# TUTORIAL 5
# BUILDING DOCUMENTS FROM MULTIPLE TEMPLATES

# 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 5 - Building Documents from Multiple Templates

## Overview

In this tutorial you will see LinkUP! automatically create a Used Car Guide using a different layout for each car manufacturer as specified in the database. This is achieved by using not one, but three different tables in a relational database. A relational database can be thought of as a series of 'mini-databases' which may be dynamically linked (If you would like to know more about relational databases, please read the Relational Reference Chapter in the LinkUP! User Manual). Using a relational database in conjunction with different templates is an extremely powerful facility. It means that the Database Operator, Product Manager or Sales Person has the ability to effect the layout used in QuarkXPress by changing a field in the database. If a client has paid for an enhanced entry in a directory then this is reflected in XPress. Similarly if a Product Manager requires a product to have a specified layout, then this can be specified in the database and happen automatically in XPress. This tutorial also introduces the use of automatic header/footer generation.

Although we are using a Used Car Guide for this tutorial, I'm sure you will be able to see that this process equally holds for producing any structured or semi-structured publications.

## 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 4.03
- 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 (www.quark.com). 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.



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).
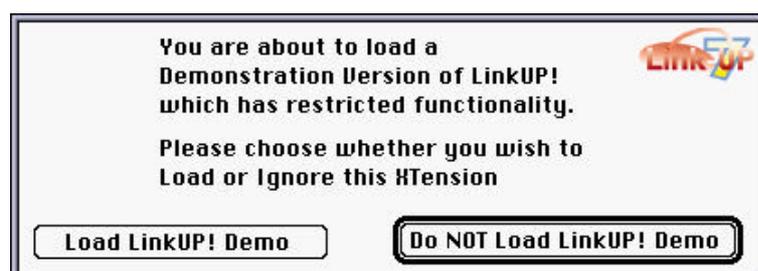
1. Insert the CD-ROM into the disk drive
2. Copy the LinkUP Folder into a location of your choice on your computer

### 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 either from within the

   **LinkUP/Program Files/LinkUP! 7 XT LinkDB (ASCII)** folder you have just copied to

   your hard disk or from within your download

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.

## Making it Happen

All the files necessary for the successful completion of Tutorial5 are located in the **Tutorial5** Folder that you downloaded or copied from the CD-ROM to your hard disk during the installation. All of the pictures for this tutorial are stored within **Tutorial Files/Pictures2** Folder.

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

    You will need the **LinkUP! 7 LinkDB Demo** XTension

2.  Locate and open the **Tutorial5** document that was copied across during the installation

    (it's located in the **Tutorial Files/Tutorial5/Documents** Folder)

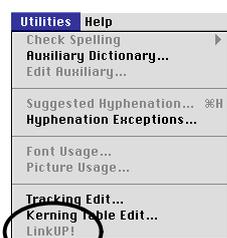The main topics that will be covered in this tutorial are;

*   **Building your Document**
*   **Updating Headers and Footers**

If you take a look at the Tutorial5 document you have just opened, you will see we have a three column chained text box containing a single template. This template will be used to hold the manufacturer, model and edition information for this Used Car Guide. This will also be our default template for the build process.



As well as the template contained on the page in the text box, you will also be able to see 5 templates to the left of the page. Each template has a slightly different layout most noticeably the background colour of the manufacturer. There are various typographical differences and layout differences just to illustrate the point of this exercise.

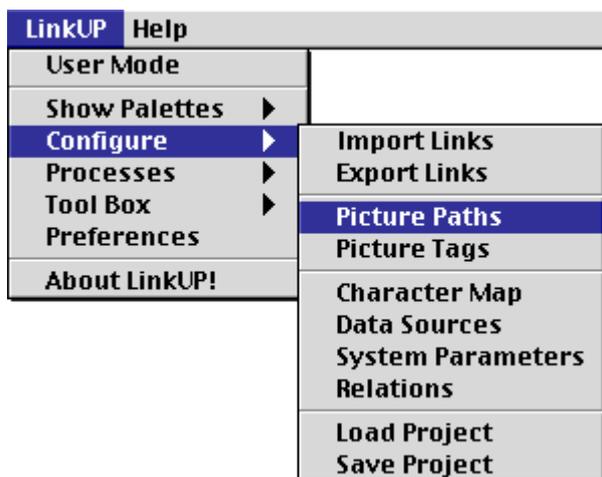1.  Switch LinkUP! on by selecting **LinkUP!** from the **Utilities Menu**.

You will notice that most of the elements on the XPress page now have underlines. These underlines signify that the underlined elements are linked in some way to an item in a database. In other words LinkUP! knows and understands the relevance of each element. These underlined items have been 'marked up'. You can learn how this is achieved in **Tutorial 2 - Preparing a document for LinkUP!**

Before we build 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 your CD-ROM to your hard disk, the paths changed. We'll start with the picture paths.
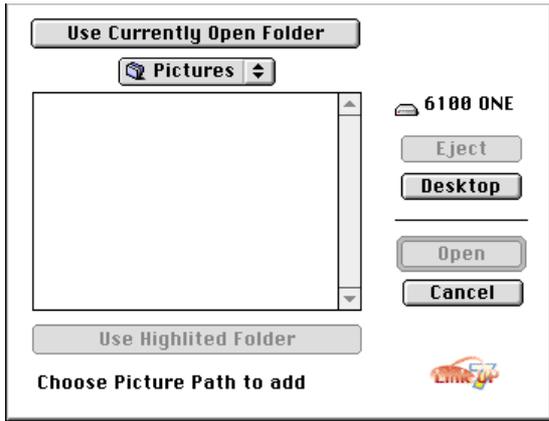
### Setting up Picture Paths
An unlimited number of picture paths can be set for any one document so you can point LinkUP! to use Low Res. pictures during the design stage and then point it to the High Res. images on your OPI server when the time comes to output the film. Alternatively you can simply use the same images throughout the production cycle.

To configure your picture paths;



2.  From the LinkUP! Menu, select **Configure   Picture Paths**

3.  Click the **Add** button

4.  Browse your computer to find the location of the pictures. (They will be located in the

    **Tutorial Files/Pictures2** Folder copied to your hard disk during the installation)

5.  Click either the **Use Currently Open Folder** Button if you are inside the **Pictures2**

    folder, otherwise highlight the **Pictures2** folder and click the **Use Highlighted Folder**

    Button.


You will see that the new picture path has been added.

6. Click the **OK** button

## Setting up the Data Sources

The next process is to tell LinkUP! where to find the data needed for building the document. We are working with 3 different Data Sources in this tutorial. One contains all of the information on the car manufacturers, one contains all of the information on the car models of all of the manufacturers and the third table holds the information on all of the editions of the car models. We will therefore need to tell LinkUP! where each of these Data Sources is stored. As you are working with LinkDB files it is simply a case of letting LinkUP! know which Folder contains the LinkDB files you are to work with. 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 edit your data source settings;

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

8. Select the **Manufacturer** Data Source

9. Click the **Edit** Button

You are now presented with a dialogue similar to the one below;



10. Click the **Learn** Button

11. You will now need to locate your data (located in the **Tutorial5/Data** Folder)

12. 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.


NB. YOU WILL NOT BE ABLE TO SEE THE AVAILABLE FILES IN THIS BROWSE WINDOW, BUT THEY ARE THERE.


Providing you have chosen the correct location, you are now presented with a list of LinkDB
files located in this folder, **Manufact.LNK.DB**, **Model,LNK.DB** and **Editions.LNK.DB**.


13. Select **Manufact.LNK.DB** and click the **OK** button


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



14. Click **OK** to return to the Select Data Sources Dialogue

You will now need to **repeat steps 8 - 14** for both the **Model** and **Edition** Data Sources. Make sure you select the **Model.LNK.DB** and **Editions.LNK.DB** files respectively when using the learn function.

15. Once you have reconfigured all three Data Source, click the **OK** button on the Available Data Sources Dialogue to finish
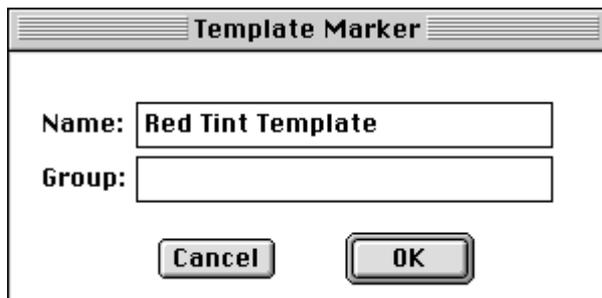
## Understanding what's happening

All of the initial configuration is now complete. LinkUP! knows where the pictures are stored and also where all of the Data Sources are located. These two actions are one-off actions. You need only perform these two configurations once. You are now ready to build the QuarkXPress document. However, before we build the page it is worth spending a couple of minutes understanding what is about to take place. Each of the 5 templates on the left-hand-side of the screen has been assigned a name. We have made this clearer by putting a label on each template (this label is not part of the template). Each record in the database has a field called Template, that contains a reference to the template that should be used for that record.

You can see the name that has been given to each template by using the Markup Tools Palette.

1. From the LinkUP! menu select **Show    Markup Tools**

2. Next in object selection mode in XPress, click onto the template with a red background behind the manufacturer

3. Now hold down the **Option Key** and click the Special Markup Button ⬚ on the Markup Tools Palette (the fourth button from the left)

You should now see the following screen appear;

```
╔═══════════ Template Marker ═══════════╗
║                                        ║
║   Name:  │Red Tint Template         │  ║
║                                        ║
║   Group: │                          │  ║
║                                        ║
║          [ Cancel ]    [   OK   ]      ║
╚════════════════════════════════════════╝
```

This tells us that this particular item is called **Red Tint Template**

4. Click the **cancel** button

5. From the LinkUP! menu select **Show Palettes    Data Viewer**

The Data Viewer provides users with the ability to view, search and query the database from within XPress.

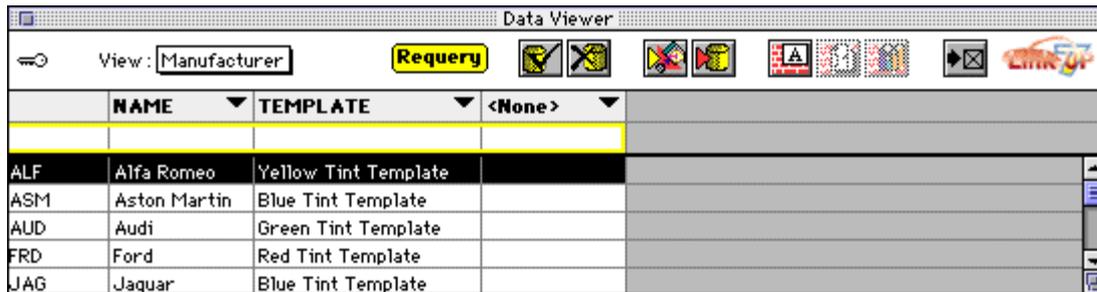6. Select the Manufacturer View if it is not already showing      View : │Manufacturer│

7.  The 2<sup>nd</sup> column will currently be displaying the title **&lt;None&gt;**

8.  Click the down arrow to the right of the word **&lt;None&gt;**

This presents you with a list of fields to choose from that are available for the manufacturer view
9.  Select **Name** from the list of fields

10. Now repeat this process for the 3<sup>rd</sup> column, selecting the **Template Field** instead

11. Click the Requery Button to refresh the Data Viewer with the new information


Your Data Viewer should now look as follows;



You can see that the template field contains the name of the template to be used for each record. When the publication is built you will see that the correct template is used for each car manufacturer. If a record doesn't contain an entry in the template field, LinkUP! will use the default template currently on the page.
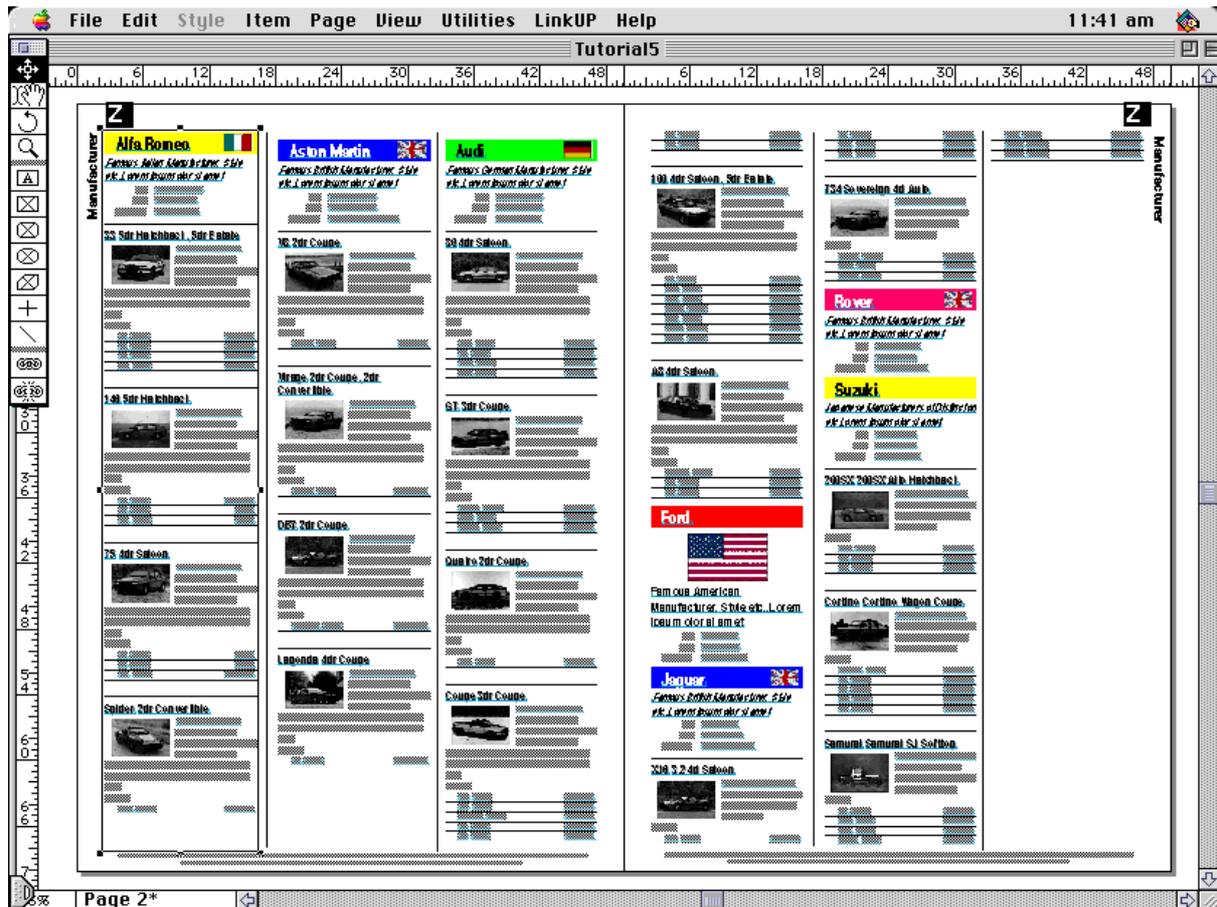
## Building the Document
Now you have seen how LinkUP! knows which templates to use, you are now ready to build the QuarkXPress document.

12. Click the text cursor into the text box on the page containing the default template

13. Hold down the **Option Key** on your keyboard and click the Build Button  on the Data Viewer Palette

14. Read the warning dialogue information and then click the **Don't Warn Again** button.

LinkUP! will now build the document for you, automatically inserting as many pages as are necessary.

NB. IF LINKUP! FAILS TO BUILD THE DOCUMENT, CLOSE THE DOCUMENT AND START THIS TUTORIAL AGAIN, MAKING SURE YOU FOLLOW THE INSTRUCTIONS CAREFULLY. IN PARTICULAR, MAKE SURE YOU HAVE PLACED THE CURSOR IN CHAINED TEXT BOX AND THAT YOU HOLD DOWN THE **OPTION KEY** DOWN WHILE CLICKING THE BUILD BUTTON.

The following is a representation of how your built page will look;



It might be helpful for you to understand what LinkUP! is doing as it assembles the pages. As we stated earlier, this is being built from a relational database. The relational database contains three hierarchical levels, Manufacturer, Model and Edition. Each Manufacturer in the database has a number of models, and each model has a number of editions. The first thing LinkUP! does is look in the Template field in the database to see which template is to be used for each manufacture. It then creates all of these on the XPress page for all of the manufacturers in the database. LinkUP! then goes to the Model Table and finds all of the models for each manufacturer and places them onto the page within the relevant templates. Finally LinkUP! looks in the Edition Table and finds each edition for each model of each manufacturer and places these into the correct templates on the page. The result, a fully built Used Car Guide in minutes using multiple layouts for each database record, complete with all of the pictures. Notice how LinkUP! has created the correct number of models for each manufacturer by expanding the list and the same with the editions of each model.

You will also be able to see that all of the elements on the page that were underlined in the original template are still underlined for all of the manufacturers, models and editions. This signifies that they are all marked up, i.e. linked to the database. If a price changes at the last minute or you happen to find a spelling mistake, you have the ability to update the XPress page from the database without rebuilding it, or alternatively send any changes to the XPress page back to the database. All of the styling on the XPress page is maintained unless you specifically ask LinkUP! to do otherwise.

## Updating Headers and Footers

A tedious part of putting together a publication such as this, is keeping all of the conditional headers and footers up-to-date on each page as the pagination changes. In the case of this tutorial we have a letter at the top of each page which is derived from the first letter of the first manufacturer on the page. We also have the manufacturer name along the left and right edges of the spread. Using LinkUP! these can be dynamically updated to reflect the current page as often as you like. So if an advertisement is dropped in at the last moment, causing all of the pages to re-flow, it is a simple matter to update the header and footer information.

Lets do this now for the page you have just built.

1. From the LinkUP! Menu select **Processes   Create Header/Footer**
2. Select **L1_Name** from the list of fields and release the mouse button

You have instructed LinkUP! to update all of the headers and footers in the document that are based on the field L1_Name, which happens to be the field containing the Manufacturers Name. Once this process is complete, the header and footer information will be updated to reflect the manufacturer at the beginning and end of each page. The picture below shows the results for the left-hand page.



Hopefully this tutorial you have just worked through will have demonstrated the speed, power and accuracy of LinkUP! in building QuarkXPress documents from database information. This process of building documents from single templates can easily by applied to many types of publication such as directories, TV and Radio Guides and many more.

**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 4 - 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