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INTRODUCTION

Producing catalogs, brochures, price lists and marketing material can be a costly and time-consuming process. Designers are required to manually enter data onto the page, significantly increasing production time all while trying to ensure that no errors occur. In turn, this leads to an extended proof-reading stage at the end of production to ensure that the document is both accurate and free from errors. If there's a last minute price-update, hundreds of pages may need to be updated resulting in the edit, proof-read process starting over again. In the case of multi-language versions, this process can be repeated multiple times.
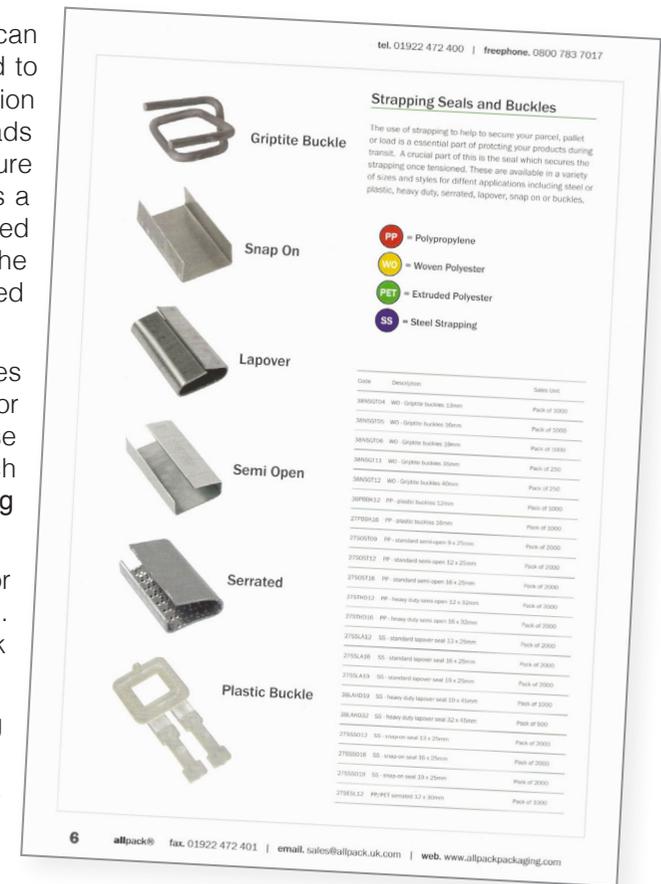
With the advent of the Internet, many companies invested in databases for their online stores. Often, though, this data is not repurposed for the printed page. Whether your data is stored in an ODBC database such as MySQL, a PIM system, Asset Management systems such as Elvis or even a spreadsheet **EasyCatalog can help by automating your catalog production**.

All of your content can be published directly from your database or spreadsheet into Adobe InDesign and can be kept right up-to-date. Your marketing material can be assembled automatically at the click of a button, resulting in significant time and cost savings.

Beginning the task of automating your catalog production using EasyCatalog can sometimes seem like a daunting process, but this white paper gives an overview of how to best prepare to ensure a successful implementation.

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2. Review intended output

3. Create Templates

4. Pagination

5. Updates, edits, checking for errors

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I already liked EasyCatalog a lot, but now I love it. It makes my job so much more efficient. I'm a real advocate for EasyCatalog. I would recommend it to everyone.

"

Ingrid D'Helft
Traffic Coordinator – Design Operations
Philips, Belgium

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" Finished our first project with Easycatalog from @65bitsoftware. Fan-tas-tic! 3 days of work reduced to +/- 30 minutes. Incredible. "

Jochen Van Coillie
Blits
Belgium

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1. Acquire Data

Good quality source data is the key to successful catalog automation with EasyCatalog. EasyCatalog is very data driven, so the quality of the source data has a direct impact on both the quality of the final output and the return on investment you'll see from using EasyCatalog.

Often, customers have partial or incomplete data: before you begin, ensure that you have:

- Everything that you need to appear on the printed page needs to be available in the source data.

- References to image files that you need to paginate. These can be in the form of full paths, partial paths or EasyCatalog can also download images from URLs in the source data.

- Each record must have a unique identifier that never changes for the life of the product. Typically this would be an SKU or product code and is required so that we can always find the correct record when updating the document. Similarly, each field must have a unique name.

- If you're producing a structured document, additional information regarding the structure needs to be available in the data. For example, if your catalog is output in a section > sub-section format, each product would need to know which section in the catalog it belongs to.

Sometimes, groups of records need to appear together on the page - perhaps in a table. EasyCatalog can group common records together and paginate them into the same library item automatically.

EasyCatalog integrates with your existing data source, no new database is required. If you've already invested in centralizing your data, re-using that data is a great way to maximize your return-on-investment from both the cost to implement the database and EasyCatalog. EasyCatalog does not have its own database: it will connect directly to your existing data so there are no additional licensing costs or database maintenance required.

EasyCatalog can import data from:

- Delimited files, such as CSV or tab-delimited files

- Microsoft Excel spreadsheets

- Google Sheets

- Using the optional *ODBC Data Provider Module*, ODBC Databases such as MySQL, Oracle, Microsoft SQL Server, FileMaker, etc.

- Using the optional *Enterprise Module*, support is provided for a range of Product Information Management (PIM) and Asset Management systems such as Elvis. Using a PIM or Asset Management system can help to ensure that your data is structured correctly and is of sufficient quality, and will also help to enforce rules such as having a unique identifier for each record and unique field names.

EasyCatalog is Unicode compliant, so multi-language documents are not an issue. Once a base document has been produced, it can either be updated with different language or market data or even repaginated.

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" You don't have to be a large institution with a massive IT staff to take advantage of [Database Publishing] any more. There is a simple solution to what used to be the daunting task of creating and linking publishing software to complex network databases. Happily all the drudgery is managed via EasyCatalog and controlled effortlessly directly from within InDesign. "

Peter Farago
Farago + Partners
New York

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2. Review Required Output

EasyCatalog is able to fully or partially automate the production of brochures, price lists, and catalogs -- in fact, anything where data needs to be output to the page. Depending on the type of document being produced, the next step is to determine how much automation is possible, and even how much is desirable. Document automation can sometimes be a trade-off between automation and design but, due to the modular nature of EasyCatalog, you can use as much or as little automation as you need.

Publications typically fall in to one of two categories:

- Some publications are design-driven as they need a designer to lay out the finished page. These typically contain pages that can be quite different from one another. This can be the case where the pages are re-arranged based on the size and shape of the images, for example.

- Some publications can be data-driven and are completely automated, such as directories, parts lists, real estate ads, etc. Where there is a structure to the document it is possible to define rules in EasyCatalog that determine how and where data should appear on the page. Automated documents don't need to appear uniform, though. By creating multiple pagination library items EasyCatalog can choose a different template for the data during pagination, and boxes within the item can be automatically modified by assigning attributes to them.

EasyCatalog caters for both types:

- For design-driven catalogs, data can be dragged 'n' dropped to the page.

- For data-driven catalogs, the optional *Pagination Module* can be used to automatically place data into the document, following a number of predetermined rules that are specified in the pagination templates.

It is also possible to use a combination of the above two methods: the *Pagination Module* can be used to get data onto the correct page, then the designer is free to re-arrange the elements post-pagination to produce a more aesthetically-pleasing layout.

The *Scripting Module* also available for situations where additional publication-specific logic required. The document that's produced is a standard InDesign document, so edits are always possible after pagination even by users who don't have an EasyCatalog license.

Take some time to look at how the output document should be structured, and whether you have specific information in your data to achieve this. For example, if the document is organized by category and sub-category, is it possible to determine this just by looking at the data you have? If not, revisit the first stage to see if this information can be added.

If you're intending to automate pagination, take a look at how the data flows through the document to see how this fits in with EasyCatalog's different pagination types:

- Flow-based pagination is ideal for publications that consist of a single flow of text through the document - for example, classified advertisements, price lists, etc.

- Guide-based pagination is used for grid-style publications, such as real-estate or car advertisements. Using guide-based pagination each library item is placed at the intersection of pre-determined page guides.

- 'Using Master Pages' pagination allows you to define a series of master pages containing your data place holders. This type of pagination is ideal for situations where there are a series of pre-determined 'slots' on the page that data should appear in.

- 'Template Pagination' is usually used for technical specification documents, flyers, etc where you need multiple documents or PDFs to be output automatically. You could, for example, output one PDF containing technical data for each record or group of records in your database.
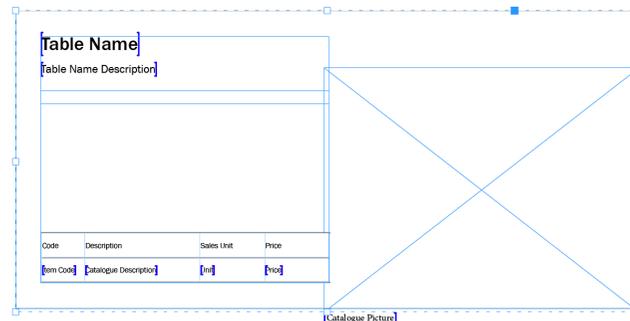
3. Create Templates

EasyCatalog is tightly integrated with Adobe InDesign, so there are no new design tools to learn, and no scripting language to master (unless you want to). EasyCatalog runs in a panel alongside all of the standard InDesign panels and includes additional tools to insert placeholders where data should appear and to specify placement rules to specify when a template should appear in the output.

It's usually possible to start with extracting the individual elements from your manually-produced document, replacing static text with EasyCatalog's data placeholders (called 'Field Specifiers'). EasyCatalog will maintain any text formatting, paragraph styles, etc applied to the text. Similarly, placeholders can be included for images too, as the image frame can be tagged with a Field Specifier for the image field in the data. These elements can then be added to InDesign libraries and form the basis of Pagination.
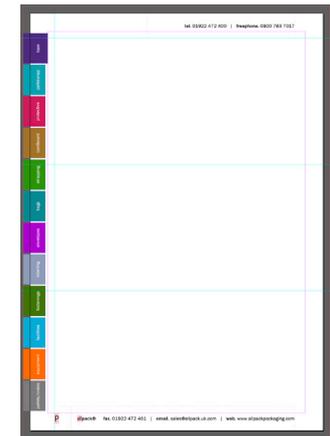
Typically, to paginate, you need two files:

- *A template document to paginate into*

    This typically defines what an empty document should look like, but includes page headers, footers, etc on the master pages. Paragraph and Character styles should also be included in this document. If you're planning on automating pagination, the pagination type (see 'Review Final Output') will also determine what needs to be in that document.

A simple guide-based pagination template: data will be placed at the intersection of the page guides.

- *A pagination library*

    This is a library that contains all of the elements necessary to insert data into your document. Even if you're not planning on fully automating your pagination, creating a library containing the main elements that make up each page will save a tremendous amount of time and effort as it can be used to drag 'n' drop data to the page.

    You can include as many library items as required, and even have multiple different designs that are automatically chosen by EasyCatalog at pagination time. Using EasyCatalog's

A pagination library item including EasyCatalog place-holders where field content will appear. The table will be expanded to accomodate all records in the group being paginated.

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Pagination Rules panel, additional attributes can be added to each box within the library item that can affect the way it appears during Pagination. For example, a rule can be attached to a box to delete it when certain criteria in the data are met.

For automatic pagiantion, each library item will also need additional attributes that specify where in your data structure each item should appear. For example, you could have a library item that's inserted at the start of each section, another that's inserted for each record, etc.

4. Pagination

Pagination - actually getting data onto the page - is the main area where customers see an immediate return on investment. Time-savings, through a correctly-configured pagination, can be significant. The actual return on investment that can be realized will vary depending on the type of publication being produced: the more automation that can be achieved, the higher the ROI. That said, simply freeing the designer from keying in data can save a significant amount of time and ensure that what goes into the document is correct.

Both text and images are imported from your data source and formatted according to the configuration in your library items.   Once placed in the document, each field is linked to the data source ensuring accuracy both when the field is initially placed and if the data is ever modified in the data source.

When connecting to an Asset Management system such as Elvis, your images are automatically downloaded locally and placed into the InDesign document for you. Attributes can also be specified for images to automatically scale and position them for you in each image frame.

Design-driven Catalogs

Where automatic pagination is not possible, or preferred, data can be quickly dragged 'n' dropped to the page. Items dropped from an 'EasyCatalog Library' will be automatically populated with the data selected in the data panel, drastically reducing page make-up time.

Data-driven Catalogs

The optional *Pagination Module* enables EasyCatalog to automatically place your data into the document, obeying the rules you attached to the library items. After pagination, you're left with a standard InDesign document that can be manipulated by the designer.

" We used to spend days formatting and prepping content. It's now literally minutes per ad. From connecting the data to posting PDFs for publications to pick up from our DropBox location - less than 10 minutes. Prior to EasyCatalog, it was hours before we could deliver ad material. "

Jeff Kew
Fireboy Creative
British Columbia, Canada

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- About EasyCatalog

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It previously took us roughly 4 months to produce our catalogue. Much of this time was taken up with proof-reading, manual data entry and information editing.

We estimate that, with the use of EasyCatalog, the next edition of our catalogue will take a maximum of 4 weeks to produce to a print-ready standard.

"

Adam Beardow
Head Graphic Designer
Trilanco, United Kingdom

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5. Updates, edits, check for errors, output

Last-minute price updates or changes to content are handled automatically by EasyCatalog because each field in the document is linked directly to your source data. By tracking the document content, EasyCatalog is also able to show you if any of the data in the document no longer matches the source data.

Occasionally, errors can occur in your source data. Where this happens, corrections can be made directly in the InDesign document and the change pushed back to your source data (but only if you allow this). This helps to ensure that the same mistake never makes it onto the page again.

Documents created using EasyCatalog can also be opened by users who do not own a license of EasyCatalog. If the document is edited by a non-EasyCatalog user we recommend them using our free 'Reader' plug-in that will ensure your data links remain intact; if they're just outputting the document then no additional plug-ins are required.

Multi-language Catalogs

Because each field in the document is linked to your source data, EasyCatalog makes working with multi-language documents even easier.

Multi-language documents are generally created in one of two ways:

- Once one language is complete and output, the fields in the document will be replaced in-situ with fields for another language before being output again (the optional *Scripting Module* is ideal for automating this process).

- Some customers prefer to have all language variants in the same document, so will duplicate a just-completed language layer and replace the fields with another language on the new layer. Layers can then be turned off and on at output time to show the correct language.

Indexes

EasyCatalog can also update your source data with the page number each record is placed on, giving you the ability to quickly produce an index or table of contents. Once you have page number information in your data it's straightforward to filter, group and sort the panel to create the structure you need for your index. Paginating it is then just a simple case of dragging and dropping to a table in the document

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About EasyCatalog

Ideal for time-critical publications, EasyCatalog can dramatically speed up page make-up time and ensure your documents remain error free. Trusted by thousands of users in over thirty countries across six continents, EasyCatalog has quickly established itself as one of the most powerful and flexible database publishing solutions for Adobe® InDesign®.

EasyCatalog is available with a number of optional modules:

Pagination Module   Paginate thousands of records at the click of a button

ODBC Data Provider   Connect directly to your ODBC-compliant database, such as MySQL, SQL Server, FileMaker or Oracle

XML Data Provider   Import data into EasyCatalog from an XML file

Enterprise Data Provider   Connect EasyCatalog directly to a number of popular systems such as Elvis, ADAM, Salsify and SalesLayer.

Relational Module   Work with multiple data sources simultaneously

Scripting Module   Harness the power of EasyCatalog through Javascript, AppleScript or Visual Basic

About 65bit Software

65bit Software Limited specialises in the development of high-quality plug-ins for Adobe® InDesign® and InCopy®.

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

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

65bit Software Limited was established in 2003 and is based in the United Kingdom.