Publishing Directly to a PDF or Word Document

This feature was added in Version 8. We are still refining it and adding new options, so please <u>let us know your feedback and suggestions</u>!

Up until Version 8, you needed to use a page layout program such as InDesign or QuarkXPress to produce your publication. Well, you could publish using RTF (Rich Text Format), but that's a rather outdated format.

Now you can produce an entire publication - with a cover page, introductory pages, and more - **without the need for using any other software**! Your publication can be saved as:

- A ready-to-print or distribute **PDF** document
- A **Microsoft Word** .docx document
- An editable word processing document saved in the database

A publication can be created in any or all three formats in one go.

## Creating a Publication

Overview

The steps to create your publication are:

1. Create a new **Publishing Project**.
2. Choose basic settings such as the page size and orientation, and what sort of document you want to create (PDF, Word, and/or editable document)
3. Add one or more **sections** to the publication.
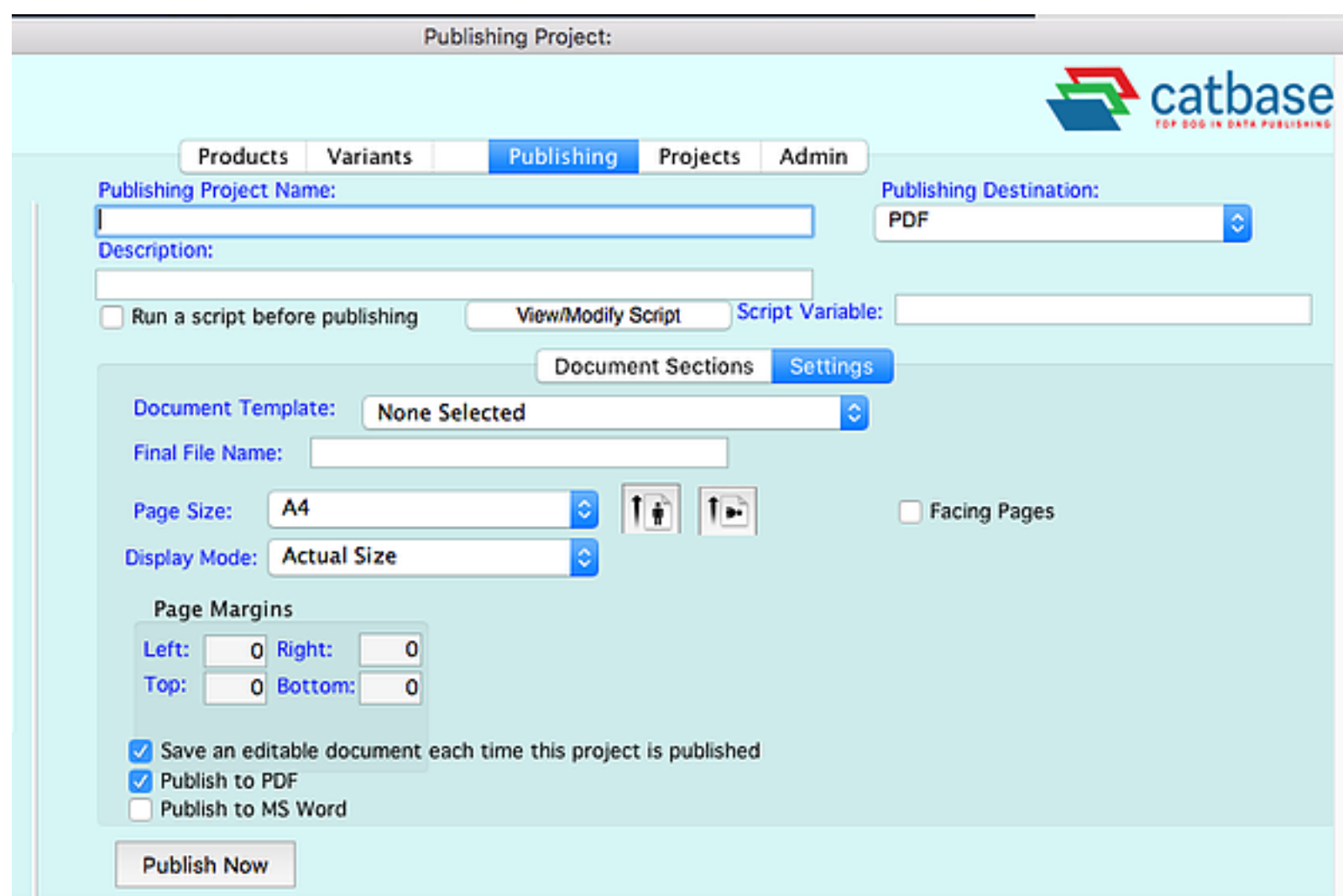4. Create your publication!

Step-by-Step Guide

Create a new Publishing Project

1. Go to the **Publishing** main tab
2. Expand the **Publishing Projects** topic on the left of the window.
3. Click **New Publishing Project**.
4. If the selected Publishing Destination is not "**PDF**", select **PDF** from the **Publishing Destination** dropdown:
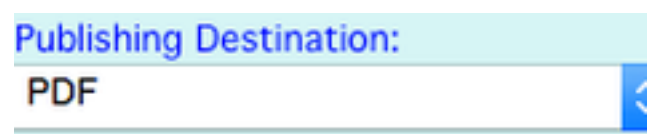
The new Publishing Project looks like this:

Publishing Project Name
Enter a name for your new project. This is required.

Description
Optionally enter a brief description of the project for your own reference.

Run a script before publishing
If you need any special processing doe prior to publishing the document, we can create a script for you. Please contact us for more info.

Script Variable
An optional value you can enter and use in Rules within your Publishing Stylesheet.

Document Settings | Sections tabs
Currently you're looking at the Settings tab. When you have completed the options on this tab, you can click on the Document Sections tab to add sections to the publication.

Document Template

You can optionally create **Document Templates** to base your publications on. In the Document Template, you can set up various options for the document, such as:

- Page headers and footers
- **Stylesheets** that you can use to set the styles for your document content. If you don't use this option, you can simply use the CatBase Stylesheets.

To create a Document Template:

1. Go to the **Publishing** main tab
2. Expand the **Document Templates** topic on the left of the window
3. Click **New Document Template**

Final File Name

Enter a name for your final document - for example :2019 Catalog".

Page Size

Choose the page size for your publication.

Orientation

The Portrait option is selected by default; click the landscape icon to change the orientation.

Facing Pages

If this option is not selected, the pages will just run sequentially. If it is selected, the document will be created in a "2-up" style.

Display Mode

Sorry, this feature is not currently active.

Page Margins

Enter the amount of space to allow for the top, bottom, left, and right sides of the pages in points.

Save an editable document each time this project is published

If this option is selected, each time you use this Publishing Project, CatBase will save an editable copy of it in the Publish Documents section.

Publish to PDF

If this option is selected, a PDF document will be created each time you uyse this Proejct.

Publish to MS Word

If this option is selected, a document will be created in the Word .docx format each time you use this Project.

Click the **Document Sections** tab once you've selected your Settings. Of course, you can come back and change the **Settings** at any time.

Adding Sections

Now you need to tell CatBase what you want to include in your publication.
The **Document Sections** page looks like this:

The top section shows the same info as you saw on the **Settings** page.

Sections

You can add any number of Sections to your publication. Each section type has certain rules and properties:

Front Cover: You can have 1 Front Cover section.
Intro Pages: Any number of Intro Page sections. Note: Each Intro Page section can consist of multiple pages.
Body: You must have at least one Body section. A Body section is automatically created when you created a new Publishing Project. The Body section will contain your data, dynamically published each time you use this Publishing Project.
**Index**: Add an index to the items in your publication.
End Matter: Add any number of End Matter pages. They are the same as Intro Pages, except they come AFTER the Body section rather than BEFORE it. Typically, this is where you might put your terms and conditions, an order form, and that sort of thing.

Editing the Document Sections

Having added your Sections, you need to specify what's going to published in each one.

Let's start by looking at the Body section.

Click on the **Body** section icon in the **Sections in the Document** area:
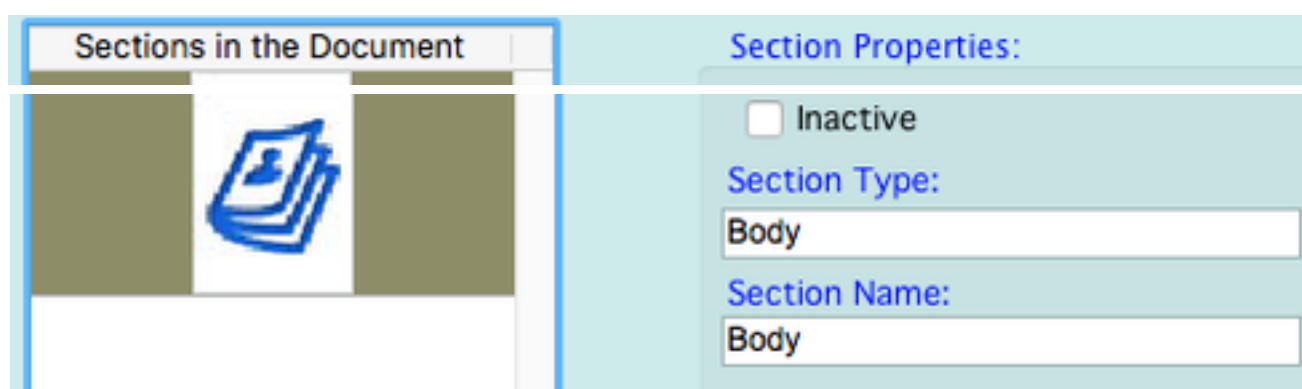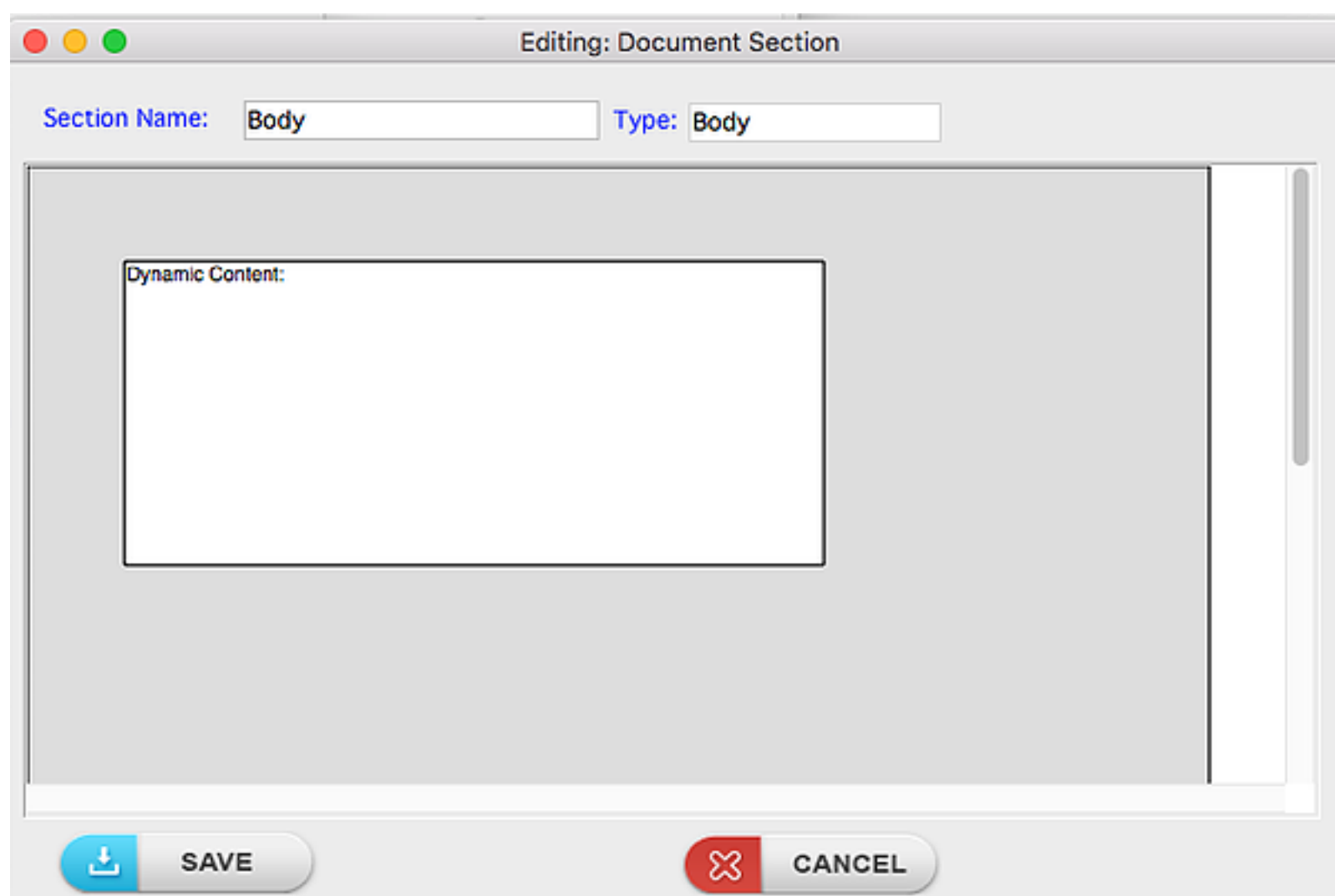
Section Properties

Inactive: You can make any section Inactive. If this is selected for any Seciton, that Section will not be included in the publication.
Section Type: The type of Section that is selected. You cannot change this.
Section Name: You can give each Section a different name.

Double-click the **Body Section** icon.
The Section Layout window opens:

For each Section, you'll add one or more **Objects**.

Section Objects can be:
- **Dynamic Content**: Only available for the Body sections. This is where your data will be dynamically published each time you run the Publishing Project. A Dynamic Content object is automatically added to each new Body section.
- **Static Text**: A text area which can contain any text content and can be styled however you wish.
- **Background Image**: A static image that can be used as a page background.
- **Static Image**: An image that can be placed anywhere on a Section layout.

Moving/Resizing an object

- Click and drag an object to move it around.
- Move the pointer to one of the object's edges or corners to resize it.

Adding Objects

Right-click (or CMD-click) on a blank area of the layout (ie - not on an existing object) and choose an object type form the pop-up menu.

Deleting Objects

Right-click or CMD-click on an object and choose **Delete** from the pop-up menu.

Editing an Object

Either double-click on the object, or right-click on it and choose **Edit Properties** from the pop-up menu.
The options available on the next page depend upon the type of object that is being edited.

Dimensions and Border are present for all object types.
Dimensions (pixels): The positions of the top, left, right, and bottom edges of the object on the page.
Border: An optional border for the object. The default is no border.

Dynamic Content
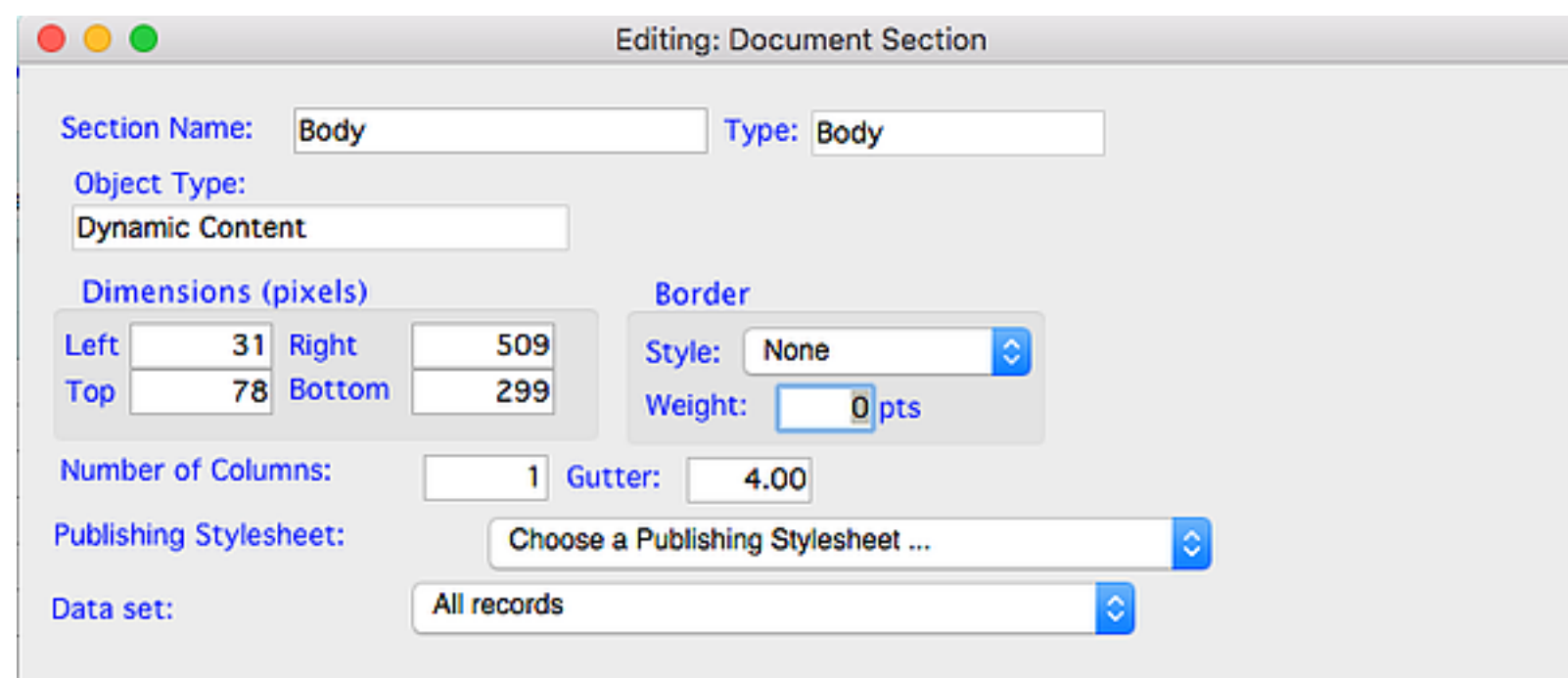
Number of Columns: How many columns to set the published data in. The default is 1.

Gutter: if the number of columns is more than 1, the Gutter is the amount of space, in pixels, in between each column.

Publishing Stylesheet: This is the most important part of the whole Publishing Project! The Publishing Stylesheet determines exactly what's going to be published, how it will be sorted, styled, and formatted, and whether images will be included. If you have already created one or more Publishing Stylesheets, or if you are using our Demo Database, choose the one you want to use for this publication. To create a new Publishing Stylesheet, choose the Create a new Publishing Stylesheet option. To learn about Publishing Stylesheets, take a look at this Tutorial.

Data set: Sets allow you to specify certain groups of data to publish (think of them as filters, if you like). For example, you might want to create a "Christmas Catalog" set in which you've selected a number of specific products to include in a special Christmas catalog. Learn more about Sets. The default option is **All records**, meaning that all relevant data will be published.

Static Image/Background Image
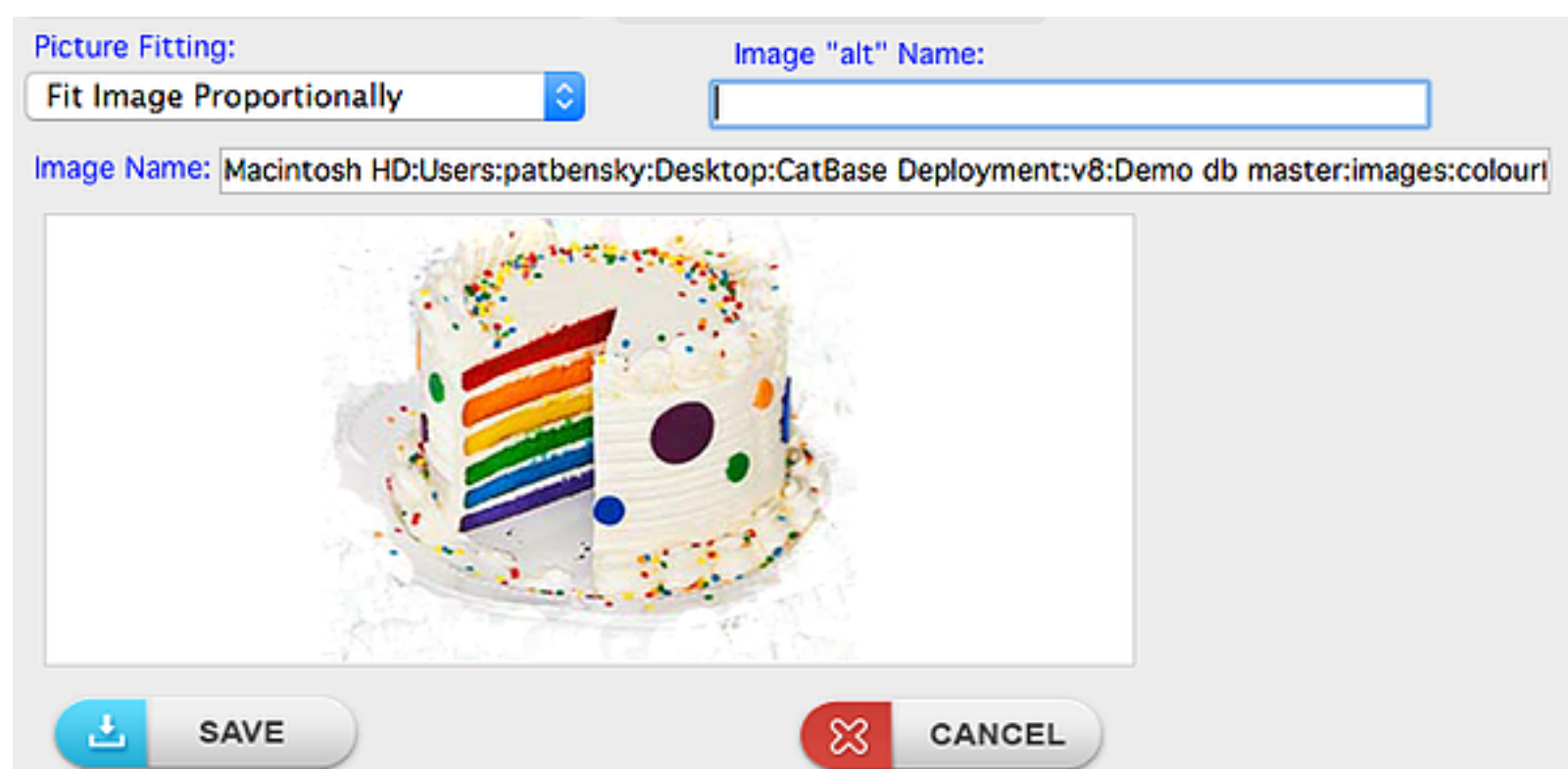
Picture Fitting: How the image will be resized to fit within the specified object size. The default option is Fit Image Proportionally. If you choose a different option, the image may become distorted when it's published.

Image "alt" name: A brief description to tag the image with.

Image Name: This field shows the full pathname to the image file. If you want to make this a relative pathname, you can edit it. For example, suppose you have a folder named Images that contains all your catalog images, and it is located in the same folder as your CatBase database. You could shorten the Image Name to "images:imagename.png".

Static Text
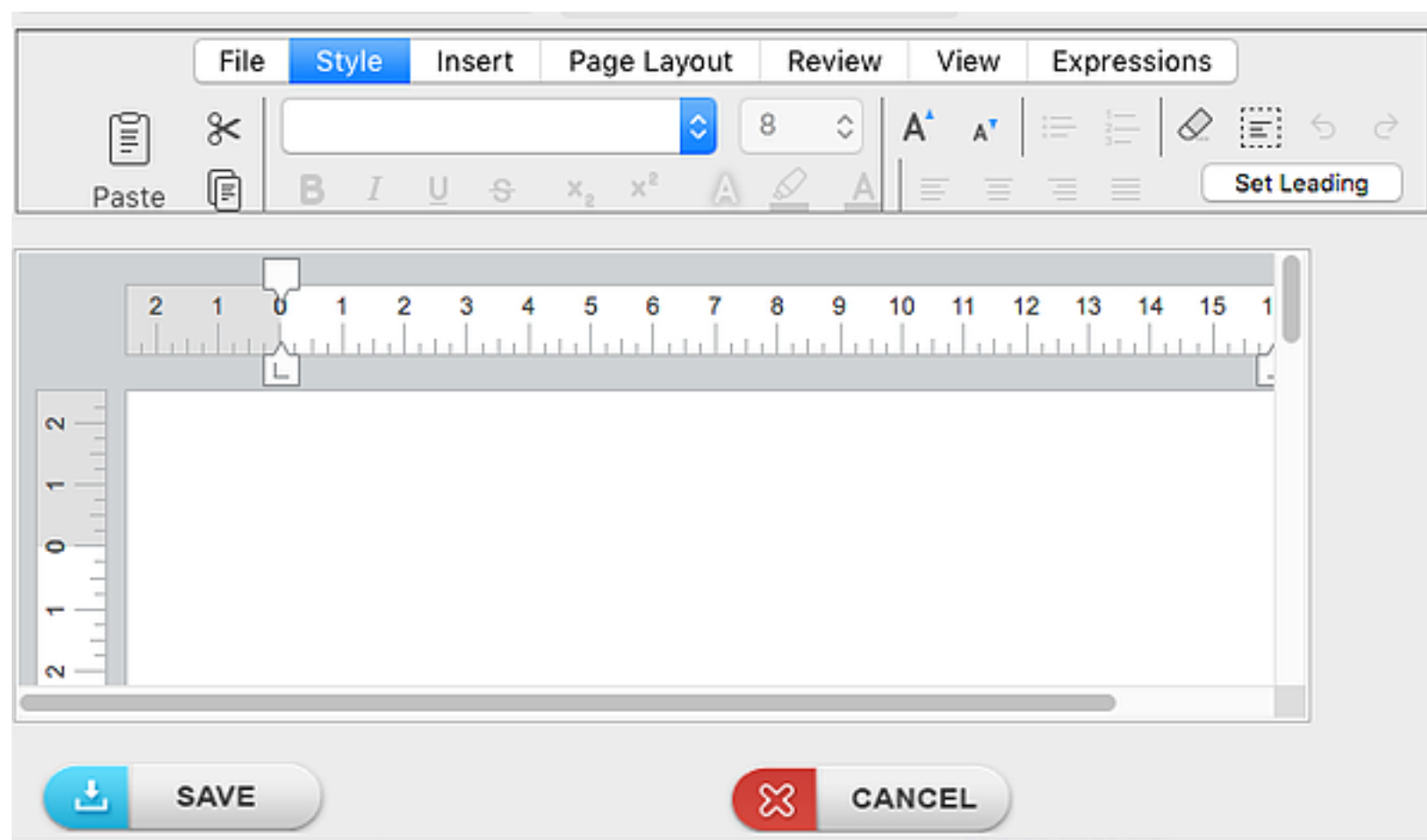
A Static Text object can contain any amount of styled text. It can also contain images.

To see a completed Publishing Project and try it out, please see the PDF Catalogue example in the CatBase Demo Database (in the default Project, the Sweet-Tooth Fairy).

Comments? Questions? Suggestions? Bug reports? Please contact us via our Feedback form!