data:**

XML from Record(s)

EasyCatalog can create XML for the record or group of records being used to paginate the table. This will be in the form of <group> and <record> nodes that represent how the data is structured in the panel. The XML node names will be based on the names of the fields in the data source, with illegal characters replaced with underscores. EasyCatalog will generate XML for the record in the following format:

```

<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<group>
  <group name = "Parent Category">
    <group name = "Child Category">
      <group name = "Manufacturer">
        <record>
          <Stock_Code>2Z9B</Stock_Code>
          <Manufacturer>Sony</Manufacturer>
          <Manufacturer_Part_Code>ZR6B2</Manufacturer_Part_Code>
          <Description>Digital X AA Oxy-Nickel 2-Pack</Description>
          <Parent_Category>Batteries & Chargers</Parent_Category>
          <Child_Category>Multipurpose Batteries</Child_Category>
          <Ex_VAT_Price>$2.25</Ex_VAT_Price>
          <Inc_VAT_Price>$2.64</Inc_VAT_Price>
          <Availability>Ordered Upon Request</Availability>
        </record>
      </group>
    </group>
  </group>
</group>
  
```

HTML/XML Content From Field

If one of the fields in your source data contains an HTML <table>, this field can be used without modification. If your field contains XML data, it must first be transformed using XSLT to output an HTML <table>. Use the 'XML Transformation for XML Data' option (below) to edit the XSLT to transform the XML into HTML.

Query an existing data source. Output:



**This option requires the Relational Module.**

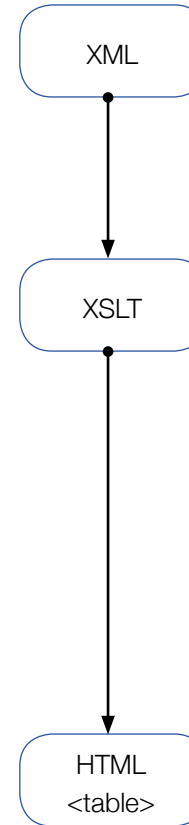
Data from another EasyCatalog data source can be queried by entering an SQL statement into the edit field. The data can be returned as an HTML <table> structure or as XML.

## XSL Transformation for XML Data

If the source data, specified above, for the table is formatted as XML it must first be transformed into an HTML <table> structure which can then be used to populate the table in the document. Press the 'Edit...' button to edit the XSLT transformation for this table.



**This option requires the XML Data Provider Module.**



```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<AttributeValues>
  <AttributeValue attributeId="quantity" orderNo="10">68</AttributeValue>
  <AttributeValue attributeId="order_code" orderNo="7">GF 33</AttributeValue>
  <AttributeValue attributeId="id" orderNo="9">116</AttributeValue>
  <AttributeValue attributeId="description" languageId="de"
orderNo="2">&lt;p&gt;AC99AFFF mit FG 50&lt;p&gt;</AttributeValue>
  <AttributeValue attributeId="width" orderNo="13">4000</AttributeValue>
  <AttributeValue attributeId="height" orderNo="6">20</AttributeValue>
  <AttributeValue attributeId="diameter" orderNo="11">100</AttributeValue>
  <AttributeValue attributeId="price" orderNo="8">312,5</AttributeValue>
</AttributeValues>

<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:template match="/">
<table>
  <xsl:for-each select="/AttributeValues/AttributeValue">
  <xsl:sort select="@orderNo" data-type="number" order="ascending" />
  <tr>
    <td><xsl:value-of select="@attributeId" /></td>
    <td><xsl:value-of select="text()" /></td>
  </tr>
</xsl:for-each>
</table>
</xsl:template>
</xsl:stylesheet>

<?xml version="1.0" encoding="UTF-8"?>
<table>
  <tr>
    <td>description</td>
    <td>&lt;p&gt;AC99AFFF mit FG 50&lt;p&gt;</td>
  </tr>
  <tr>
    <td>height</td>
    <td>20</td>
  </tr>
  <tr>
    <td>order_code</td>
    <td>GF 33</td>
  </tr>
  <tr>
    <td>price</td>
    <td>312,5</td>
  </tr>
  <tr>
    <td>id</td>
    <td>116</td>
  </tr>
  <tr>
    <td>quantity</td>
    <td>68</td>
  </tr>
  <tr>
    <td>diameter</td>
    <td>100</td>
  </tr>
  <tr>
    <td>width</td>
    <td>4000</td>
  </tr>
</table>
```

### ❶ Example XML

An example of the XML that will be used to populate the table will be shown here, based on the record(s) selected in the panel.

## 2 XSL Transformation

Enter the XSL transformation that should be used to transform the XML into an HTML <table> structure.

## 3 Test

Use the 'Test' button to apply the XSL transformation to the XML. The preview table

4 will be updated to show the table structure.

The screenshot shows the 'Edit XSL' dialog box with the following content:

**Example XML (Based On Selection)**

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<AttributeValues>
<AttributeValue attributeld = "quantity" orderNo = "10">68</AttributeValue>
<AttributeValue attributeld = "order code" orderNo = "7">GF 33</AttributeValue>
<AttributeValue attributeld = "id" orderNo = "9">116</AttributeValue>
<AttributeValue attributeld = "description" languageld = "de" orderNo = "2">AC99AFFF mit FG 50</AttributeValue>
<AttributeValue attributeld = "width" orderNo = "13">4000</AttributeValue>
<AttributeValue attributeld = "height" orderNo = "6">20</AttributeValue>
<AttributeValue attributeld = "diameter" orderNo = "11">100</AttributeValue>
<AttributeValue attributeld = "price" orderNo = "8">312,5</AttributeValue>
</AttributeValues>
```

**XSL Stylesheet:**

```
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:template match="/">
<table>
<xsl:for-each select="/AttributeValues/AttributeValue">
<xsl:sort select="@orderNo" data-type="number" order="ascending" />
<tr>
<td><xsl:value-of select="@attributeld" /></td>
<td><xsl:value-of select="text()" /></td>
</tr>
</xsl:for-each>
</table>
</xsl:template>
</xsl:stylesheet>
```

**Test**

	1	2
1	description	AC99AFFF mit FG 50
2	height	20
3	order code	GF 33
4	price	312,5
5	id	116
6	quantity	68
7	diameter	100
8	width	4000

Buttons: Cancel, OK

## TABULAR FIELDS

If your data contains data in a single field that should be output as a table in the document, EasyCatalog's 'Tabular Field' field type can be used. Using tabular fields, it's possible to output data that would be too complex to represent using a simple record/field type structure. Data in your tabular field can be presented to EasyCatalog as XML, HTML (in the form of an HTML <table> structure), or as delimited text (such as tab or comma-delimited data).



*Delimited text example:*

Key	Description	Price	Specifications	See Also
AAA123	Red Widget	99.99	Width»10cm¶Height»20cm¶Depth»30cm	AAA124»Blue Widget¶AAA125»Yellow Widget¶AAA126»Green Widget

In this example, the 'Specifications' and 'See Also' fields contain data in a tab-delimited format.

*XML example:*

Here the 'Specifications' and 'See Also' fields contain data represented as XML. This XML will need to be transformed using XSL into an HTML <table> structure before it

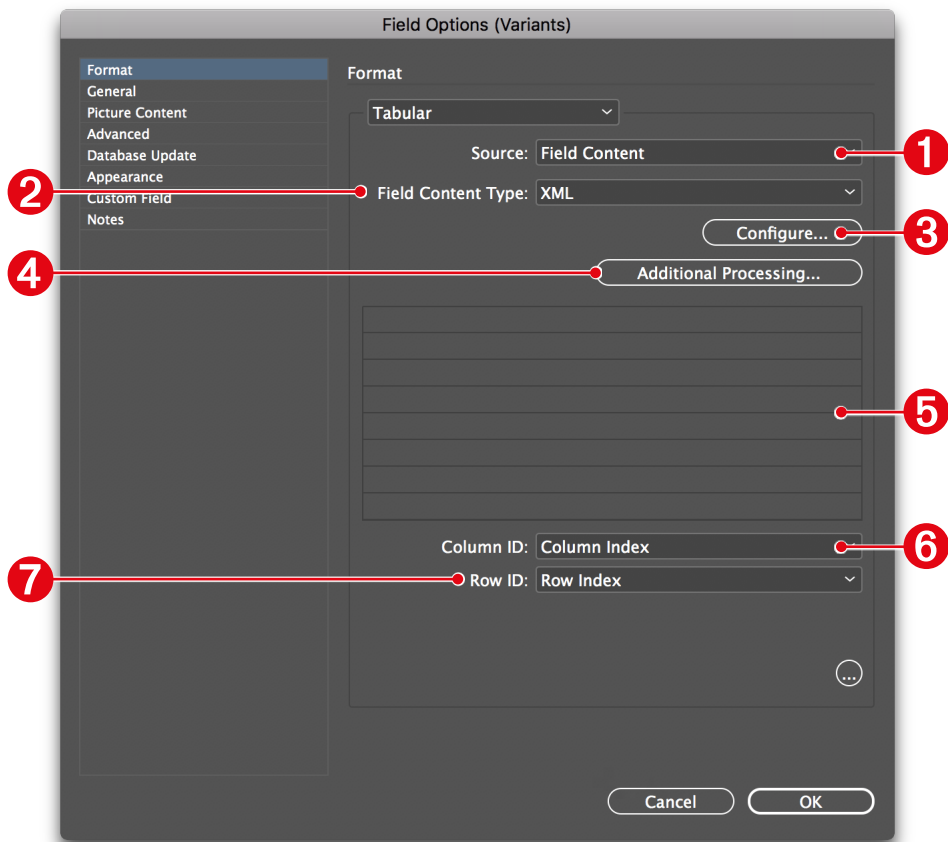
can be output to the document. Each tabular field has its own XSL transformation specified, so the format of the XML can be different in each field.

Key	Description	Price	Specifications	See Also
AAA123	Red Widget	99.99	<pre>&lt;specifications&gt; &lt;attribute name="Width"&gt;10cm&lt;/attribute&gt; &lt;attribute name="Height"&gt;20cm&lt;/attribute&gt; &lt;attribute name="Depth"&gt;30cm&lt;/attribute&gt; &lt;/specifications&gt;</pre>	<pre>&lt;alternatives&gt; &lt;alternative code="AAA124"&gt;Blue Widget&lt;/alternative&gt; &lt;alternative code="AAA125"&gt;Yellow Widget&lt;/alternative&gt; &lt;alternative code="AAA126"&gt;Green Widget&lt;/alternative&gt; &lt;/alternatives&gt;</pre>

*HTML example:*

Here the data in the 'Specifications' and 'See Also' fields are represented in an HTML <table> structure. No further transformation of this data is necessary.

Key	Description	Price	Specifications	See Also
AAA123	Red Widget	99.99	<pre>&lt;table&gt; &lt;tr&gt;&lt;td&gt;Width&lt;/td&gt;&lt;td&gt;10cm&lt;/td&gt;&lt;/tr&gt; &lt;tr&gt;&lt;td&gt;Height&lt;/td&gt;&lt;td&gt;20cm&lt;/td&gt;&lt;/tr&gt; &lt;tr&gt;&lt;td&gt;Depth&lt;/td&gt;&lt;td&gt;30cm&lt;/td&gt;&lt;/tr&gt; &lt;/table&gt;</pre>	<pre>&lt;table&gt; &lt;tr&gt;&lt;td&gt;AAA124&lt;/td&gt;&lt;td&gt;Blue Widget&lt;/td&gt;&lt;/tr&gt; &lt;tr&gt;&lt;td&gt;AAA125&lt;/td&gt;&lt;td&gt;Yellow Widget&lt;/td&gt;&lt;/tr&gt; &lt;tr&gt;&lt;td&gt;AAA126&lt;/td&gt;&lt;td&gt;Green Widget&lt;/td&gt;&lt;/tr&gt; &lt;/table&gt;</pre>



### 1 Source

Field Content	Description
Field Content	The contents of this field will be used to populate the table. The format fo the content of this field can be specified in the "Field Content Type"
HTML	This field contains HTML - more specifically, it contains an HTML <table> structure.
Delimited Text	This field contains contains delimited data, such as tab-delimited or comma-delimited data. The field and record separators can be specified using the 'Confugre...' button.

### 2 Field Content Type

Field Content Type	Description
XML	This field contains XML. The XML needs to be transformed to an HTML <table> structure using XSLT. This XSLT can be specified using the 'Configure...' button.
HTML	This field contains HTML - more specifically, it contains an HTML <table> structure.
Delimited Text	This field contains contains delimited data, such as tab-delimited or comma-delimited data. The field and record separators can be specified using the 'Confugre...' button.

### 3 Configure

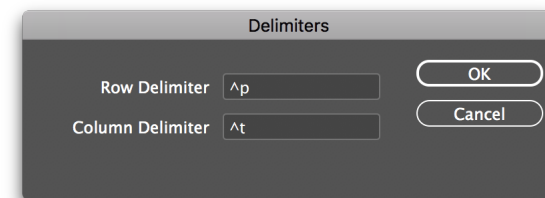
The purpose of the "Configure" button depends on the type of content specified in the Field Content Type popup.

#### HTML

HTML contents needs to be transformed into an HTML <table> structure, so the "Configure" button is used to define the XSL transformation that should be used to achieve this.

#### Delimited Text

Specify the character used to define the characters used to separate rows and columns in the source data:



InDesign metacharacters, such as ^p and ^t can be used in these fields.

#### 4 Additional Processing

EasyCatalog also includes support for a lightweight programming language called 'LUA'. LUA can be used to process the contents of the table and offers sophisticated processing capabilities. For example, data in the table can be re-ordered and filtered, rows and columns can be added or deleted, etc. It's also possible to combine the content of multiple fields using LUA.

Further information on the LUA programming language can be found here: <https://www.lua.org>

Before being used to populate the document, the LUA script will be called. An object called 'table' is passed to the script, which can then be manipulated. For example, the following code returns a rotated version of the original table:

```
newtable = table:rotate();
newtable:present();
```



**After processing the contents of the table in LUA, always use the present() method on the table to populate the field with the tabular content.**

#### 5 Preview

If a field was selected in the panel before showing the 'Field Options' dialog, the Preview pane will update to show how the contents of the field will be output using the current configuration settings.

#### 6 Column ID / 7 Row ID

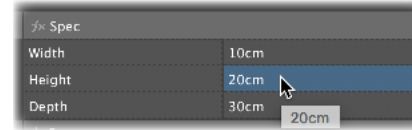
The Column and Row ID fields are used to determine how fields in the document should be linked to fields in the panel.

By default, a field's position in the table (row and column number) will be used so, for example, the field in row 2 column 3 in the panel will always appear in row 2, column 3 of the document table. This has implications if the data in the tabular field is re-ordered, as the data in the document table will also be re-ordered.

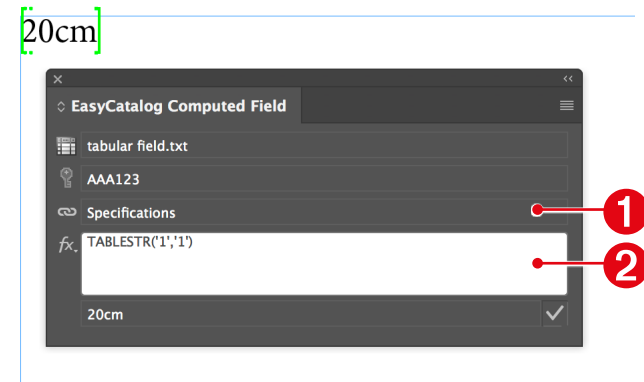
Alternatively, if the tabular field contains a header row and/or a header column at the left of the table these fields can be specified which will ensure that data in the document will be updated correctly even if columns or rows are re-ordered in the source data.

## INSERTING SINGLE TABULAR FIELDS

Individual cells can be inserted into the document using the same process as a regular field - by double clicking on an unplaced field or by selecting an already-placed field and pressing the insert icon in the panel.



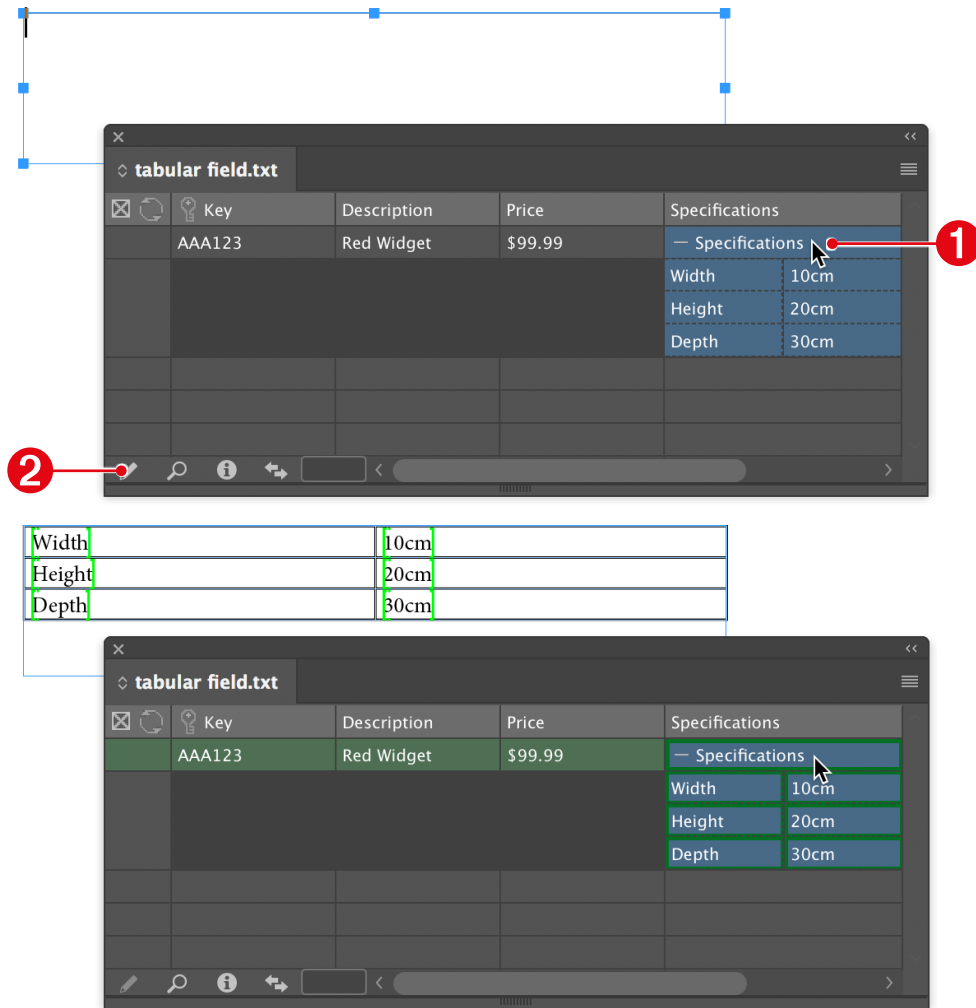
When the field is inserted into the document, a Computed Field command will be applied which ensures that data from the correct cell in the tabular field is used to populate and update the field.



Field content is inserted into the document using a regular field/Field Specifier marker (1) character with a Computed Field function applied (2). The TABLESTR custom field command is used to specify which cell in the tabular field to retrieve data from.

## INSERTING TABULAR FIELDS TABLES

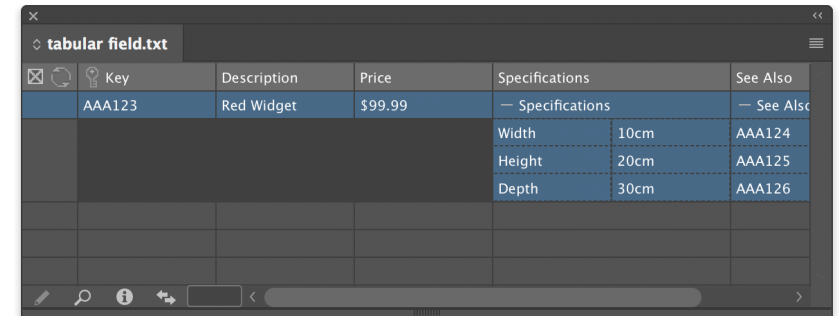
The entire table can be inserted into the document by selecting the field (1) and using the insert button (2):



## POPULATING TABLE PROTOTYPES

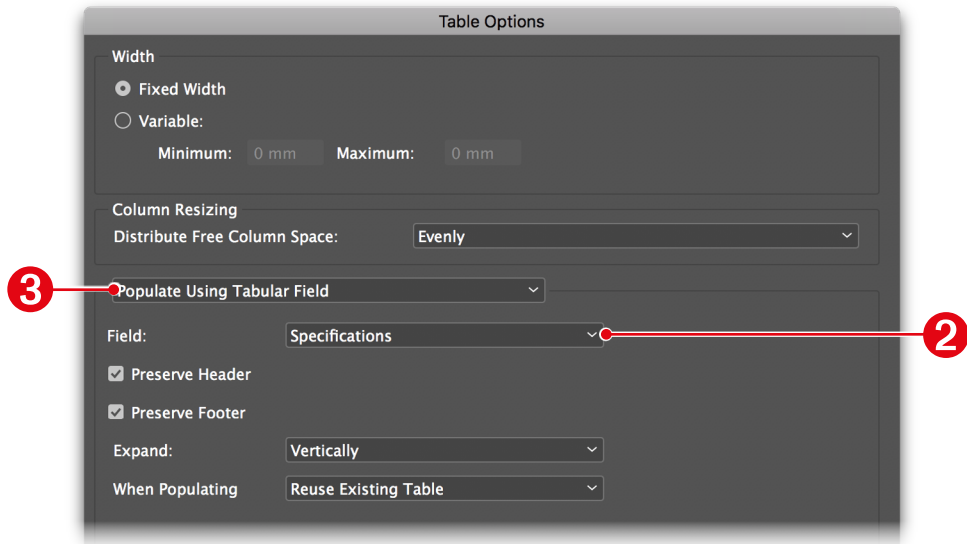
Tabular fields can also be used to populate existing, designed, document tables. These tables can also be used in EasyCatalog libraries and Formatting Rules.

Start by designing your table in the document (1), applying formatting such as row stokes, cell stokes, etc as required.



Field Specifiers are not included in the table - the content of the table is determined by the content of the tabular field. The Table Options dialog is used to tell EasyCatalog to populate the table using the contents of a named (2) tabular field (3).

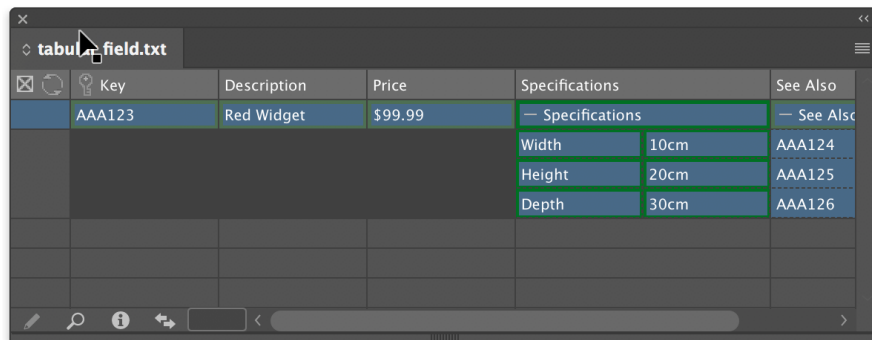




Attribute	Option	Description
Preserve Header/ Preserve Footer	<input checked="" type="checkbox"/>	The header and the footer defined in the table prototype will always be retained even if the tabular field contains header and footer rows.
	<input type="checkbox"/>	The header and footer defined by the tabular field will be used in preference to the header and footer rows in the table prototype.
Expand	Vertically	The table will expand vertically to accommodate the number of records in the tabular field. Additional columns will not be added.
	Horizontally	The data in the tabular field will be rotated, with additional columns added to the table as necessary to accommodate the data. Additional rows will not be added.
When Populating	Reuse Existing Table	The existing table prototype in the document will be populated with data, maintaining the attributes applied to the rows and cells.
	Create New Table	The table is used purely as a placeholder, and will be re-created based on the content of the tabular field. Formatting information for the table can be included in the HTML table structure that was used to populate the table, or formatting can be applied using LUA on the "Additional Processing" dialog in Field Options.

EasyCatalog will not add columns to the finished table - sufficient columns should be provided to accommodate all of the potential columns in the tabular field. Empty columns can subsequently be removed, and the other columns resized, using the EasyCatalog Table > Column Options dialog.

Attribute	Value
Width	10cm
Height	20cm
Depth	30cm



## CHAPTER 12

# PAGINATION RULES REFERENCE



The Pagination Rules panel is only available as part of the *Pagination Module* which must be purchased separately.

## INTRODUCTION

This chapter provides a reference for the attributes available on the Pagination Rules panel. Using this panel, it is possible to specify both processing instructions (such as whether to use a Product Style during pagination) and layout instructions (such as fitting each box to the depth of the text).



➤ If the '*Pagination Rules*' panel is not visible, show it by selecting *Pagination Rules* from the *Window* menu.

## USING THE PAGINATION RULES PANEL

The Pagination Rules panel is split into two sections: the top portion ❶ shows the attributes assigned to the **currently-selected box in the document**; the bottom section ❷ shows the 'actions' that have been defined for the box.

### ❶ Attributes

Pagination attributes define either:

#### ▶ Processing Instructions

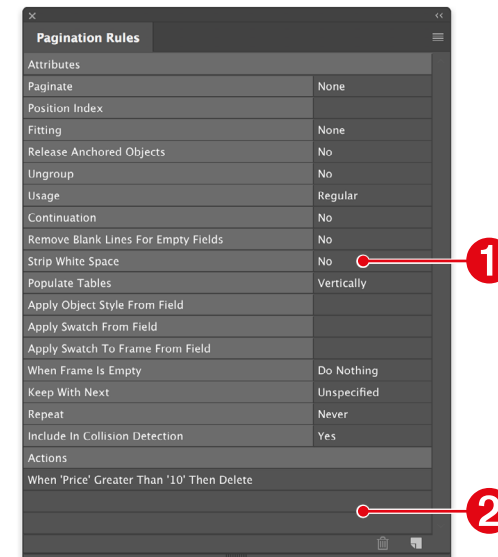
Some of the attributes in the panel define when the Product Style should be used during pagination. For example, the "Paginate" attribute is used to determine whether the Product Style should appear once for every record in the panel or once per specified group.

#### ▶ Attributes that affect how the box appears or behaves

Attributes are available to change the appearance of the item during pagination. For example, attributes are available to resize a box to fit its content; apply a swatch based on the content of one of your data fields, etc.

### ❷ Actions

Actions are simple rules that are evaluated at pagination time and can be used, for example, to delete a box based on the contents of one of the fields being paginated.



## EDITING ATTRIBUTES

To modify any of the properties shown in the panel, double click on it or select it and use the 'Edit...' menu on the pop-out menu.



Some of the attributes shown in the panel are dependant on other attributes or the current document selection.

## PAGINATION RULES REFERENCE

### Paginate

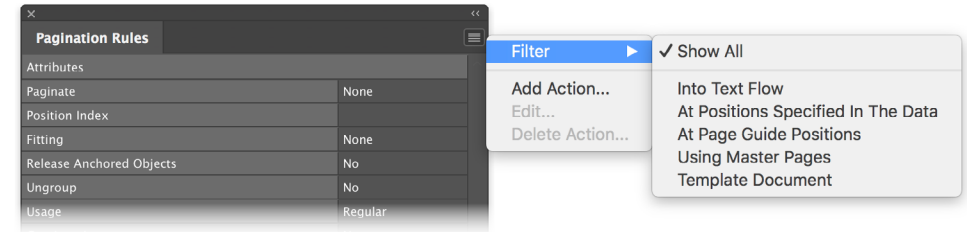
<b>Pagination Types</b>	Flow-based, Guide-based, Postional
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	None

Apply this attribute to the outer-most box in the Product Style (if the Product Style consists of multiple boxes, group them together and apply this attribute to the group box). This attribute is used to associate the Product Style with a level in your panel grouping hierarchy.

The configuration of this field is **mandatory** for all types of automatic pagination.

Paginate...	Description
Once Per Record	The Product Style should be used each time EasyCatalog wants to insert an individual record into the document.
Once Per Group	Apply this attribute to Product Styles that should be used when paginating groups. You <b>must</b> set the 'Group Label' field to specify which group the Product Style should be used for. For example, to specify that the Product Style should be used to paginate the 'Manufacturer' group, set the Group Label attribute to 'Manufacturer'.

## FILTERING THE PAGINATION RULES PANEL



The attributes shown in the panel can be filtered to show only the attributes that are applicable to the type of pagination you'll be using. Select the pagination type on the "Filter" menu option on the Pagination Rules panel's pop-out menu.

Paginate...	Description
Furniture Data	This attribute is typically applied to page headings that contain information about the first or last record on a page or spread. See the 'Furniture' chapter for more information.

### Paginate Once Per Record



The Product Style will be inserted for each record in the panel when 'Paginate Once Per Record' is set.

### Paginate Once Per Group

In this example, the panel is grouped by 'Parent Category', 'Child Category' and 'Manufacturer'. Product Styles can be defined to paginate each of these levels.



If the 'Group Label' is set to 'Child Category' the Product Style will be used to paginate each Child Category group. If the Product Style contains a table, it will be populated with all sub-groups and records within the Child Category group.



When using the Relational Module, the Group Name attribute should **always** be set when paginating records or groups as a Relational panel can contain records in multiple groups.

### Insert

<b>Pagination Types</b>	Flow-based
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	None

This option affects whether the Product Style will be anchored in the pagination text flow or if the text content of the Product Style will be inserted.

Attribute	Description
As Inline	This option will insert the Product Style as an anchored box in the pagination text flow – this is required if your Style consists of more than one box.
Frame Contents	This option <b>must only</b> be used when the <i>Product Style</i> consists of <b>one text box</b> . Instead of anchoring the Product Style in the text flow, EasyCatalog will copy the text content from the text box and paste it into the pagination text flow.

### Group Name

<b>Pagination Types</b>	Flow-based, Guide-based, Postional
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	None

This attribute specifies the point in the panel grouping hierarchy to use this library item. For example, if this library item should be inserted once for each 'Manufacturer' group, 'Manufacturer' should be specified in this attribute.

### 'Insert' Flow-based Pagination Rule

'Frame Contents' will insert the contents of the Product Style into the pagination text flow.

Manufacturer Part Code	Description	Inc VAT Price
ST-D777ES	ST-D777ES ES Range DAB Tuner	\$646.25
VL-60640	DRX-701ES - Silver	\$205.62
VL-60631	DRX-701ES - Black	\$199.99
VL-60570	Pure DRX-601EX	\$487.62
DVDR75	DVDR 75	\$421.82
DVDR70	DVDR 70	\$292.57
TA-DA9000ESB		

'As Inline' will anchor the Product Style into the pagination text flow.

Each record has been inserted as an anchored box into the pagination text flow.

### Paragraph Style

<b>Pagination Types</b>	Flow-based
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	Insert 'As Inline'

The Paragraph Style Sheet named here will be applied to the *Product Style* when it is anchored in the pagination text flow. Using InDesign's paragraph style sheets allows typographical controls, such as 'space before', 'keep together', etc to be applied to each anchored *Style*.

Note that the Paragraph Style Sheet specified here *must* be present in the document being paginated into.

### Append Return

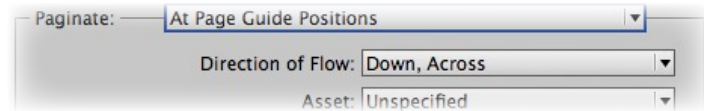
<b>Pagination Types</b>	Flow-based
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	Insert 'As Inline'

When inserting the Product Style 'As Inline', this option specifies whether to add a carriage-return after the anchored item.

### Force Break

<b>Pagination Types</b>	Flow-based, Guide-based Not all options available with both types of pagination.
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	None

This option specifies whether the Product Style should be inserted on a new page, or in a new column or frame.

Option	Description
No Break	The Product Style will be inserted after the previous Product Style.
Page	<i>Flow-based and Guide-based Pagination Only</i> EasyCatalog will ensure that the Product Style is being placed onto a new page. A page-break character may be inserted before the Product Style to ensure this is the case.
Column	<i>Flow-based Pagination</i> The Product Style will be inserted in a new column. A column-break character may be inserted before the Product Style to ensure this is the case. <i>Guide-based Pagination</i> The 'Direction of Flow' selected on the Paginate... dialog affects how this attribute is applied:  When paginating 'Down and Across', pagination will move to the next vertical column. When paginating 'Across and Down', pagination will move to the next horizontal row.

Option	Description
Frame	<i>Flow-based Pagination Only</i> The Product Style will be inserted in a new frame. A frame-break character may be inserted before the Product Style to ensure this is the case.

### Prevent Break

<b>Pagination Types</b>	Flow-based
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	Insert At 'Frame Contents'

This option specifies whether the Product Style should be allowed to break across pages, columns or frames.

Option	Description
Don't Prevent Breaking	The Product Style will be allowed to break across any frame, page or column.
Over Columns	The Product Style will not be allowed to break across a column. If it does, a column-break character will be inserted before the Product Style content.
Over Pages	The Product Style will not be allowed to break across a page. If it does, a page-break character will be inserted before the Product Style content.
Over Frames	The Product Style will not be allowed to break across a frame. If it does, a frame-break character will be inserted before the Product Style content.

### Fitting

<b>Pagination Types</b>	Flow-based, Guide-based, Positional Not all options available with all types of pagination.
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

Fitting options are provided to automatically adjust the size of each box within the Product Style to accommodate a variable amount of data. For example, the depth of a text box can be automatically resized to the depth of its text.

Fitting Option	Text Boxes	Picture Boxes
None	The size of the box will remain fixed.	

Fitting Option	Text Boxes	Picture Boxes
Frame To Content	If there is only one line of text in the box, both the width and depth of the box will be adjusted to the size of the text. Where there are multiple lines of text, only the depth will be adjusted.	The Field Options will be used to initially import the image into the box, then both the width and depth will be adjusted to the size of the picture content.
Content To Frame	The text content will be resized until it fits within the box. Constraints can be specified in the 'Minimum/Maximum Text Scale/Size' attributes.	The picture content will be resized to fit the frame.
Frame Depth To Content Depth	The height of the box will be resized to the height of the text. The width will be unaffected, regardless of the number of lines of text.	The Field Options will be used to initially import the image into the box, then the height of the picture box will be resized to the height of the picture box. The width will be unaffected.
Grow and Flow	The depth of the text box will expand to accommodate the amount of text, constrained to the bottom margin of the page. If the box is still overset, the Product Style will be inserted again on the next page and any boxes marked as 'Grow and Flow' will be linked together.	This setting does not affect Picture boxes.
Frame Depth to Field Depth	The depth of the box will be specified by one of the other fields for the record being used to paginate. When this option is selected a 'Field Name' attribute will appear: enter the name of the field that contains the frame depth here. Ensure that the field contains the measurement system - e.g. 10mm. Use the Field Suffix field option to add this if necessary.	The frame will be resized to the height specified by the nominated field, then the Field Options will be used to import the image content within this box.
Frame to Content Depth and Width	Both the width and height of the frame will be adjusted until the content fits.	

## Fit Content To Frame

Fit Content To Frame will automatically adjust the size of the box's text content until it fits. Both the point size and horizontal scale can be adjusted until the text fits.

Maximum and Minimum parameters can be specified for point size and horizontal scale adjustment.  
All parameters a percentages based on the size of the text in the box prior to fitting.

Fitting	Content To Frame
Minimum Text Size(%)	100
Maximum Text Size(%)	100
Minimum Text H Scale	100
Maximum Text H Scale	100

### Example:

Assuming that before fitting the text box contains 10pt text, the *Minimum Text Size* is set to 50 and the *Maximum Text Size* is set to 150:

If the text is overset, the size of the text will be reduced until all of the text fits in the box with a minimum point size of 5pt (50% of 10pt). Otherwise, the text size will be increased until it fits the box exactly, up to a maximum of 15pt (150% of 10pt).

### 'Grow and Flow' (Guide-Based Pagination Only)

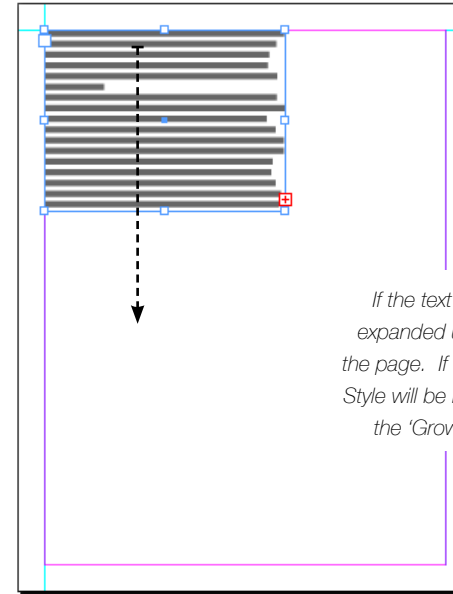
The 'Grow and Flow' fitting option provides the ability for a Product Style to be split when pagination reaches the bottom of the page.

When applied to a text frame, the 'Grow and Flow' fitting option will expand the text box vertically until all of the text fits in the box, or until the page's bottom margin is reached. In this instance, the Product Style will be inserted at the start of the next page and any frames with the 'Grow and Flow' fitting attribute applied will be linked together, allowing their text content to flow across the page boundary.



'Grow and Flow' is only applicable when using "At Page Guide Postion" pagination

## Grow and Flow



If the text in the box is overset, the frame's height will be expanded until either the text fits or the frame is as deep as the page. If the page's bottom margin is reached, the Product Style will be inserted on the following page and the boxes with the 'Grow and Flow' attribute set will be linked together.



## Release Anchored Objects

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

After pagination, a 'Release' will be performed on all anchored boxes within any boxes with this attribute applied. Once released, the anchored boxes become standard InDesign frames which can be moved independently of their original anchor location.

## Ungroup

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

By applying this attribute to a group box, an 'Ungroup' will be performed after pagination. This option is useful where you want to manually edit the document after pagination and do not want to manually go through the document ungrouping each Product Style.

## Usage

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Outermost/group box
<b>Dependant Attributes</b>	None

Applied to the outer-most box in Product Style, this option allows different Product Styles to be used depending on the record or group's position within its parent group.

The screenshot shows a table titled 'STOCK.CSV' with columns for 'Stock Code', 'Manufacturer', and 'Manu'. The table is divided into several groups, each with a checkbox and a count in parentheses:

- AV Accessories (2)**: Contains items 11TT (Sony, RM-V), 100C (Minolta, 87711), and 100D (Minolta, 87712).
- Remote controls (9)**: Contains items 24ZW (Sony, RM-AV), 84D (Canon, REMA), 31HK (Sony, RM-V2), 2H69 (Sony, RM-Dr), 2G21 (Sony, RM-VD), and NNH (Keyspan, URM).
- Standalone Video Editing Solutions**: Contains item 224R (Sony, CV-B).
- Batteries & Chargers (2)**
- Books (1)**
- Business and Finance (12)**

Annotations on the right side of the table indicate pagination styles for specific rows:

- First Instance**: Points to the first row of the 'Remote controls' group (11TT).
- Regular**: Points to the second row of the 'Remote controls' group (84D).
- Last Instance**: Points to the last row of the 'Remote controls' group (NNH).
- Single Instance**: Points to the first row of the 'Standalone Video Editing Solutions' group (224R).

Different styles can be defined that are used to paginate the first record in the group; the last record in the group and everything inbetween.

A style can also be defined for use when there is a single record or group within the group.



## Position Index

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

Position index can be used to force the n'th record or sub-group to populate a box within the Product Style.

*Position Index 1*

*Position Index 2*

*Position Index 4*

Each box within the Product Style can be assigned a 'Position Index'. All boxes within a group box will be populated with the same record or group, unless a Position Index is specified in any of the child boxes.

*When dragging a group of records, the first record will go into the box set with Position Index 1, the second into Position Index 2, etc.*

## Continuation

<b>Pagination Types</b>	Guide-based
<b>Apply to</b>	Outermost/Group Box
<b>Dependant Attributes</b>	None

By setting the 'Continuation' attribute to 'Yes', the Product Style will be used whenever pagination moves to a new page.

Option	Description
No	This item will not be used when pagination continues on a new page.
Yes	This item will be used when pagination continues on a new page.
Grow and Flow	This item will be used when a Grow and Flow item is about to continue paginating on a new page.

## Remove Blank Lines for Empty Fields

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

This attribute will remove any lines in the textual content of the box that contain only empty fields. This attribute is useful when paginating data that contains optional values that should not be paginated if empty.

## Strip White Space

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

White space (tabs, spaces, etc) at the end of the text content in the box will be stripped after pagination. This attribute is useful for removing unwanted extra carriage returns.

## Apply Object Style From Field

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

The Object Style specified by the contents of the nominated field will be applied to this box during pagination.

This object style is applied only during pagination, so will not change during an 'Update Document' operation if the contents of the nominated field change.

## Apply Swatch From Field

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

During pagination, EasyCatalog will apply a fill to the frame using either the specified swatch or an RGB/CMYK value.

The colour used will be determined by the contents of the specified field. The field can either contain:

- ▶ The name of a swatch to apply to the box
- ▶ A hexadecimal value that specifies an RGB colour to use

The hexadecimal value should be in the format:

**#RRGGBB**

Where RR is a hexadecimal value for the red component of the colour; GG is the green component and BB is the blue.

For example, to apply a red colour to the box the nominated field should contain:

**#FF0000**

- ▶ A CMYK value

A CMYK value can be specified using the following format, where 'NNN' is a value in the range 000 - 100:

**#cNNNmNNNyNNNkNNN**

For example, to apply magenta to the box the following value would be used:

**#c0m100y0k0**

## Apply Swatch To Stroke From Field

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

During pagination, EasyCatalog will apply a stroke to the frame using either the specified swatch or an RGB/CMYK value. See 'Apply Swatch From Field' (above) for further information on what the specified field should contain.

## When Frame Is Empty

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

Specify an action to take when the box is empty.

Option	Description
Do Nothing	The box will remain in the document empty.
Delete	The box will be removed from the document.

## Page Orientation

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Outermost/Group Box
<b>Dependant Attributes</b>	None

Specifies whether this library item should be used on left-hand pages, right-hand pages or either. The use of this attribute allows you to define different library items that should be used on left or right pages.

Option	Description
Left	This library item will be used on left-hand pages only.
Right	This library item will be used on right-hand pages only.
Any	This library item can be used for any type of page.

## Populate Tables

<b>Pagination Types</b>	Flow-based, Guide-based, Positional
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

Specifies whether the table should be populated one row per record or one column per record.

Option	Description
Horizontally	The table will be expanded or contracted horizontally: columns will be added or removed from the table to accommodate the amount of data being paginated.
Vertically	The table will be expanded or contracted vertically: rows will be added or removed from the table to accommodate the amount of data being paginated.
No Expansion	The dimensions of the table will not be adjusted at all and it will be populated as-is without any adjustment.

## Keep With Next

<b>Pagination Types</b>	Guide-based/Flow-based Paginatioin
<b>Apply to</b>	Outermost/Group Box
<b>Dependant Attributes</b>	None

This option is especially useful for paginating headers that should not become separated from the first item in the group.

Guide-based Pagination:

This attribute works in a similar manner to the Pagraph keep option, and will attempt to keep this library item with the one that is paginated next.

Option	Description
Yes	Where possible this library item will be kept with the next-paginated item.
No Unspecified	This item will not be kept with the next-paginated item.

Into Text Flow Pagination

This attribte will apply InDesign's 'Keep' paragraph option to the paragraph that the Product Style is inserted into.

Option	Description
Yes	InDesign's "Keep With Next" attribute will be applied to the inserted paragraph.
No	InDesign's "Keep With Next" attribute will be turned off on the inserted paragraph..
Unspecified	In the case of "Into Text Flow" pagination, this option will not adjust the keep options applied to the paragraph that's inserted. This allows, for example, the keep option to be determined by the paragraph style that's already applied to the paragraph.

## Repeat

<b>Pagination Types</b>	Guide-based
<b>Apply to</b>	Outermost/Group Box
<b>Dependant Attributes</b>	None

Specifies whether this item should repeat at the start of each new colum or page. Within a single library, different items may be specified that repeat at the start of each new page and column.

Option	Description
Never	This item will not be repeated.
Every Column	This item will be repeated at the start of each new column.
Every Page	This item will be repeated at the start of each new page.

## Include in Collision Detection

<b>Pagination Types</b>	Guide-based
<b>Apply to</b>	Any box in the Product Style
<b>Dependant Attributes</b>	None

This attribute determines whether the box will be included in the 'Collision Detection' operation during "At Page Guide Position" pagination. By default, EayCatalog will ensure that the new Product Style it places does not collide with any box in the previous Style. This attribute allows some boxes to be excluded from this collision detection.

## CHAPTER 13

# CUSTOM FIELDS REFERENCE

## INTRODUCTION

Custom Fields provide a way to add new fields to the source data, the value of which can be computed using predefined functions.

Typical applications for Custom Fields include the ability to create summary data (such as the sum of all values in a given field) and data manipulation (e.g. extracting the first character from a field).

## CREATING A NEW CUSTOM FIELD

New Custom Fields can be created in the EasyCatalog data panel by right-clicking (or Ctrl-clicking on Macintosh) in the data area of the panel and selecting “New Custom Field”.

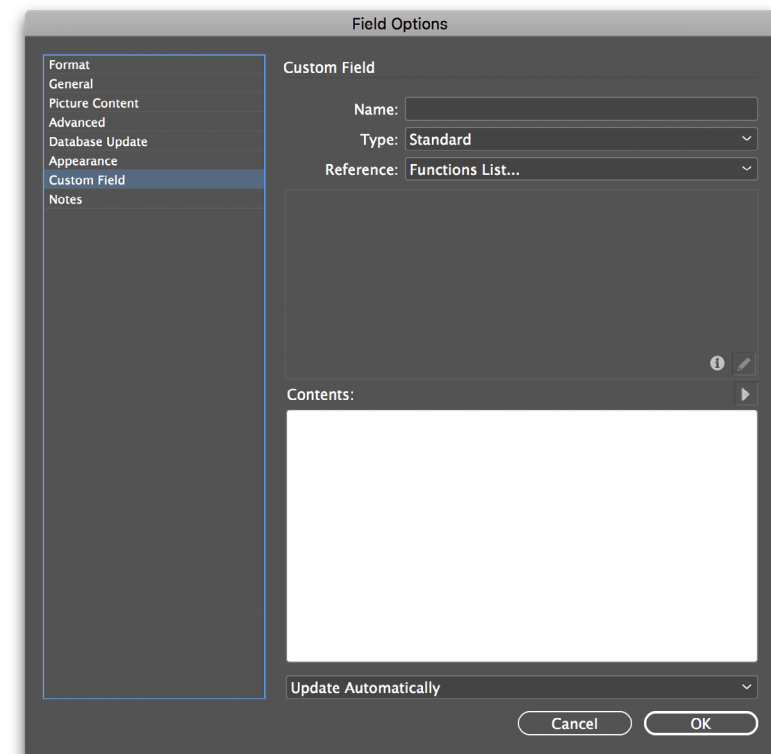
Custom Fields are configured using the 'Custom Field' pane on the Field Options dialog.



Custom Fields can also be used with Relational Data sources, although they must be created in the appropriate child data source.

Custom Fields behave in exactly the same way as other EasyCatalog fields, and Field Specifiers for Custom Fields can be inserted into Product Styles where appropriate.

This chapter lists the functions that are available, and gives an example of their use.



## TYPES OF FUNCTIONS

Functions in this reference have been split into five categories:

### ► String Manipulation

String manipulation functions are available to enable you to extract characters from a field, change the case of a field or determine the length of a field.

String manipulation is often necessary when the source data needs to be 'cleaned-up' before insertion into the document.

### ► Math Functions

Several math functions are available that operate on either a record-by-record basis or on groups of records. Many functions, such as 'SUM' offer a group-based equivalent (e.g. 'GROUPSUM').

### ► Logic Functions

Logic functions can be used to make decisions based on the content of your data. For example, you could output a field only if the price field is greater than a specified value.

### ► Utility Functions

Utility functions have been provided to, for example, determine whether an image exists. This information could then be used later to make decisions during pagination.

### ► Group Functions

Group functions operate on groups of records and are often used to produce summary information for multiple records. For example, there is a group function - 'GROUPRTOTAL' - that creates a running total of a specified field within a group.

As Custom Fields are defined at the data source level, the visible structure of the data in your panel is not important and cannot be used to determine the order of records used by the group functions. Therefore, all group functions typically have two parameters: a group path and a field to sort the records by. The group path parameter defines the fields use to group the data.

When using group functions, the Custom Field for all records in the group will typically (but not always) be populated with the same value.

Example

```
GROUPLIST('Parent Category:Child Category','Manufacturer','Manufacturer','',',',  
' and ')
```

The 'GROUPLIST' function will populate the Custom Field with a list of all unique values in a specified field. In this example, we want to create a comma separated list of all manufacturers within each Child Category group.

## COMBINING FUNCTIONS

Multiple functions can be used within the same Custom Field statement to create complex operations:

```
IF(FIELDVAL('Price'),'>=' ,1,CONCAT('£',FIELDVAL('Price')) ,  
CONCAT(FIELDVAL('Price'),'p'))
```

In this example, if the 'Price' field is greater than or equal to 1 the price will be prefixed with a pound symbol; otherwise it will be suffixed with a pence symbol.

## PARAMETER TYPES

Each function shown in this reference chapter will expect its parameters to be of a specific type. These parameter types are:

Type	Description
Field	Specify only the name of the field. Usually, the field name would be enclosed in single quotes. e.g: <code>LEFTSTR ('Description',5)</code>
String	Either specify a string literal or use the <code>FIELDSTR</code> command to retrieve the contents of another field. e.g.: <code>LENGTH(FIELDSTR('Manufacturer'))</code>
Number	Either specify a numeric literal or use the <code>FIELDVAL</code> command to retrieve the numeric contents of another field. <code>IF(FIELDVAL('Price'))...</code>
...	Some functions show a parameter of type '...', which indicates that the function accepts any number of parameters. Typically, the type of these additional parameters is the same as the preceding parameter.

## WHAT IS THE DIFFERENCE BETWEEN FIELDSTR AND FIELDVAL?

The two most commonly used functions are **FIELDSTR** and **FIELDVAL**. If they are being used as arguments to another function, as a general rule use **FIELDVAL** if the function is expecting a numeric argument; use **FIELDSTR** if it's expecting a string.

## STRING FUNCTIONS

### SUBSTR

This function is used to extract specific characters from another field.

Parameter	Type	Description
Field Name	Field	The name of the field to extract characters from.
Start Index	Integer	The index of the first character, starting at 0.
Length	Integer	The number of characters to extract.

Example:

**SUBSTR (Manufacturer, 3, 8)**

Manufacturer	SUBSTR(Manufacturer, 3, 8)
Apple Computer	le Compu

### LEFTSTR

This function returns characters from the left (start) of the given field.

Parameter	Type	Description
Field Name	Field	The name of the field to extract characters from.
Length	Integer	The number of characters to extract.

Example:

**LEFTSTR (Manufacturer, 5)**

Manufacturer	LEFTSTR (Manufacturer,5)
Apple Computer	Apple

**FIELDSTR** will return the formatted content of the given field - including any prefixes, suffixes, number formats, etc. **FIELDVAL** will return the raw numeric content of the field excluding number formatting, prefixes, etc.

### RIGHTSTR

This function returns characters from the right (end) of the given field.

Parameter	Type	Description
Field Name	Field	The name of the field to extract characters from.
Length	Integer	The number of characters to extract.

Example:

**RIGHTSTR (Manufacturer, 3)**

Manufacturer	RIGHTSTR (Manufacturer,3)
Apple Computer	ter

### PARTSTR

This function can be used to extract a specific element from a delimited field.

Parameter	Type	Description
Field Name	Field	The name of the field to extract characters from.
Part No.	Integer	The element number to retrieve (numbered from zero).
Delimiter	String	The character(s) used to delimit each part of the string.

Example:

**PARTSTR(images, 2, ',')**

Images	PARTSTR(images, 2, ',')
Picture 1, Picture 2, Picture 3	Picture 3

## EAN13

This function can be used to translate from an EAN13 code into the correct glyphs in the free 'eanwrp36tt' font.

Parameter	Type	Description
Field Name	Field	The name of the field to containing the EAN13 code.

Example:

```
EAN13('Stock Code')
```

The output from this function should be placed in the document and the 'eanwrp36tt' font applied to its content.

## EAN8

This function can be used to translate from an EAN8 code into the correct glyphs in the free 'eanwrp36tt' font.

Parameter	Type	Description
Field Name	Field	The name of the field to containing the EAN8 code.

Example:

```
EAN8('Stock Code')
```

The output from this function should be placed in the document and the 'eanwrp36tt' font applied to its content.

## LOWER

Converts the contents of the given field to lower case.

Parameter	Type	Description
Field Name	Field	The name of the field to convert.

Example:

```
LOWER('Manufacturer')
```

Manufacturer	LOWER('Manufacturer')
Apple Computer	apple computer

## UPPER

Converts the contents of the given field to upper case.

Parameter	Type	Description
Field Name	Field	The name of the field to convert.

Example:

```
UPPER('Manufacturer')
```

Manufacturer	UPPER('Manufacturer')
Apple Computer	APPLE COMPUTER

## CONCAT

This function will concatenate (join) the values of all of its arguments together.

Parameter	Type	Description
Argument	String	A value to concatenate to the result.
...		This function can have as many arguments as required.

Example:

```
CONCAT(FIELDSTR('Price'),' , Available in ',FIELDSTR('Availability'))
```

Price	Availability	CONCAT(FIELDSTR('Price'),' , Available in ',FIELDSTR('Availability'))
10.99	2 days	10.99, Available in 2 days
5.99	1 week	5.99, Available in 1 week

## REGEX

Performs a regular expression search and replace.

Parameter	Type	Description
String to Search	String	The string to search within
Regular Expression	String	The regular expression statement to search for
String to Replace	String	The string to replace when a match is found.

Example:

```
REGEX(FIELDSTR(Stock Code), '^((....)(...)(..)', '\1.\2.\3')
```

Stock Code	REGEX
AAAA12345	AAAA.123.45
BBBB67890	BBBB.678.90
CCCC12345	CCCC.123.45
DDDD67890	DDDD.678.90

## STRIPWHITESPACE

Strip white space from the given string.

Parameter	Type	Description
String	String	The string to remove white space from
Strip All	Boolean	When TRUE, remove all white space from the string; when FALSE only remove white space from the start and end of the string.

Example:

`STRIPWHITESPACE ( FIELDSTR ( ' Category ' ) )`

## TITLECASE

Change the case of the given string to Title Case.

Parameter	Type	Description
String	String	The string to process

Example:

`TITLECASE ( FIELDSTR ( ' Body Copy ' ) )`

Body Copy	TITLECASE(FIELDSTR('Body Copy'))
this sentence should appear in title case	This Sentence Should Appear In Title Case

## SENTENCECASE

Change the case of the given string to sentence case.

Parameter	Type	Description
String	String	The string to process

Example:

`SENTENCECASE ( FIELDSTR ( ' Body Copy ' ) )`

EasyCatalog User Guide

Body Copy	SENTENCECASE(FIELDSTR('Description'))
this sentence should appear in sentence case	This sentence should appear in sentence case

## LENGTH

Returns the length of the given string.

Parameter	Type	Description
String	String	The string to return the length of

Example:

`LENGTH ( FIELDSTR ( ' Body Copy ' ) )`

Body Copy	LENGTH(FIELDSTR('Manufacturer'))
Apple Computer	14

## INDEXOF

Returns the character index of the first instance of one string within another, or -1 if the first string does not contain the second.

Parameter	Type	Description
Search In	String	A string to search within
Search For	String	A string to search for
Start Index	Integer	(Optional) The character index to start searching at (default: 0).

Example:

`INDEXOF ( FIELDSTR ( ' Manufacturer ' ) , ' Apple ' )`

Manufacturer	INDEXOF(FIELDSTR('Manufacturer'), 'Apple')
Apple iMac	0
I like Apples	7
Dell Computer	-1
Apple iMac by Apple, Inc.	0

Manufacturer	INDEXOF(FIELDSTR('Manufacturer'), 'Apple', 3)
Apple iMac	0
I like Apples	7



Manufacturer	INDEXOF(FIELDSTR('Manufacturer'), 'Apple', 3)
Dell Computer	-1
Apple iMac by Apple, Inc.	14

## LASTINDEXOF

Returns the character index of the last instance of one string within another, or -1 if the first string does not contain the second.

Parameter	Type	Description
Search In	String	A string to search within
Search For	String	A string to search for
Start Index	Integer	(Optional) The character index to start searching at (default: 0).

Example:

`LASTINDEXOF(FIELDSTR('Body Copy'), 'Apple')`

Body Copy	LASTINDEXOF(FIELDSTR('Body Copy'), 'Apple')
Apple iMac	0
I like Apples	7
Dell Computer	-1
Apple iMac by Apple, Inc.	14

Body Copy	LASTINDEXOF(FIELDSTR('Body Copy'), 'Apple', 3)
Apple iMac	0
I like Apples	-1
Dell Computer	-1
Apple iMac by Apple, Inc.	0

## COUNTOF

Returns the number of times one string appears within another.

Parameter	Type	Description
Search In	String	A string to search within
Search For	String	A string to search for

Example:

`COUNTOF(FIELDSTR('Body Copy'), 'pl')`

Body Copy	COUNTOF(FIELDSTR('Body Copy'), 'pl')
Apple iMac	1
I like Apples	1
Dell Computer	0
Apple iMac by Apple, Inc.	2

## CONTAINSANY

Tests to see if the 'Search In' string contains any of the strings specified by the subsequent parameters.

Parameter	Type	Description
Search In	String	A string to search within
Search For	String	A string to search for
...	String	Multiple 'Search For' parameters can be specified.

Example:

`CONTAINSANY(FIELDSTR('Body Copy'), 'A', 'iMac')`

Body Copy	CONTAINSANY(FIELDSTR('Body Copy'), 'A', 'iMac')
Apple iMac	TRUE
I like Apples	TRUE
Dell Computer	FALSE
Apple iMac by Apple, Inc.	TRUE

## CONTAINSALL

Tests to see if the 'Search In' string contains all of the strings specified by the subsequent parameters.

Parameter	Type	Description
Search In	String	A string to search within
Search For	String	A string to search for
...	String	Multiple 'Search For' parameters can be specified.

Example:

`CONTAINSALL(FIELDSTR('Body Copy'), 'A', 'iMac')`

Body Copy	CONTAINSANY(FIELDSTR('Body Copy'), 'A', 'iMac')
Apple iMac	TRUE
I like Apples	FALSE
Dell Computer	FALSE
Apple iMac by Apple, Inc.	TRUE

## CHAR

Inserts a character with the given unicode value into the string.

Parameter	Type	Description
Character Code	Integer	The unicode value of the character to insert. Hexadecimal values should be prefixed with '%'

Example:

CHAR ( 65 )

CHAR(65)
A

CHAR ( %41 )

CHAR(%41)
A

## URLENCODE/URLDECODE

URL-encodes or URL-decoded the given string.

Parameter	Type	Description
String	String	The string to URL-encode or URL-decode

Example:

URLENCODE('This is a test')

URLENCODE('This is a test')
This%20is%20a%20test

URLENCODE('This%20is%20a%20test')

URLDECODE('This%20is%20a%20test')
This is a test

## DISTINCTLIST

Creates a delimited list containing only the unique values from the parameters passed to the function.

Parameter	Type	Description
Separator	String	The separator to use in the list
...	String	A string to add to the list. If its value has already been added it will not be added again.

Example:

Field A	Field B	Field C
Apple iMac	Dell Computer	Apple iMac

DISCTINCTLIST(',', FIELDSTR('field a'), FIELDSTR('field b'), FIELDSTR('field c'))
Apple iMac, Dell Computer

## REMOVEBLANKLINES

Removes empty paragraphs from the given text. Only paragraphs ending with a hard return are removed. This function is useful for combining the contents of multiple fields and ensuring that empty paragraphs do not result from the concatenation.

Parameter	Type	Description
Text	String	The text to process

Example:

Field A	Field B	Field C
Apple iMac		Dell Computer

A simple concatenation of these fields would be:

```
CONCAT(FIELDSTR('Field A'),'^p',FIELDSTR('Field B'),'^p',FIELDSTR('Field C'))
```

This would result in an empty paragraph if any of the fields are empty.

<code>CONCAT(FIELDSTR('Field A'),'^p',FIELDSTR('Field B'),'^p',FIELDSTR('Field C'))</code>
Apple iMac¶ ¶ Dell Computer

The REMOVEBLANKLINES function will remove any empty paragraphs:

<code>REMOVEBLANKLINES(CONCAT(FIELDSTR('Field A'),'^p',FIELDSTR('Field B'),'^p',FIELDSTR('Field C')))</code>
Apple iMac¶ Dell Computer

## FIELDSTR

Returns the string contents of the given field.

Parameter	Type	Description
Field Name	Field	The field to retrieve

Example:

`FIELDSTR('Field A')`

## FIELDVAL

Returns the numeric value of the given field. A numeric value is only retrieved for fields defined as one of the numeric types such as 'Number' or 'Currency'.

Parameter	Type	Description
Field Name	Field	The field to retrieve

Example:

`FIELDVAL('Field A')`

## LITERAL

The **LITERAL** function should be used to supply a string to a function that is expecting a field name.

Parameter	Type	Description
String literal	String	This string will be passed as-is.

As an example, the **LEFTSTR** command expects a field name as the first parameter. If, however, you want to pass a fixed string to this function the **LITERAL** command should be used:

`LEFTSTR(LITERAL(' abcdefg '),2)`

## I2OF5

This function can be used to convert a numeric code into the interleaved 2-of-5 barcode format. The characters output by this function should be formatted in the document using the 'Dobson2OF5' font.

Parameter	Type	Description
Code	String	The numeric code to convert to Interleaved 2-of-5 format.

Example:

`I2OF5(FIELDSTR('mycode'))`

## CODE128

This function can be used to convert a purely numeric code into a Variant C Code 128 barcode, or an alphanumeric string into a Variant B code 128 barcode. The glyphs produced by this function should be formatted in the document using the 'Code128bWin' or 'Code128bWinLarge' fonts.

Parameter	Type	Description
Code	String	The string to convert to a Code 128 barcode.

Example:

`CODE128(FIELDSTR('mycode'))`

# MATH FUNCTIONS

## MUL

Multiply one field by another.

Parameter	Type	Description
LHS	Number	A number to multiply
Factor	Number	The number to multiply by

Example:

`MUL(FIELDVAL(Price), 10)`

Price	MUL
10.00	100.00
15.00	150.00
17.50	175.00

## DIV

Divide one field by another.

Parameter	Type	Description
LHS	Number	A number to divide
Factor	Number	The number to divide by

Example:

`MUL(FIELDVAL(Price), 10)`

Price	DIV
10.00	1.00
15.00	1.50
17.50	1.75

## MOD

The “MOD” operation finds the remainder of the division of one number by another.

Parameter	Type	Description
LHS	Number	A number to divide
Factor	Number	The number to divide by

Example:

`MOD(FIELDVAL(Price), 10)`

Price	MOD
10.00	0.00
15.00	5.00
17.50	7.50

## SUM

This function returns the sum of all of its arguments.

Parameter	Type	Description
Argument	Number	A value to use as part of the sum.
...	...	This function can have as many arguments as required.

Example:

`SUM(FIELDVAL('Price'), 10)`

Price	SUM
10.00	20.00
15.00	25.00
17.50	27.50

## SUB

This function will subtract the values in the second and subsequent parameters from the first parameter..

Parameter	Type	Description
Argument	Number	A value to use as part of the sum.
...	...	This function can have as many arguments as required.

Example:

`SUB(FIELDVAL('Price'), 10, 5)`

Price	SUB
20.00	5.00
25.00	10.00
27.50	12.50

## MIN

This function returns the lowest value in its arguments.

Parameter	Type	Description
Argument	Number	A value to test.
...		This function can have as many arguments as required.

Example:

`MIN(FIELDVAL('Price'),10)`

Price	MIN
5.00	5.00
10.00	10.00
15.00	10.00
17.50	10.00

## MAX

This function returns the highest value in its arguments.

Parameter	Type	Description
Argument	Number	A value to test.
...	...	This function can have as many arguments as required.

Example:

`MAX(FIELDVAL('Price'),10)`

Price	MAX
5.00	10.00
10.00	10.00
15.00	15.00
17.50	17.50

## AVG

This function returns the numerical average of its arguments.

Parameter	Type	Description
Argument	Number	A value to test.
...		This function can have as many arguments as required.

Example:

`AVG(FIELDVAL('Price'),10)`

Price	AVG
5.00	7.50
10.00	10.00
15.00	12.50
17.50	13.75

## DECTOFRAC

This function will attempt to convert the given decimal value into a fraction.

Parameter	Type	Description
Value	Number	The decimal value to convert to a fraction
Format	Boolean	Specifies whether to add HTML formatting to the result string around the numerator and demoninator.

Example:

DECTOFRAC ( 0.5 , FALSE )

DECTOFRAC(0.5,FALSE)	DECTOFRAC(0.5,TRUE)
1/2	<sup>1</sup>/<sub>2</sub>

## LOGIC FUNCTIONS

### COMPARESTR

This function can be used to compare the contents of a field with a value or the contents of another field.

Parameter	Type	Description
Field Name	Field	The name of the field to evaluate.
Value	String	The value to compare against the contents of the field.
True Value	String	(Optional) If the contents of the field matches the given value, this parameter will be used as the output of this command.
False Value	String	(Optional) If the contents of the field does not match the given value, this parameter will be used as the output of this command.

Example:

*Comparing a field with a fixed value:*

```
COMPARESTR(Description, 'abcdefg', 'Match', 'No Match')
```

If the 'Description' field contains 'abcdefg' then 'Match' will be output; if the field does not contain 'abcdefg' then 'No Match' will be output.

*Compare a field with another field:*

To compare against the value of another field, use the FIELDSTR command as the second parameter to the COMPARESTR command.

```
COMPARESTR('Short Description', FIELDSTR('Long Description'),  
  'Match', 'No Match')
```

In this example, the contents of the 'Description' field will be compared with the contents of the 'Long Description' field.

### IF

Unlike the 'COMPARESTR' command, the 'IF' command also allows an operator to be specified to make more complex comparisons.

Parameter	Type	Description
Operand	String	The first field or value to compare
Operator	String	The operator to use in the comparison - valid operands are:
Operand	String	The second field or value to compare.
True Value	String	(Optional) The value to output if the comparison evaluates to true.
False Value	String	(Optional) The value to output if the comparison evaluates to false.

Example:

To compare the contents of a field against a fixed value:

```
IF (FIELDSTR(Price), '<', '100', 'Less than 100',  
  'Greater than 100')
```

To compare the contents of a field against the contents of another field:

```
IF (FIELDSTR(Price), '=', FIELDSTR('Sale Price'), 'Prices Match',  
  'No Price Match')
```

## AND

This function will return TRUE if the values of all of its arguments are true.

Parameter	Type	Description
Argument	String	A value to test
...	...	This function can have as many arguments as required.

Example:

```
AND(IF (FIELDSTR(Price), '>', 10), IF (FIELDSTR(Availability),  
    '=', 'TRUE'))
```

Price	Availability	AND
10.00	TRUE	FALSE
15.00	TRUE	TRUE
17.50	FALSE	FALSE

## OR

This function will return TRUE if the values of any of its arguments are true.

Parameter	Type	Description
Argument	String	A value to test
...	...	This function can have as many arguments as required.

Example:

```
OR(IF (FIELDSTR(Price), '>', 10), IF (FIELDSTR(Availability),  
    '=', 'TRUE'))
```

Price	Availability	OR
5.00	TRUE	TRUE
6.75	FALSE	FALSE
10.00	TRUE	TRUE
15.00	TRUE	TRUE
17.50	FALSE	TRUE

## NOT

Returns the logical opposite of the first parameter.

Parameter	Type	Description
Argument	Boolean	A value to test

Example:

```
NOT (FIELDSTR(myflag))
```

myflag	NOT (FIELDSTR (myflag))
TRUE	FALSE
FALSE	TRUE

## GROUPLIST

GROUPLIST will take values from the nominated field and create a delimited list.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The name of a field to sort the values by
Value Field	String	The name of the field that contains the values we want to create a list of.
First Separator	String	(Optional) The first separator to use in the delimited list.
Regular Separator	String	(Optional) The separator to use between entries in the delimited list.
Last Separator	String	(Optional) The separator to use between the penultimate and last item in the delimited list.

Example:

```
GROUPLIST('Parent Category:Child Category','Price',  
    'Price','','',' ', ' and ')
```

In this example, the field will be populated with a comma delimited list of all Price fields in each 'Child Category' group, sorted by 'Price'.

Price	GROUPLIST
15.00	10.00, 15.00 and 20.00
10.00	10.00, 15.00 and 20.00
20.00	10.00, 15.00 and 20.00

## GROUPSUM

GROUPSUM will create a mathematical total of the contents of a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Value Field	String	The name of the field that contains the values we total.

Example:

```
GROUPSUM('Parent Category:Child Category','Price')
```

This command will total all of the Price fields within the Child Category grouping.

Price	GROUPSUM
15.00	45.00
10.00	45.00
20.00	45.00

## GROUPRTOTAL

GROUPRTOTAL will create running total of the values in a group. Unlike GROUPSUM, this function will populate each record in the group with the total up to that point in the group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The name of the field to sort the records by in the group..
Value Field	String	The name of the field that contains the values we total.

Example:

```
GROUPRTOTAL('Parent Category:Child Category','Price','Price')
```

Price	GROUPSUM
10.00	10.00
15.00	25.00
20.00	45.00

## GROUPAVG

GROUPAVG will create a mathematical average of the contents of a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Value Field	String	The name of the field that contains the values we want to average.

Example:

```
GROUPAVG('Parent Category:Child Category','Price')
```

This command will return the average all of the Price fields within the Child Category grouping.

Price	GROUPAVG
15.00	15.00
10.00	15.00
20.00	15.00

## GROUPMAX

GROUPMAX will return the maximum numerical value of a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Value Field	String	The name of the field that contains the values we find the maximum value in.

Example:

```
GROUPMAX('Parent Category:Child Category','Price')
```

This command will return the maximum value of the 'Price' field in the Child Category group.

Price	GROUPMAX
15.00	20.00
10.00	20.00
20.00	20.00



## GROUPMIN

GROUPMIN will return the minimum numerical value of a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Value Field	String	The name of the field that contains the values we find the minimum value in.

Example:

```
GROUPMIN('Parent Category:Child Category','Price')
```

This command will return the minimum value of the 'Price' field in the Child Category group.

Price	GROUPMIN
15.00	10.00
10.00	10.00
20.00	10.00

## GROUPFIRST

GROUPFIRST will return the first value of a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The field to sort the records in the group by.
Value Field	String	The field that we want to retrieve the value from.

Example:

```
GROUPFIRST('Parent Category:Child Category','Price', 'Price')
```

This command will first sort the 'Price' field into ascending 'Price' order and return the first value.

Price	GROUPFIRST
10.00	10.00
15.00	10.00
20.00	10.00

## GROUPLAST

GROUPLAST will return the last value of a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The field to sort the records in the group by.
Value Field	String	The field that we want to retrieve the value from.

Example:

```
GROUPLAST('Parent Category:Child Category','Price', 'Price')
```

This command will first sort the 'Price' field into ascending 'Price' order and return the last value.

Price	GROUPLAST
10.00	20.00
15.00	20.00
20.00	20.00

## GROUPSEQUENCE

Each record in the nominated group will receive the next value from a given list of values.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The field to sort the records in the group by.
Value Field	String	A colon-delimited list to populate each record in the group with.

Example:

```
GROUPSEQUENCE('Parent Category:Child Category','Inc VAT Price', 'A:B:C:D')
```

This function will evaluate to 'A' for the first record in the Child Category group; 'B' for the second, etc. Once all values in the list have been exhausted, EasyCatalog will continue with the first, second, etc.

Inc VAT Price	GROUPSEQUENCE
10.00	A

Inc VAT Price	GROUPSEQUENCE
15.00	B
20.00	A
17.50	C
19.00	D

## GROUPCOUNTUNIQUE

This function returns the number of unique values in a nominated field within a group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Field	String	The field to count the number of unique instances in

Example:

`GROUPCOUNTUNIQUE('Parent Category:Child Category','Price')`

Price	GROUPCOUNTUNIQUE
10.00	3
15.00	3
15.00	3
17.50	3
17.50	3

This function will evaluate to the same value for every record in the group.

## GROUPCOUNT

This function returns the number of records in each group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use

Example:

`GROUPCOUNT('Parent Category:Child Category')`

Price	GROUPCOUNT
10.00	5
15.00	5

Price	GROUPCOUNT
15.00	5
17.50	5
17.50	5

This function will evaluate to the same value for every record in the group.

## GROUPSERIES

This function can be used to populate the custom field with a numerical series within each group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The name of the field to sort the records in the group by
Start	Integer	An integer to start at
Increment	Integer	A value to increase the integer by for each record in the group.

Example:

`GROUPSERIES('Parent Category:Child Category', 'Price', 10,100)`

Price	GROUPSERIES
10.00	10
15.00	110
15.00	210
17.50	310
17.50	410

## GROUPONCHANGE

This function will evaluate to TRUE each time a nominated field within a group changes value, FALSE otherwise.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The name of the field to sort the records in the group by
Field	String	The field to evaluate

Example:

GROUPONCHANGE('Parent Category:Child Category', 'Price', 'Price')

Price	GROUPONCHANGE
10.00	TRUE
15.00	TRUE
15.00	FALSE
15.00	FALSE
17.50	TRUE
17.50	FALSE

### GROUPISFIRST

This function returns 'TRUE' for the first 'n' number of records in the specified group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	A field to sort the records by within the group.
Number of records	Integer	The number of records to return 'TRUE' for.

Example:

GROUPISFIRST('Parent Category:Child Category', 'Price', 2)

Price	GROUPISFIRST
5.00	TRUE
10.00	TRUE
15.00	FALSE
17.50	FALSE

### GROUPISLAST

This function returns 'TRUE' for the last 'n' number of records in the specified group.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	A field to sort the records by within the group.
Number of records	Integer	The number of records to return 'TRUE' for.

Example:

GROUPISLAST('Parent Category:Child Category', 'Price', 2)

Price	GROUPISLAST
5.00	FALSE
10.00	FALSE
15.00	TRUE
17.50	TRUE

### GROUPSERIESONFIELDCHANGE

Populate a group with a numerical series that increments each time a given field changes value.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	A field to sort the records by within the group.
Field Name	Field Name	Each time the value of this field changes, the value returned by this function will be incremented.
Start Value	Integer	An integer to start from
Increment	Integer	Each time the specified field changes value, the value returned by this function will be incremented by the amount specified by this parameter.

Example:

GROUPSERIESONFIELDCHANGE('Parent Category:Child Category', 'Price', 'Price', 1, 10)

Price	GROUPSERIESONFIELDCHANGE
5.00	1
5.00	1
10.00	11
15.00	21
17.50	31

### GROUPNUMBERSEQUENCE

Compiles a list of numbers into a page range-style list.

Parameter	Type	Description
Group Path	String	The grouping configuration to use

Parameter	Type	Description
Number Field	String	The name of the field containing the numbers to collate

Example:

`GROUPNUMBERSEQUENCE('Parent Category:Child Category', 'Page')`

Page	GROUPNUMBERSEQUENCE
1	1, 3-5,7,10
3	1, 3-5,7,10
4	1, 3-5,7,10
5	1, 3-5,7,10
7	1, 3-5,7,10
10	1, 3-5,7,10

## GROUPXREFFIELD

This function will search within each group for a record whose field content matches a given value, and will return the value of another field for the found record.

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Search Field	Field	The name of the field to search in
Search Value	String	The value to search for in the 'Search Field'
Return Field	Field	The name of the field to return from the matching record.

Example:

`GROUPXREFFIELD('Parent Category:Child Category', 'PartNo', FIELDSTR('XRefPartNo'), 'Page')`

This example will search for a record whose 'PartNo' field contains the value of this record's 'XRefPartNo' field. When one is found, the contents of its 'Page' field will be returned. Unlike `XREFFIELD`, however, this function will only search within each group (not the entire data source).

## GROUPCROSSTABLEHEAD / GROUPCROSSTABLEVALUE

These two functions are used to build cross tables that have a finite number of columns. A cross table is a matrix-style table that contains both a variable number of rows and columns, and is typically used to produce a matrix of product options and prices.

Consider the following data that contains two products - 'AAA123' and 'BBB321'. Both products are available in a number of colours, but 'BBB321' is only available in red and green (no blue).

Key	Product Code	Colour	Price
AAA123 (3)			
1	AAA123	Red	\$10.00
2	AAA123	Blue	\$20.00
3	AAA123	Green	\$20.00
BBB321 (2)			
4	BBB321	Red	\$15.00
5	BBB321	Green	\$25.00

To paginate a table that contains product codes vertically and colours horizontally, a function is required that will cross reference these two fields.

PRODUCT CODE	RED	BLUE	GREEN
AAA123	\$10.00	\$20.00	\$20.00
BBB321	\$15.00	-	\$25.00

To achieve this we need to create custom fields for each of the possible columns and also a field for each column header. For example, if we know that there will be a maximum of three colours we would create three header fields and three value fields. Using custom fields we can then determine what the values of these new fields should be:

## GROUPCROSSTABLEHEAD

The `GROUPCROSSTABLEHEAD` function is used to determine the headers for each column in the table. The value returned by this function will also be used as a parameter to the `GROUPCROSSTABLEVALUE` function to determine the value to display in each table cell.

Parameter	Type	Description
Group Path	String	The grouping configuration to use. This will limit the scope of this function to the specified grouping.

Parameter	Type	Description
Sort Field	String	A field to sort the records by within the group. This will determine the order that the columns will appear in.
Cross Field	String	The field that should be used in each column of the table.
Header Index	Integer	The index number of this header.

Like all 'GROUP' functions, the scope of this function can be limited to the nominated grouping. This could be used, in this example, to prevent colours from products belonging to one department affecting the colours from another. In this example, all products are in the same parent group so we do not need to specify a group path.

So, assuming that we only ever have three possible colours per product, we could create three new custom fields with the following Custom Field functions:

Field Name	Custom Field
col1	GROUPCROSSTABLEHEAD(,colour,0)
col2	GROUPCROSSTABLEHEAD(,colour,1)
col3	GROUPCROSSTABLEHEAD(,colour,2)

In this example, we are not interested in a particular group (as we want the table to list all available colours from any product), or in sorting the records. This function will look at all unique values in the 'colour' field and pick one (0 = the first colour; 1 = the second, etc).

## GROUPCROSSTABLEVALUE

The **GROUPCROSSTABLEVALUE** function is used to determine the value to display in each table cell.

Parameter	Type	Description
Group Path	String	The grouping configuration to use. This will limit the scope of this function to the specified grouping.
Sort Field	String	A field to sort the records by within the group. This will determine the order that the columns will appear in.
Cross Field	String	The field that should be used in each column of the table.
Search Field	String	The field value to find in the 'Cross Field' field
Value Field	String	The field to use in the table
Empty Value	String	The value of this parameter will be used if the Search Field cannot be found.

The 'GROUPCROSSTABLEVALUE' function is used to determine the value that should appear at each intersection of the table. This function should be used in conjunction with the 'GROUPCROSSTABLEHEADER' function to determine the cross references.

Field Name	Custom Field
col1value	GROUPCROSSTABLEVALUE('product code','', 'colour', 'col1', 'price', '-')
col2value	GROUPCROSSTABLEVALUE('product code','', 'colour', 'col2', 'price', '-')
col3value	GROUPCROSSTABLEVALUE('product code','', 'colour', 'col3', 'price', '-')

In essence, this function is searching the 'colour' field for the value shown in the 'col1'/'col2'/'col3' field. When found, the value in the 'price' field will be used; if it's not found then the literal value of the last parameter will be used ('-') instead.

In this example, we want to restrict the search for colours to a single product, so have specified 'product code' as the group path.

Using a combination of these two commands gives the following result in the panel:

Key	Product Code	Colour	Price	Col1	Col1value	Col2	Col2value	Col3	Col3value
AAA123 (3)									
1	AAA123	Red	\$10.00	Red	\$10.00	Blue	\$20.00	Green	\$20.00
2	AAA123	Blue	\$20.00	Red	\$10.00	Blue	\$20.00	Green	\$20.00
3	AAA123	Green	\$20.00	Red	\$10.00	Blue	\$20.00	Green	\$20.00
BBB321 (2)									
4	BBB321	Red	\$15.00	Red	\$15.00	Blue	-	Green	\$25.00
5	BBB321	Green	\$25.00	Red	\$15.00	Blue	-	Green	\$25.00

This data panel can now be used to create a table such as:

PRODUCT CODE	RED	BLUE	GREEN
AAA123	\$10.00	\$20.00	\$20.00
BBB321	\$15.00	-	\$25.00

Using EasyCatalog's Table Column Options, any empty columns can be deleted after populating the table. So, for example, if one group only has two colours the third, empty, column could be deleted.

## UTILITY FUNCTIONS

### SNIPPETDEPTH/SNIPPETWIDTH

Returns the depth or width in points of the given snippet. The path provided for the snippet file can either be a fully qualified path or, if just the filename is provided, EasyCatalog will look inside of the workspace 'Assets' folder. Any Field Specifiers in the snippet will be populated with data for each record; Pagination Rules such as fitting to content will also be applied.

Parameter	Type	Description
Filename	String	The filename of the snippet to measure

```
SNIPPETDEPTH('Snippet 1.idms')
```

```
SNIPPETDEPTH('Macintosh HD:Users:InDesignUser:Snippet 1.idms')
```

### GROUPSNIPPETDEPTH

Returns the depth in points of the given snippet. The path provided for the snippet file can either be a fully qualified path or, if just the filename is provided, EasyCatalog will look inside of the workspace 'Assets' folder.

Unlike `SNIPPETDEPTH`, `GROUPSNIPPETDEPTH` will populate the snippet with data for the each group (as defined by the group path).

Parameter	Type	Description
Group Path	String	The grouping configuration to use
Sort Field	String	The name of the field to sort the records by in the group..
Filename	String	The filename of the snippet to measure

Example:

```
GROUPSNIPPETDEPTH('Parent Category:Child Category','Price',  
'Snippet 1.idms')
```

```
GROUPSNIPPETDEPTH('Parent Category:Child Category','Price',  
'Macintosh HD:Users:InDesignUser:Snippet 1.idms')
```

### GOOGLEQRCODEURL

Generates a Google Charts URL which will generate a QRCode with the given content.

Parameter	Type	Description
Width	Integer	The required width of the QR Code image in pixels (maximum 500).
Height	Integer	The required height of the QR Code image in pixels (maximum 500).
Text	String	The content to encode within the QR Code

Example:

```
GOOGLEQRCODE(500,500,'http://www.65bit.com')
```

### CALLSCRIPT

This function will return the result of executing the ExtendScript in the given file.

Parameter	Type	Description
Filename	String	The name of the ExtendScript file to execute. This can either be the full path to a script or, if the script is stored in the 'Scripts' data source folder, just the filename.

Example:

```
CALLSCRIPT('myscript.jsx')
```

The script itself will be passed the contents of the other fields for this record in an array called 'myRecord'. An example script to concatenate the contents of "field b" to "field a" would be:

```
myRecord["field a"] + myRecord["field b"];
```

### DOESIMAGEEXIST

Tests to see whether an image exists for the given field. The specified field's picture field options will be used to determine the path to the image.

Parameter	Type	Description
Field	Field	The name of the image field

Example:

```
DOESIMAGEEXIST('mypicturefield')
```

If the image exists this function will return TRUE; if it doesn't the function will return FALSE.

### GETNTHPOPULATEDPARAM

Returns the n'th non-empty parameter.

Parameter	Type	Description
Field Index	Integer	The index of the parameter to return, starting from zero.

Example:

```
GETNTHPOPULATEDPARAM(0,'a','','c','d','','e')
```

GETNTHPOPULATEDPARAM(0,'a','','c','d','','e')
a

GETNTHPOPULATEDPARAM(1,'a','','c','d','','e')
c

### XREFFIELD

This function will search the data source for a record whose field content matches a given value, and will return the value of another field for the found record.

Parameter	Type	Description
Search Field	Field	The name of the field to search in
Search Value	String	The value to search for in the 'Search Field'
Return Field	Field	The name of the field to return from the matching record.
Data Source	String	(Optional) The name of another EasyCatalog data source to search within. This option applies to the Search Field and Return Field parameters; the Search Value will be retrieved from fields in the current data source.

Example:

```
XREFFIELD('PartNo',FIELDSTR('XRefPartNo'),'Page')
```

This example will search for a record whose 'PartNo' field contains the value of this record's 'XRefPartNo' field. When one is found, the contents of its 'Page' field will be returned.

### EVALUATEXPath

Evaluates an XPath expression using the XML fragment in the given field.

Parameter	Type	Description
Field	Field	The name of the field containing the XML fragment to evaluate
XPath	String	The XPath to evaluate
Separator	String	If the XPath evaluates to multiple nodes, the values will be separated by the string specified here.

Example:

```
EVALUATEXPath(Options, '//Option1/@coll', ',')
```

### APPLYXSLT

Applies an XSLT transformation to the XML fragment in the given field.

Parameter	Type	Description
Field	Field	The name of the field containing the XML fragment to apply the XSL transformation to.
XSL Filename	String	The name of the XSL transformation to apply. The XSL transformation file should be stored in the 'XSLT' folder inside of the workspace folder for the data source.

Example:

```
APPLYXSLT(Options,'myxslt.xsl')
```

### Example XSLT

```
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:template match="/">
    <html>
      <body>
        <table>
          <xsl:for-each select="//Option1[position() = 1]">
            <tr>
              <th><xsl:value-of select="@col1"/></th>
              <th><xsl:value-of select="@col2"/></th>
            </tr>
          </xsl:for-each>
          <xsl:for-each select="//Option1[position() > 1]">
            <tr>
              <td><xsl:value-of select="@col1"/></td>
              <td><xsl:value-of select="@col2"/></td>
            </tr>
          </xsl:for-each>
        </table>
      </body>
    </html>
  </xsl:template>
</xsl:stylesheet>
```