

# **EASYCATALOG**

## **FOR ADOBE® INDESIGN®**



# **XML DATA PROVIDER USER GUIDE**

**65bit Software Ltd**



#### *Revision History*

Version	Date	Remarks
1.0.0	4 June 2007	First draft for InDesign CS3.

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## CHAPTER 1

# OVERVIEW

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**WELCOME** Thank you for downloading the XML Data Provider for EasyCatalog.

65bit Software are committed to providing high quality software for Adobe InDesign, and appreciate the time you take to evaluate our products. All feedback is welcome, good or bad. Please email [support@65bit.com](mailto:support@65bit.com). If you have any questions relating to this or any other product, or need any help, please use the [support form](#) on our website.

**WHAT IS XML?** XML (Extensible Markup Language) is a W3C initiative that allows information to be encoded in a structure that computers and humans can understand. XML is quickly becoming the standard for the interchange of information, and is being adopted by system and database vendors worldwide as a method of exchanging data.

**WHAT IS THE XML DATA PROVIDER?** The XML Data Provider is an optional module for EasyCatalog which enables EasyCatalog to link to an XML-formatted file. As with all EasyCatalog Data Providers, this link is bi-directional allowing changes made to the data within InDesign to be updated to the source XML file.

**INSTALLATION** The XML Data Provider is an optional module for EasyCatalog, and is available as an installable option in the installer which is available for download from our web site.

**DEMO VERSION** The XML Data Provider is available as a 15-day trial download, and will be fully functional during this period.

Thank you for taking time to evaluate the XML Data Provider – 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 at our web-site:

<http://www.65bit.com/support/support.shtm>

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.

**ASSUMPTIONS** This manual assumes that you have a working knowledge of EasyCatalog, XML and XPath.

## CHAPTER 2

# WORKING WITH XML FILES

## INTRODUCTION

The XML Data Provider enables EasyCatalog to directly connect to your XML files. Creating and working with an XML data sources works in the same way as working from delimited files, although slightly more configuration is required.

The Data Provider makes heavy use of XPath to interrogate the XML file. XPath expressions are used to identify the location of each record and field within the XML.

The XML Data Provider also provides support for a wide range of character encodings including unicode (UTF-8 and UTF-16).

## WHAT IS XPATH?

XPath is a language for finding information in an XML document, and is used by the XML Data Provider to navigate through elements and attributes in your XML document

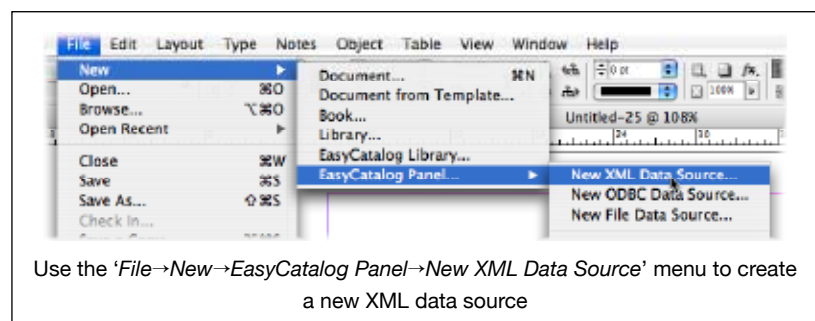
XPath uses path expressions to select nodes or node-sets in an XML document. These path expressions look very much like the expressions you see when you work with a traditional computer file system.

In addition to being able to find and identify nodes, XPath also includes a number of functions, such as node value comparison, etc. The remainder of this manual assumes a working knowledge of XPath. For further information, please refer to the full language reference, which can be found on the following Web page:

<http://www.w3.org/TR/xpath>

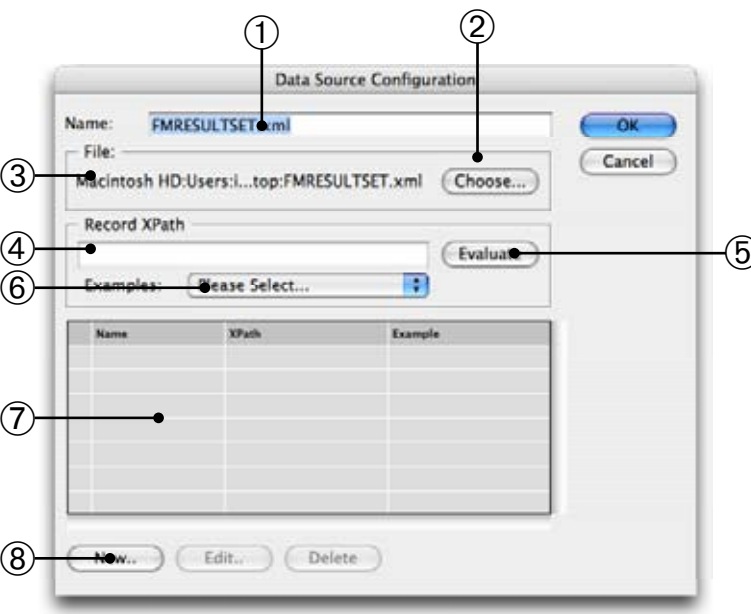
## CREATING AN XML DATA SOURCE

The XML Data Provider appears as an additional data source type on the *File→New→EasyCatalog Panel* menu.



## CONFIGURING AN XML DATA SOURCE

Configuring a data source is a relatively simple task and principally involves specifying various values within the *XML Data Source Configuration* dialog.



The screenshot shows the 'Data Source Configuration' dialog box. It has a title bar with the text 'Data Source Configuration'. Inside, there are several fields and buttons. Callout 1 points to the 'Name' field, which contains 'FMRESULTSET.m'. Callout 2 points to the 'Choose...' button next to the 'File' field. Callout 3 points to the 'File' field, which contains a long path. Callout 4 points to the 'Record XPath' field. Callout 5 points to the 'Evaluate' button. Callout 6 points to the 'Examples' dropdown menu. Callout 7 points to a table with columns 'Name', 'XPath', and 'Example'. Callout 8 points to the 'New...' button at the bottom left.

Name	XPath	Example

- ① The name of the data source - this will be used to refer to the data source within EasyCatalog.
- ② Use this button to select a replacement XML file, or locate a file that has been removed or updated.
- ③ Displays the path to the currently selected XML file.
- ④ Enter an XPath expression to identify each record node.
- ⑤ Evaluates the 'Record XPath' expression and displays the number of records found in the XML file
- ⑥ Displays a list of example XPath expressions. These are built from the parsed XML file.
- ⑦ This area of the dialog shows the fields that have been configured.
- ⑧ Create/Edit or Delete field information

To successfully configure a data source, you must specify:

### *Data Source Name*

As with all EasyCatalog data sources, the data source name must be unique and is used to identify your new data source. The name entered here will appear on the *File→New→EasyCatalog Panel* menu.

### ③ *File*

The location of the XML file is shown here, and this file will be read when you create the data source and on subsequent 'Synchronize with Data Source' operations.

### ④ *Record XPath*

The XML Data Provider requires an XPath to identify the location of each record node within the XML. Further information on this can be found in the example configuration at the end of this chapter.

A pop-up menu, which has been populated based on the content of the XML file, is provided containing a list of valid XPath's. To use one of the example shown in the list, select it from the 'Examples' pop-up menu.

To determine whether you have the correct record XPath, use the 'Evaluate' button: this will show you how many records will be imported into EasyCatalog.



The Record XPath must identify a node within the XML structure, not an attribute.

### ⑦ *Field XPath's*

An XPath must be provided for each of the fields you want to import from the record node.

Create a new field using the 'New' button at the bottom of the dialog:

The screenshot shows the 'Field Configuration' dialog box. It has four fields: 'Name' (containing 'name'), 'Path' (containing 'field/@name'), 'Examples' (containing 'field/@name'), and a 'Key' checkbox (checked). There are 'OK' and 'Cancel' buttons on the right. Numbered callouts point to: 1. The 'Name' field, 2. The 'Path' field, 3. The 'Key' checkbox, and 4. The 'Examples' field.

- ① The name of the field source - this will be the name of the field within EasyCatalog
- ② XPath to the field's content. This path is relative to the record XPath configured earlier
- ③ Used to define the field as a key
- ④ Displays an example list of XPath expression paths.



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.

Field content may be retrieved from node values or from attributes within the XML. As with the Record XPath configuration, example Field XPaths - relative to the record XPath - are shown in the example menu. To use one of the examples, select it from the list. If you have not already given the field a name, one will be entered for you based on the example you have selected.

## EXAMPLE XML CONFIGURATION

Using the following simple XML as an example:

Each record in the file is contained within a <product> node

```

- <section name="Digital Camera Accessories">③
  - <category name="Kodak">②
    ① - <product stockcode="320-387-1010">
      - <fields>
        <description>DC260/265/290 Lens Adaptor</description>
        <price>787.00</price>④
      </fields>
    </product>
    ① - <product stockcode="320-387-1020">
      - <fields>
        <description>Snap Server 12000 1 Yr OSM</description>
        <price>28.50</price>④
      </fields>
    </product>
  </category>
  - <category name="Canon">②
    ① - <product stockcode="320-387-1030">
      - <fields>
        <description>30/BJC-70/80 Battery</description>
        <price>787.00</price>④
      </fields>
    </product>
    ① - <product stockcode="320-387-1040">
      - <fields>
        <description>BJ30/BJC70/80/85 AC Adaptor</description>
        <price>28.50</price>④
      </fields>
    </product>
  </category>
</section>
  
```

The data in the above example for each record is contained within a <product> node ①. The record XPath for this node would be:

```
/section/category/product
```

Using the 'Evaluate' button will report four instances of these nodes within the XML. This indicates that when the data source is



## CONFIGURING AN XML DATA SOURCE (CONTINUED)

fully configured, EasyCatalog will find four records from this XML structure.

Now that the record XPath has been configured, XPaths for each of the fields we want to import into EasyCatalog must be defined. In the example shown here, we want to import five fields - some of them are contained within the record node, others such as Category name ② and Section name ③ must be retrieved from the <product>'s parent nodes.

XPaths for fields are relative to the record. So, for example, to retrieve the contents of the Price node, we would use the following XPath:

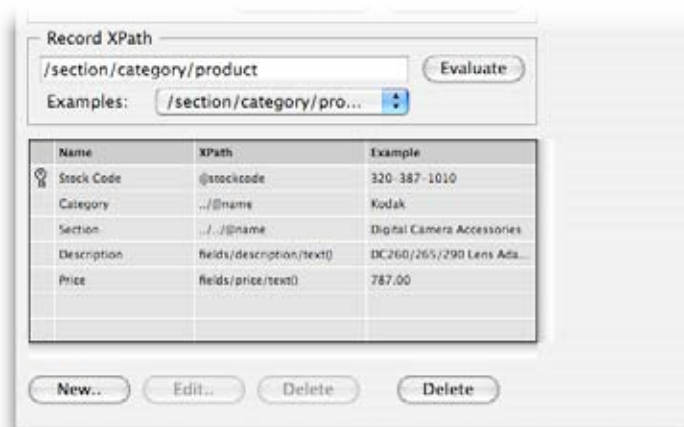
```
/fields/price/text()
```

To retrieve the contents of a parent node, such as the product's category name ②, use '..' to reference nodes and attributes higher up in the XML hierarchy:

```
../@name
```

This specifies the 'name' attribute of the record's parent node.

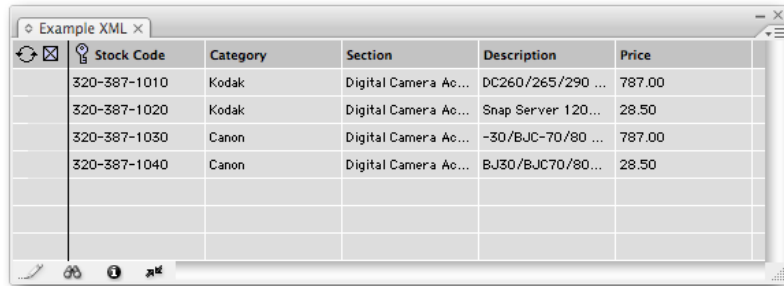
To retrieve the contents of the other nodes and attributes, the following XPaths would be used:



Field	XPath	Description
Stock Code	@stockcode	Contents of the 'stockcode' attribute
② Category	../@name	'name' attribute of the parent node
③ Section	../../@name	'name' attribute of grandparent 'section' node
Description	/fields/description/text()	Textual contents of the given node
④ Price	/fields/price/text()	Textual contents of the given node

## CONFIGURING AN XML DATA SOURCE (CONTINUED)

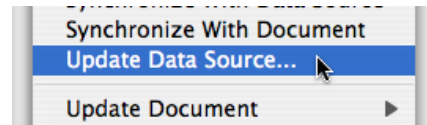
When the data source is fully defined, EasyCatalog will present the following panel:



Stock Code	Category	Section	Description	Price
320-387-1010	Kodak	Digital Camera Ac...	DC260/265/290 ...	787.00
320-387-1020	Kodak	Digital Camera Ac...	Snap Server 120...	28.50
320-387-1030	Canon	Digital Camera Ac...	-30/BJC-70/80 ...	787.00
320-387-1040	Canon	Digital Camera Ac...	BJ30/BJC70/80...	28.50

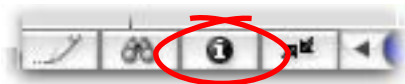
## UPDATING A DATA SOURCE

In the same way file based data sources are updated, EasyCatalog has the ability to update XML data sources. A snapshot of the XML file is stored when a data source is created or synchronized, so EasyCatalog will only update those nodes that have changed. This means any additional information in the XML which is not used by EasyCatalog will be preserved.



## RE-CONFIGURING A DATA SOURCE

The configuration for a data source can be modified later using the 'Information' dialog. Hit the 'Info' button at the bottom of the EasyCatalog panel, then use the 'Configure...' button to change the settings for the data source.



### Key Fields

Once a data source has been configured, only the XPath attribute for 'key' fields can be amended. Key fields cannot be renamed or deleted after the initial configuration. This prevents links on your document from being broken by modifying the key fields.