TUTORIAL 2 - TEMPLATE BUILDING

DEMONSTRATION EDITION

Please Consider

If you Have not already done so, it might be helpful for you to have a read through the LinkUP! User Manual either before you perform this tutorial or afterwards. In particular the Concepts Chapter will help you to get a better grasp of the terminology and technologies involved. The manual also contains explanations of the various LinkUP! Palettes that will be used during this tutorial. The LinkUP! User Manual has been included in your download or on the CD-ROM.

For this tutorial our data source will be locally stored LinkDB files. These are database files created from ASCII text files using our LinkDB utility. The LinkDB Utility is available free of charge and can be found on the MC Research Website and the LinkUP! CD-ROM. Again, a fuller explanation of LinkDB and working with ASCII text files is provided in the Manual.

Tutorial 2 - Template Building

Overview

In Tutorial 1 you were able to see LinkUP! updating a QuarkXPress document from our supplied database file. Next we will take this a stage further by allowing you to decide which products go where and in what format. We are going to achieve this through a simple building block approach using some pre-marked library items. This will enable you to see just how quickly a page can be assembled using the library and LinkUP! - saving operators countless hours of data input. Although we are using grouped items for this tutorial, these Library items are only grouped for convenience. LinkUP! places no restrictions on how you layout your publication.

Requirements

LinkUP! 68k XTension for Macintosh
- QuarkXPress 3.32r5 or 4.03
- System 7.5
- 32MB RAM with at least 8MB assigned to QuarkXPress

LinkUP! PPC XTension for Macintosh
- QuarkXPress 3.32r5 or 4.02
- System 7.6 or 8.0
- 32MB RAM with at least 10MB assigned to QuarkXPress

Updaters for both QuarkXPress 3.32v5 and version 4.03 have been included on the CD in the 3rd Party Folder. These are also available from Quark's Website. Although LinkUP! will run without both of these Updaters, there are several known bugs in the non-updated versions of XPress that will adversely effect LinkUP! 7s performance and could compromise your document's integrity. We would therefore strongly recommend installing the appropriate Updater.

Installation

You will need the **LinkUP! 7 LinkDB Demo** XTension installed to be able to work through these tutorials successfully. This is achieved as follows;

What do you Install?

When you install LinkUP! on a computer alongside a copy of XPress the main LinkUP! program effectively becomes part of your copy of XPress.

A new menu, 'LinkUP' appears at the right-hand end of your QuarkXPress menubar as below.

🍎 **File Edit Style Item Page View Utilities LinkUP Help**

You will require the following components for this tutorial;

- LinkUP! 7 LinkDB Demo XTension
- Tutorial Files

The first thing you need to do is copy these components from the LinkUP! CD-ROM to your hard disk (If you downloaded the demo then this will not be necessary so skip to the Installing the XTension section below).
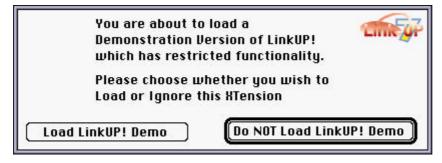
1. Insert the CD-ROM into the disk drive

2. Copy the LinkUP Folder into a location of your choice on your computer

Installing the XTension

With all the files now installed onto your hard disk it is now necessary to copy the LinkUP! XTension into the **QuarkXPress/XTensions** folder. This will cause LinkUP! to be automatically loaded when QuarkXPress is loaded.

3. Locate the **QuarkXPress/XTensions** folder on your hard disk.

4. Locate the **LinkUP! 7 LinkDB Demo** XTension file from within the **LinkUP/Program Files/LinkUP! 7 XT LinkDB (ASCII)** folder you have just copied to your hard disk.

5. Copy the **LinkUP! 7 LinkDB Demo** file into the **QuarkXPress/XTensions** folder

Provided you followed the instructions above correctly you have now installed the LinkUP! XTension on your computer. To verify that the LinkUP! XTension is correctly installed where QuarkXPress will recognise it, you should now try and load XPress in the normal manner. If everything has installed correctly, then you will see an alert similar to the one below, as soon as XPress loads.

You are about to load a
Demonstration Version of LinkUP!
which has restricted functionality.

Please choose whether you wish to
Load or Ignore this XTension
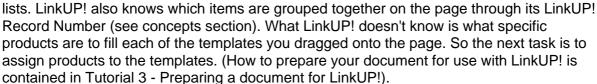
[Load LinkUP! Demo]   [Do NOT Load LinkUP! Demo]

Making it Happen

All the files necessary for the successful completion of Tutorial2 are located in the **Tutorial2** Folder that you downloaded or copied from the CD-ROM to your hard disk during the installation. The only exception to this are the pictures that are located in the **Pictures** Folder.

1. Launch QuarkXPress with the LinkUP! XTension properly loaded as above.

2. Create a new blank QuarkXPress document, A4 or letter size will do.

3. Locate and open the Tutorial2 Library that you copied across during the installation (it's located in the **Tutorial2/Documents** Folder)

4. Switch LinkUP! on by selecting **LinkUP!** from the **Utilities Menu**.

5. Now drag four of the library elements from the **Tutorial2 Library** onto the blank QuarkXPress page you created

What you now have on the page are some marked up items denoted by the fact that they are underlined. Currently LinkUP! knows what each marked item is. It knows w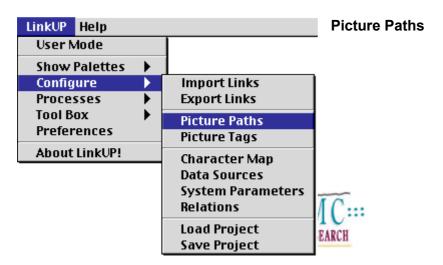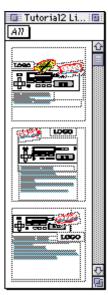hich are product pictures, logos, prices, feature lists. LinkUP! also knows which items are grouped together on the page through its LinkUP! Record Number (see concepts section). What LinkUP! doesn't know is what specific products are to fill each of the templates you dragged onto the page. So the next task is to assign products to the templates. (How to prepare your document for use with LinkUP! is contained in Tutorial 3 - Preparing a document for LinkUP!).

6. From the LinkUP! menu select **Configure   Load Project**

7. Locate and open the **Tutorial2 Project**

Before we update the page it is necessary to tell LinkUP! where both the pictures and the data you wish to work with are located. LinkUP! works with absolute paths so when you downloaded or copied the files from the CD-ROM to your hard disk, the paths changed. We'll start with the picture paths.

An unlimited number of picture paths can be set for any one document so you can point LinkUP! to use Low Res. pictures during the design stage and then point it to the High Res. images on your OPI server when the time comes to output the film.
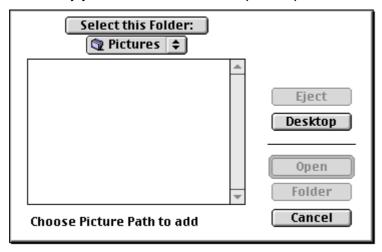
To configure your picture paths;

Picture Paths

4

9. Click the Add button
10. Browse your computer to find the location of the pictures. (They will be located in the **Tutorial Files/Pictures** Folder copied to your hard disk during the installation)
11. Click either the **Use Currently Open Folder** Button if you are inside the Pictures folder, otherwise highlight the Pictures folder and click the **Use Highlighted Folder** Button.

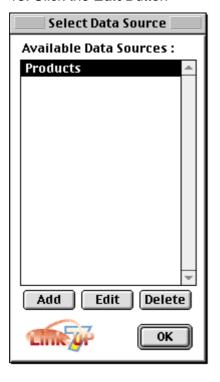Either way you will see that the new picture path has been added.

12. Click the **OK** button

The next process is to tell LinkUP! where to find the data needed for updating the document. As you are working with LinkDB files it is simply a case of letting LinkUP! know which Folder contains the LinkDB file. LinkUP! comes with a 'learn' feature that gives it the ability to learn all of the necessary information about a data source without you having to type it all in. We'll use this function now.

To select your data source;

13. From the LinkUP! menu select **Configure   Data Sources**

14. Select the **Products** Data Source

15. Click the **Edit** Button

16. The data for this tutorial is held in the **Tutorial2/Data** Folder

17. Click the **Learn** Button

18. You will now need to locate your **Data** Folder (located in the **Tutorial2/Data** Folder)

19. Click either the **Use Currently Open Folder** Button if you are inside the **Data** folder, otherwise highlight the data folder and click the **Use Highlighted Folder** Button

Providing you have chosen the correct location, you are now presented with a list of LinkDB files located in this folder. In this case there is just the one, Products.LNK.DB

20. Select this and click the **OK** button

LinkUP! has now automatically re-configured itself to the new location of the data source. Your dialogue will look similar to this apart from the Login Database will contain your local path to the data.

21. Click **OK** to finish

All of the initial configuration is complete. LinkUP! knows where the pictures are stored and also where the Data Source is located. These two actions are one-off actions. You need only perform these two configurations once. You are now ready to update the QuarkXPress document.

The next task is to tell LinkUP! which products you would like to appear in which templates. We do this by using the Data Viewer to look directly at the data within QuarkXPress and then assigning database records to the page.
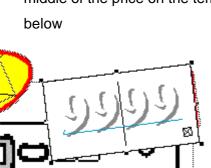
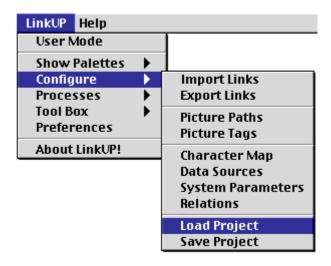22. From the LinkUP! menu select **Show Palettes   Data Viewer**

Use the controls and the re-query button to select the fields that will be most helpful for you in deciding which products to use. Probably Title and description (For more information on the Data Viewer see the LinkUP! Demo Edition User Guide).

In this particular example, the price field also holds the information as to which record in the database is to be used for each template. So, all you have to do to assign a product one of the templates is;

23. Place the cursor somewhere in the middle of the price on the template as below

24. Double-click on the product listed in the Data Viewer that you wish to assign to that template

You will notice that the cursor has moved from the middle of the price field to the beginning. By opening the Configuration Tools Palette and clicking in the price field again, you should be able to see that the stock number of the product you selected is now visible in the hidden key section of the Configuration Tools Palette. If this is not the case you can either try the above again or alternatively you can simply type the stock number of the product into the hidden key box.

The reason we chose the price field and not any of the other elements to assign the product to is that the price field in these templates is a special one. The price field in this example is what is called a hidden key. That means that although to the user the price field just looks like any other price, it also had embedded within it the stock number for that particular group of elements. So by clicking in it and double-clicking on the product in the data viewer, you are transferring the stock number from the Data Viewer to the price. This could be done as we have just mentioned by simply typing the desired stock number into the hidden key section on the Markup Configuration Tools Palette.

Now repeat this process for the other library items you dragged onto the page using either the same product or some different products from the Data Viewer. i.e. click into the price and then double-click on the product to assign from the Data Viewer.
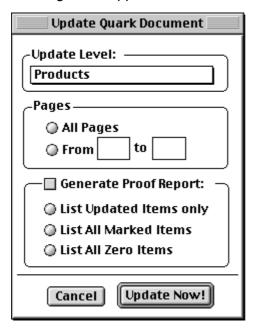
All that now remains is to update the page to reflect the products that you assigned to it.

25. Click the **Update** button on the Data Viewer Palette 🖼

A dialogue will appear;

Update Quark Document

Update Level:
Products

Pages
○ All Pages
○ From [ ] to [ ]

□ **Generate Proof Report:**
○ List Updated Items only
○ List All Marked Items
○ List All Zero Items

[Cancel] [**Update Now!**]

We are about to see LinkUP! use this database to update the QuarkXPress page to reflect the information held in our database for each product on the page.

26. Click the **Update Now!** Button

LinkUP! will present its **LinkUP! is about to Update** windows, allowing you to observe and confirm each individual update. For now we will just proceed with the process automatically.

27. Click the **Update without further confirmation** button and watch LinkUP! bring the real

products and pictures onto the page.

It is important to realise that although you were working with grouped templates from the Library this was only done for convenience in this tutorial. LinkUP! places no restrictions on how QuarkXPress operators layout the pages. Items do not have to be grouped, in the same text box or even on the same page.

Further Tutorials

There are currently five Tutorial Files available for LinkUP! 7;

- Tutorial 1 - Updating a QuarkXPress Document
- Tutorial 2 - Template Building
- Tutorial 3 - Preparing a document for LinkUP!
- Tutorial 5 - Building Documents from Single Templates
- Tutorial 5 - Building Documents from Multiple Templates

Please keep an eye on the MC Research web site for new Tutorials covering a range of applications for LinkUP! including;

- Creating a Directory
- Creating Retail Flyers
- Using LinkUP! with Holiday Brochures
- Creating Property Guides

MC Research Ltd
Suite A, Squires House
81-87 High Street
Billericay
Essex CM12 9AS, UK

Tel. +44 (0)1277 632887
Fax. +44 (0)1277 632023
email. mail@mcresearch.co.uk

http://www.mcresearch.co.uk