# ONIXEDIT User Manual

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## ONIXEDIT

## ONIXEDIT Cover

# Presentation

## What is ONIX?

ONIX is an acronym for **ON**line **I**nformation e**X**change. ONIX is a standard format which publishers can use to distribute electronic information about their books to wholesalers, distributors, resellers, and bookstores. In short, for all those who are involved in book sales, ONIX allows the transmission of information about books between different organizations, even if their infrastructure and business needs are different. The support used in ONIX is an XML file which is a standard in information technology.

ONIX has been developed to fulfill two needs:

- To maintain a richer body of online information
- To provide a communication standard between different users and user groups.

With the advances of the Internet and the explosion of online book sales, the book industry has faced a difficult situation: How can we supply online resellers with the information required by buyers? At a bookstore, the buyer has in hand a book to browse, from its cover page to the author's biography to the synopsis, and so on; all the promotional information needed by the buyer to make a decision to purchase. On the Internet, the physical book has been replaced by a web page with all the relevant information regarding the book, along with audio or video, extracts in PDF format, and even the whole book in electronic format. Research has shown that the more information consumers have about a book, the more they will be inclined to buy. ONIX gives publishers a way to transmit all this information, in a rigorously standardized fashion, to all their business partners.

Whether you publish five titles per year or five thousand, you need to maintain trustworthy, standardized information about your list, and to communicate it to your trading partners. The ONIX standard has been designed for this purpose. The international EDItEUR group coordinates the development of standards concerning electronic commerce for the book industry, and which has developed the ONIX norms. Immediately after its release, ONIX was quickly adopted as the preferred means of information by the important actors in the chain of book sales  transmission, for example by Amazon, Bowker, Nielson, and Ingram, to name just a few.

Unfortunately, ONIX is a complex norm presented in the form of a large XML file, with rigorous and difficult-to-learn syntax and rules:
ONIX 3.0 Documentation

```
<Product>
  <RecordReference>1234567890</RecordReference>
  <NotificationType>03</NotificationType>
  <ProductIdentifier>
    <ProductIDType>02</ProductIDType>
    <IDValue>0816016356</IDValue>
  </ProductIdentifier>
  <ProductForm>BB</ProductForm>
  <Title>
    <TitleType>01</TitleType>
    <TitleText>British English, A to Zed</TitleText>
  </Title>
  <Contributor>
    <SequenceNumber>1</SequenceNumber>
    <ContributorRole>A01</ContributorRole>
    <PersonNameInverted>Schur, Norman W</PersonNameInverted>
    <BiographicalNote>A Harvard graduate in Latin and Italian literature, Norman
Schur attended the University of Rome and the Sorbonne before returning to the
United States to study law at Harvard and Columbia Law Schools. Now retired
from legal practise, Mr Schur is a fluent speaker and writer of both British and
American English</BiographicalNote>
  </Contributor>
  <EditionTypeCode>REV</EditionTypeCode>
  <EditionNumber>3</EditionNumber>
  <Language>
    <LanguageRole>01</LanguageRole>
    <LanguageCode>eng</LanguageCode>
  </Language>
  <NumberOfPages>493</NumberOfPages>
  <BASICMainSubject>REF008000</BASICMainSubject>
  <AudienceCode>01</AudienceCode>
  <OtherText>
    <TextTypeCode>01</TextTypeCode>
    <Text>BRITISH ENGLISH, A TO ZED is the thoroughly updated, revised, and
expanded third edition of Norman Schur's highly acclaimed transatlantic dictionary
for English speakers. First published as BRITISH SELF-TAUGHT and then as
ENGLISH ENGLISH, this collection of Briticisms for Americans, and Americanisms
for the British, is a scholarly yet witty lexicon, combining definitions with
commentary on the most frequently used and some lesser known words and
phrases. Highly readable, it's a snip of a book, and one that sorts out – through
comments in American – the "Queen's English" – confounding as it may
seem.</Text>
```

## What is ONIXEDIT?

**ONIXEDIT** is a program for title management designed to be used by publishers and based on the ONIX 2.1 and 3.0 norm.

Given its complexity, the ONIX norm is difficult to put in place and is often beyond the means of publishers. Therefore, in 2004 we produced a first version of a program destined to democratize the ONIX norm for publishers. First produced for Canadian needs, our freeware EXA Editor quickly became the reference norm in Canada from sea to sea.

3 years after, we began to work on the development of a totally new generation of the program. In 2009 EXA Editor became **ONIXEDIT**. A new name, but also a totally new interface, a new XML engine, an international scope and design resolutely directed towards publishers; this is what **ONIXEDIT**, has become, the standard of excellence in ONIX worldwide.

## Who is ONIXEDIT for?

Even if it was first conceived especially for publishers, **ONIXEDIT** is directed towards everyone who is a link in the supply chain of bookselling, all those who need to maintain, receive, or transmit bibliographic, commercial, and promotional information about books and ebooks.

ONIX is used throughout the world, especially in North America, Europe, Australia, and Asia.

**ONIXEDIT** is a Canadian program available in English, French, Spanish and Portuguese. Therefore we have, first of all, concentrated our efforts on meeting the ONIX needs of the following organizations:

*EDItEUR* (Organization in charge of the ONIX standard)

*BTLF* (Canada, French)

*BookNet* (Canada, English)

*BISG* (USA)

*BIC* (England)

*APA* (Australia)

*AMAZON*

ONIX is used at all levels, from the publisher through to the point of sale. However there is no exhaustive list of all the members in the chain of bookselling using ONIX. Here is nonetheless a partial list of businesses that are able to receive and work with ONIX files. This list is classified by the formats supported by **ONIXEDIT**:

**BTLF Format**
- BTLF

**BookNet Format**
- Indigo
- Amazon.ca
- BookManager
- Bowker
- United Library Service
- Library Service Center

**BISG Format**
- American Booksellers Association (ABA)
- American BookSense Website
- Association of American Publishers (AAP)
- Association of American University Presses (AAUP)
- American Wholesale Booksellers Association
- Baker & Taylor
- Barnes & Noble
- Bowker

- Evangelical Christian Publishers Association (ECPA)
- Follet
- Google
- Hachette Book Group
- Harcourt Trade Publishing
- HarperCollins Publishers
- Houghton Mifflin
- Ingram Book Company
- John Wiley & Sons
- Library of Congress
- Login Brothers
- McGraw-Hill Companies
- MUZE, Inc.
- National Book Network
- Nielsen BookScan
- Net read
- Paladin Press
- Pearson
- Princeton University Press
- Random House, Inc.
- Reiter’s
- Rowman & Littlefield Publishing Group
- Simon and Schuster
- Time Warner Publishing
- Yale University Press

**BIC Format**

- Nielsen BookData

**APA Format**

- Abbey's Bookshop
- ACBA Booksellers
- Alliance Distribution Services
- Angus & Robertson
- Bookwise International
- Brumby Books
- Collins Booksellers
- Dymocks Booksellers
- Gary Allen
- Gleebooks
- Harper Entertainment Distribution Services
- James Bennett
- Leading Edge Books
- Macmillan Distribution Services
- Mary Martin Bookshops
- Nielsen Bookdata
- Random House Distribution Services
- Thorpe Bowker
- Tower Books
- UNIREPS
- United Book Distributors
- Woodslane

## Possible Uses

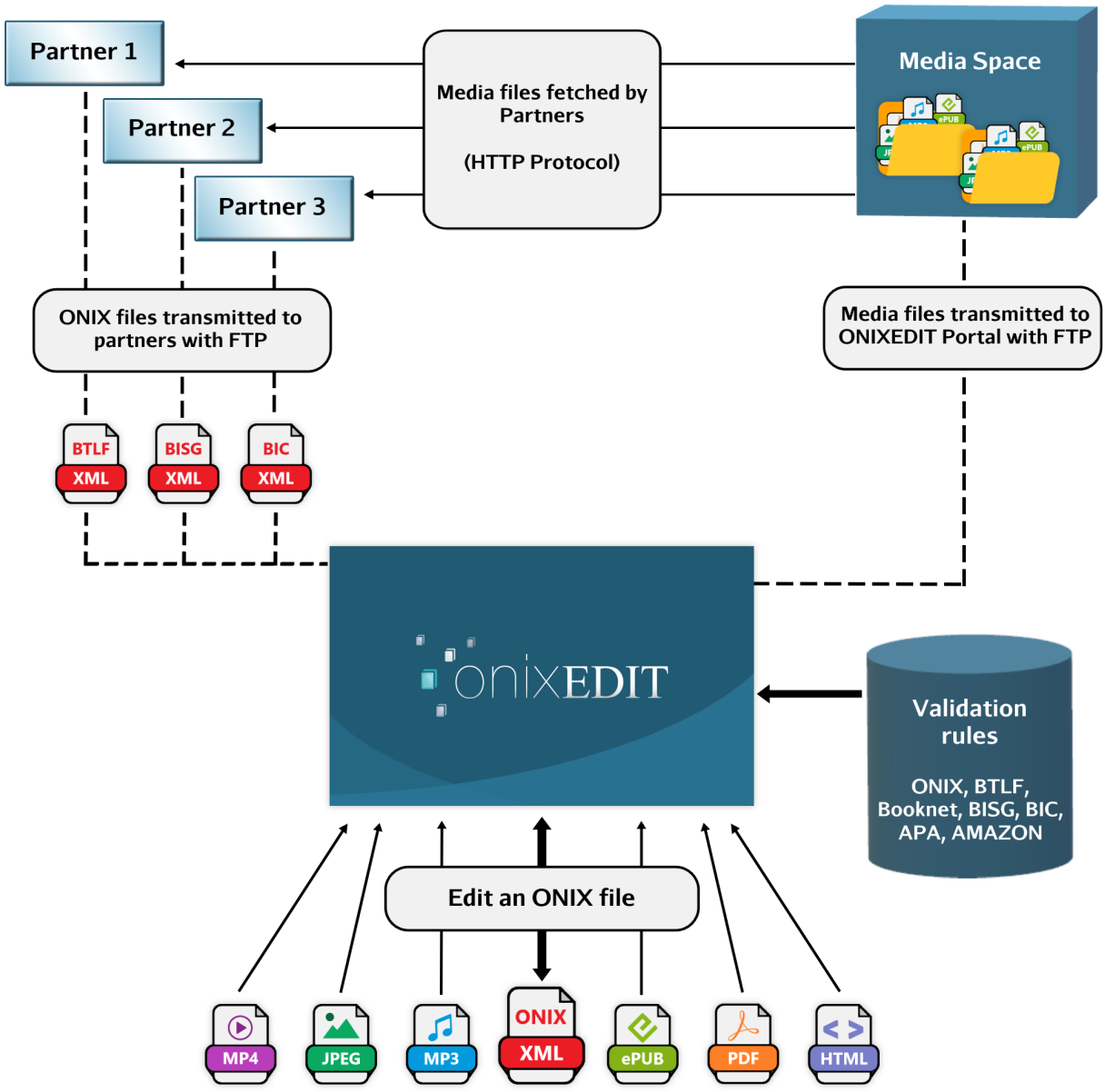
Affordable, simple, and powerful, **ONIXEDIT** allows you to :

- Manage bibliographic, commercial and promotional information on thousands of books rapidly and easily.
- Establish new commercial alliances with the largest international resellers: Amazon, Bowker, Indigo, Nielsen, and many others.
- Be compatible with the largest world standard of metadata on books, and to do real-time verification of information conformity to ONIX norms, without having to be preoccupied with the complexities of ONIX.
- Integrate, as needed, specialized validators for the standards established by BTLF, BookNet Canada, BISG, BIC, APA, AMAZON and EDItEUR and immediately obtain your ONIX certification with regard to these organizations.
- Take over the promotional material (table of contents, covers, introduction, description, etc.) and media (images, video, audio) in different formats (text, PDF, HTML, JPEG, MP3, MPEG, etc.) and effortlessly make all this available to your trading partners.
- Manage the prices and taxes by country and region, in various currencies.
- Maintain exclusivity and exclusion rights by country.
- Manage your stock.
- Automate the transmission of your ONIX files to your trading partners everywhere in the world and keep control of whom receives what, thanks to the integrated FTP transmission tool.
- Open and edit ONIX files directly without having to transform them.
- Maintain a single file, ideal for all your information concerning your book collection.
- Consult, research, and modify the contents of existing ONIX files.
- Convert your book collection on Excel files into ONIX back and forth.
- Exchange rich and complete information with all the key players of the new publishing supply network.
- Share your promotional material easily with your partners.
- Increase Discoverability of your books and eBooks with ONIX Metadata!

## Architecture

**ONIXEDIT** is designed around a unique and novel concept. The architecture of **ONIXEDIT** allows editing of ONIX files without needing to be troubled by XML language and its rules, and also offers a powerful tool for transmission of your files to your business partners:

# Architecture




The usual steps in editing an ONIX file are:

- Opening an existing file or creating a new file.
- Adding a Product record for each book.
- For each book record, defining bibliographical, commercial, and promotional information.
- Adding, as needed, media files for each title (author's picture, cover page, interview, extracts from the book, etc.)

- As the data are collected,**ONIXEDIT** informs you of missing information or of inputs which are invalid according to the requirements of **ONIX**, **BTLF**, **BookNet**, **BISG**, **BIC**, **APA**, **AMAZON** and **EDItEUR**. Only the formats needed by your trading partners are verified.

- Automatic transmission of media files to the **ONIXEDIT** portal in your private media space. Local references for your ONIX file such as "C:\Documents and Settings\Administrator\My Documents\Projects\Book_102\PageCover.jpg", which would not be accessible by your trading partners are now automatically transformed into URLs which are now accessible on the Internet. Your pictures, videos, interviews, and book extracts are taken into **ONIXEDIT**, standardized, and filed in your private media space.

- Automatic transmission of ONIX files to each of your trading partners in their preferred format; for example, the same series of books can be transmitted to one partner in BookNet format and to another in BIC.

Not only do you benefit from a modern, efficient tool to save and standardize your book information, but also you now have the capacity to communicate with the biggest players in the chain of book sales, using the language they expect: ONIX.

## Differences between ONIXEDIT and ONIXEDIT PRO

**ONIXEDIT** for Windows is available in two versions: **ONIXEDIT** and **ONIXEDIT** Pro. The regular and Pro version are exactly the same software, but for the regular version, some features are optional. See the following table for the comparison, or refer to the following web page for the complete, detailed and updated list of differences between these two versions:

http://onixedit.com/en-us/products/onixedit/features

| Features | ONIXEDIT | ONIXEDIT Pro |
|---|---|---|
| ***ONIX*** | | |
| Read and write ONIX 2.1 and 3.0 XML files with short or long tags | ✓ | ✓ |
| Automatically convert your ONIX 2.1 files to ONIX 3.0 | ✓ | ✓ |
| Integrated ONIX 2.1 and 3.0 validator | ✓ | ✓ |
| Integrated validator for specific formats and for the latest ONIX 3.0 Best Practices | One | All |
| Compliant to the block update facility and tag attributes of ONIX 3.0 with the Advanced Interface | Optional | ✓ |
| Automatic Header section signature with your name and company name | ✓ | ✓ |
| Error summary, with automatic positioning to the next error | ✓ | ✓ |
| ONIX table of contents, with search and positioning | ✓ | ✓ |
| View the XML results for a title | ✓ | ✓ |

| | | |
|---|---|---|
| Compatible with over two hundred ONIX 2.1 and ONIX 3.0 components and tags (click here for the complete list) | ✓ | ✓ |
| ***CONTENT*** | **ONIXEDIT** | **ONIXEDIT Pro** |
| User-defined default values for all the contents of a file | ✓ | ✓ |
| Unlimited number of identifiers (including proprietary) | Optional | ✓ |
| Unlimited number of titles | Optional | ✓ |
| Unlimited number of contributors | ✓ | ✓ |
| Unlimited number of publishers | Optional | ✓ |
| Unlimited number of distributors, with country and regional support | Optional | ✓ |
| Unlimited number of prices, currencies, discounts and taxes | ✓ | ✓ |
| Unlimited number of selling rights or restrictions in one or more countries | Optional | ✓ |
| Management of stocks and warehouses | Optional | ✓ |
| Unlimited amount of marketing agents | Optional | ✓ |
| Definition of target audiences, with definition by age range | ✓ | ✓ |
| Subject classification, with integrated values list from BIC, BISG, CLIL and THEMA | ✓ | ✓ |
| Unlimited number of conferences and prizes | Optional | ✓ |
| Description, tables of contents, back cover, review, biographical notes, excerpt | ✓ | ✓ |
| Integrated XHTML editor | ✓ | ✓ |
| Unlimited number of collections and series | Optional | ✓ |
| Associate external cover image | ✓ | ✓ |
| Associate external media files | Optional | ✓ |
| Unlimited number of related products | 3 included | ✓ |
| ***TOOLS*** | **ONIXEDIT** | **ONIXEDIT Pro** |
| Automatic conversion and verification of formats EAN/ISBN/ISBN13 | ✓ | ✓ |
| Automatically saves most frequent contributor data | Optional | ✓ |
| Generic Import/Export tools allowing you to convert ONIX files to flat files and inversely | Optional | ✓ |
| Import Excel files in BTLF summary and Booknet Bronze | ✓ | ✓ |
| Title search using every supported ONIX tags | ✓ | ✓ |
| Search And Replace a value in any supported ONIX tags | ✓ | ✓ |
| Copy any ONIX sections from a title and merge it to a selection of titles | ✓ | ✓ |

| | | |
|---|---|---|
| Batch Updates of ONIX files | Optional | ✓ |
| Standardization of images, size and resolution | ✓ | ✓ |
| Share media files on the Internet using your private Media Space | Optional | ✓ |
| Automatic FTP transmissions of ONIX files and cover images to your trading partners and your Shopify Bookstore | ✓ | ✓ |
| Create stunning price lists and promotional catalogues with our Report Builder | Optional | ✓ |
| Generate THEMA subjects automatically from your BISAC or BIC subjects | ✓ | ✓ |
| ***OTHER*** | **ONIXEDIT** | **ONIXEDIT Pro** |
| Multilingual interface: English/ French/ Spanish/ Portuguese | ✓ | ✓ |
| Simplified Form: Allow the edition of most usual ONIX fields. Click here for a preview. | ✓ | ✓ |
| Advanced Form: Allow the edition of all supported ONIX fields. Click here for a preview. | Optional | ✓ |
| Open several files at once | ✓ | ✓ |
| Transfer/copy files by "drag and drop" | ✓ | ✓ |
| Remember ten most recently opened files | ✓ | ✓ |
| Manage several thousand titles in a single file | ✓ | ✓ |
| 50 MB of space to store and share your media files | Optional | ✓ |
| Technical support from ONIXEDIT specialists | Optional | ✓ |
| Customization of the metadata to show in your main list | ✓ | ✓ |

## System requirements

**ONIXEDIT** requires one of the following operation systems:

- Microsoft Windows 11
- Microsoft Windows 10
- Microsoft Windows 8.1
- Microsoft Windows 7 SP1
- Microsoft Windows Server 2008 R2 SP1 (x64)
- Microsoft Windows Server 2012 (x64)
- Microsoft Windows Server 2012 R2 (x64)
- Microsoft Windows Server 2016 (x64)
- Microsoft Windows Server 2019 (x64)

### Computer hardware requirements

The table below shows the recommended equipment.

| | CPU | RAM |
|---|---|---|
| **Recommended** | 2 GHz or higher | 4096 MB or more |

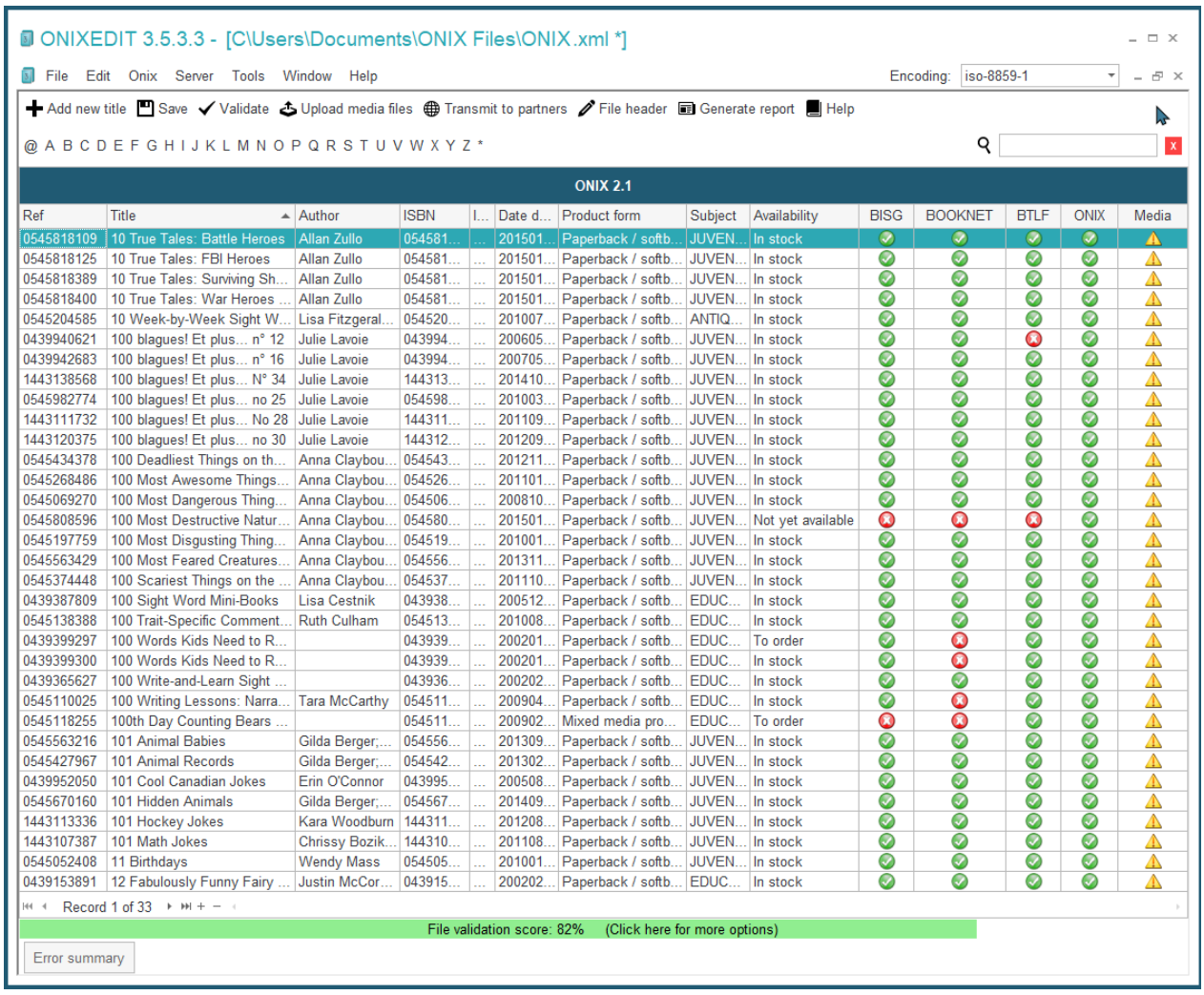
**ONIXEDIT** requires Internet access in order to permit registration or updating of the user licence, as well as to allow access to the **Media Space** and transmission of ONIX files to trading partners.

# Features

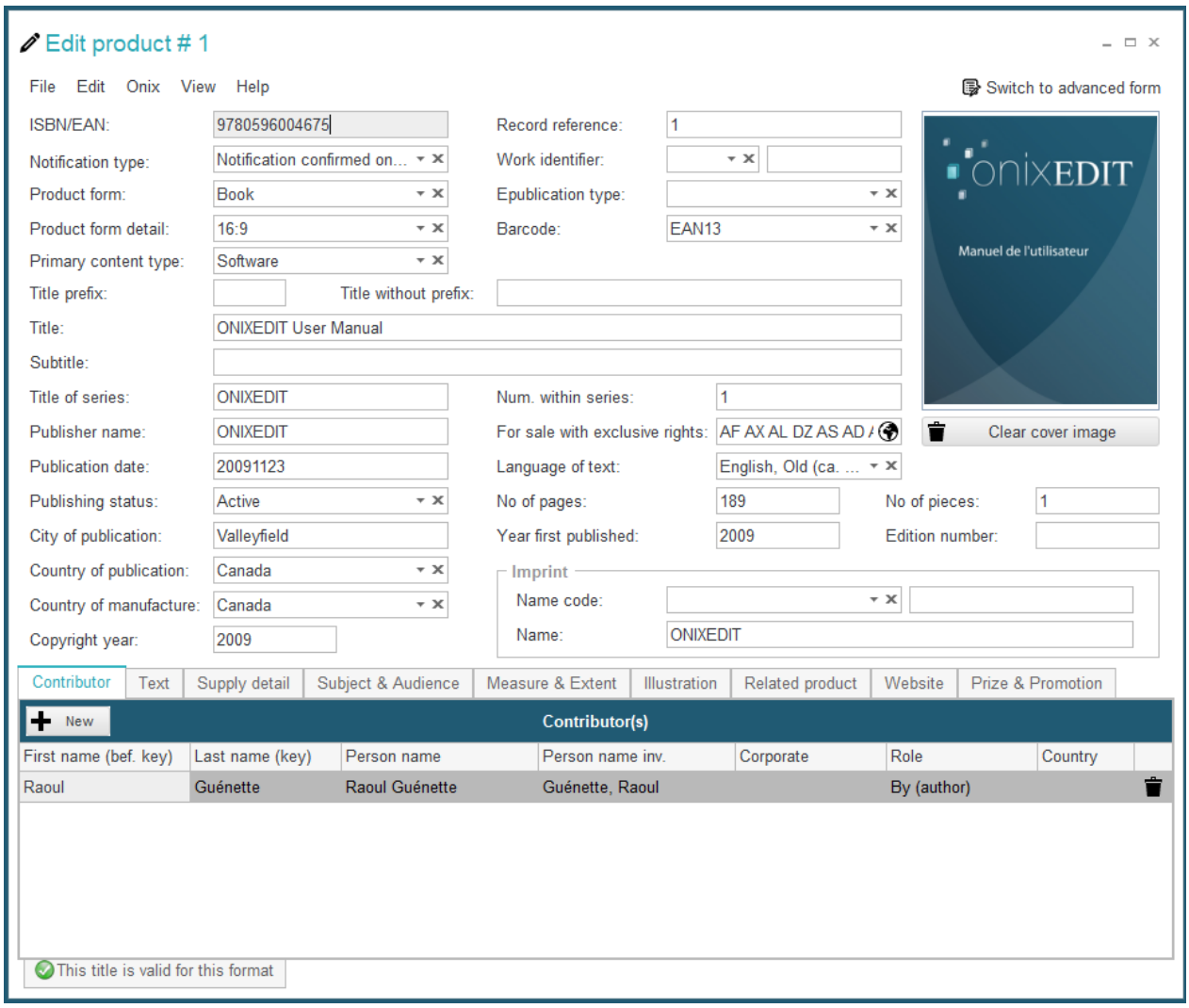
## A Friendly Interface

**ONIXEDIT** is provided with a modern and user-friendly interface. You do not need to understand XML or the ONIX norms in order to use it. You can just concentrate on what is important to you: your metadata:

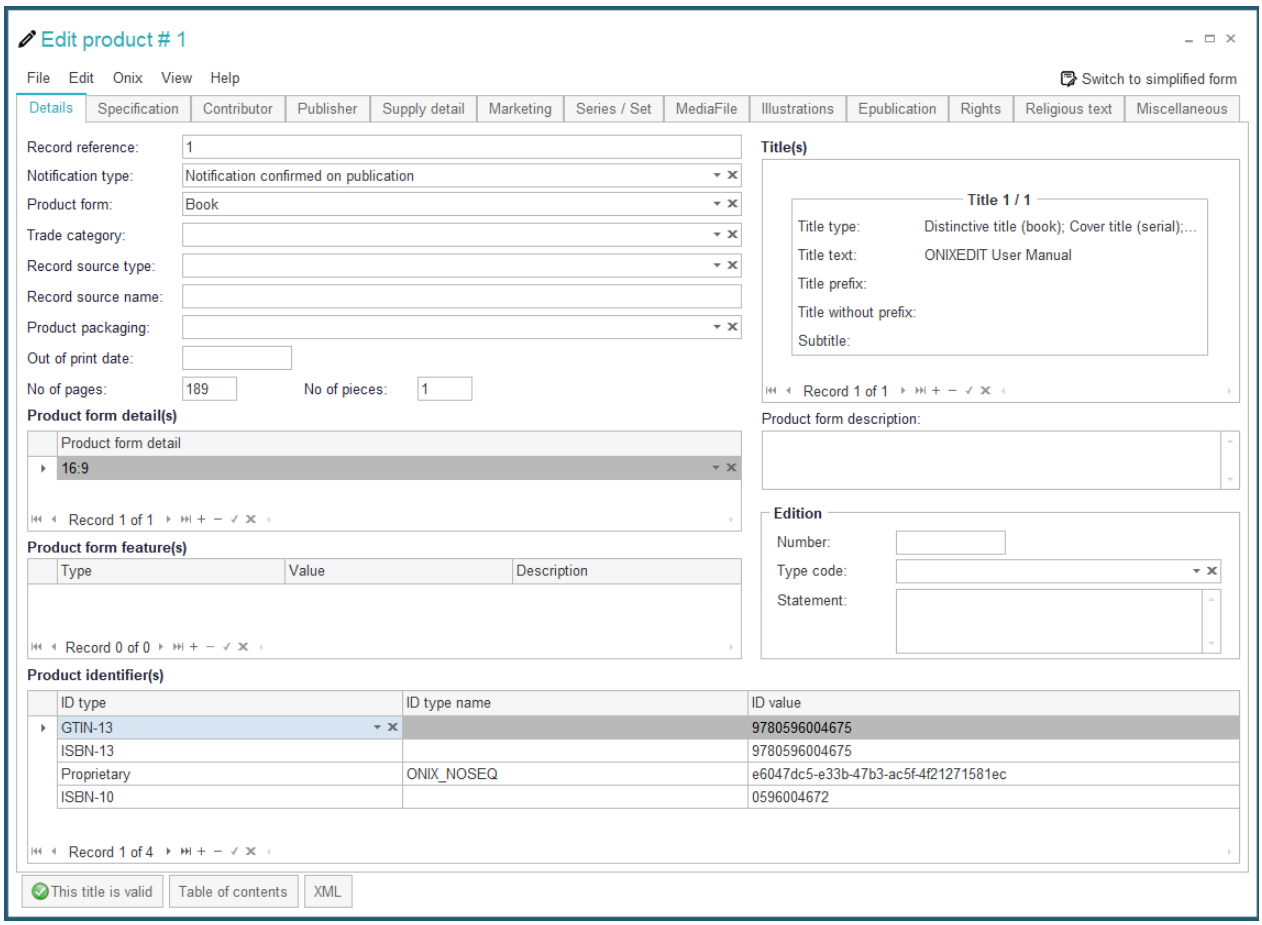
**MAIN LIST**




**EDITING A TITLE - Simplified Form**

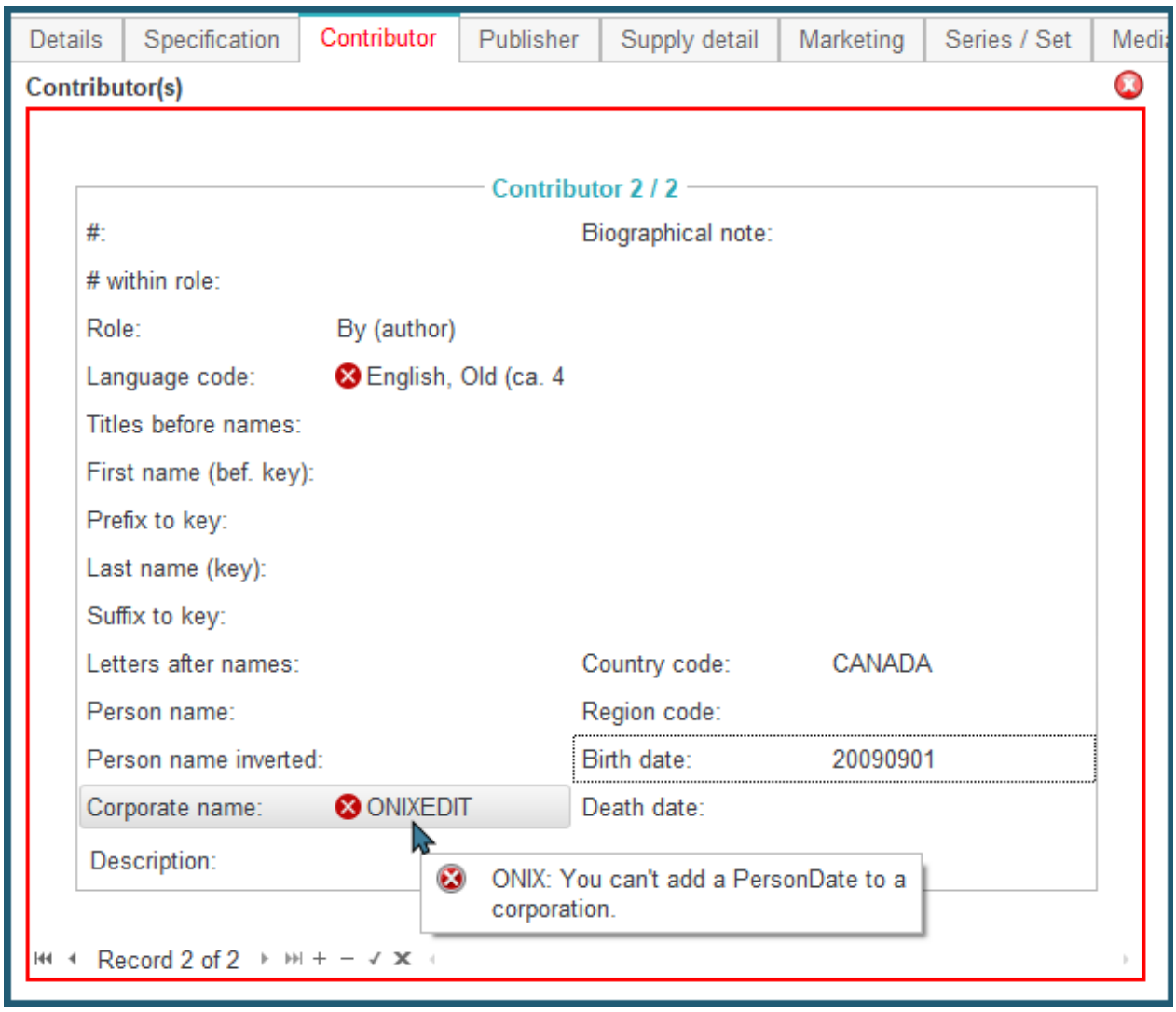



**EDITING A TITLE - Advanced Form**




## A powerful validation engine

All the power of **ONIXEDIT** lies in its sophisticated ONIX validation engine. With this to support you, the ONIX files that you produce will 100% conform to the norms. Our engine is so powerful that it detects the smallest of errors. No other system offers such precision. For example, what would happen if you tried to define a birth date for a corporate contributor?



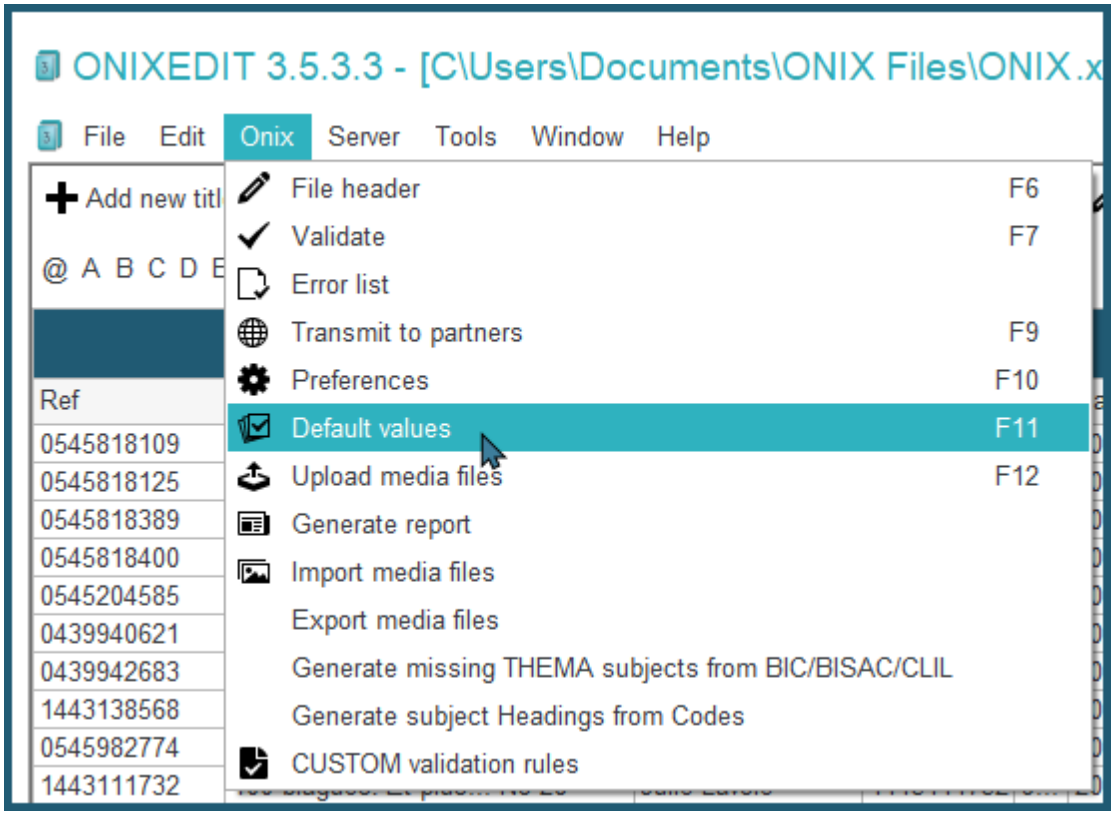

The **ONIXEDIT** validation engine immediately detects the problem and informs you of it, detailing the rules that have been broken as well as any invalid formats. Also, **ONIXEDIT** is provided with a retractable panel on the bottom of the screen, presenting the summary of errors on a title:

A simple double-click on an error positions you directly on the problem field. You can also use a positioning function directing you to the next error so you can correct errors rapidly. Producing conforming ONIX files has never been so easy!

## Specialized data entry tools

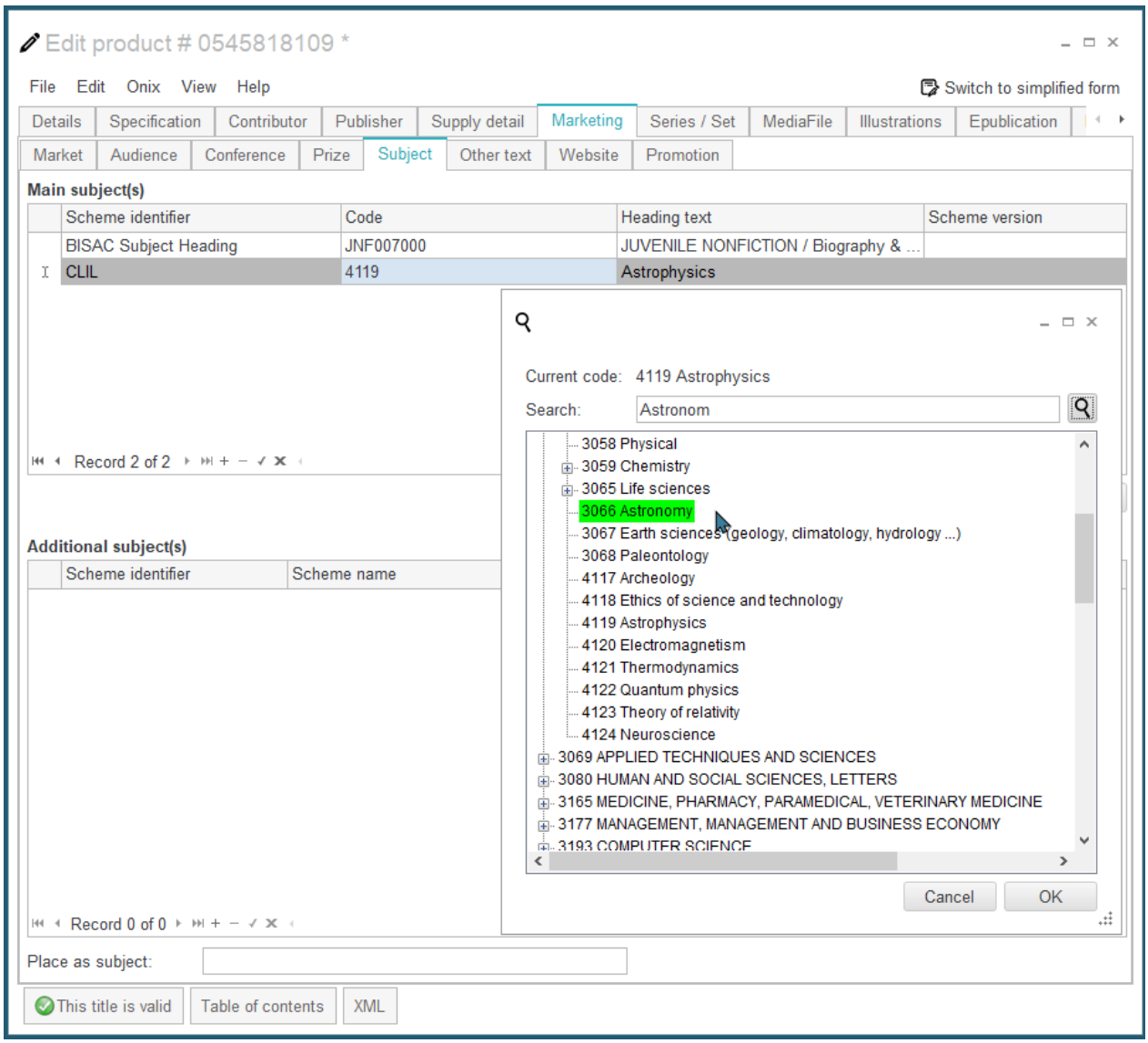
**ONIXEDIT** saves you time!

With the default values template, define a model title record with all the data defined according to your needs. Then, every title that you add will automatically input all these values:

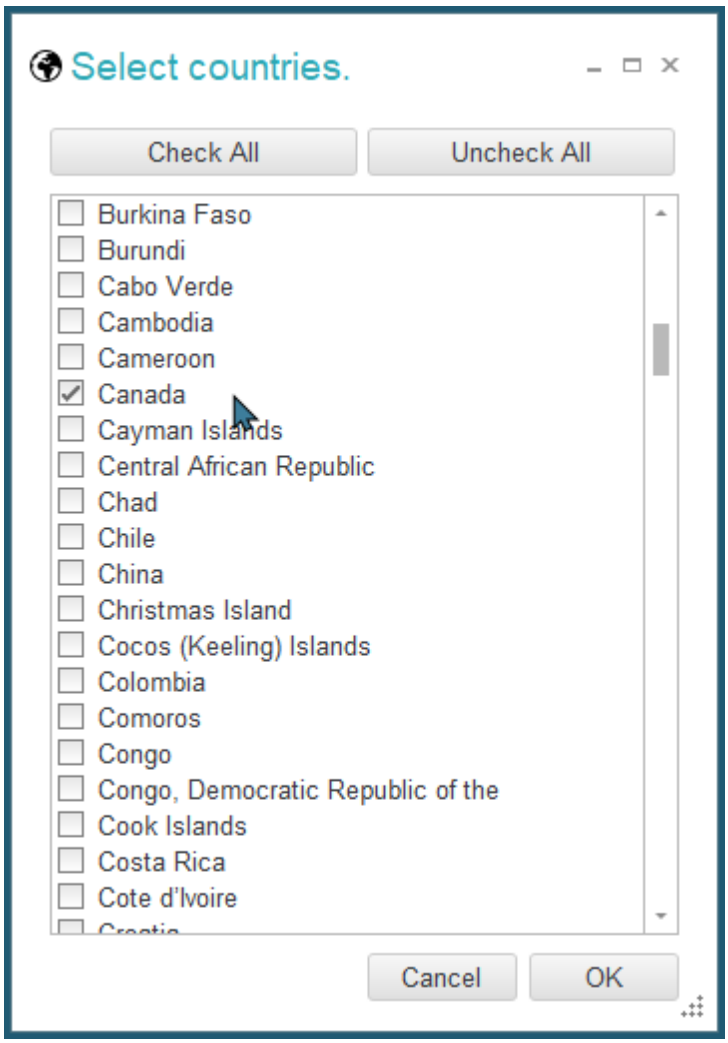



With the identifier assistant, you can validate your EAN, ISBN-10 and ISBN-13 at the time of data entry and make the conversion automatically.

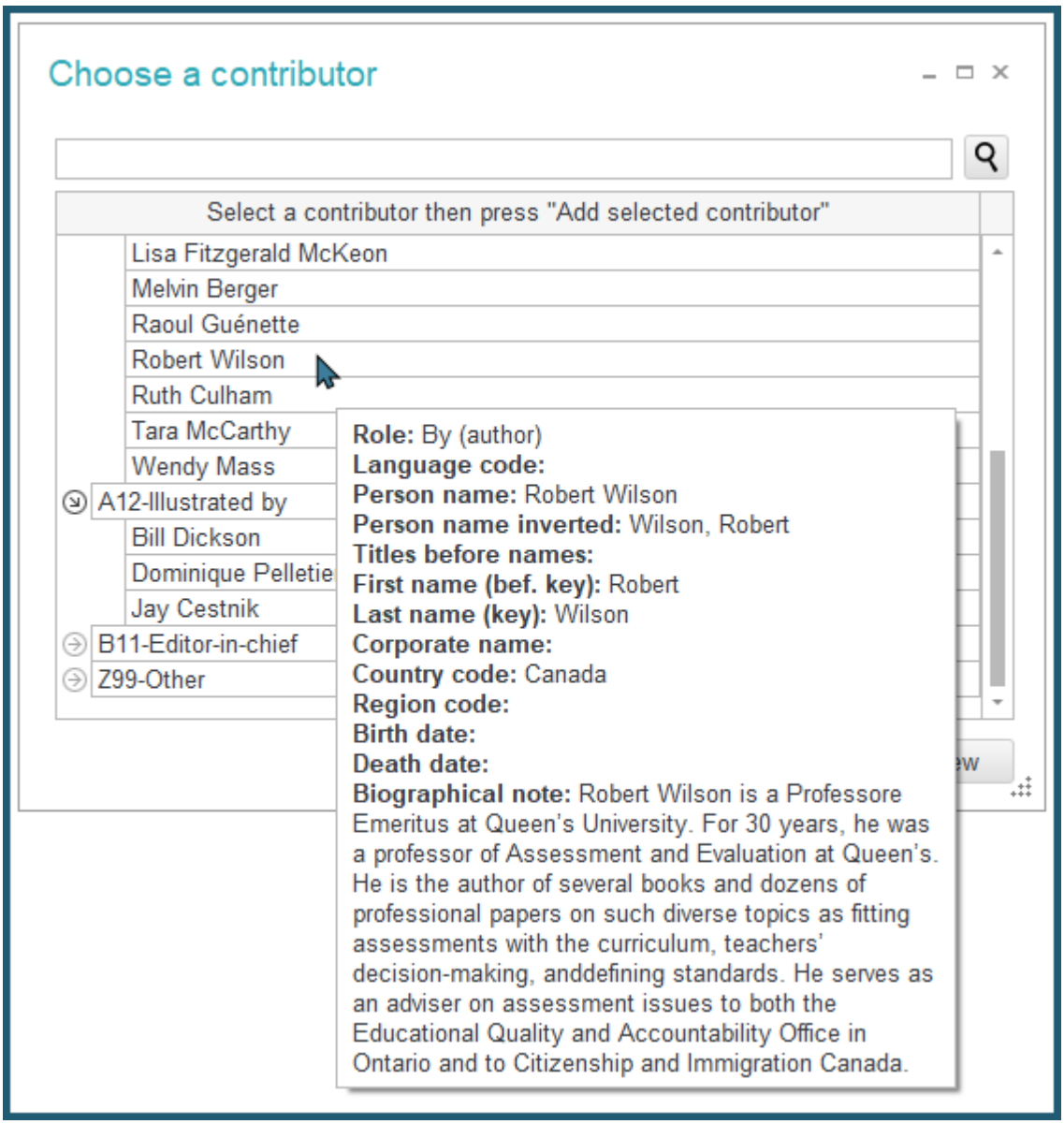
With drop-down menus for authorized values, you will be sure to have exact ONIX codes:



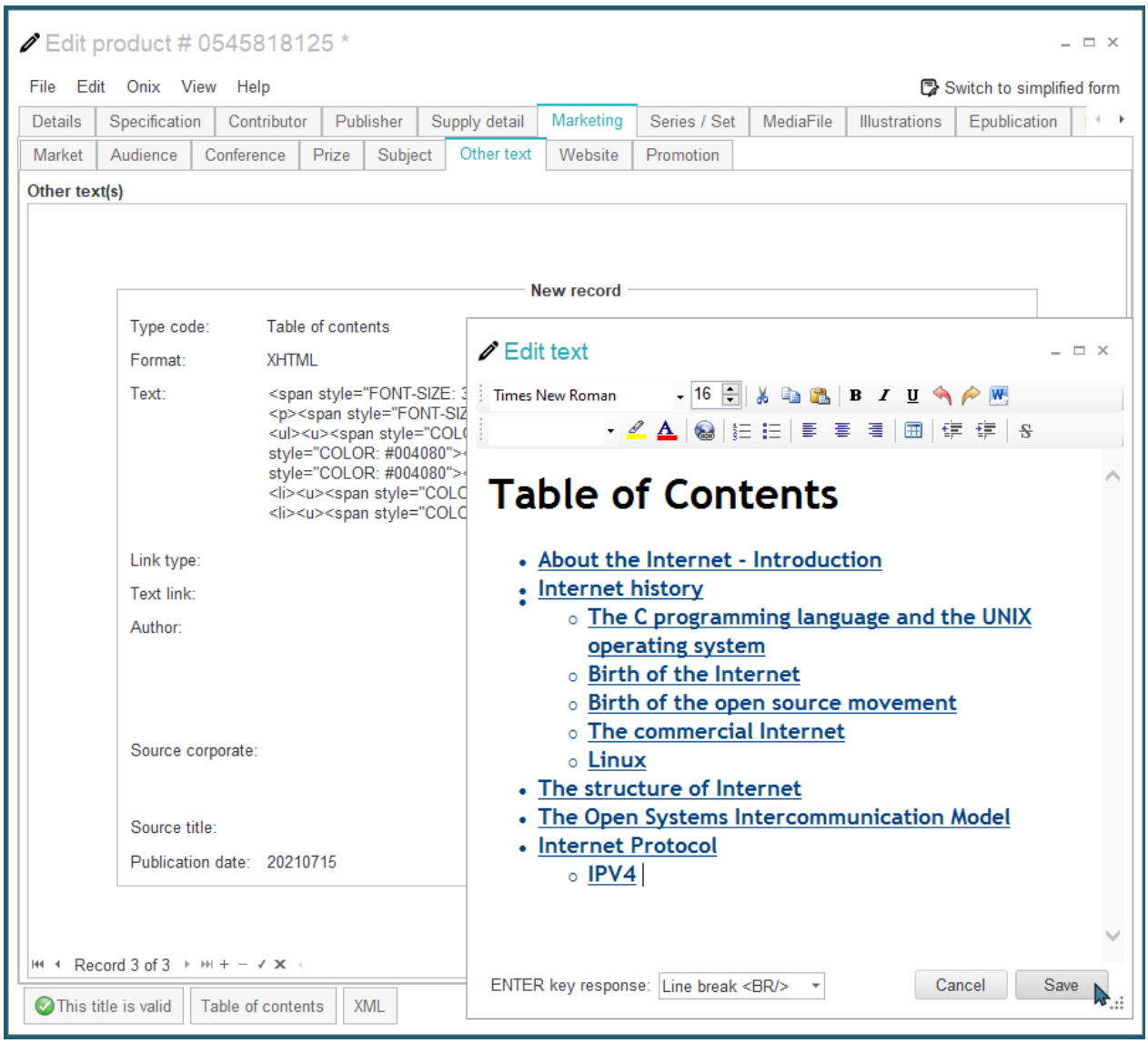

Or you can select the country or countries you deal with using the country and region selector dialogue:




**ONIXEDIT** keeps a list of contributors to your ONIX file, making it possible to define them easily for each of your titles:




Thanks to our integrated XHTML editor you can present your data, exactly as you wish, at partner's websites by furnishing them precise instructions:



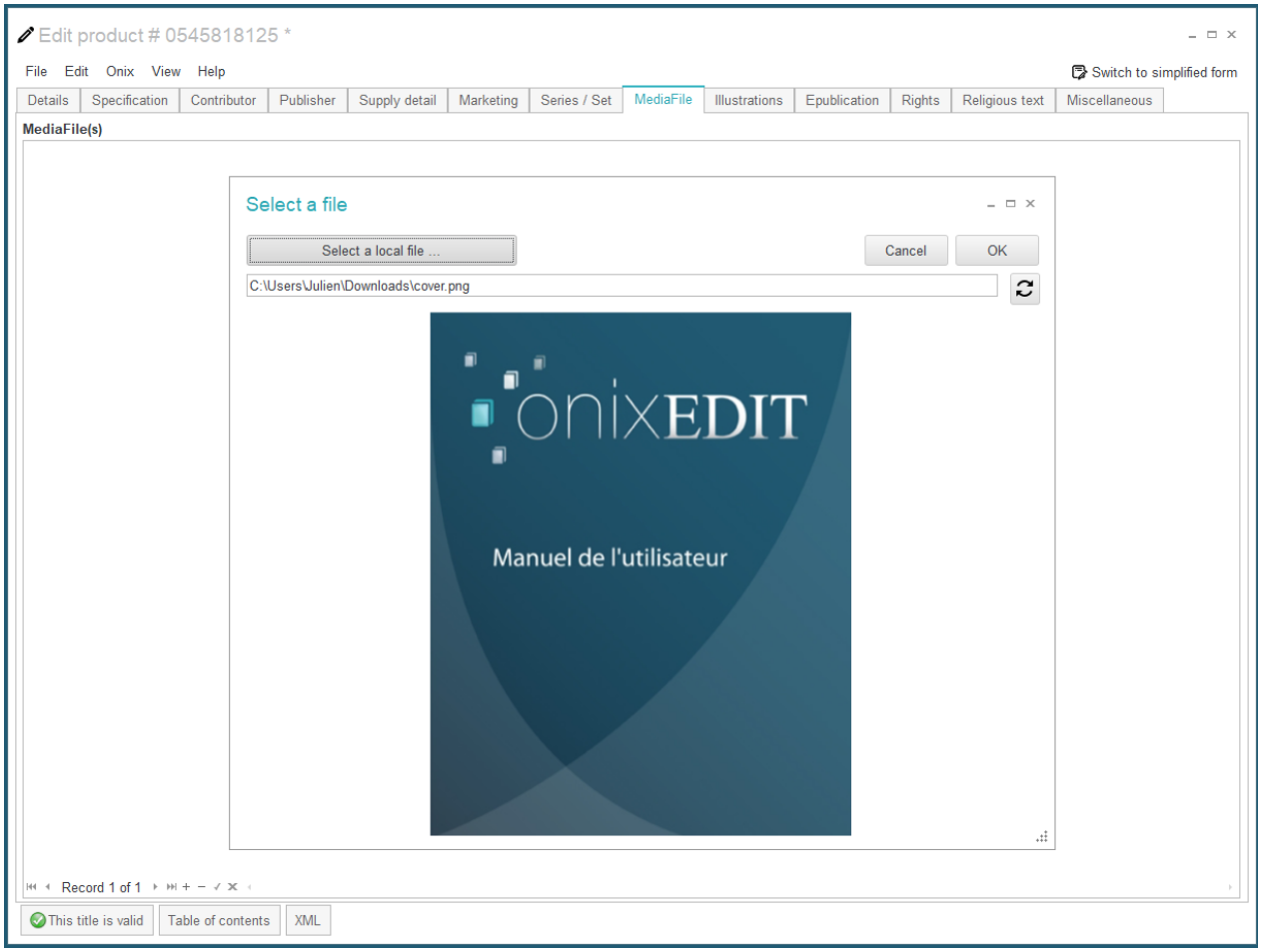

## Managing your media files

One of the principal problems in the transmission of ONIX files is without a doubt the transmission of external files which should accompany the titles: extracts from books in PDF format, pictures of the authors, the cover page, the back cover and flaps, video and audio interviews, etc.; in short, all the promotional material designed to support sales. Of course it is easy to transmit the ONIX file to your business partner by email or using an FTP program. But what becomes of these media files? How can you be certain that everything has been sent? How can you be sure that the images are the right size? Or that there aren't two files with the same name, which would lead to frustrating errors? How will your business partner be able to locate things if you send him all in one an ONIX file of a hundred titles with all the pictures, illustrations, and book extracts? Is this a problem that worries you?

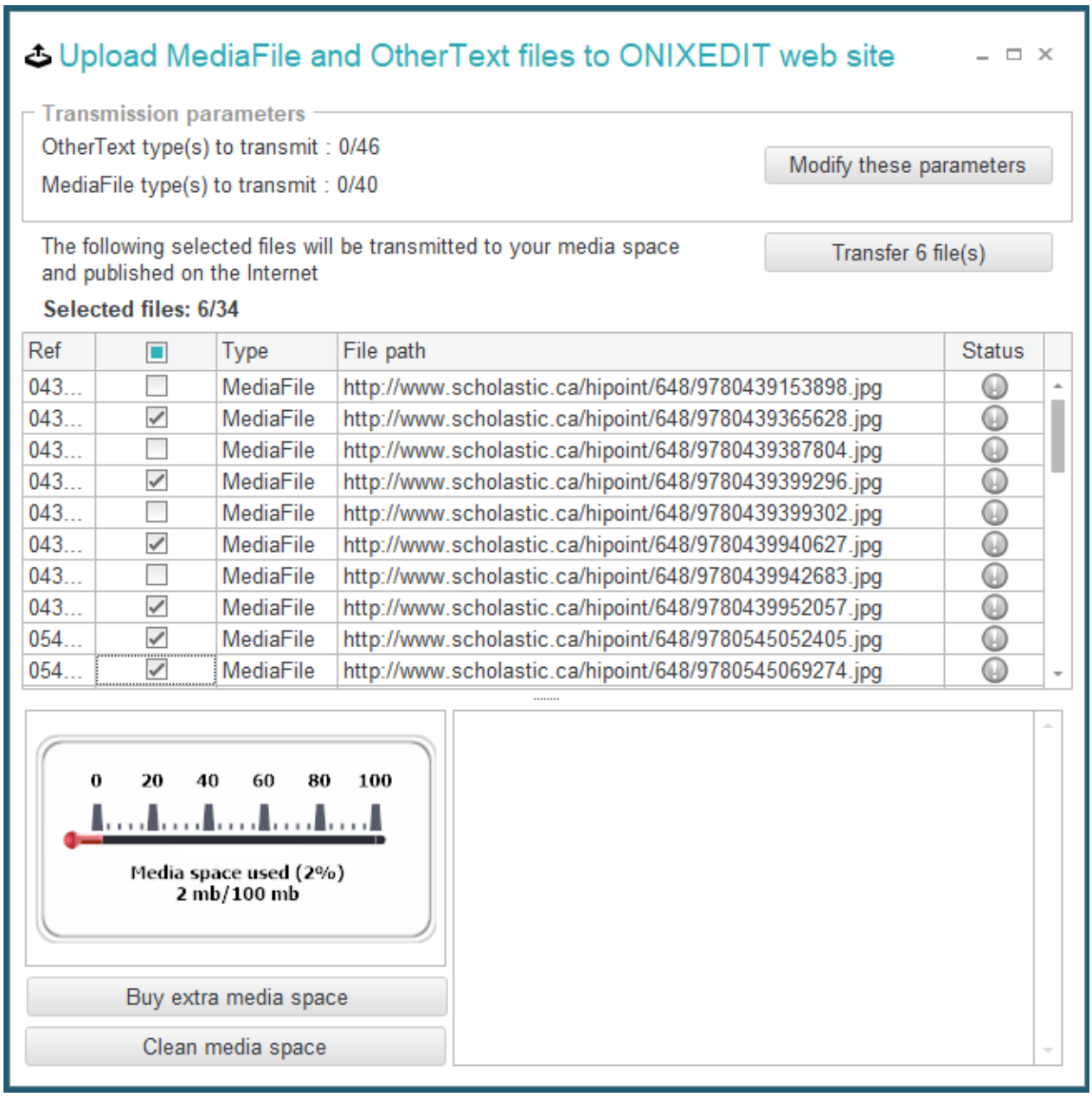
**ONIXEDIT** offers you a simple and effective solution! Each **ONIXEDIT** PRO user (optional with the regular version) has a private space on our web portal. This is your **Media Space**. In this media space, **ONIXEDIT** standardizes and classifies your media files associated with your titles, no matter from what source, and does it in two simple steps.

1- You associate the title with your media files found on your hard disk, or from a server

accessed from your computer:



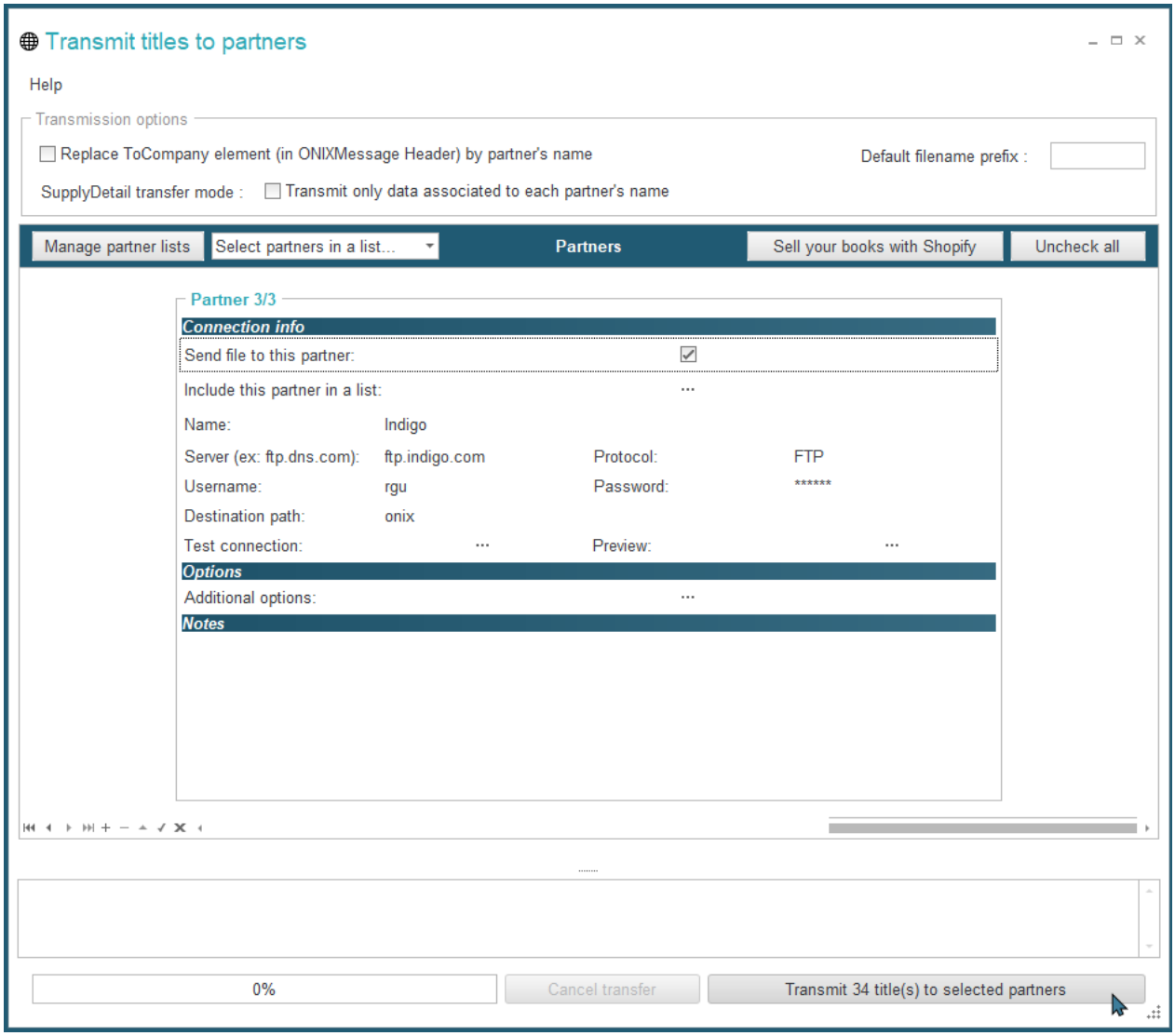
2- When you have finished the data entry for your titles and the association of the external files accompanying them, you use the **ONIXEDIT** function "**Upload Media Files**":




Once transferred, local references to your media files are automatically transformed to URL references, pointing to a corresponding object in your private media space. This space is a kind of website which is reserved for you, and which has only one function: making your standardized media files available on the Internet. Your trading partners, who receive your ONIX files, will be able to easily and rapidly recover these files directly from your media space which is accessible twenty-four hours a day. Further, you don't even have to worry about the name given to your media files. There is no danger that two files having the same name could be mixed because the files are adopted by the system and if necessary a unique name will be given to each one. A simple solution which will save time for you and your partners**!**

## Automatic transmission to your partners

5:00 PM Friday, end of the day. Your new releases need to get to your trading partners before 6:00 PM in order to be available on their website this weekend. No worry. You have **ONIXEDIT** which will take care of things thanks to its automatic FTP transmission function:

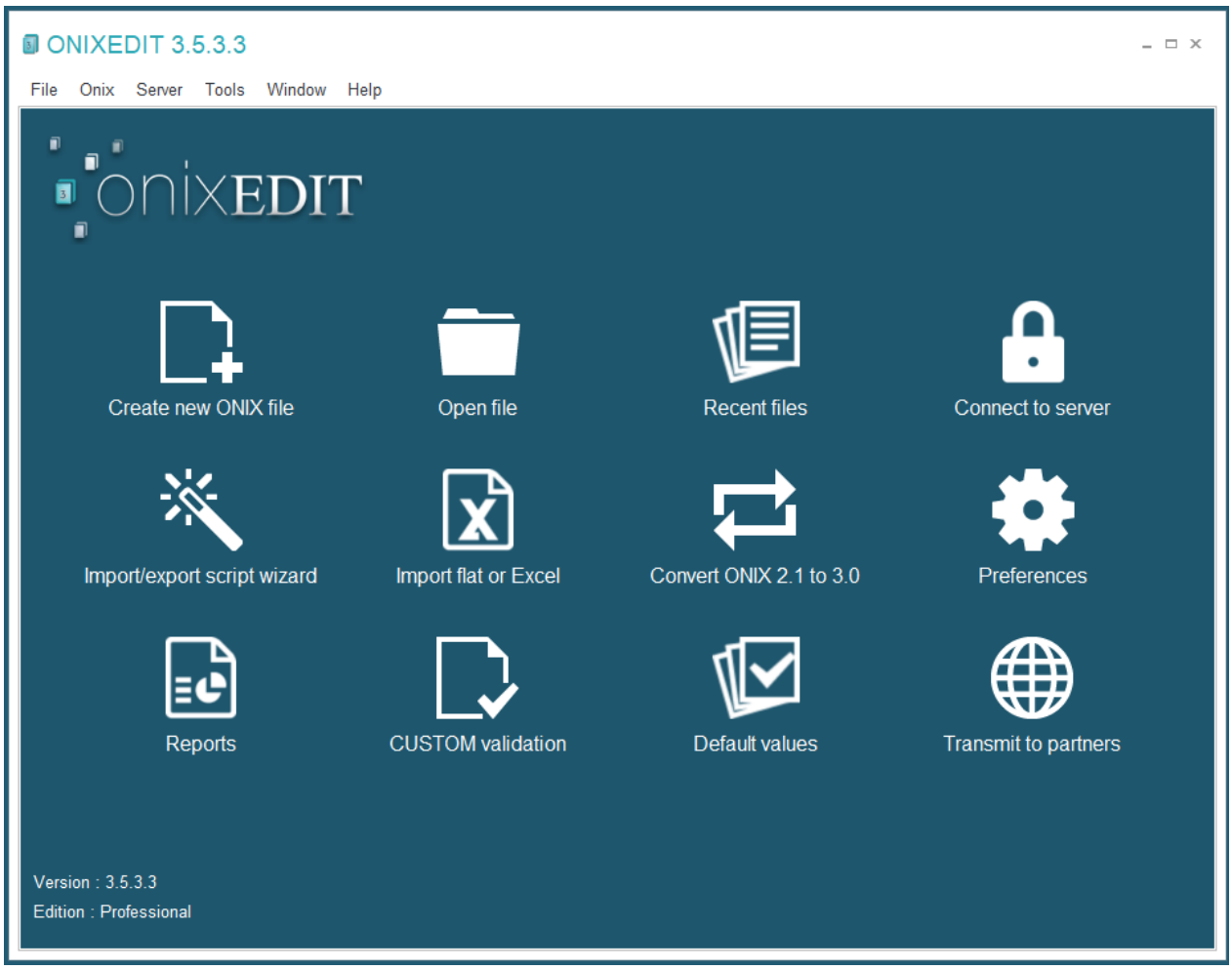



The FTP account which each of your partners has provided for you is defined in the **ONIXEDIT** program, along with the preferred ONIX format for that particular partner. You just select the titles to send and click on the Send button. All the rest is done automatically. Simple and efficient!

# Tour

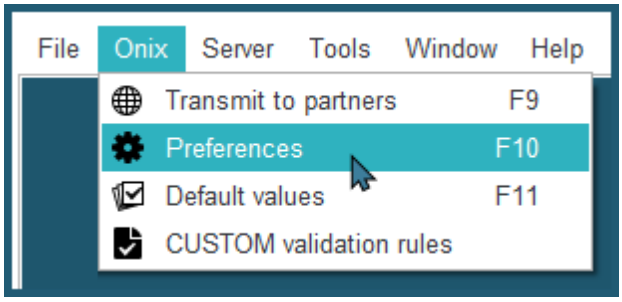
## My first ONIX file

When **ONIXEDIT** is launched, or when there is no opened document, the Start Screen showing the most common operations appears:

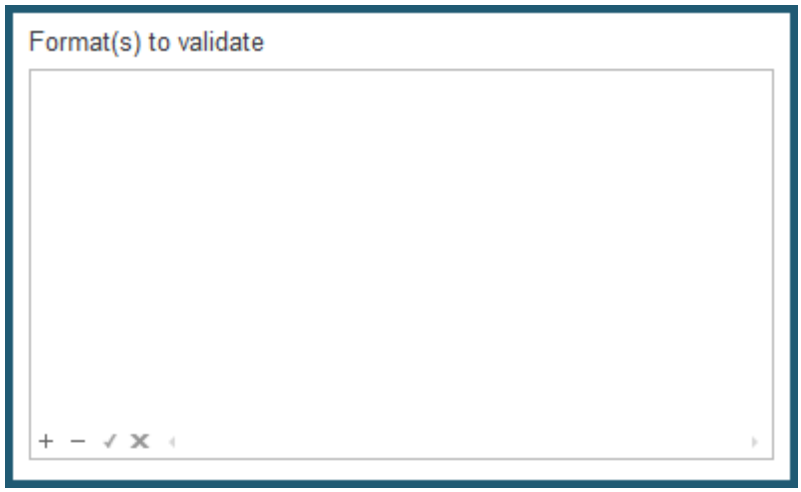



Click on the first action "Create new ONIX file". A dialog allowing you to select the ONIX version (ONIX 2.1 or ONIX 3.0) will pop up. Once the version is selected, a window with a new ONIX document is created.

First, we will check the preferences configuration. To do this, use the **Preferences** function from the **ONIX** menu or by pressing **F10**:



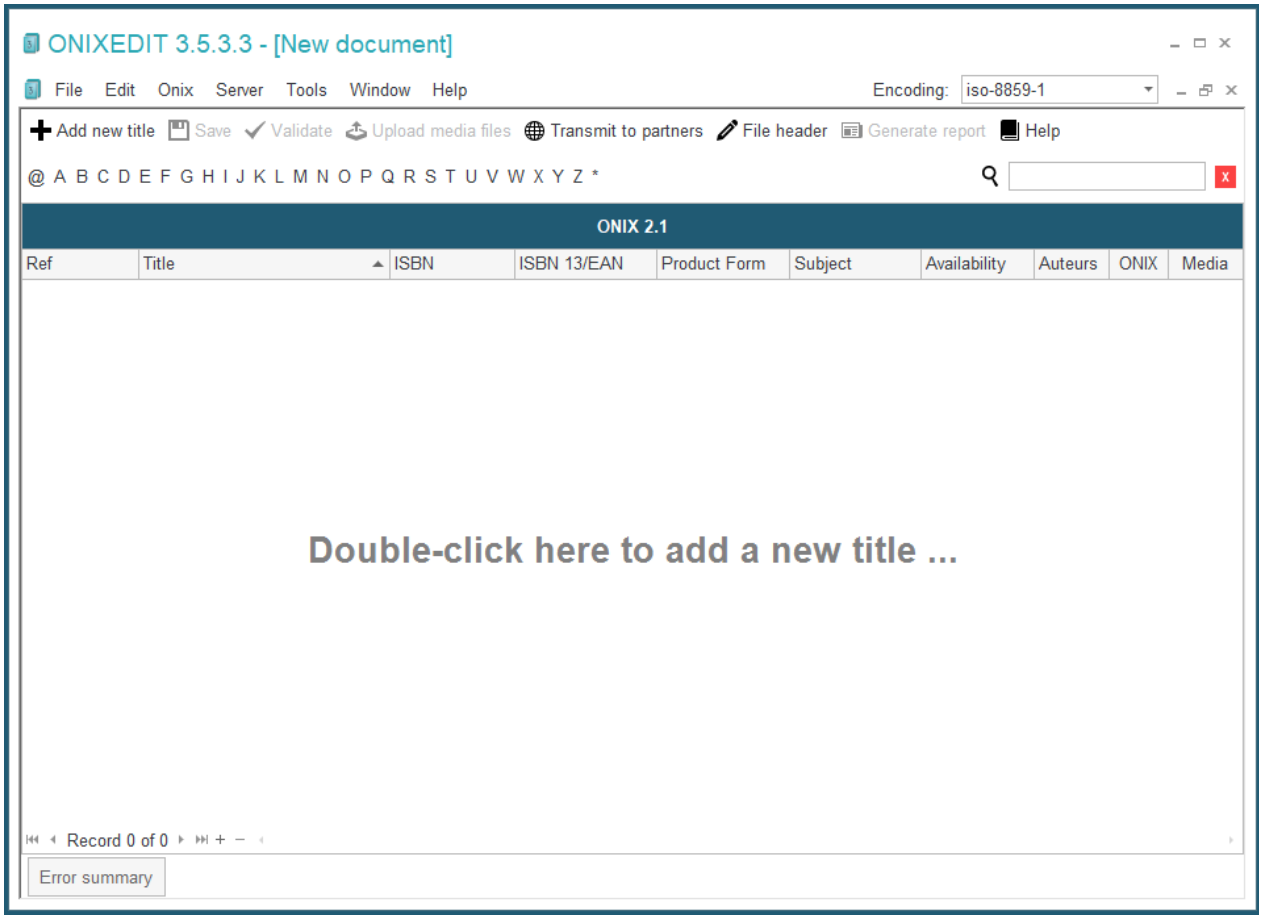
The Preferences dialogue appears. Go to **ONIX validation** tab and verify that the list of **Formats to validate** is empty. To do this, select in turn each format, then click on the − button at the bottom of the list:



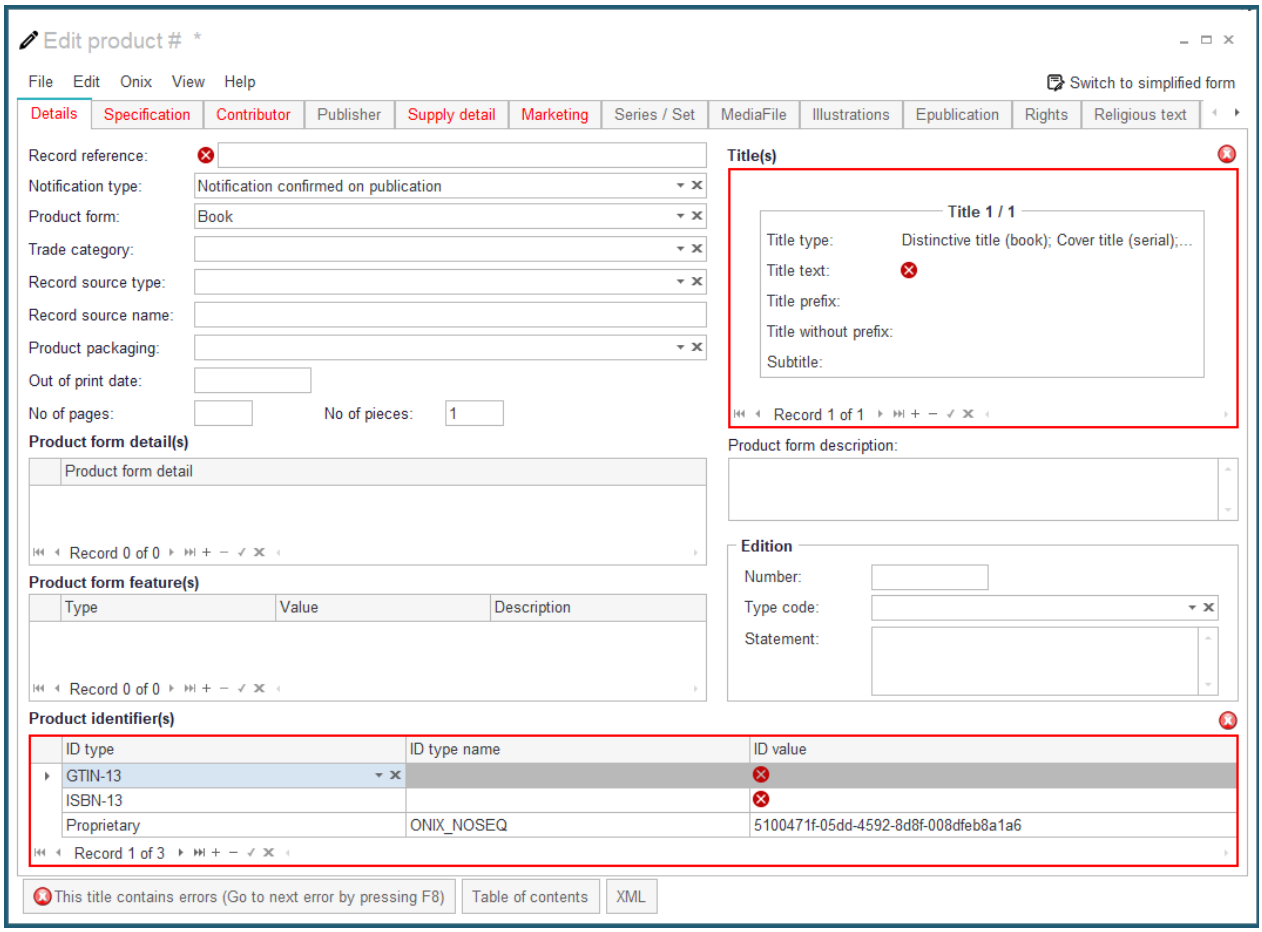

By removing the special formats, you set **ONIXEDIT** to verify only the minimal ONIX format, that is, the basic elements required to make a valid ONIX document in its simplest form.

Finally, save your preferences.

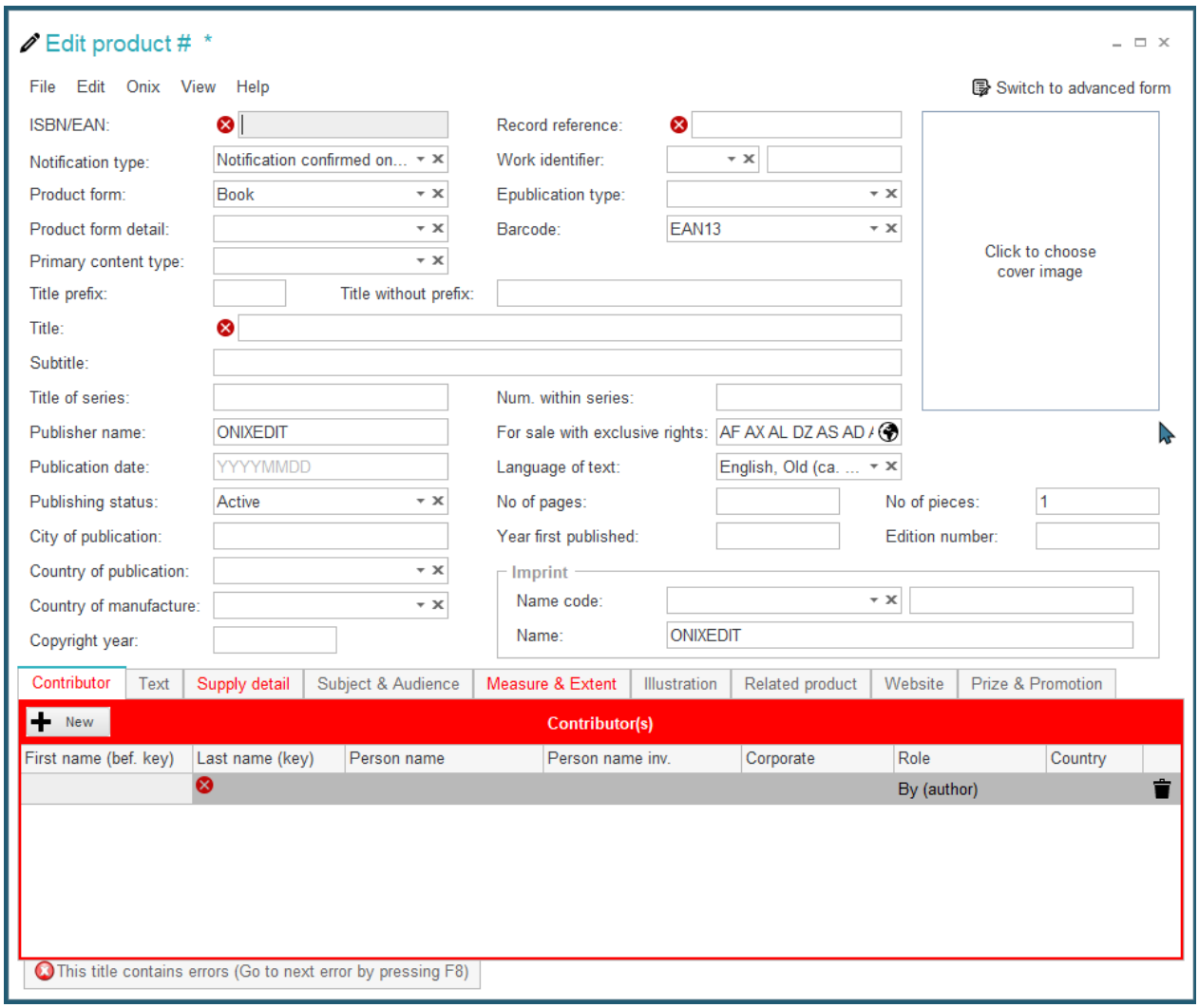
Back at the main **ONIXEDIT** list, double-click in the centre of the list or on the + button at the bottom of the list to add a new ONIX title:



A new window for an ONIX title will open:

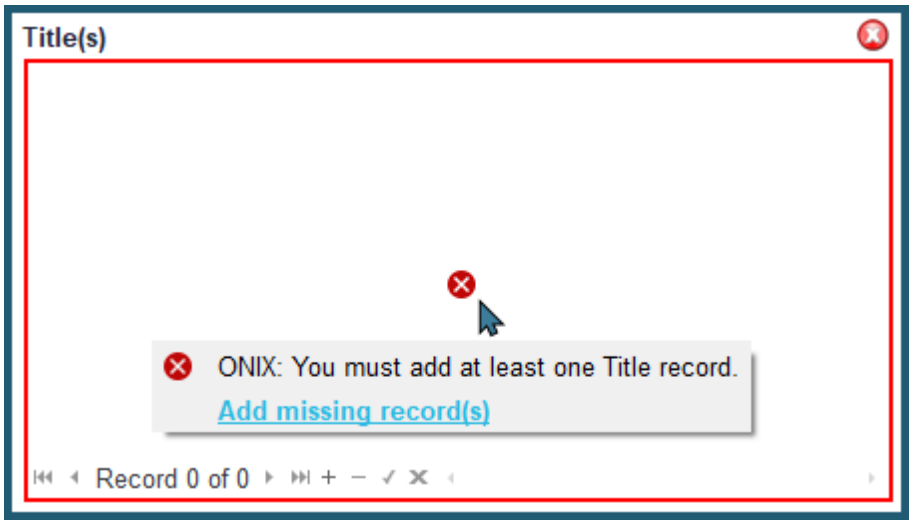



If you have the simplified form, the screen will look like this:



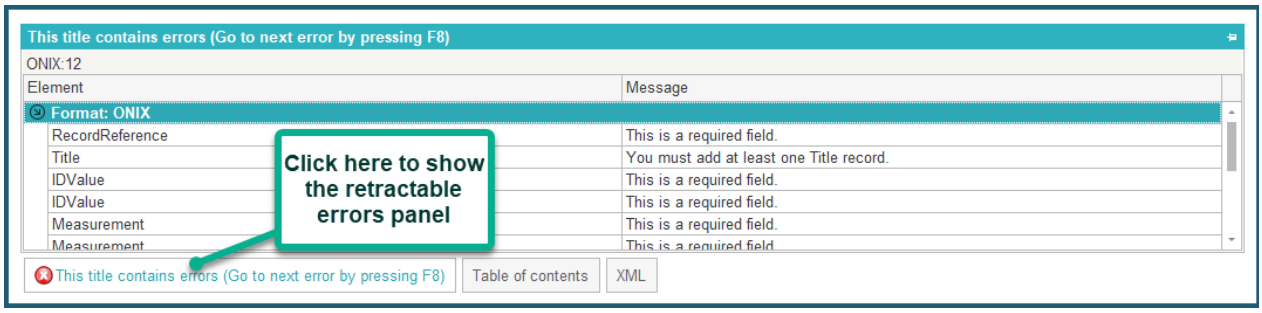

Usage of the Simplified Form is the same as the Advanced Form referred in the following example.

To make up a valid ONIX record, certain fields are required. Others require certain particular values. There are also some fields which are dependent on others. **ONIXEDIT** will guide you during the process of editing a title by showing in red any sections which do not conform to ONIX rules. By positioning your cursor above a red marker, you will see a description of the error accompanied in some cases, by a clickable action link to automatically fix the problem:

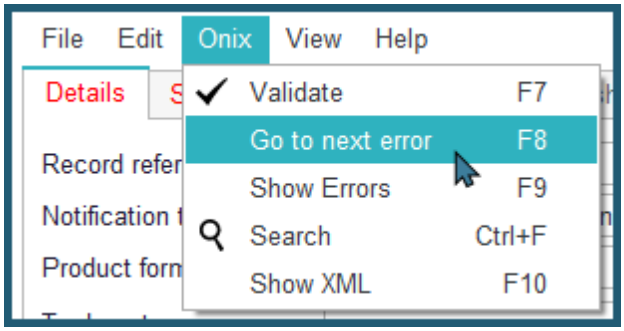



Try clicking on the "Add missing record(s)" link to define a new title to your book.

Also, at the bottom of the window, clicking on the “Errors” tab allows you to display the error panel, showing all the current errors:

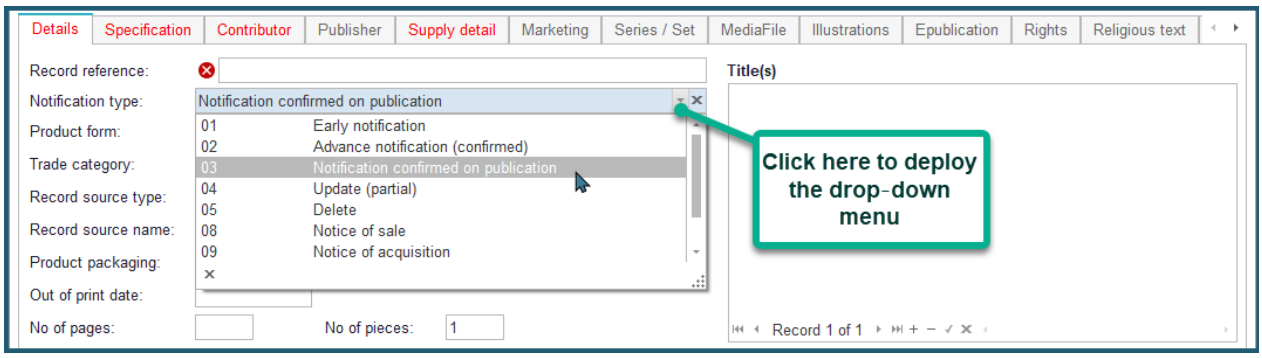



To go to the next field containing an error, you can either double-click a specific error on the panel, activate the **Go to Next Error** function of the ONIX menu, or simply press **F8**:




Continue to press the **F8** key and enter the required values until the message indicating no more errors appears.

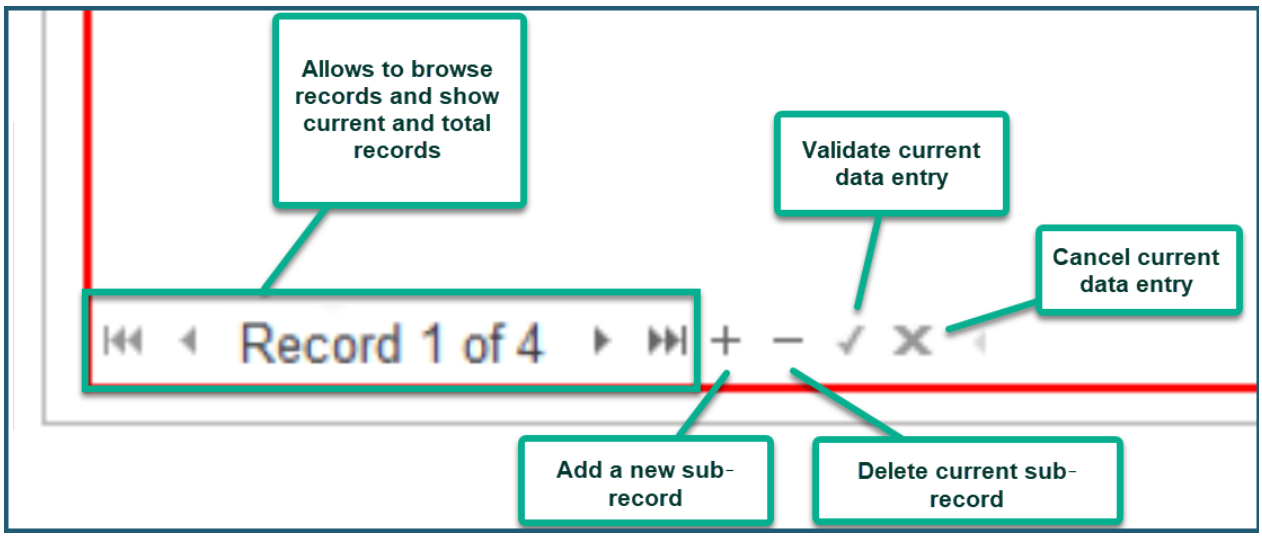
Certain fields have drop-down menus. This is the case for the “Notification Type” field:




You can start by typing the first letters of the value you want and **ONIXEDIT** will automatically suggest values starting with those letters. Or you may also simply click on the arrow at the right of the drop-down menu to display the complete list of values and select the one that you wish. A drop-down menu may also be deployed using the key combination **ALT-↓**

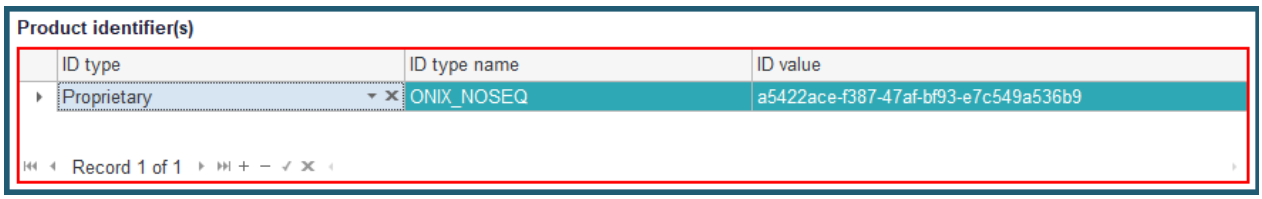
To erase an incorrect value in a drop-down menu, click on the X on the right of the menu.

In a Title record, you will often find **sub-lists**. These lists allow the capture of several sub-records. For example, there may be several identifiers for the same title. A sub-list always includes a navigation control inside the lower left corner of the list. This navigation control allows you to work on the list as shown in the following figure:



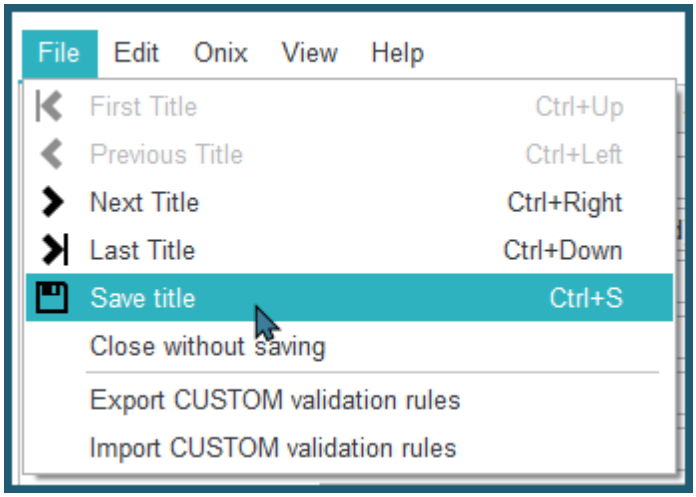

For the list of product identifiers, you will notice that at the time of data entry of an EAN, ISBN-10, or ISBN-13, the system verifies the validity of the code, and if it is valid, automatically converts it to the other identifier. Thus, if for example you insert a valid EAN, the ISBN-10 and ISBN-13 will be completed for you automatically. The corresponding sub-records must be created first.

You will also notice that an identifier of ID Type “Proprietary” with the name “ONIX_NOSEQ” is automatically added for each new title:



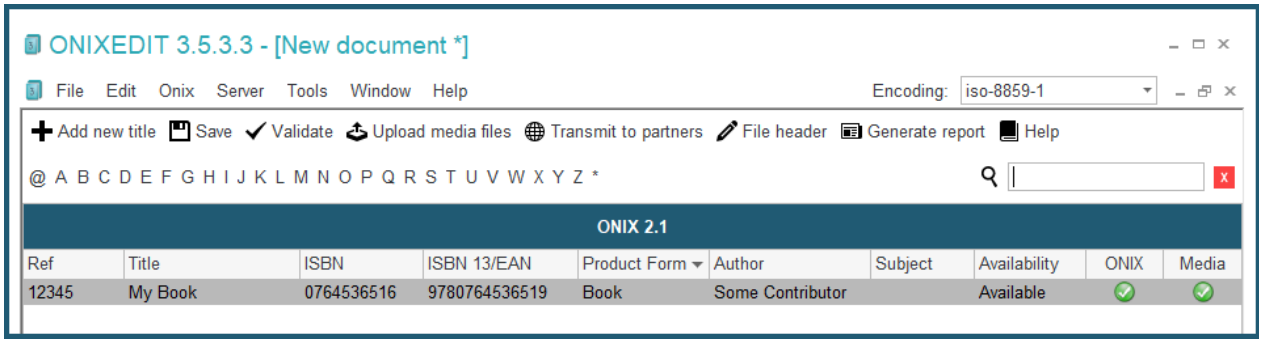

This is a sequential number which **ONIXEDIT** assigns to each of your titles. You cannot alter or remove this identifier.

When there are no more errors and you have entered all the information required, you can then save your title. To do this, you simply use the **Save title** function on the **File** menu, or **CTRL-S**:




If you close the window before saving your title, an alert will warn you to save before closing.

Then close the editing window for your new title. Your title now appears in the main list and a green check mark under the ONIX column indicates that your title is valid according to ONIX norms:



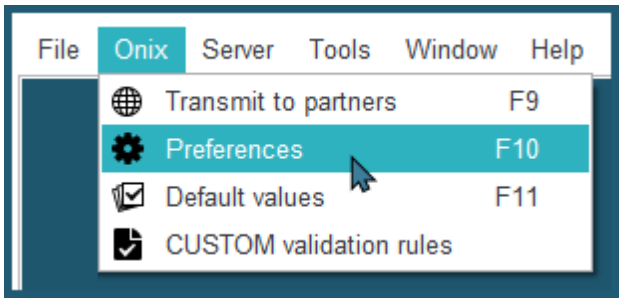

The only thing left to do is to save the file using the **Save** function of the **File** menu, or **CTRL-S**. A file save dialogue will then appear. Choose the location where you want to save your file and give it a name.

You have just created your first standard ONIX file!

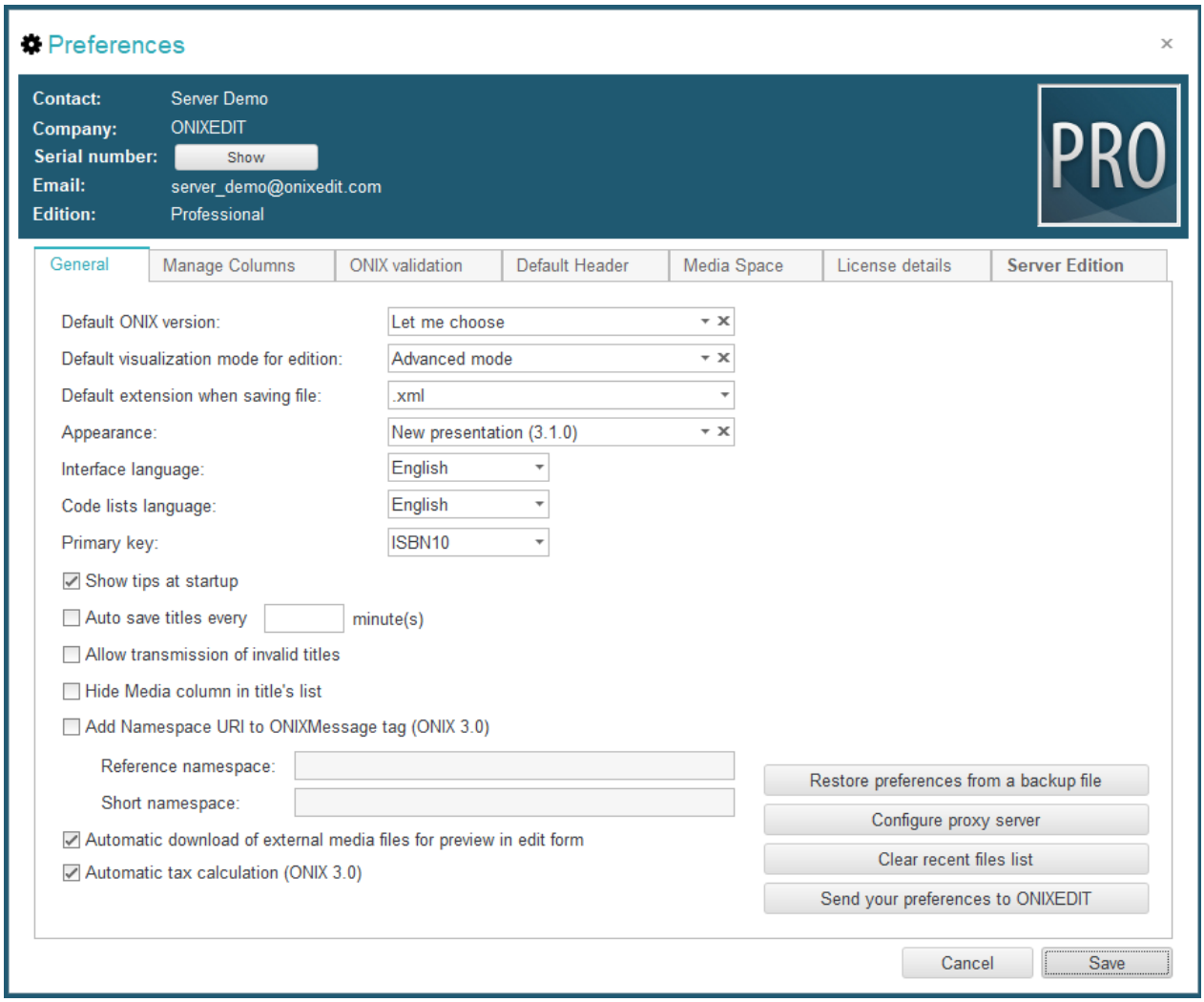
If you want to modify the title which you have just created, you only have to click on the record in the main list to make the editing window for that title appear.

## Preferences

The Preferences dialog of **ONIXEDIT** is reached through the **Onix / Preferences** menu:




The Preferences dialog will then appear:

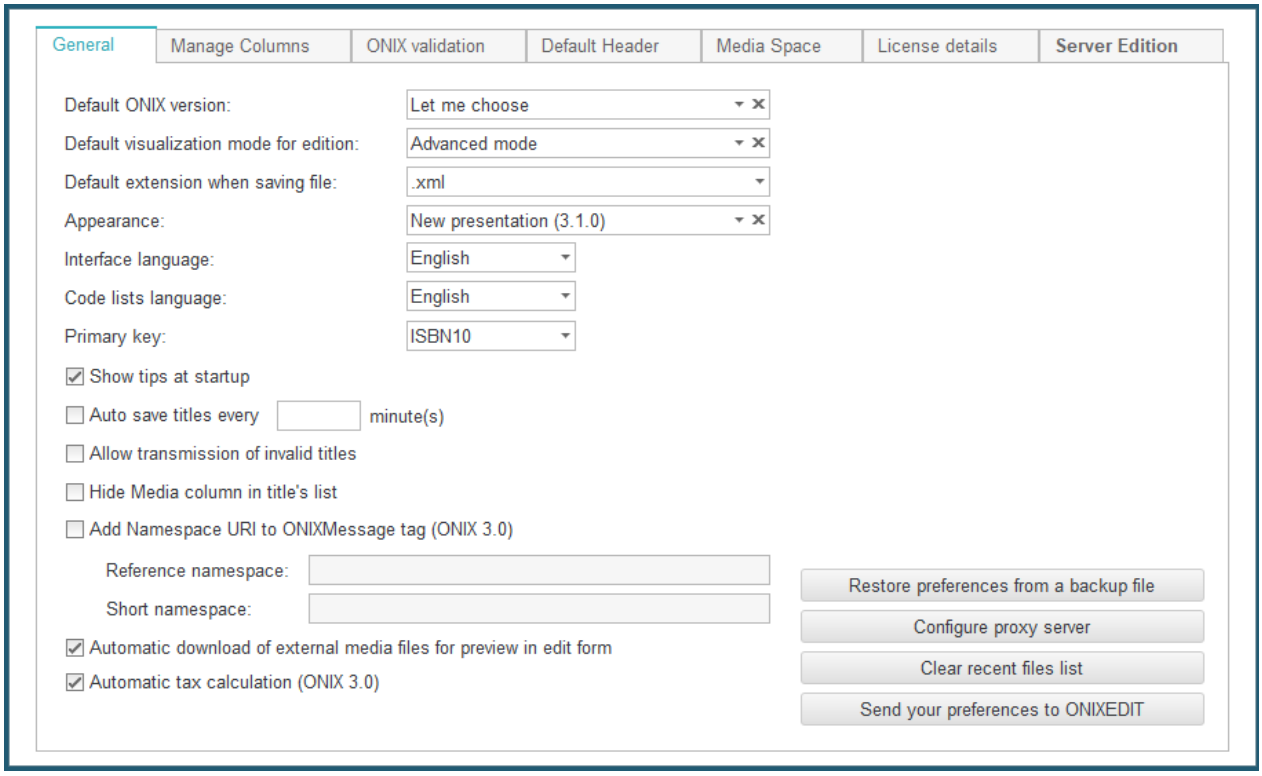



In the upper right corner of the dialogue you will see the label PRO if you have bought the

professional version of **ONIXEDIT** or **SE**, if you bought the Server Edition . On the left of this label, you will see the personal information that you gave when you registered on the website www.onixedit.com as well as your email and your registration number. This information may not be modified.

Below, you will see five tabs: General, Manage Columns, ONIX validation, Default Header and License details. If you bought Pro version or the **Media Space** option, you will also find a Media Space tab, and if you bought the Server Edition, another tab allowing to define users and catalogues will be present.

## General tab




Using the General tab, you can set the following options:

- **Default ONIX version:** Determines the version that will be applied by default when creating ONIX files.
- **Default visualization mode for edition:** If you bought Pro version or the advanced form option, this option will allow you to choose which form to display first when editing a title.
- **Default extension when saving files:** This drop-down list allows you to set the extension for your ONIX files among ".xml", ".onx" and ".onix".
- **Appearance:** This drop-down list allows you to choose among two different interface styles.
- **Interface and code lists language:** For the ONIX code lists and the **ONIXEDIT** interface, you can choose between English, French, Spanish and Portuguese. If you select French for the interface, you have the additional choice **Translate ONIX**

**fields**. If this option is checked, all the labels for ONIX fields will be translated into French. If not, they will remain in the original English.

- **Primary key:** Allows you to define the field that will be used to compare titles when copying from one ONIX file to another. The options are: ONIX_NOSEQ, ISBN10, ISBN13 or EAN.

- **Show tips at startup:** If this option is activated, **ONIXEDIT** will show usage tips at startup.

- **Auto save titles every n minute(s)**: This option allows you to define an automatic save of your titles at specific intervals.

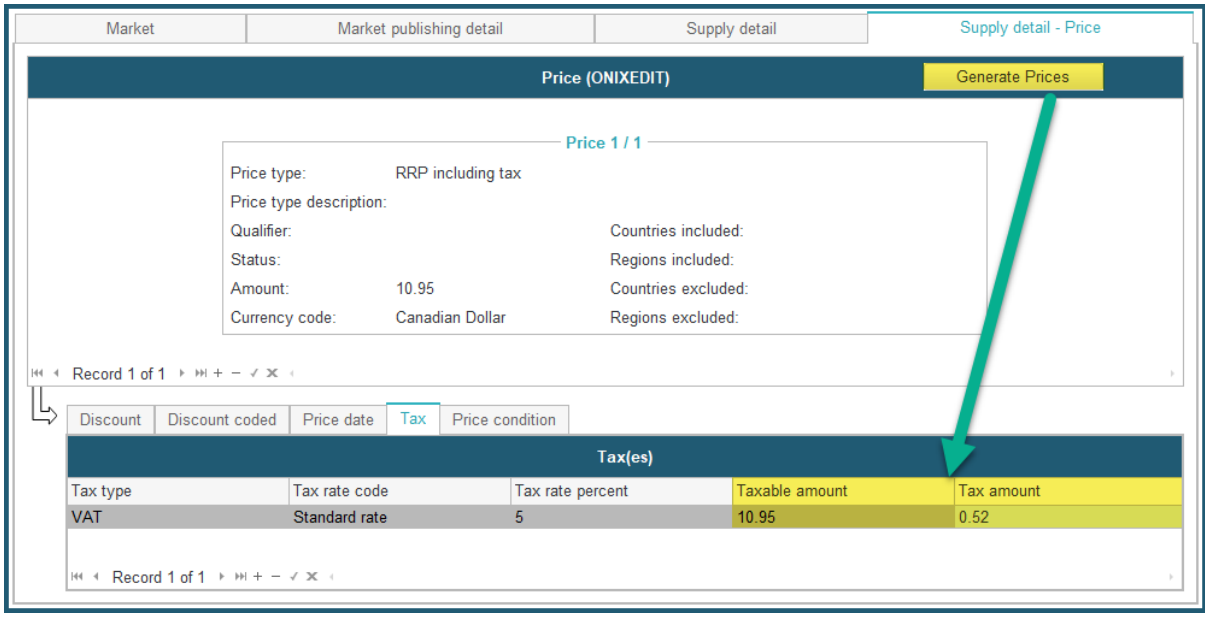
- **Allow transmission of invalid titles:** If this option is activated, **ONIXEDIT** will allow you to transmit invalid ONIX records with the Transmit to partners function.

- **Hide Media column in title's list:** If this option is activated, the Media column showing titles having media files that must be uploaded to the Media Space will be hidden. See Media Space section for details.

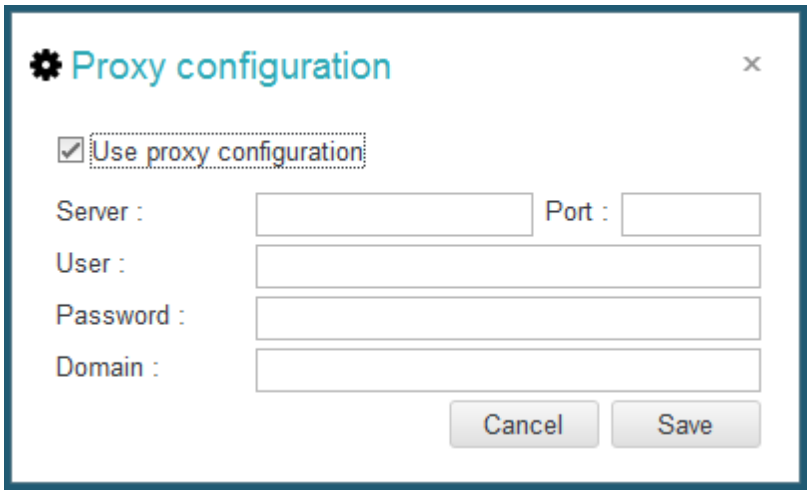
- **Add Namespace URI to ONIXMessage Tag (ONIX 3.0):** If you activate that option, you will be able to define Namespace attribute that will be added to the ONIXMessage tag at the top of your ONIX 3.0 files. This is required by some organizations for validation purpose. See ONIX 3.0 documentation at EDItEUR for more information.

- **Automatic download of external media files for preview in edit form:** This option is activated by default. It allows ONIXEDIT to automatically show media files such as cover image when you edit a title. When not activated, you will have to double click on the media file to let ONIXEDIT download it and see its content. For performance reasons, a media file is not automatically downloaded if its size is higher than 1 MB.

- **Automatic tax calculation (ONIX 3.0):** If you activate this option, ONIXEDIT will add a button name "Generate Prices" in the "Supply Detail - Price" section of the advanced form for ONIX 3.0 titles. You can then define a price with its tax rate percent and ONIXEDIT will automatically calculate the corresponding taxable amount and tax amount:



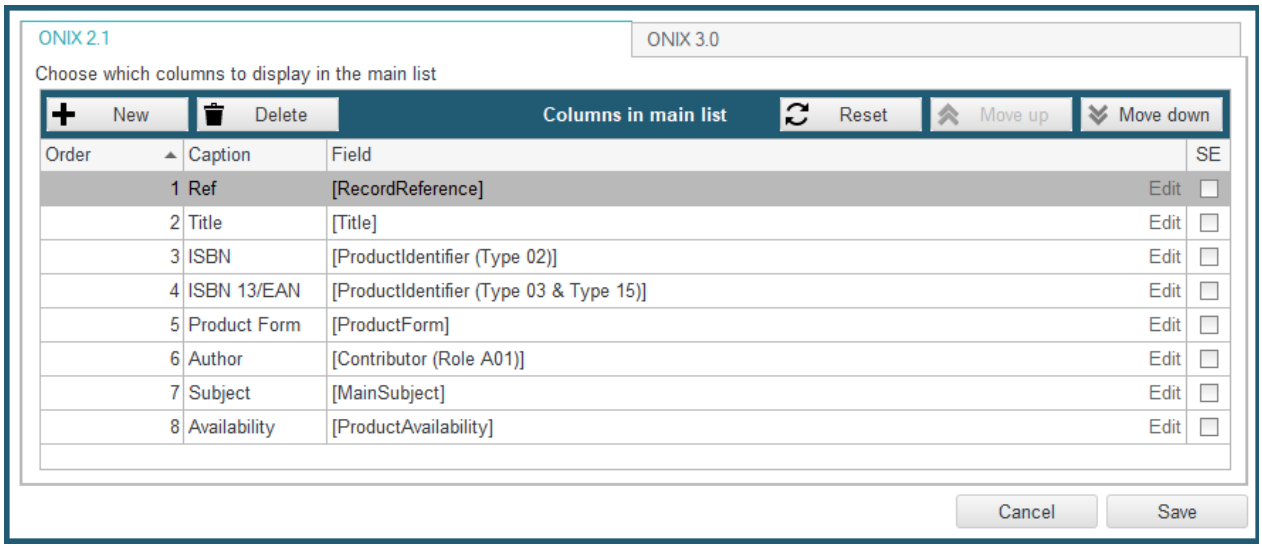

- **Configure proxy server button:** If your organization provides Internet access through a Proxy Server, you can use that button to configure the proxy settings:



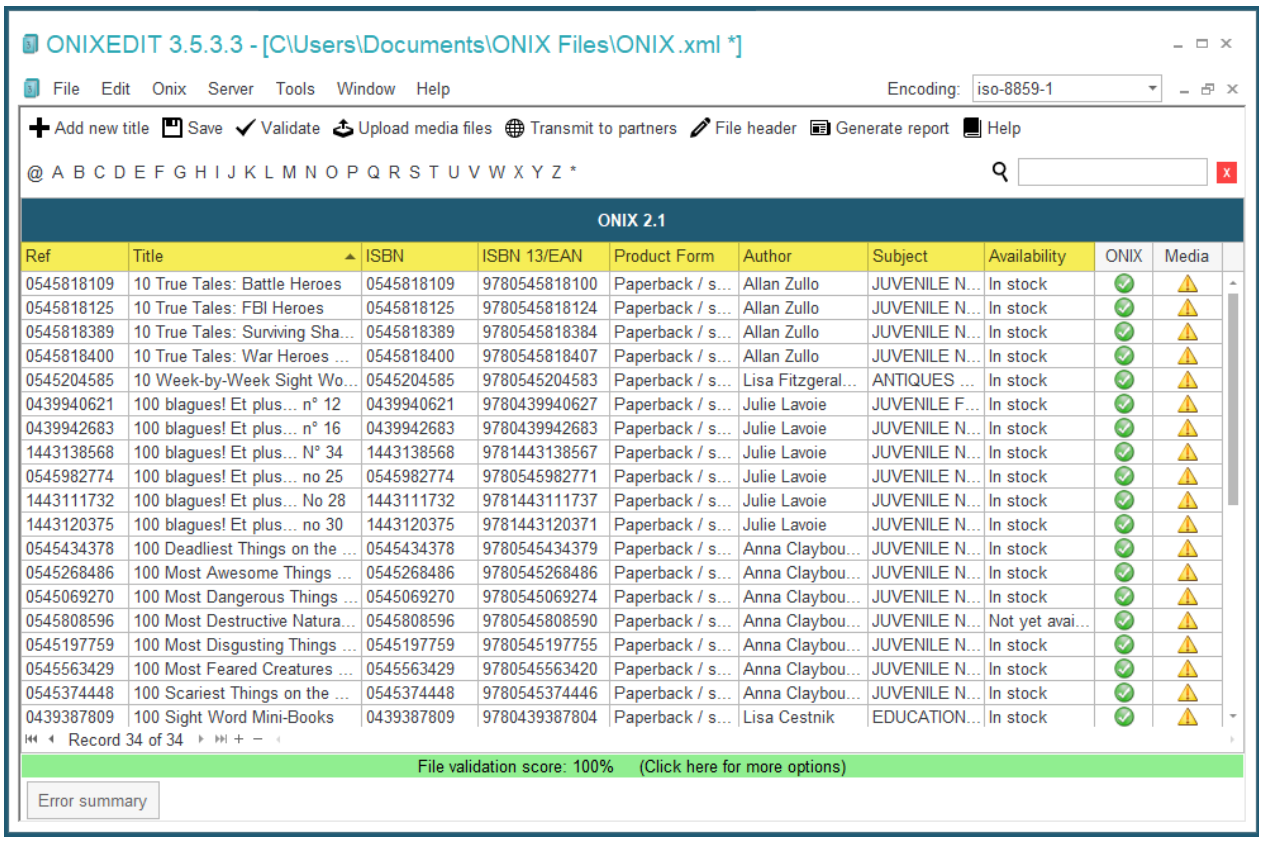

- **Clear recent file list button:** This action will clear the "File/Recent files" menu presenting the most recent ONIX files that you opened.

## Manage Columns tab

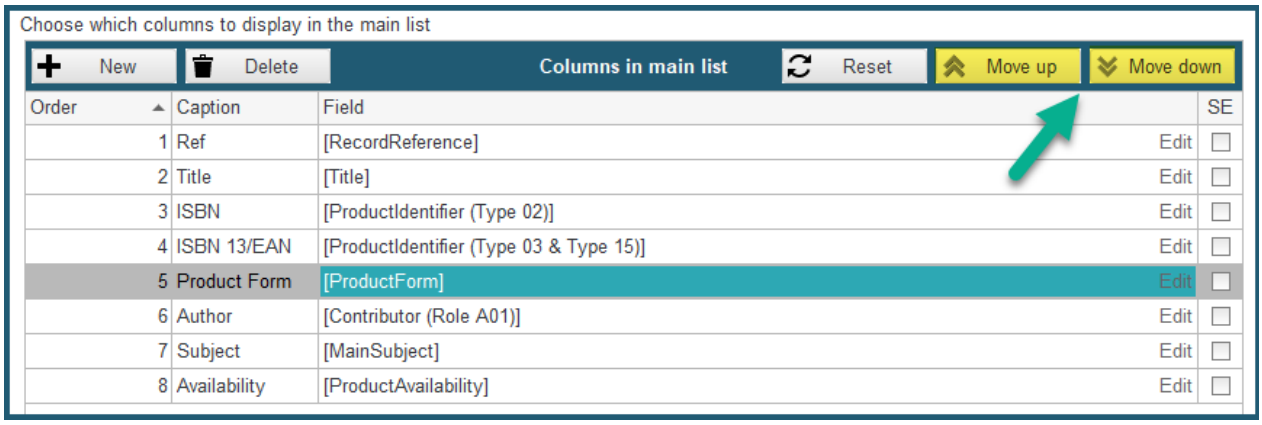
The Manage Columns tab allows you to define which fields to show in your main title list when you open an ONIX file. You can set different columns for each ONIX standard (2.1 and 3.0). By default, the following columns are defined:



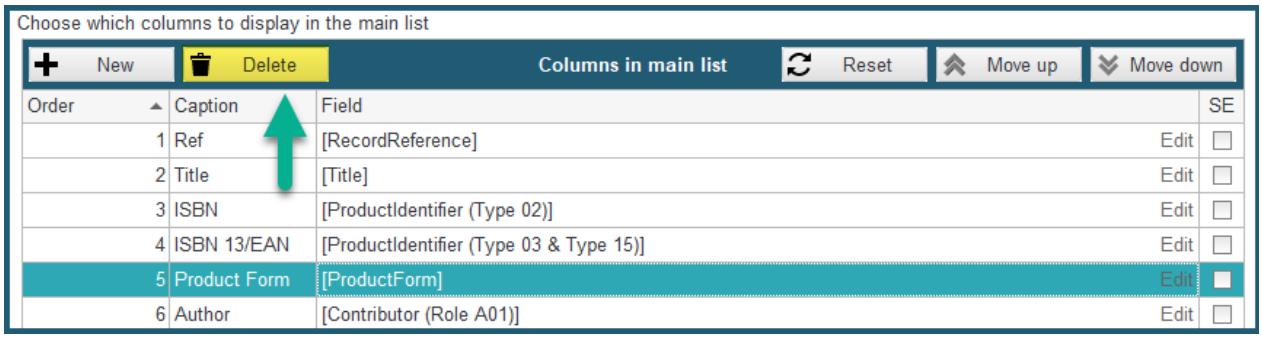

If you open an ONIX file with the above configuration of columns, this is what you will see:



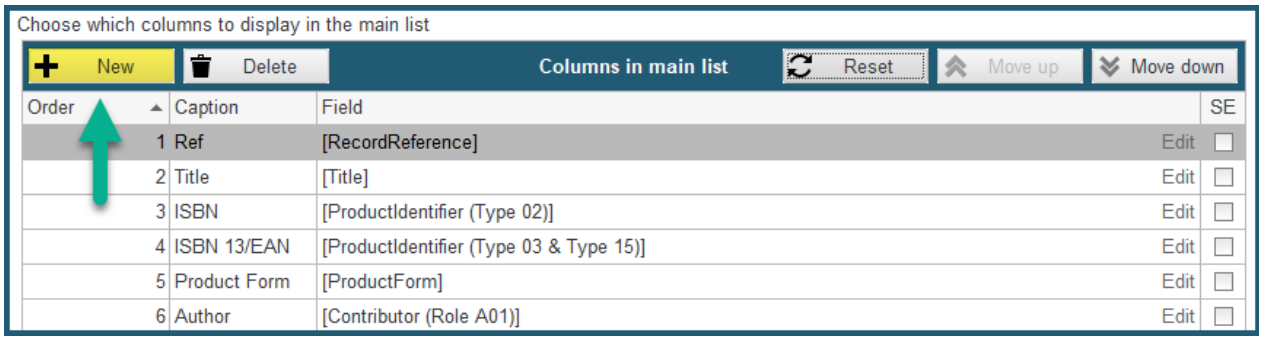

You can change the presentation order of those columns using the Move Up and Move Down buttons:



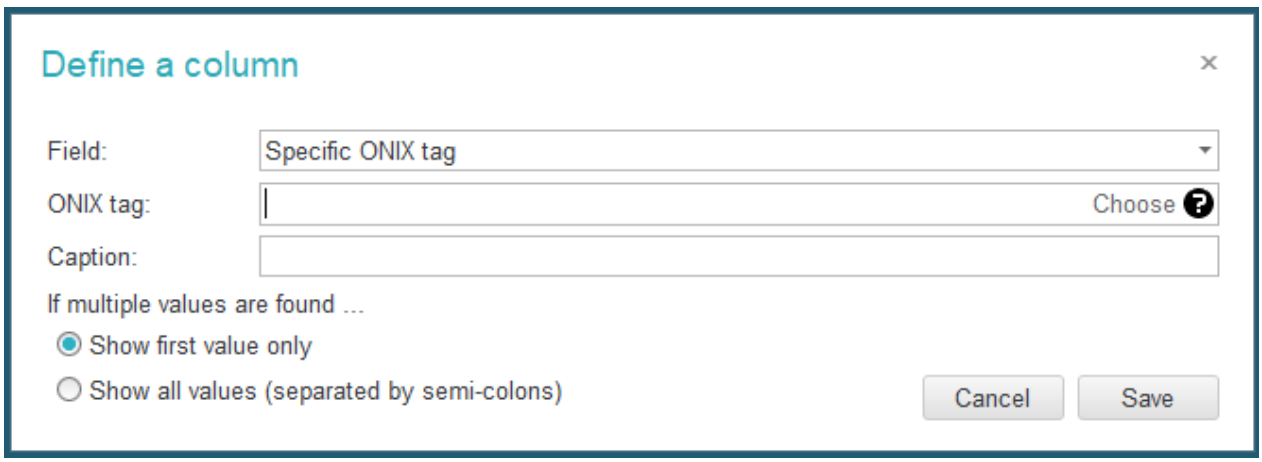

You can also Delete columns that you don't need using the Delete button:



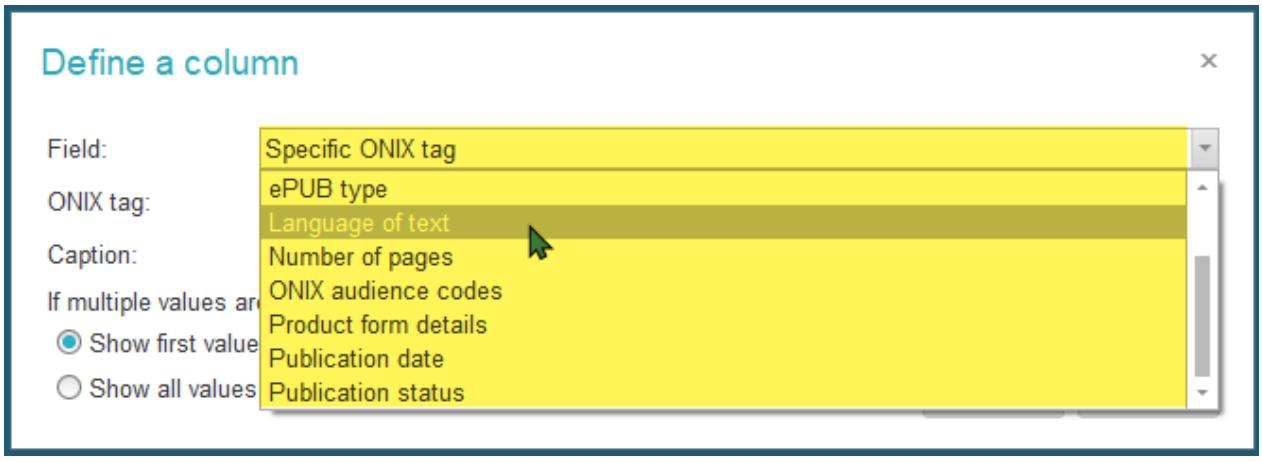

And finally, you can define new columns with the New button:



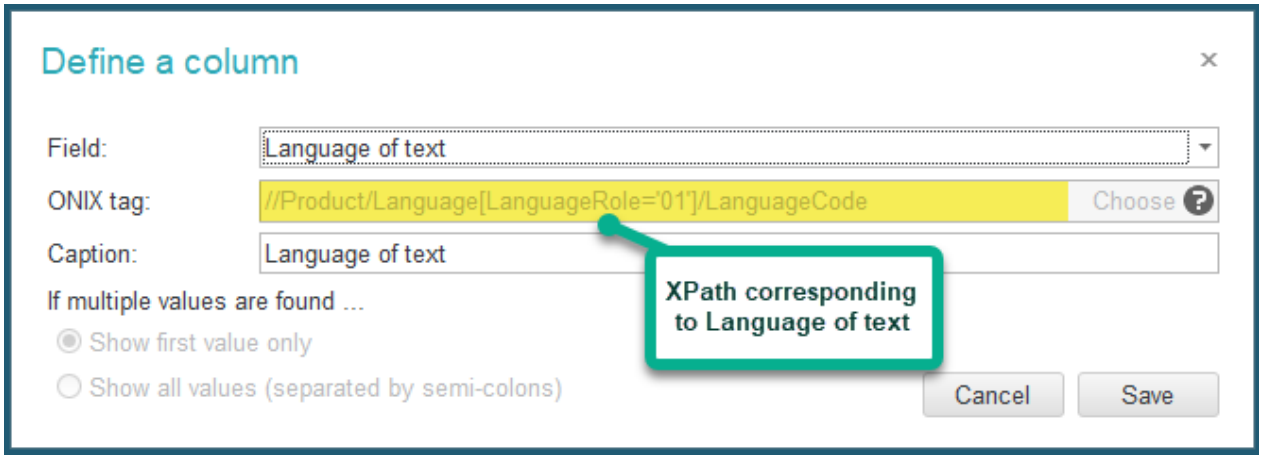

When you click on the New button, the following dialogue is shown:



The first drop-down list presents some common ONIX fields to place in the main list:

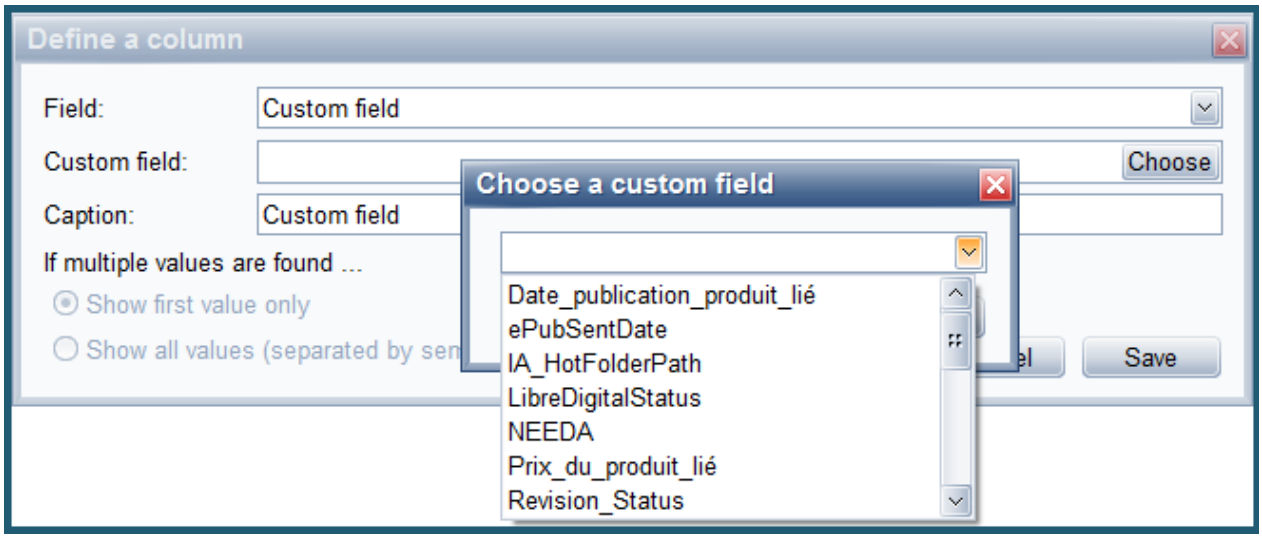



If you select one (for instance "Language of text"), you will get as a result, the corresponding XPATH instruction leading to that information in ONIX:

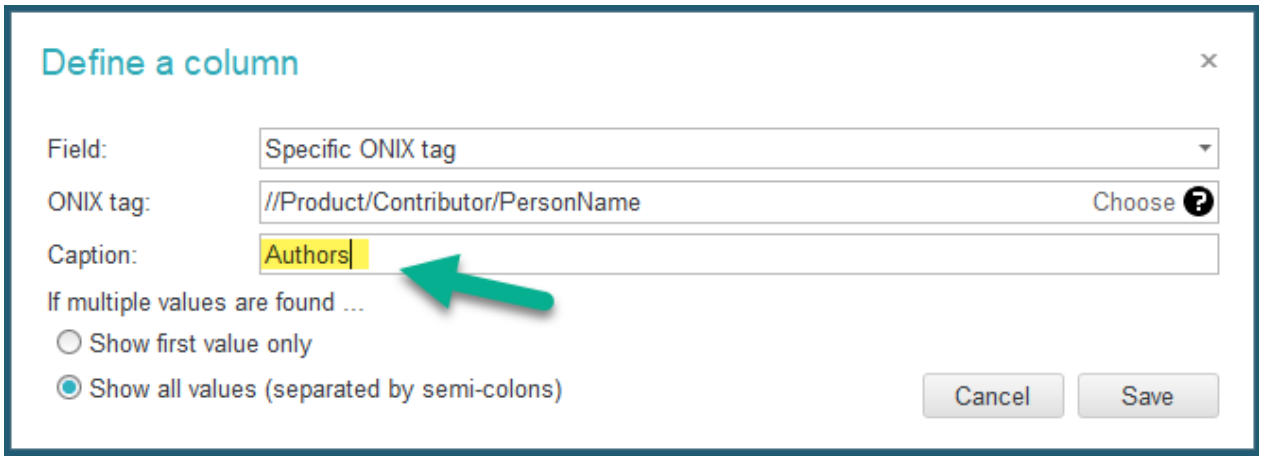



You can edit XPATH instructions if you need to target specific ONIX metadata tags precisely or if you want to alter their values. Please, check section "Defining XPATH instructions" for more details.

If you are an **ONIXEDIT** Server user, you will also see your "Custom Fields" in the Field drop-down list:




For each field that you will add, you must define its caption that will be shown in the corresponding column header:




ONIX 2.1

| Subject | Availability | Authors | ONIX |
|---|---|---|---|
| JUVENILE... | In stock | Allan Zullo | ✓ |
| JUVENILE... | In stock | Allan Zullo | ✓ |
| JUVENILE... | In stock | Allan Zullo | ✓ |
| JUVENILE... | In stock | Allan Zullo | ✓ |
| ANTIQUE... | In stock | Lisa Fitzgerald McKeon | ✓ |
| JUVENILE... | In stock | Julie Lavoie;Dominique Pelletier | ✓ |
| JUVENILE... | In stock | Julie Lavoie;Dominique Pelletier | ✓ |
| JUVENILE... | In stock | Julie Lavoie;Dominique Pelletier | ✓ |
| JUVENILE... | In stock | Julie Lavoie;Dominique Pelletier | ✓ |
| JUVENILE... | In stock | Julie Lavoie;Dominique Pelletier | ✓ |
| JUVENILE... | In stock | Julie Lavoie;Dominique Pelletier | ✓ |
| JUVENILE... | In stock | Anna Claybourne | ✓ |

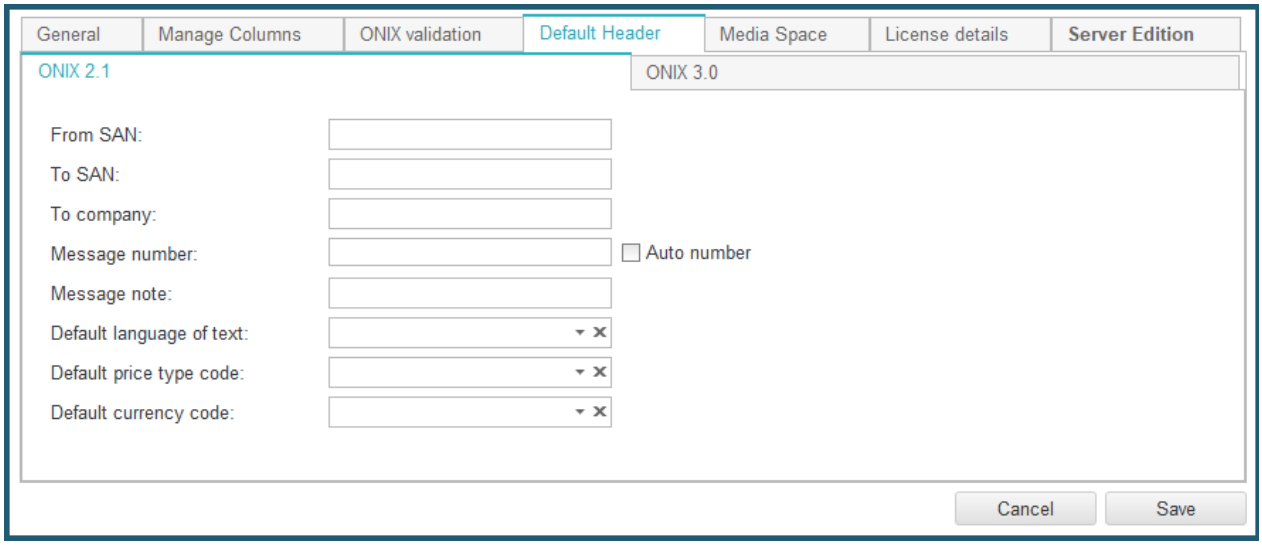
## ONIX validation tab

The tab ONIX validation presents the special validation formats that you can add to ensure best practices' compliance with BTLF, BookNet Canada, BISG, BIC, APA , AMAZON and EDItEUR. See Specialized Formats section for more details. In the 2.1 section, the option "Validate ONIX 3.0 mandatory elements" when checked tells **ONIXEDIT** to also check for ONIX elements that are optional in 2.1 but mandatory in 3.0. Indeed, an ONIX 2.1 file that is completely valid may have errors when converted to ONIX 3.0. This option allow you to identify titles that may have such problems and fix it before you convert it to 3.0.

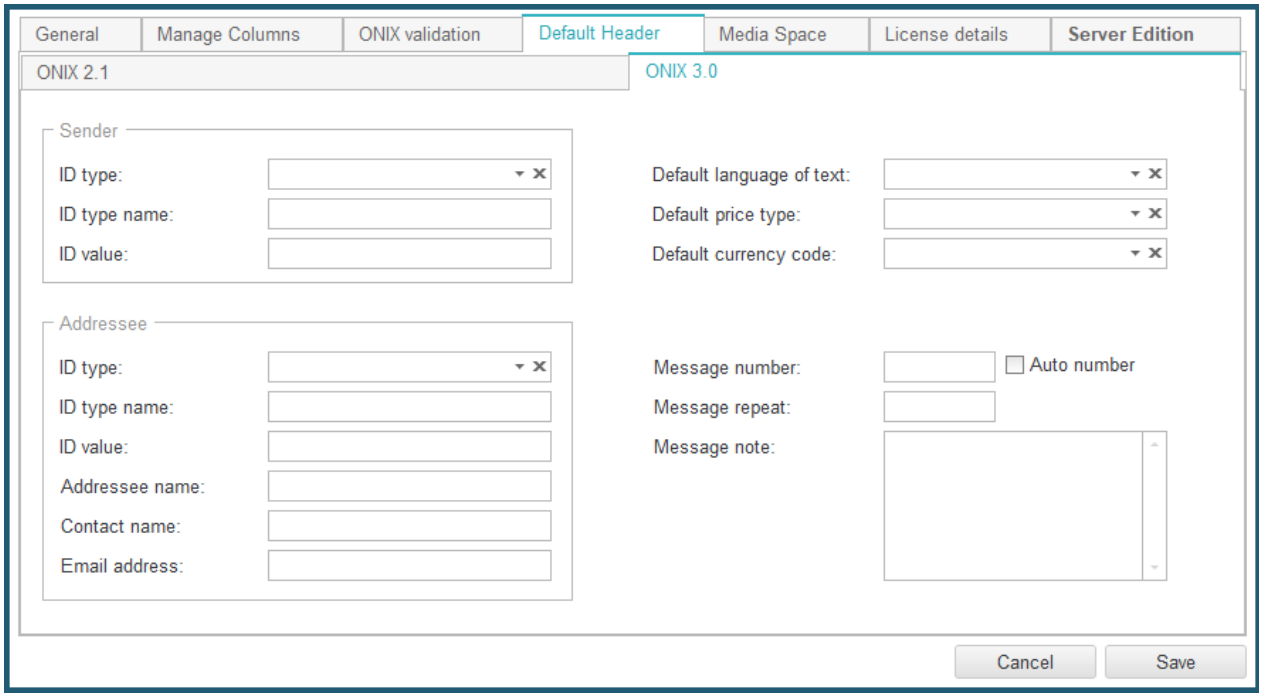
## Default Header tab

The tab **Default Header** allows you to define the default values to insert as an ONIX file header when you create a new ONIX 2.1 or ONIX 3.0 file:

ONIX 2.1:

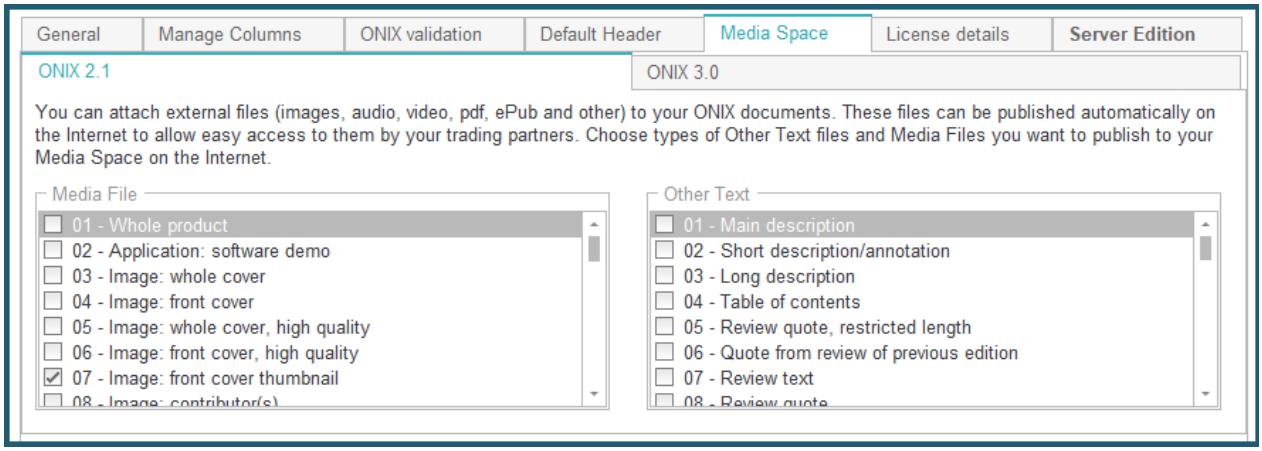


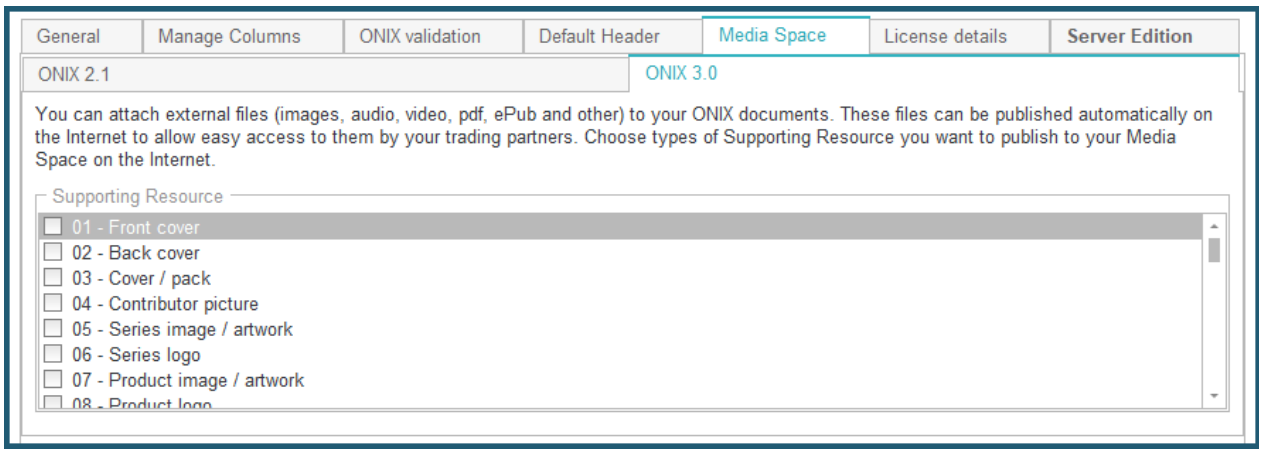

ONIX 3.0:



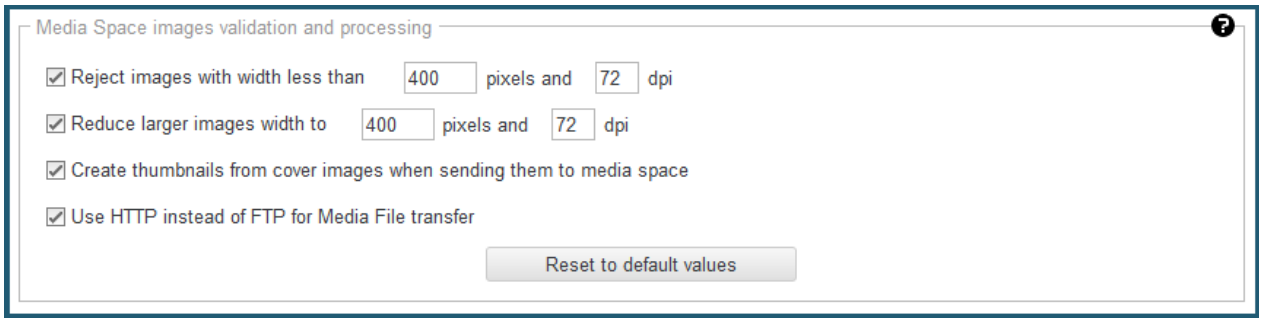

## Media Space tab

The tab **Media Space** allows you to define which type of file you want **ONIXEDIT** to select automatically for you when it is time to upload external files (Media Files and Other Text Files) to your Media Space (included with ONIXEDIT Pro and optional with ONIXEDIT Regular edition). See the Media Space section for details:





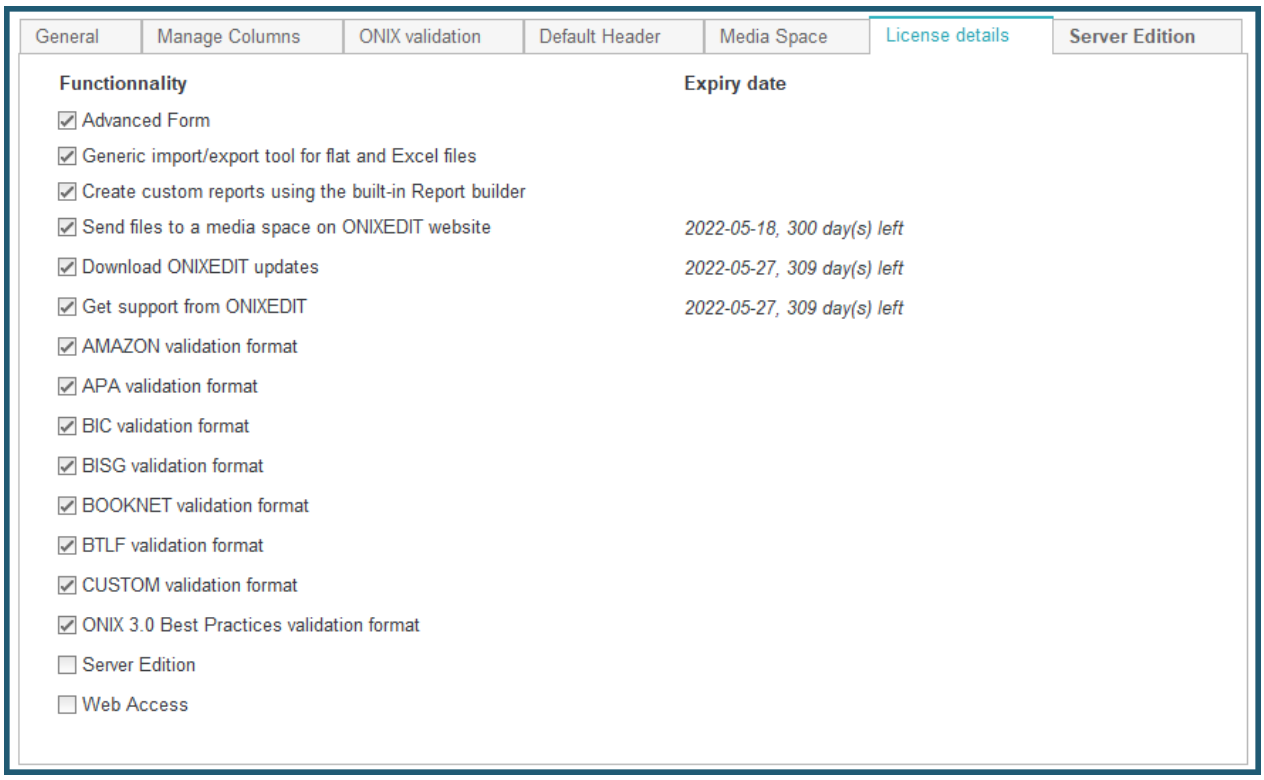

Also, you can control images size with the following options:




By default, **ONIXEDIT** will reject images that are too small and will reduce those that are too big to fulfill best practices of the industry for images like front and back cover. But you can change these settings to suit your needs.

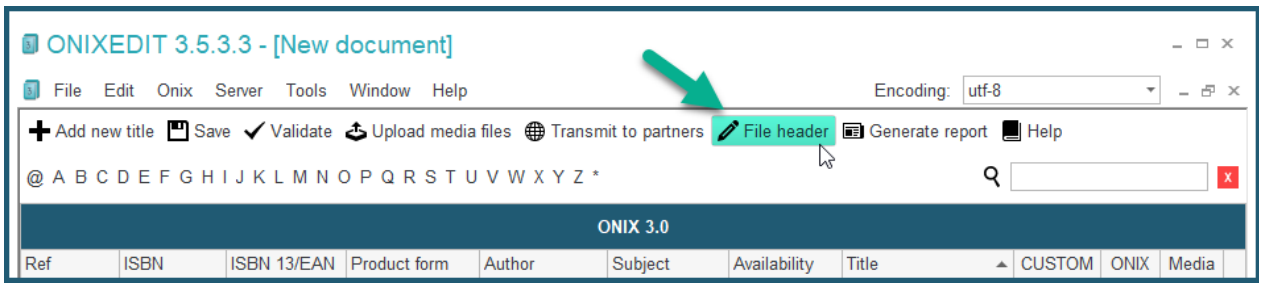
## License details tab

The tab License details shows all the options and services you have according to your license. For renewable services, you will find their expiration dates:

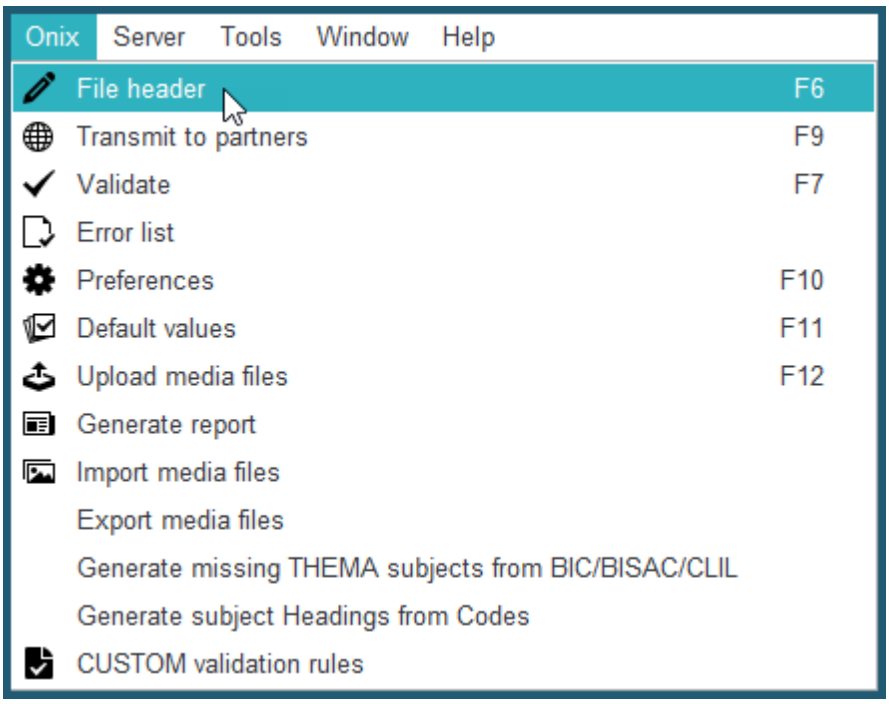



## The ONIX File Header

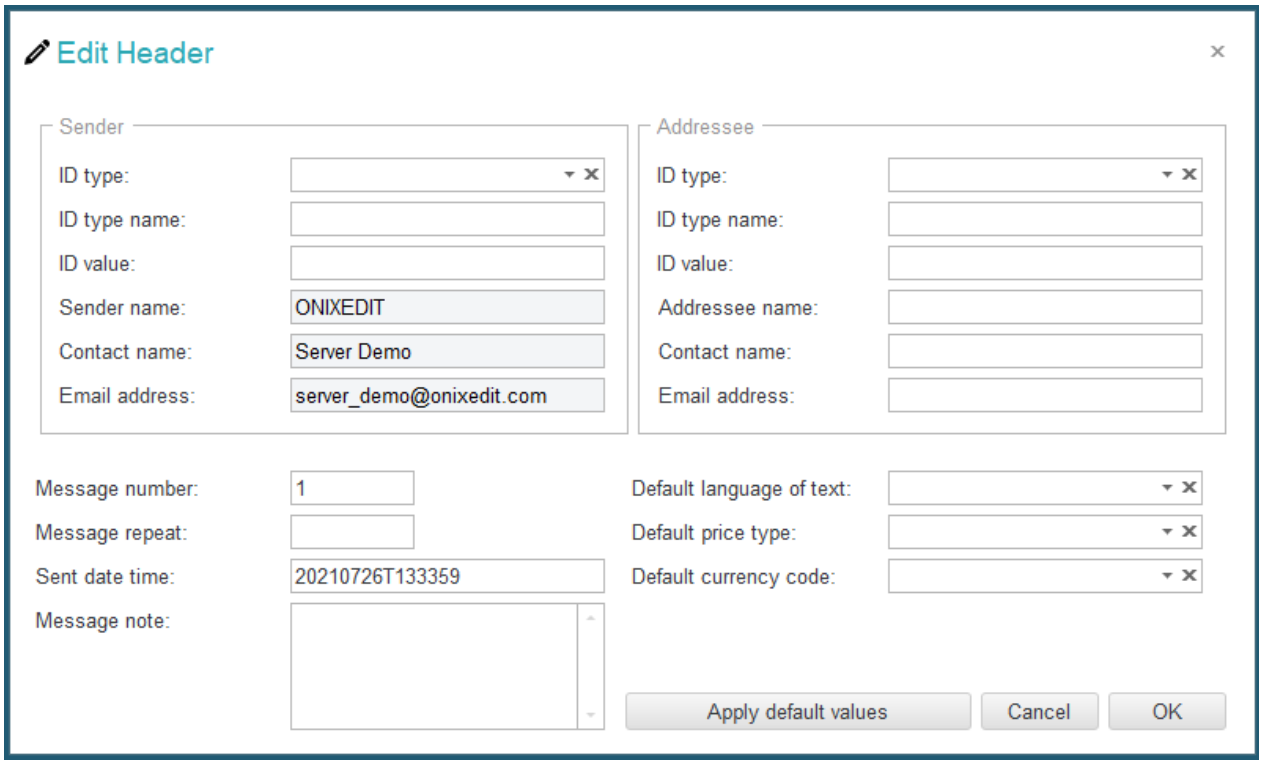
The first part of a valid ONIX file is its header. It permits you to define the sender and recipients of an ONIX file, as well as certain basic elements concerning the file as a whole. As we have seen in the preceding section, Preferences, **ONIXEDIT** allows you to define the default values which will be recorded in the header each time a new ONIX file is created. You can always modify these values by clicking the **File Header** button on the **ToolBar**:




Or by using the **File Header** option in the **Onix** menu (F6).




When you select **File Header** in the **ONIX** menu, or press the (**F6)** Function key, the following screen will appear:




Some fields concerning the sender, such as the company, the person and the email cannot be edited; they correspond to the information which you furnished when you registered on the **ONIXEDIT** website. This information can never be changed. All the rest may be modified

If you use the Transmit to Partners function, the **Sent Date** field will automatically be filled

with the current date. Similarly, the fields of the Addressee may be filled with the name and information of your trading partner to whom the ONIX files are to be sent.

The **Apply Default Values** function allows you to re-initialize the header editing window with the values defined in the Preferences.

## Specialized Formats

As mentioned above, **ONIXEDIT** contains only a subset of the informational elements from the ONIX 2.1 and 3.0 norms. The elements which have been retained are the result of the combination of different elements established in the following specialized formats:

BTLF (French Canada)

BookNet (English Canada)

BISG (USA)

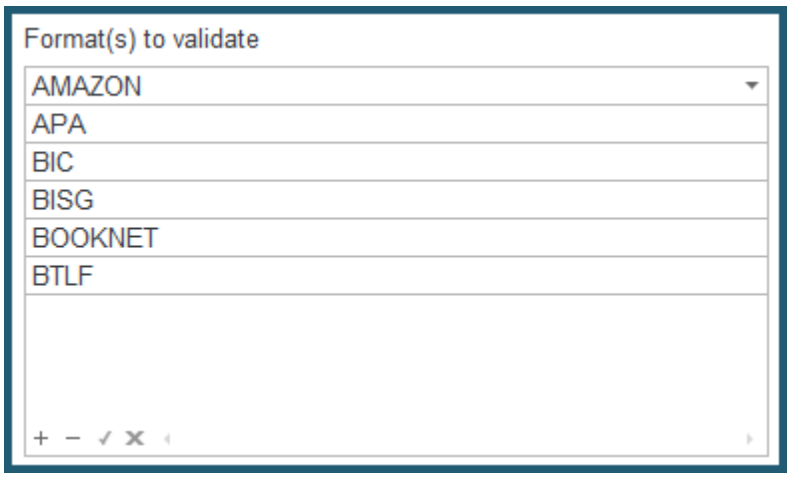
BIC (England)

APA (Australia)

AMAZON

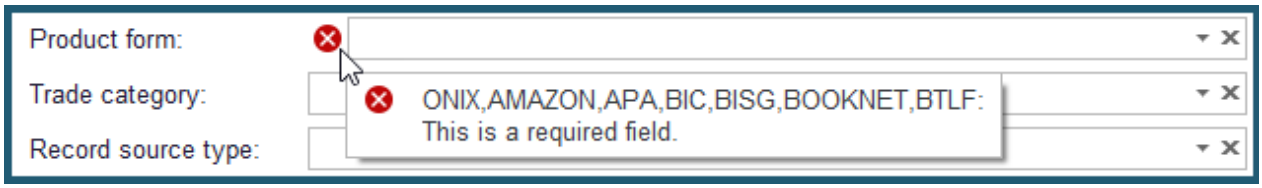
Each of these organizations has established what elements of ONIX information should be in force in their respective markets. We have fused all these elements to form the **ONIXEDIT** format (see Appendix A and Appendix B ). ONIX files created by **ONIXEDIT** are saved in this format. You have access to all of these elements whether you use the regular version with the advanced form option or the Pro version.

For ONIX 2.1 files, there is a specific validation function for each of these formats, BTLF, BookNet, BISG, BIC, APA and Amazon. If you have purchased ONIXEDIT PRO, you have all the supported validators. If you have the regular version, you have a validator included and the others are optional. To activate one or more of these validation functions, you simply define which ones you want using the Preferences dialogue in the ONIX validation 2.1 tab:

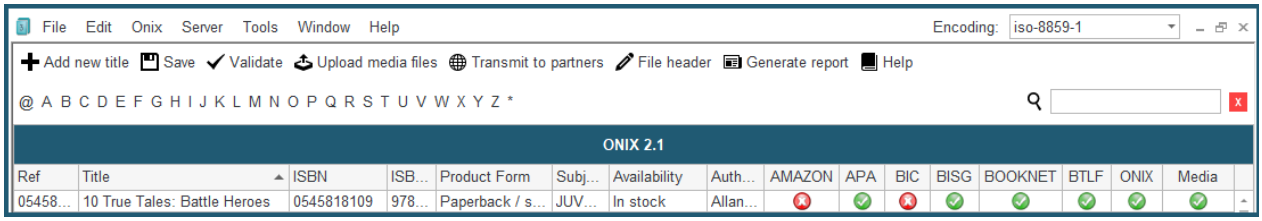



Defining one or more specialized formats in the Preferences does not add any new fields since these are all already present in the editing dialog. But this choice activates the

specialized validation functions corresponding to the chosen formats and you will always know which formats are nonconforming when an error occurs:




Also, a new column for each format is added in the main list, indicating if the associated titles conform or not to the specialized formats chosen:




Of course you do not have to activate the whole package of six specialized formats supported by **ONIXEDIT**. Normally, you only activate those used by the trading partners you deal with. **ONIXEDIT** is provided with export functions which permit you to generate valid ONIX files containing only information elements for one specialized format in particular (Please see chapters Sending ONIX files and Saving a File in a Specialized Format). If no specialized validation format is activated, then your files will be validated against the ONIX standard only.

For ONIX 3.0 files, there is only one specialized validation format that you can activate by checking the box "**Validate against ONIX 3.0 Best Practices Guide**". This validation format is based on the official guide of the EDItEUR group called "ONIX Best Practices Guide" that you can get here. You also have some other options :

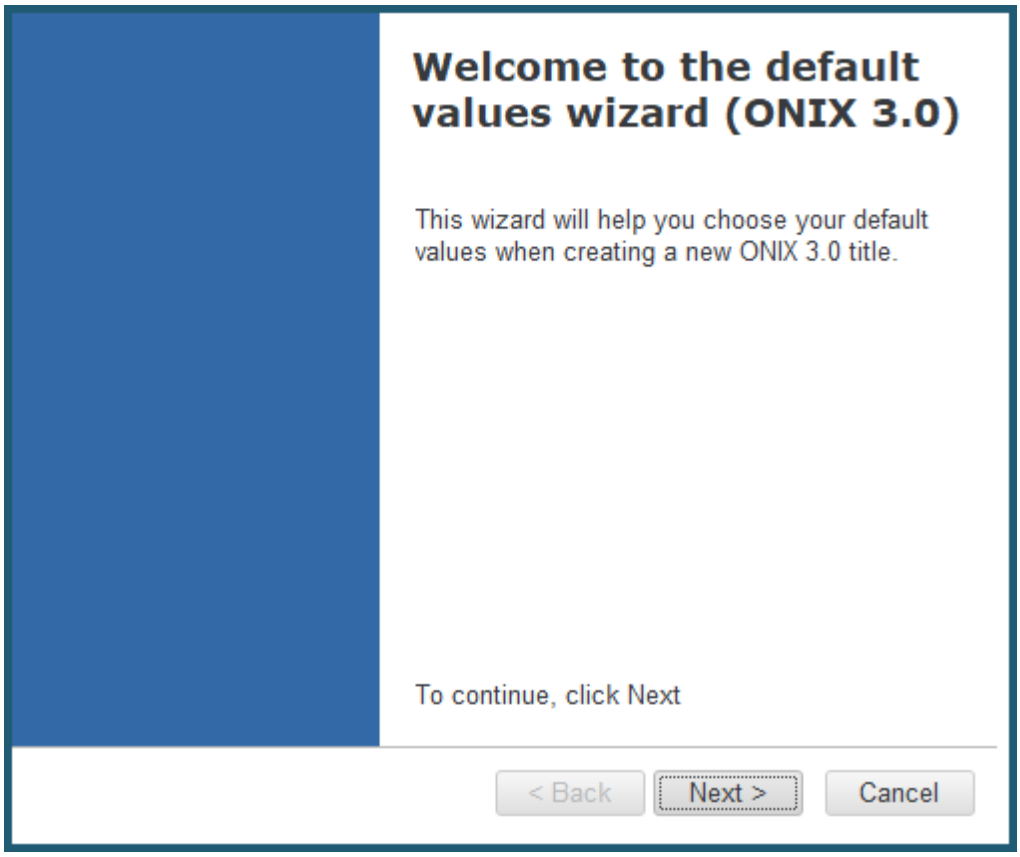
- **Strict validation for numeric data elements**: Limit certain numeric values to positive numbers or integers, for example.

- **Validate against the CUSTOM validation rules**: Determines if titles will be validated according to your own CUSTOM validation rules that you have defined. (See section on CUSTOM Validation)

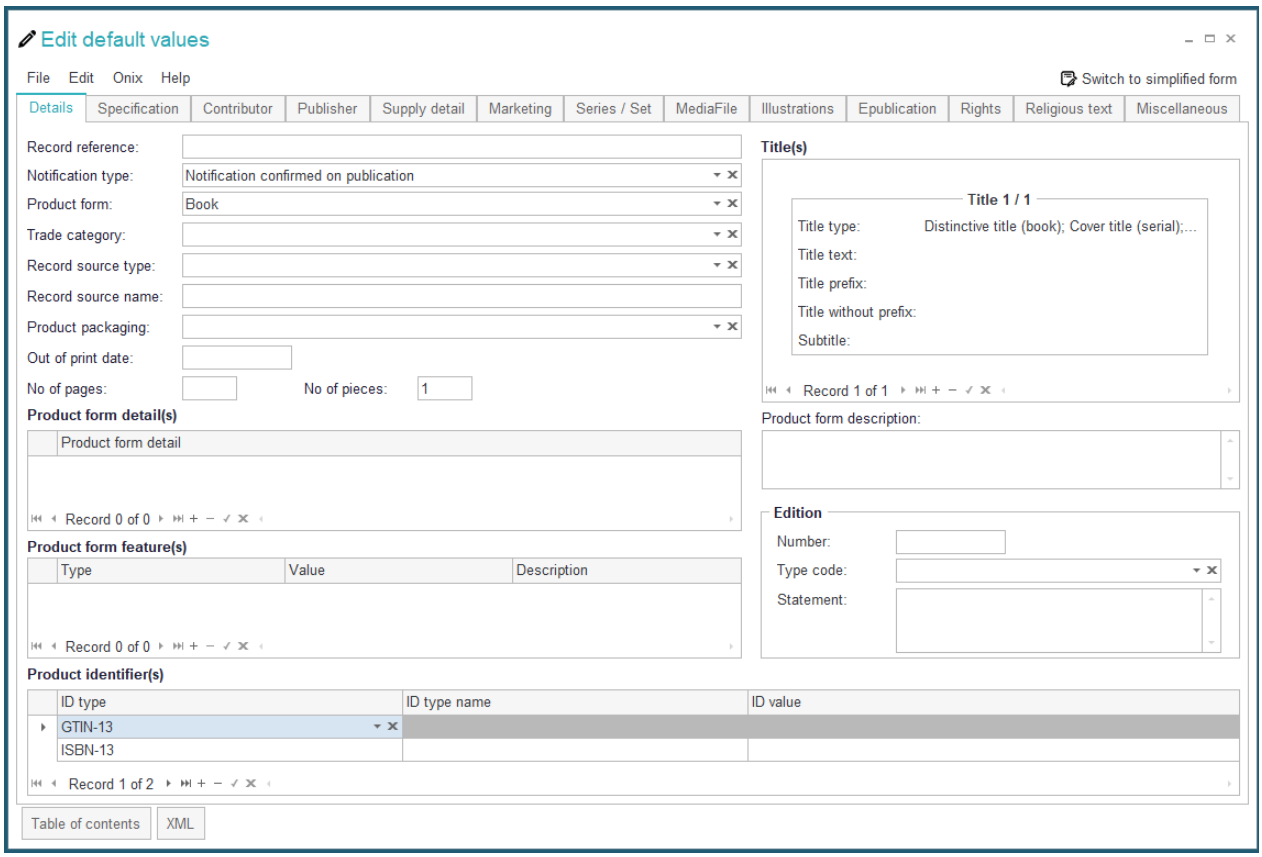
- **A valid ISBN13 or EAN must be supplied**: Determines if the ISBN13 or EAN field is required to be valid.

## Default Values

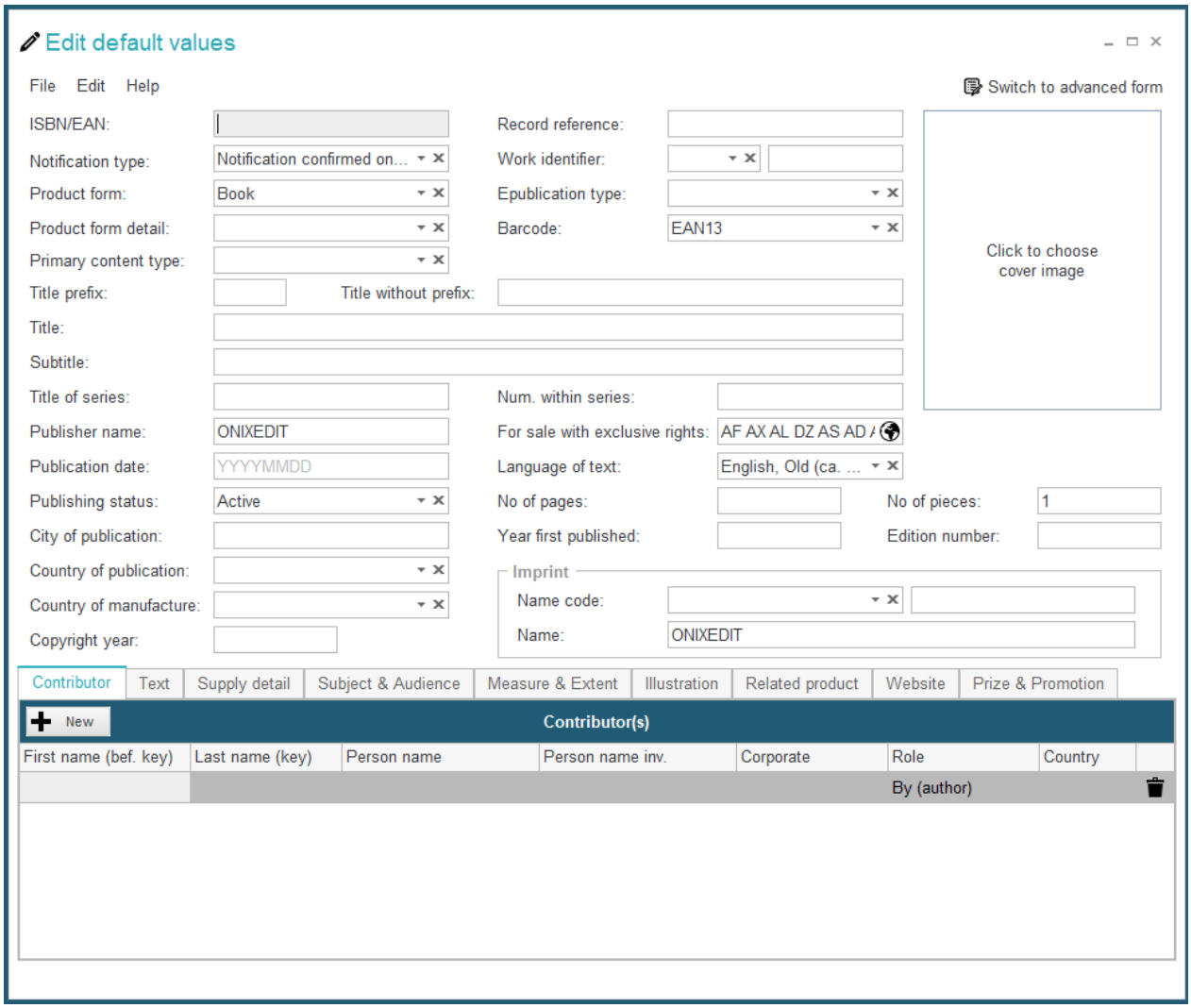
**ONIXEDIT** is provided with an ingenious mechanism to define default values which are involved in the creation of new titles. **ONIXEDIT** allows you to define a title template with all the information elements supported by the program. You can define default values for your ONIX 2.1 files and another set of default values for ONIX 3.0 files. To define this model, you simply activate the **Default Values** function of the **Onix** menu, **F11**. If you press **F11** key from an ONIX 2.1 file, you will be able to set default values for ONIX 2.1. If you press **F11** from an ONIX 3.0 file, you will set ONIX 3.0 default values. If you have access to the advanced form, your first option will be the Default Values Wizard which will help you define your default values amongst the most common ones,




and your second option will be to choose to define your default values using the advanced or simplified form. You will then get a title editing screen that is identical in every way to the screen you get when you add or edit a title:


Edit default values
File Edit Onix Help
Switch to simplified form
Details Specification Contributor Publisher Supply detail Marketing Series / Set MediaFile Illustrations Epublication Rights Religious text Miscellaneous
Record reference:
Notification type: Notification confirmed on publication
Product form: Book
Trade category:
Record source type:
Record source name:
Product packaging:
Out of print date:
No of pages:
No of pieces: 1
Product form detail(s)
Product form detail
Record 0 of 0
Product form feature(s)
Type Value Description
Record 0 of 0
Title(s)
Title 1 / 1
Title type: Distinctive title (book); Cover title (serial);...
Title text:
Title prefix:
Title without prefix:
Subtitle:
Record 1 of 1
Product form description:
Edition
Number:
Type code:
Statement:
Product identifier(s)
ID type ID type name ID value
GTIN-13
ISBN-13
Record 1 of 2
Table of contents XML

or

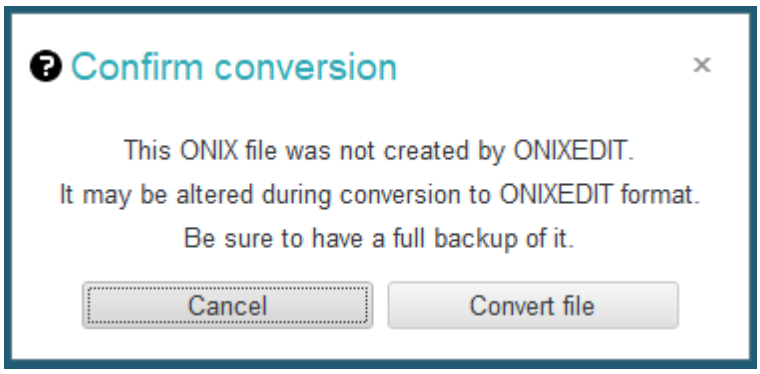



All the values which you define in this default values window will be added automatically when you create new titles. You can thus take advantage of this function to input values specific to your business which will then be repeated from one title to another. You can also define records of sub-lists which you want to be added automatically by the program. You then just make changes specific to each title when you create it.

## Opening an existing file

Opening an existing ONIX file is done in the usual manner. You just use the **Open** function on the **File** menu, **CTRL-O**, to obtain the standard file choice dialogue. Only XML files will be presented in the dialogue.

If you try to open an ONIX file which was not created by **ONIXEDIT**, you will see the following confirmation dialogue:




The file that you want to open will be altered in the following ways:

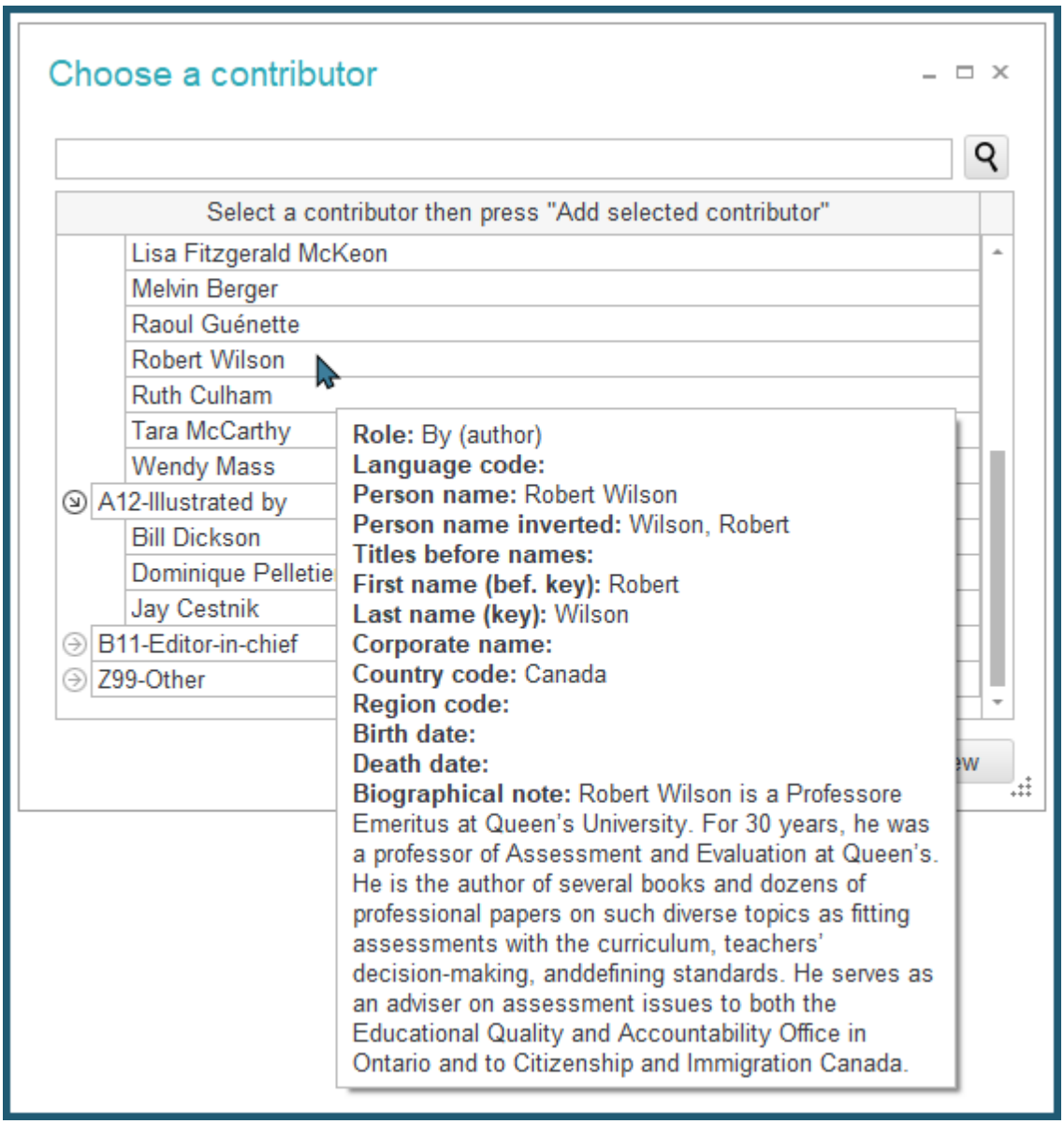
- A comment will be added on top of the file stating that it was created using **ONIXEDIT**.
- Information elements not supported by ONIXEDIT will be removed. Please see Appendix A and Appendix B for the list of supported ONIX information elements.
- Certain elements will be converted and standardized.
- **ONIXEDIT** does not support ONIX attributes on ONIX 2.1 files and these items will be removed. However, attributes will be kept if you open a ONIX 3.0 file.

If you try to open an XML file that is not an ONIX file, the program will refuse to open it and will inform you with an error message.

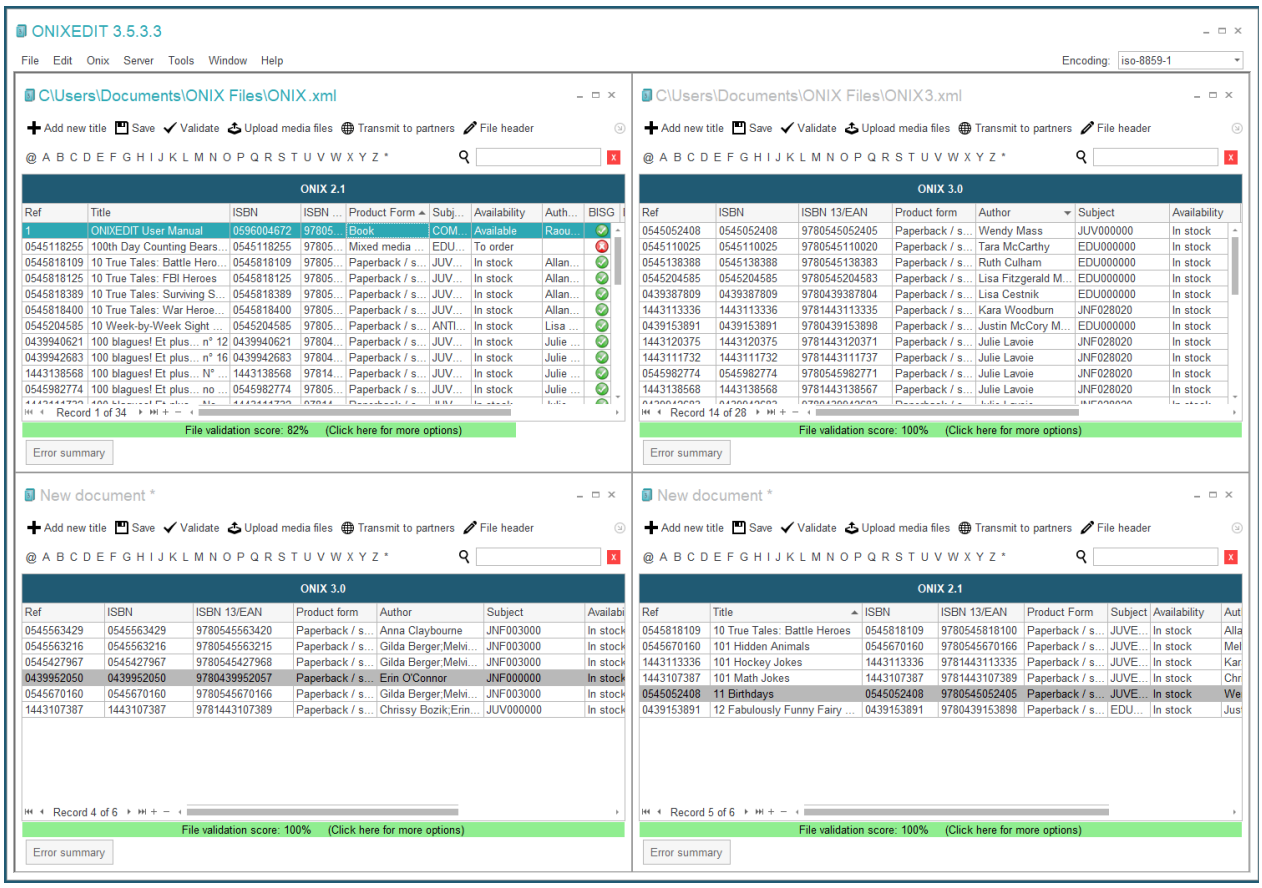
Each time an existing ONIX file is open, all the titles it contains will be re-verified in conformance with the specialized formats defined in your present Preferences. One verification pass will be made for each specialized format defined. A file will therefore take a little more time to open if you have activated all possible formats (6 for ONIX 2.1 files and 1 for ONIX 3.0) than if you have activated only one. No matter, **ONIXEDIT** is very fast thanks to its ultramodern technology.

The maximum ONIX file size to be open is limited only by the memory of your computer. You can thus load files of several thousand titles without difficulty. For bigger files, you may have to split it in multiple parts. You can use our free tool *ONIXEDIT Splitter* for that purpose.

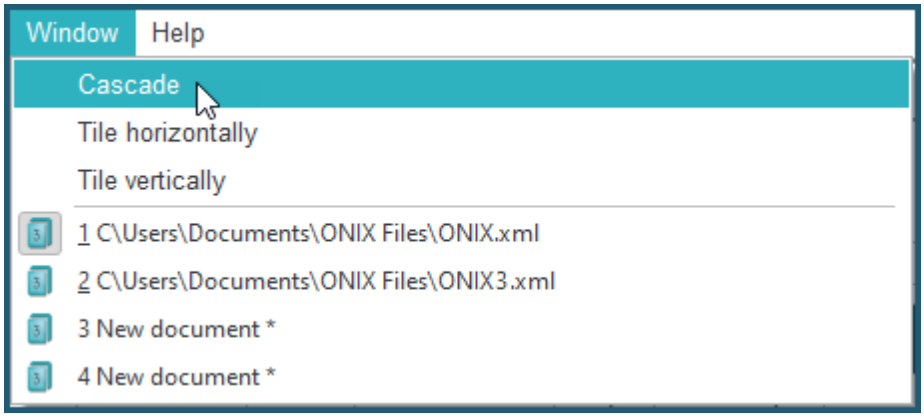
Also, when an ONIX file is opened, the different authors in it will be added to the catalogue of contributors which will remain in memory as long as you do not close **ONIXEDIT**. This catalogue allows you to capture information about an author rapidly for your new titles:




**ONIXEDIT** allows you to open several ONIX files at the same time. You simply open the files you want to work with in order to see them. This allows you to quickly perform operations such as copying or moving titles from one file to another::




The **Window** menu allows you to manipulate open files and place them on your screen as you wish:




See the section Open Several ONIX Files for more details.

Each time you manipulate a file, it will be available in the list of recent files on the **File** menu. This list shows the last ten files consulted. You can always load one of these files from the recent file menu.

## Validation

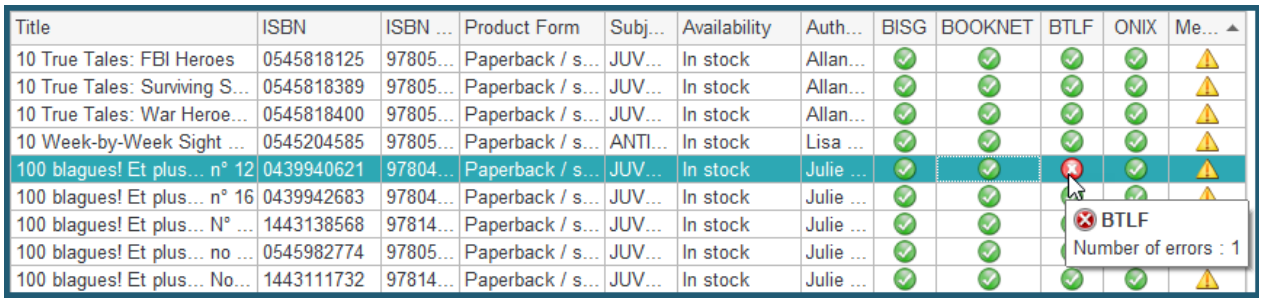
One of the principal characteristics of **ONIXEDIT** is its powerful integrated validation engine. It is not a simple ordinary XML checker, but a sophisticated engine to verify ONIX

rules as established in the official ONIX 2.1 and 3.0 documentation. This engine will verify:

- That the required ONIX information elements, and those specified in the special formats defined in your preferences, are all present.
- That only permitted values are defined.
- That lengths and types of fields are respected.
- That conditional elements are respected. For example, if you try to define a birth date for an organizational or corporate contributor or a group of authors, an error message will appear.

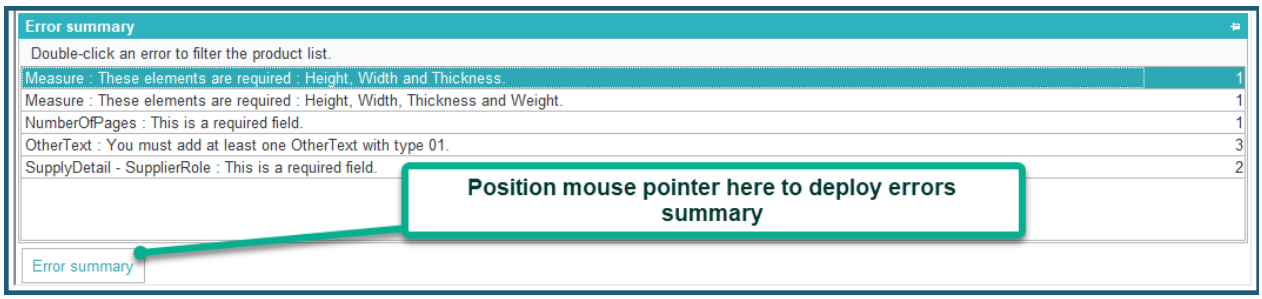
Only **ONIXEDIT** offers this high level of verification.

Titles are verified when an existing file is open and also in the process of data capture for a new title. You can also always call on the verification engine by means of the **Validate** function on the **ONIX** menu, **F7**. When this function is called from the main list, all the files or titles which it contains will be verified. You can thus easily see which titles contain errors. Also, by placing the cursor above the icons for an invalid title, you will see the number of errors for that title:




| Title | ISBN | ISBN ... | Product Form | Subj... | Availability | Auth... | BISG | BOOKNET | BTLF | ONIX | Me... |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 10 True Tales: FBI Heroes | 0545818125 | 97805... | Paperback / s... | JUV... | In stock | Allan... | | | | | |
| 10 True Tales: Surviving S... | 0545818389 | 97805... | Paperback / s... | JUV... | In stock | Allan... | | | | | |
| 10 True Tales: War Heroe... | 0545818400 | 97805... | Paperback / s... | JUV... | In stock | Allan... | | | | | |
| 10 Week-by-Week Sight ... | 0545204585 | 97805... | Paperback / s... | ANTI... | In stock | Lisa ... | | | | | |
| 100 blagues! Et plus... n° 12 | 0439940621 | 97804... | Paperback / s... | JUV... | In stock | Julie ... | | | | | |
| 100 blagues! Et plus... n° 16 | 0439942683 | 97804... | Paperback / s... | JUV... | In stock | Julie ... | | | | | |
| 100 blagues! Et plus... N° ... | 1443138568 | 97814... | Paperback / s... | JUV... | In stock | Julie ... | | | | | |
| 100 blagues! Et plus... no ... | 0545982774 | 97805... | Paperback / s... | JUV... | In stock | Julie ... | | | | | |
| 100 blagues! Et plus... No... | 1443111732 | 97814... | Paperback / s... | JUV... | In stock | Julie ... | | | | | |

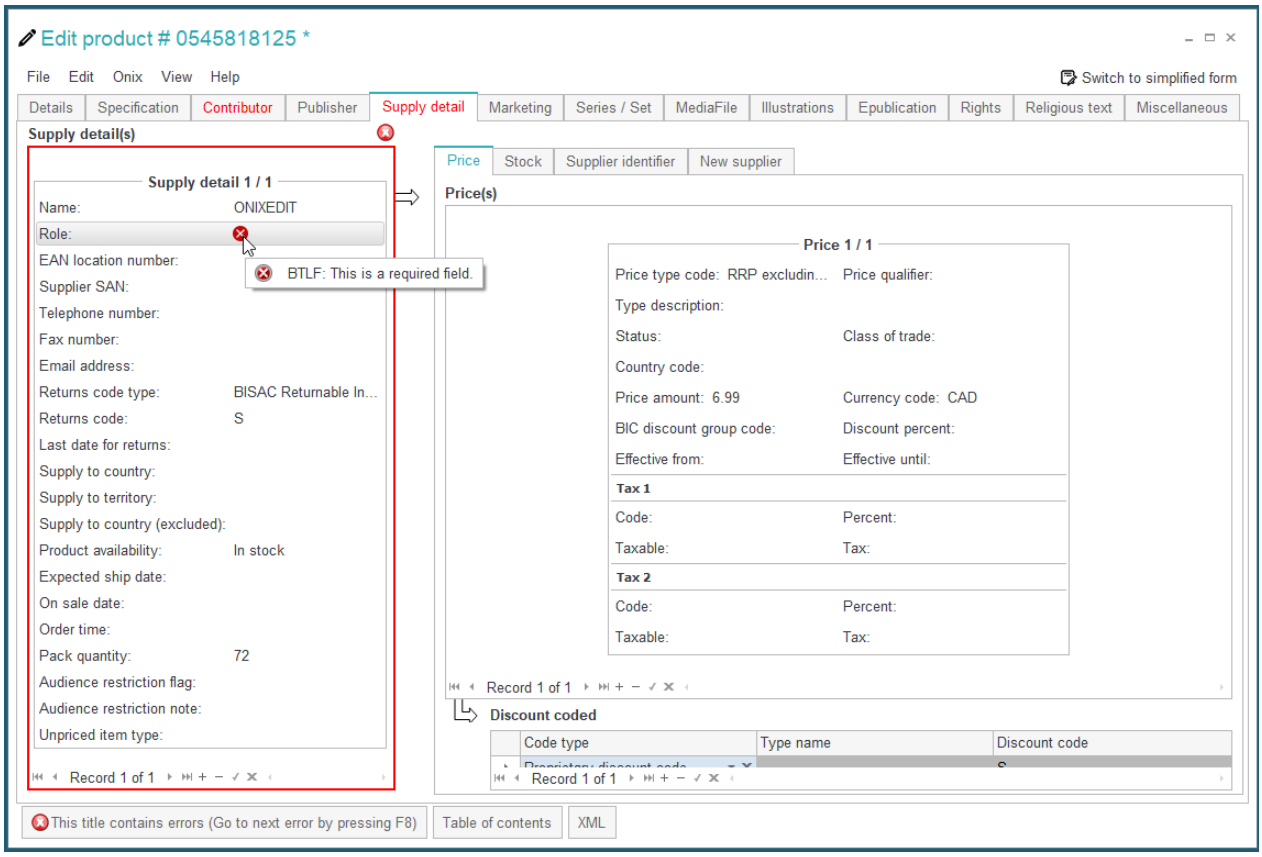
You can also access an error summary in the retractable panel available at the bottom of the screen:



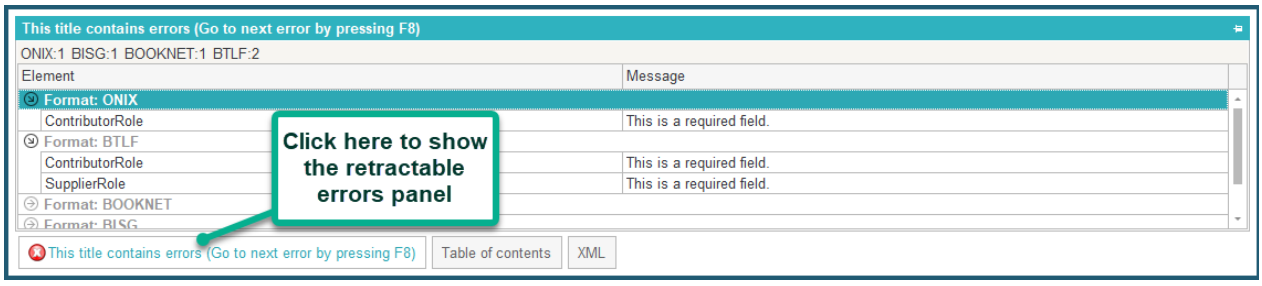

This summary indicates the different types of errors found in the file, and for each file the number of titles affected. By double-clicking on an error in this summary, you can have the main list show only the corresponding titles.

When you edit a title by double-clicking it from the main list, validation of that title is automatically applied. You can also invoke the validation function at any time using the **F7** key. All the incorrect fields will appear with a red error indicator. The editing screen is

divided into tabs. Tabs having incorrect fields will appear in red. You can also obtain further information concerning an error by positioning your cursor above the affected field:




The editing screen also has a pop-up for current errors. This pop-up is presented in the form of a hierarchical list identifying, for each format, the list of rules that have been infringed:




A double-click on an error takes you immediately to the incorrect field in order to allow you to correct it easily.

You can also go through the list of errors in turn by means of the function **Go to next error** on the **Onix** menu (**F8**). This function will move you to the incorrect field each time in order to allow you to correct the error quickly and easily. After correcting an error, you can press **F8** again to move to the next error until there are none left.

Since version 3.1.9, it is now possible to create your own custom validation rules.

## Saving a file

Saving an ONIX file using **ONIXEDIT** is done in the standard way with the functions **Save** and **Save as** on the **File** menu. The file which will thus be saved on your computer will be an ONIX file, valid in **ONIXEDIT** format (Please see Specialized Formats ). Even though this file can be sent directly to your commercial partners, it is preferable to send them only files in their preferred format. The **ONIXEDIT** format contains all the information elements of the entire group of specialized validation formats supported by **ONIXEDIT**. There is a function allowing you to export a file, in whole or in part, in a particular specialized format. Please see the section Saving a File in a Specialized Format for more information.

## Media Space

We have already mentioned the question of media files and the difficulties of transmitting these files without errors to your business partners, in the section Automatic Transmission to Your Partners. **ONIXEDIT** offers a Media Space available on the Internet. When you buy the Pro version of **ONIXEDIT** you get 50 Megabytes in your media space for one year, as part of your purchase. The Media Space Service is optional for the regular version of **ONIXEDIT**.

**ONIXEDIT** manages the media space for you. You do not have to worry about it. As soon as you add a title, an external file, be it a picture, an audio or video file, an extract in PDF form or even a complete eBook in the ePub format, the management starts immediately. The Media column in each title for which external files have been added recently will show an ⚠ icon in the main list.

This indicates that there are external files associated with your titles waiting for transmission to your media space. As long as you have not used the **Upload Media Files** function from the **Onix** menu, these icons will be shown.

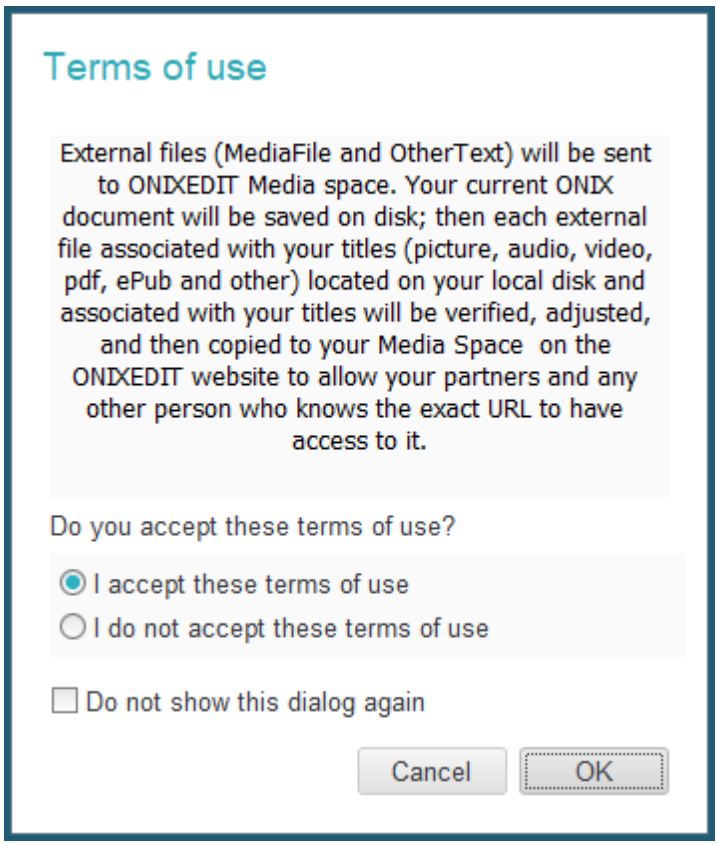
When you associate an external file to a title, the reference saved in the ONIX file is an access path to this file. Most of the time, this will be a reference to a file on your computer. When you use the function **Upload Media Files** from the **Onix** menu, these files are sent to your media space and each of the references in your ONIX file is converted as a URL to the corresponding file in your media space, which is accessible on the Internet.

This manoeuvre aims to make your external files available to your trading partners at all times, without your having to worry about them.

**ONIXEDIT** will even organize your media space for you. For example, if you modify a title by adding a new picture to it, or by removing an existing picture, there will be an automatic synchronization of the media space as soon as you start the function **Upload Media Files**. Thus, the images that have been removed or replaced will be removed from the media space in order to avoid occupying space uselessly.

If you start to be short of space, you can add more easily as needed by going to your account at www.onixedit.com.

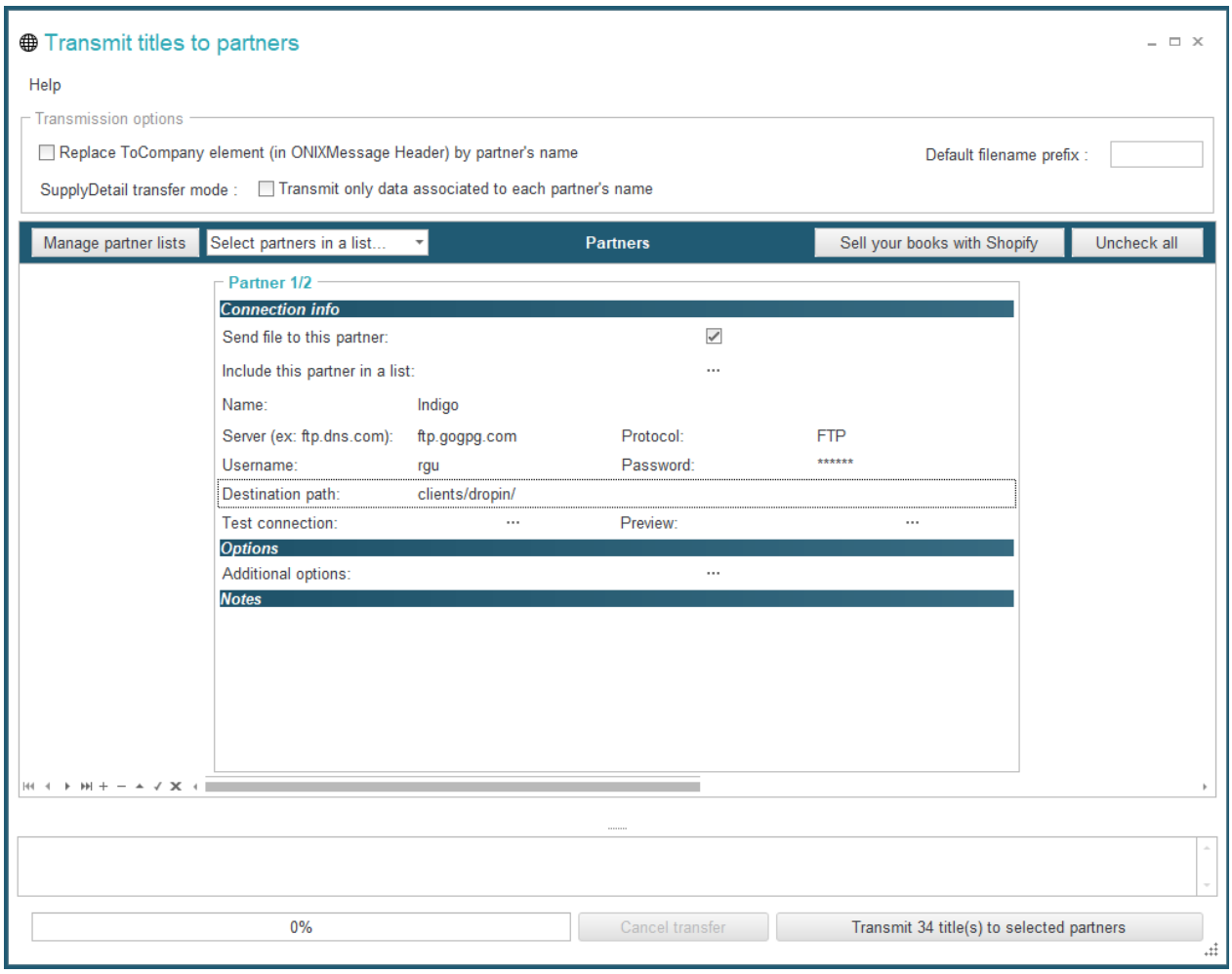
Each time you use the media space, **ONIXEDIT** shows a usage warning panel which you must accept before proceeding:




This warning informs you that the files which will be sent to your media space will be published on the Internet. To reach the space, an Internet user must know the exact URL addresses, and it is precisely these addresses that are found in your ONIX files which will eventually be sent to your trading partners. You must therefore agree that your pictures, audio and video and PDF files, and others will be in the public domain starting from the moment that they are placed in your media space.

## Sending ONIX Files

One of the main reasons for using the ONIX standard is without a doubt transmitting bibliographic commercial and promotional information about your books to your partners in a universal language that can be understood by everyone. This is the primary reason for the existence of the ONIX standard. Sending an ONIX file may be done manually (Please see the section Sending a File to a Partner by Email ). But it is preferable and easier to let **ONIXEDIT** do it for you especially if you have the Media Space Service. Indeed, **ONIXEDIT** offers a simple and powerful automatic transmission tool through the function **Transmit to Partners** from the **Onix** menu (**F9**). This function will show a dialogue similar to the following:



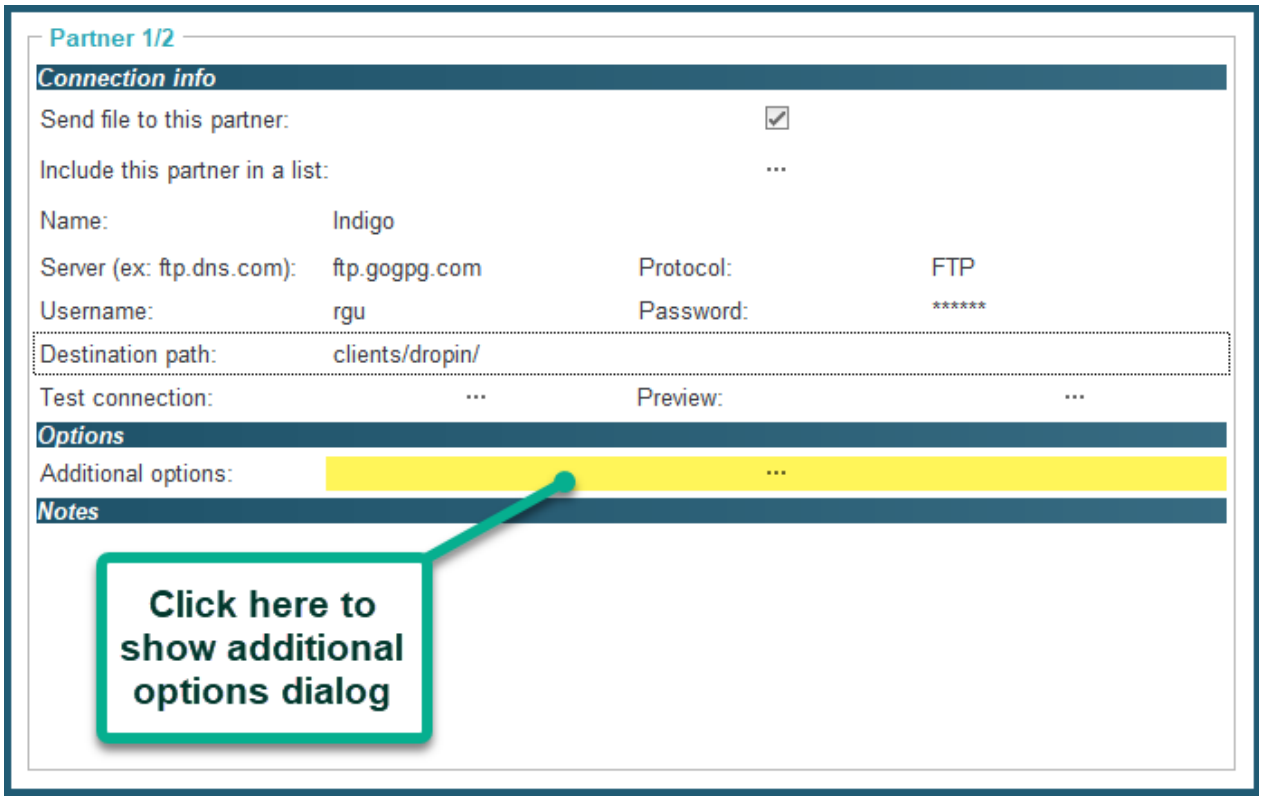

Using this dialogue, you can define which of your partners are intended to receive your ONIX files, as long as they each have an ftp server dedicated to this purpose. The integrated ONIX transmission tool in **ONIXEDIT** uses the FTP protocol to send files. This is a standard that is generally recognized and used in the industry.

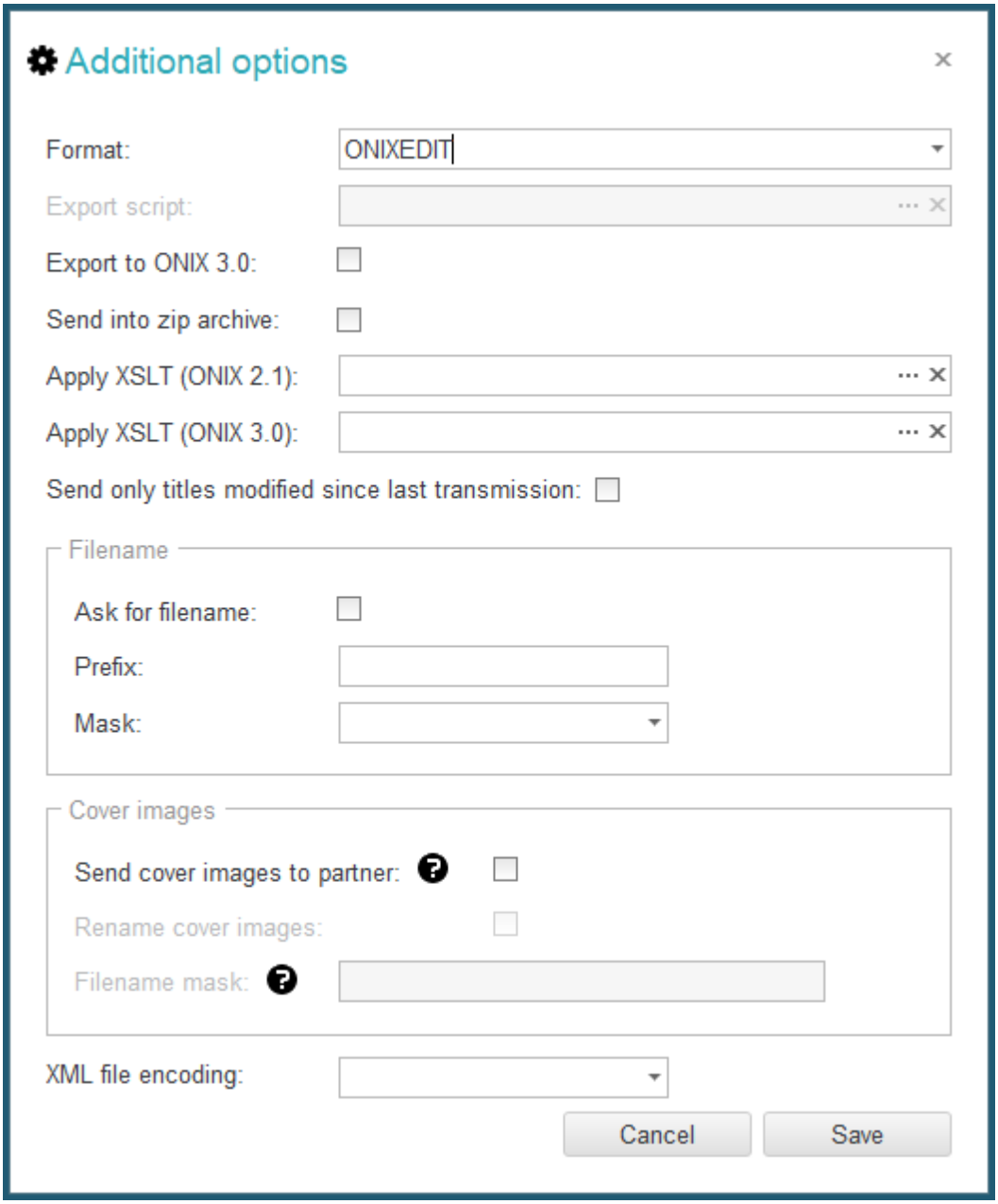
Normally your trading partners should make an FTP account available to you. Please communicate with each of them to ask for an account. This is information which should be input in the trading partners list in **ONIXEDIT.** For each, you need to define the following information:

- **Send file to this partner.** This check box indicates which are the partners to whom you wish to send your metadata file. When you click on the **Transmit n Title(s) to Selected Partners** button, only those partners having this check box checked will receive the file.
- **Name**. Name of your trading partner. This is a required field.
- **FTP Server**. URL address of the FTP server made available to you by your trading partner in order to receive ONIX files. If you need to specify a particular port, you can add it at the end of your FTP server address preceding it by ":". For instance "ftp.acme.com:12345". This is a required field.
- **Username**. The user name of your FTP account as sent to you by your trading partner. Required field.

- **Password**. The password for your FTP account as sent to you by your trading partner. Required field.
- **Destination path**. This is an optional field. Your trading partner will tell you if you should place your files in a particular location, and if this is the case, you should input the exact name of the location here.
- **Protocol**. You must choose between regular FTP protocol or Secure FTP (SFTP) depending on the type of FTP server used by your trading partner.

You can also define additional options:






The Additional Options dialogue will allow you to set the following:

- **Format**. For ONIX 2.1 files, you have to choose one of the six Specialized Formats supported by **ONIXEDIT**. For each of these formats, you have the choice of long tag names using the first five formats on the scrollable menu, or short tag names using the last five formats on the scrollable menu. ONIX supports these two different format types to achieve exactly the same results. The only difference between these two formats is that the short tag format creates files which are smaller but also more difficult for a human being to interpret, if you try to read them. But for a computer, there is no difference. The choice of these two formats depends simply on your trading partner's preferences. If you are using ONIX 3.0 files, you will only have the choice between short and long tags. As an option, you can also choose to export your metadata files to a flat file or Excel file (EXCEL/FLAT) using an **ONIXEDIT** export script. You will then have to enter the path name of your export script and **ONIXEDIT** will automatically convert your ONIX file using this script before sending

it to your trading partner. Please, read section Exporting to a Flat File or Excel to learn how to create an Export Script.

- **Export script**: You can use **ONIXEDIT** to automatically export your ONIX file to a flat file or Excel file for your partners that do not support the ONIX standard. You must have **ONIXEDIT** Pro or the Import/Export option to use that function. The Export Script selector will be activated only if you choose the "EXCEL/FLAT" format in the Format drop-down list. Then, you must select a valid **ONIXEDIT** export script.

- **Export to ONIX 3.0**: This option is available when you want to transmit an ONIX 2.1 file. If checked, **ONIXEDIT** will automatically convert titles to ONIX 3.0 for that specific trading partner. If you intend to transmit ONIX 3.0 files automatically converted from an ONIX 2.1 file, it is highly recommended to activate the special validation option "Validate ONIX 3.0 mandatory elements" to ensure the resulting ONIX 3.0 will be valid. See section Convert an ONIX 2.1 file to ONIX 3.0 for more details.

- **Send into zip archive**: When checked, the resulting ONIX file will be compressed in a .zip archive before being sent to your partner.

- **Apply XSLT**: Apply an XSLT file to make the desired changes to the resulting XML file.

- **Send only titles modified since last transmission**: If you activate this option, ONIXEDIT will automatically keep track of titles already sent to each of your partner. Each time you will use the Transmit to Partners function having this option activated, ONIXEDIT will automatically transmit modified or new titles only from your titles selection. If ever you need to clear the transmission history for a specific partner, you will simply have to click on the delete icon at the right of the option. Once the history cleared, the partner will receive the complete title selection at next transmission.

- **Ask for filename**: If you prefer to give a name for each file by yourself, then you should check this option and at transmission time, **ONIXEDIT** will prompt you to give a filename for each of your trading partners.

- **Filename Prefix**: This is an optional field. If you define it, the value entered will be used by **ONIXEDIT** as a prefix to the file name for your trading partner.

- **Filename Mask**: This is an optional field. You could use it to define the template that will be used by **ONIXEDIT** to generate the ONIX file name for your trading partner. If you leave this field blank, the following mask will be applied: **yyyyMMddHHmmss**. You could define your mask with any alphanumeric characters except the following: ", \, /, ?, :, *, >, < and |. Indeed, those characters can't be used for file name on many operating systems. You could also use the following special sequences:

    - **yyyy** will be replaced by current year;

    - **MM** will be replaced by current month;

    - **dd** will be replaced by current day;

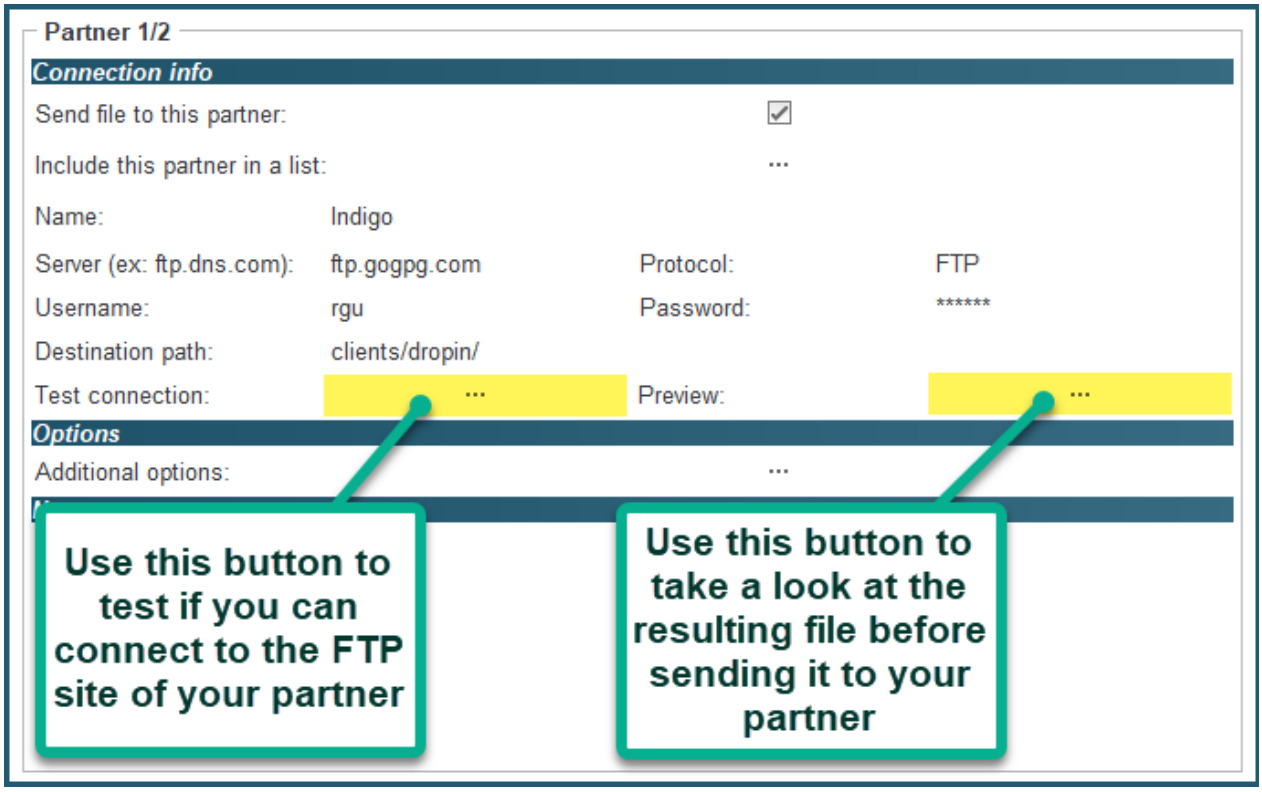
    - **HH** will be replaced by current hour;

- **mm** will be replaced by current minutes;
- **ss** will be replaced by current seconds.

For example, if "ONIX_" is defined as the Filename Prefix and you enter "yyyy_Hello_MMdd" as the Filename Mask and the current date at transmission time is May 15, 2010, then the resulting file name will be "ONIX_2010_Hello_0515.xml".

- **Send Cover Images to partner**: If you check this option, ONIXEDIT will download your cover images from your Media Space (or any other external source) and send it to your partner's FTP site. Also, references to your cover images in the ONIX file sent to your partner will be adjusted accordingly.
- **Rename Cover Images**: If you check this option, you will be able to define a filename mask (next field) that will allow ONIXEDIT to automatically rename your cover images following a particular template according to requirements of your trading partner.
- **Filename mask**: In this field, you will define the filename template that will be used by ONIXEDIT to name your cover image files before sending it to your partner. This template must be defined using a special tag among [ISBN-10], [ISBN-13], [EAN] or [REF] and any valid filename characters. You don't have to type the file extension. As an example, if you define the filename mask "ONIXEDIT_[REF]_cover" it will become "ONIXEDIT_12345_cover.jpg" for a JPG cover image associated to title having Record Reference 12345.

There are also 2 special buttons in each partner definition record:



- **Test Connection.** After defining a new trading partner, use this button to verify that the connection to the FTP server is possible and valid. Thus, in case of connection failure, you will have immediate feedback. In this case verify that the parameters of your account are correct in all details. Most of the time, the problem is a typographical error. If, on the other hand, the parameters conform exactly to the information furnished by your trading partners, please communicate with them to verify the status of your FTP account.

- **Preview**. The Preview button will allow you to look at the resulting metadata file as it will be sent to your trading partner without having to send it.

Above the list of trading partners, you will see 3 options:

- **Replace “ToCompany” (in ONIX Message header) by partner's name**. This is an option allowing you to define the name of your trading partner automatically, in the header of an ONIX file, as the recipient of the file (tag ToCompany).

- **Default Partner File Prefix**. The files which are to be sent to your business partners will be named with the date and time of file creation (yyyyMMddHHmmss.xml), for example 2090831105034.xml. If you define a prefix, it will be added at the beginning of all the files you produce. For example, if you define the prefix "GPG", the file in the preceding example will become GPG20090831105034.xml. This is the same as the Prefix column in the trading partners list, but acts as a default value for all partners. If something is defined in the partners' list, this will have priority over the default prefix value.

- **SupplyDetail transfer mode**: If the checkbox “Transmit only data associated with each partner name” is chosen, then every partner will receive a distinct ONIX file limited to the SupplyDetail records concerning them. To define a SupplyDetail record for a specific partner, you should first have the Advanced Form of the PRO version (in options for **ONIXEDIT** regular edition). If no SupplyDetail record is defined for this partner, the resulting ONIX files will not include any SupplyDetail component. This allows you to target precise commercial information to be transmitted to each partner, without having to transmit your entire metadata contents to everyone.

Once you have defined all your trading partners, you can use the automatic file transmission tool as follows:

1. First open your ONIX file with **ONIXEDIT**

2. Select the files to be transferred from the main list. You do not have to make a selection if you want to send all the titles contained in one file.

3. Click on the **Transmit to Partners** button in the toolbar, or activate the **Transmit to Partners** function from the **Onix** menu (**F9**).

4. Make sure that the number of titles to send (inserted in the **Send n Titles to Selected Partners** button) corresponds to what you want to send.

5. Check the trading partners to whom you want to send an ONIX file.

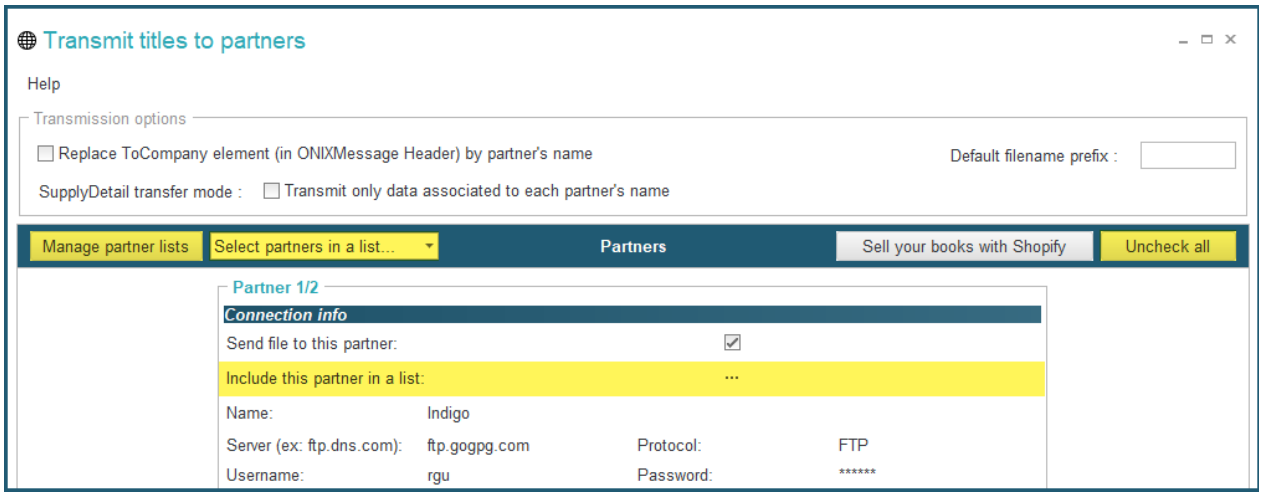
6. Click on the **Send n Titles to Selected Partners** button and finally, look in the contents of the processing journal at the bottom of the window to make sure that

there have been no transmission errors.

If you try to send a file containing titles with errors, you will be warned to correct these errors first if the option "**Allow transmission of invalid titles**" in Preferences module is not checked. If you try to send titles having external files that are not synchronized in your media space (Please see the Media Space section) you will be asked to use the function **Upload Media Files** as a preliminary step, so that these files will be available to your business partners.

### Partner Lists

You can create lists and add partners to these lists to quickly select a group of partners to send your books to. Here's how you can interact with these lists:




- The **Manage partner Lists** button: Press this button to bring up a dialog that will allow you to create new lists or delete existing lists.
- The **Select partners in a list...** drop-down menu: This drop-down menu will display all your created lists, you just have to select one of them so that the box "Send file to this partner" is checked for all the partners of this list.
- The **Include this partner in a list** button: Press this button to add this partner to one or more of the lists you have created.
- The **Uncheck All** button: Press this button to uncheck the "Send file to this partner" box for all your partners.

### Sell your books with Shopify

See the section on the ONIXEDIT Bookstore app for Shopify to learn more about how to feed your Shopify store directly from ONIXEDIT.

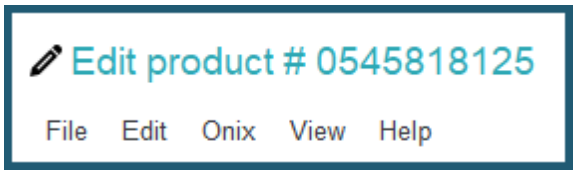
# References

## Menus

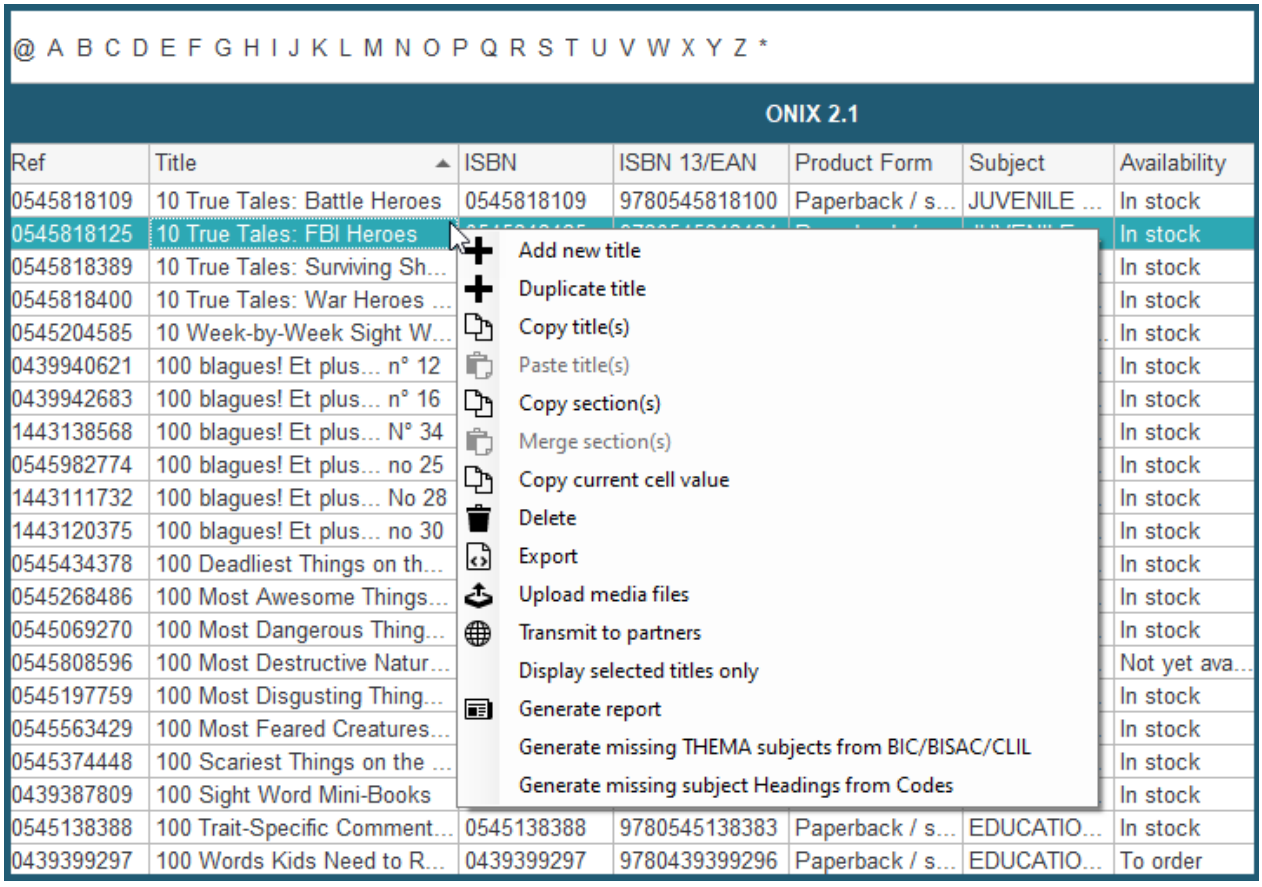
The menu structure in **ONIXEDIT** allows you simple and efficient manipulation of the interface. Most of your menus are accompanied by keyboard shortcuts to allow faster activation. There are three menus available:

**The main menu bar:**

**The edit title dialogue menu bar:**




**The main list context menu:**

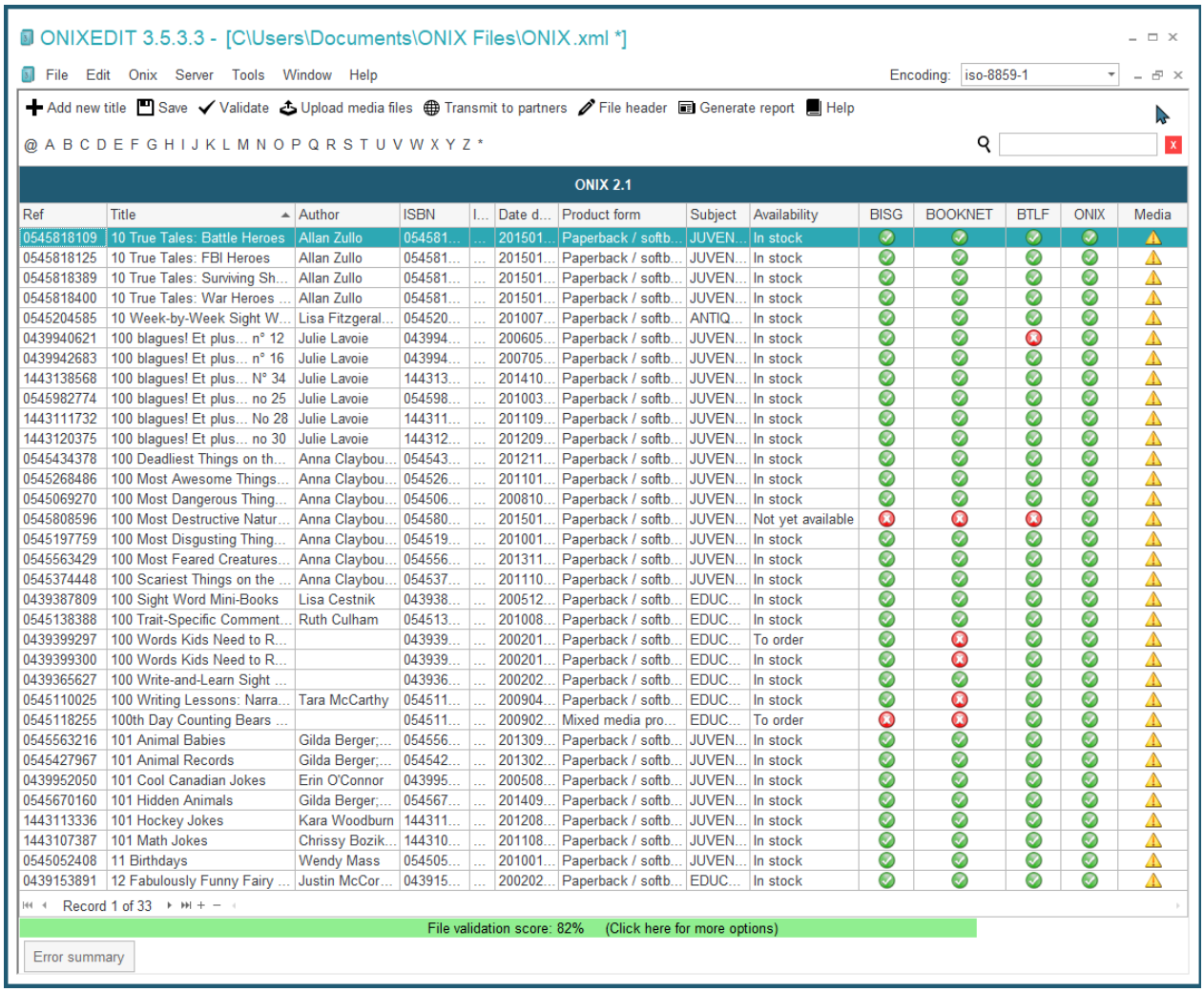



In this help file, you will find detailed information on all of the functions of these menus.

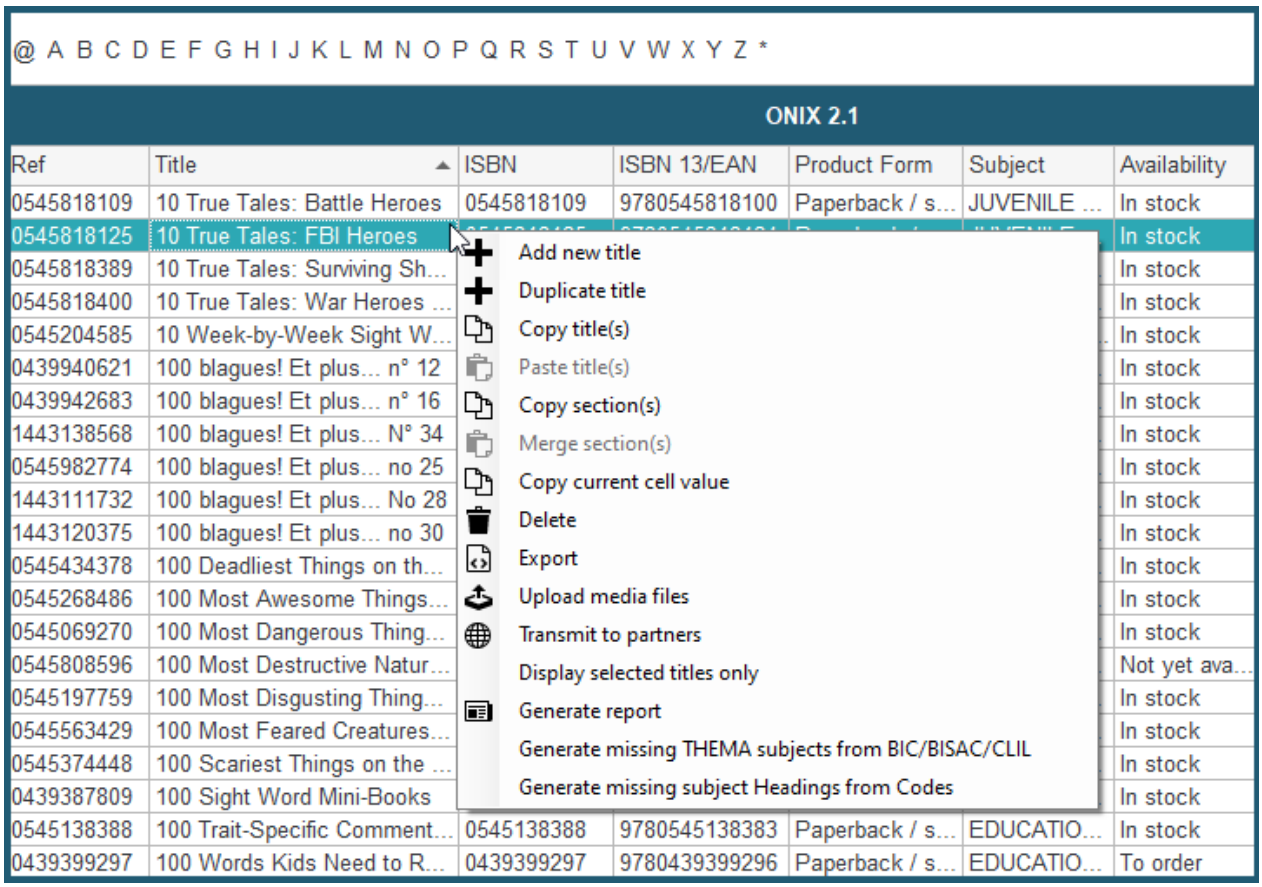
## Lists

There are three kinds of lists in the **ONIXEDIT** program.

The **Main List** is seen when the program is open and presents these titles in the ONIX file that are in the process of being edited:

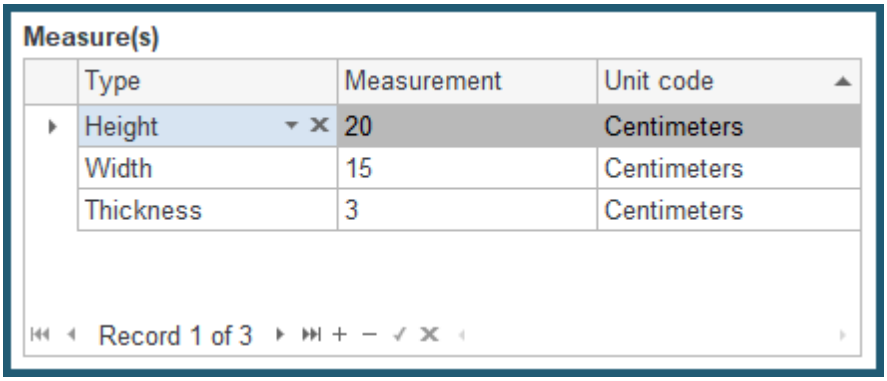



From the main list, you can make a selection of multiple titles. To make a continuous selection, click on the first record that you want on the list and then, while holding down the **SHIFT** key, click on the last record you want. To make a discontinuous selection, select your first title and then, holding down the **CTRL** key, select the other records required in turn. Once you have a selection, you can then activate one of the available functions on that selection. One way to accomplish this is to use the contextual menu which you can pull up using a right click on your mouse:

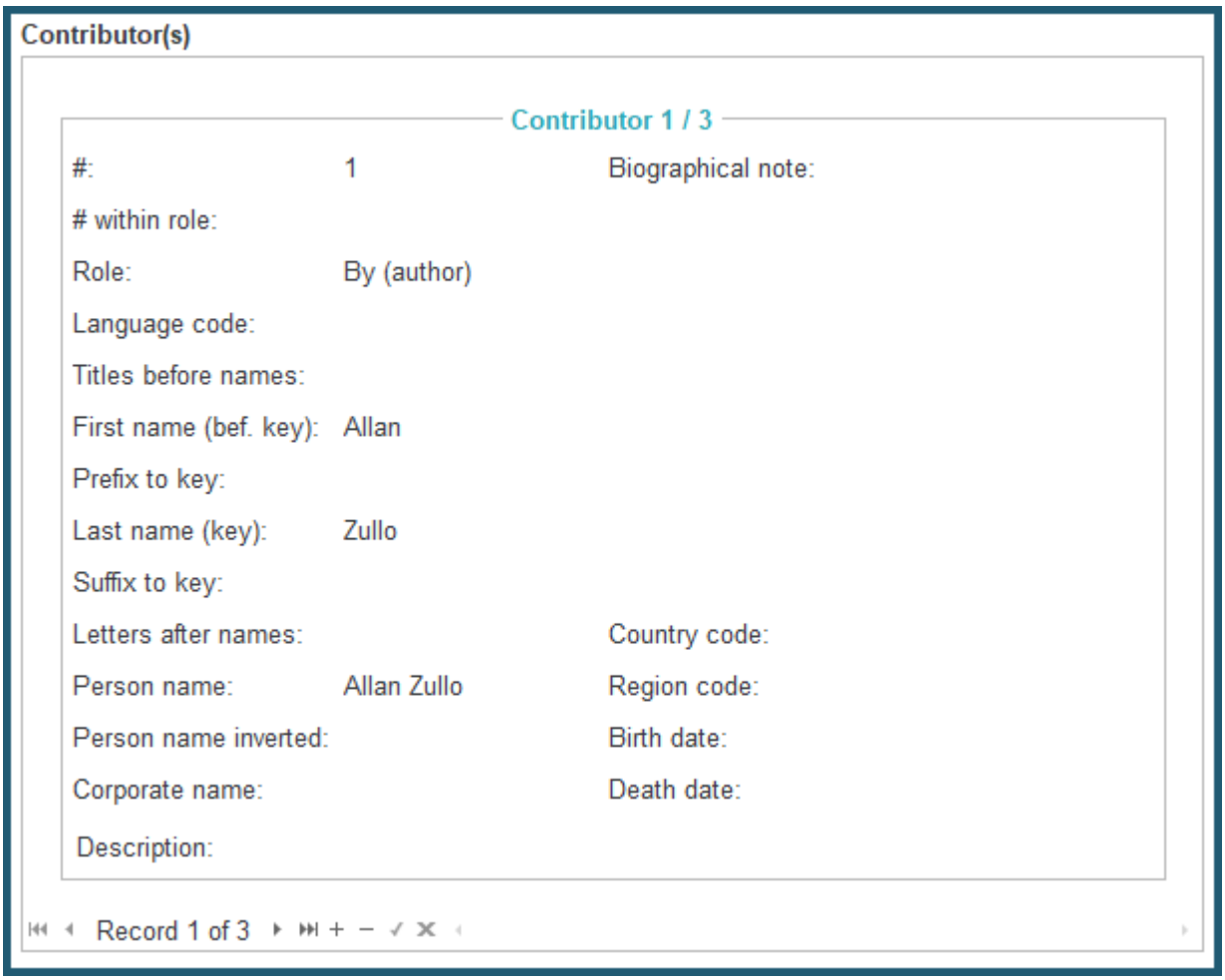



Starting from the edit titles dialogue, different lists are included:

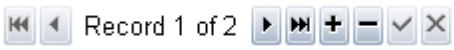
The standard list:




The "carousel" type lists which are found in the title editing screen:




Whatever the type of list, each is provided with a navigation control on the left bottom of the list:




Navigation control on a list consists of the following elements:

- Takes you to the first record on a list.
- Takes you to the preceding record.
- Record 1 of 2 Indicates the current record.
- Takes you to the next record.
- Takes you to the last record on the list.
- Allows you to add a new record.
- Deletes the current record.
- Validates the editing in progress on the list.
- Cancels the editing in progress on the list.

Except for lists of the “carousel” type, you can always sort the contents of the list in order of one or the other of the columns presented, simply by clicking on the column header. A second click on the same header will reverse the sorting order. You can also combine sorting by several columns by holding the **SHIFT** key while clicking on the headers.

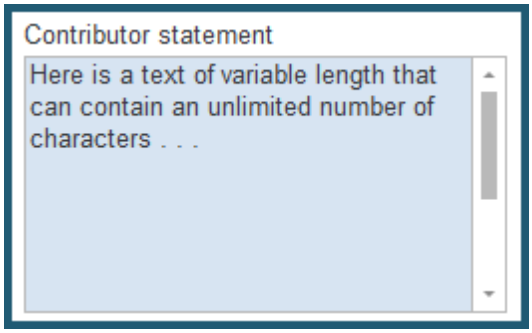
Starting from the main list, you can double-click on a title to bring up the editing window for that title. It is possible to have several editing windows opened at the same time.

## Editing Controls

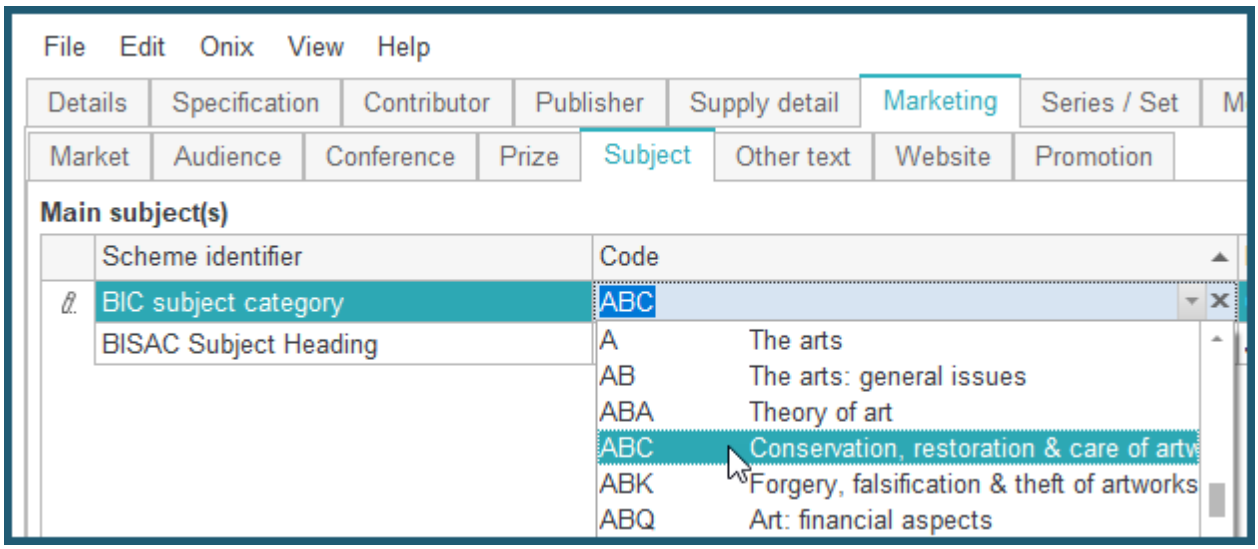
In order to allow you to edit all the different information elements in an ONIX file, **ONIXEDIT** provides you with a variety of controls.

The **regular Text field** allows simple text editing:

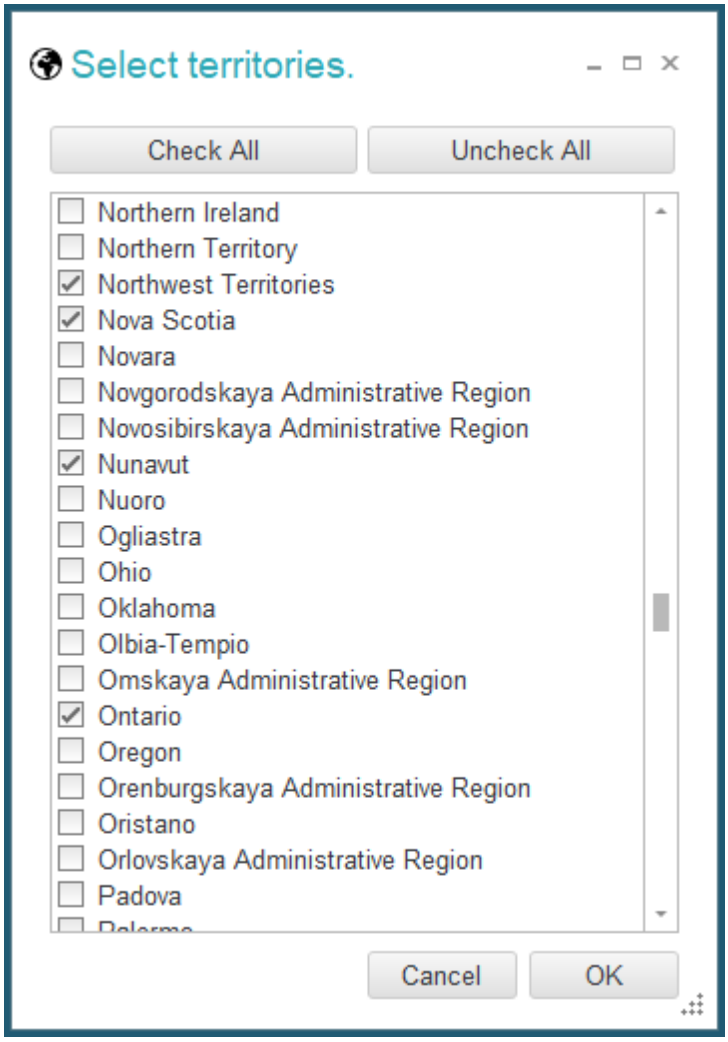
The **Text field** allows the capture of an unlimited number of characters. It has a scroll bar which allows you to move down the text if it goes beyond the size of the control:




The **drop-down menu** allows you to choose a pre-defined value easily. Only values permitted for the field are found. To choose a value, you can start to type the first letters of the value you want, and the drop-down menu will deploy automatically, showing only corresponding values. Up and down arrows on the number pad may be used to select the value you want. Choose by pressing on the ENTER or RETURN key. You may also use the mouse to deploy the menu and to choose a value. A drop-down menu can also be deployed using the sequence **ALT-↓.** To deselect a previously selected value, just click on the drop-down menu ✕ button:

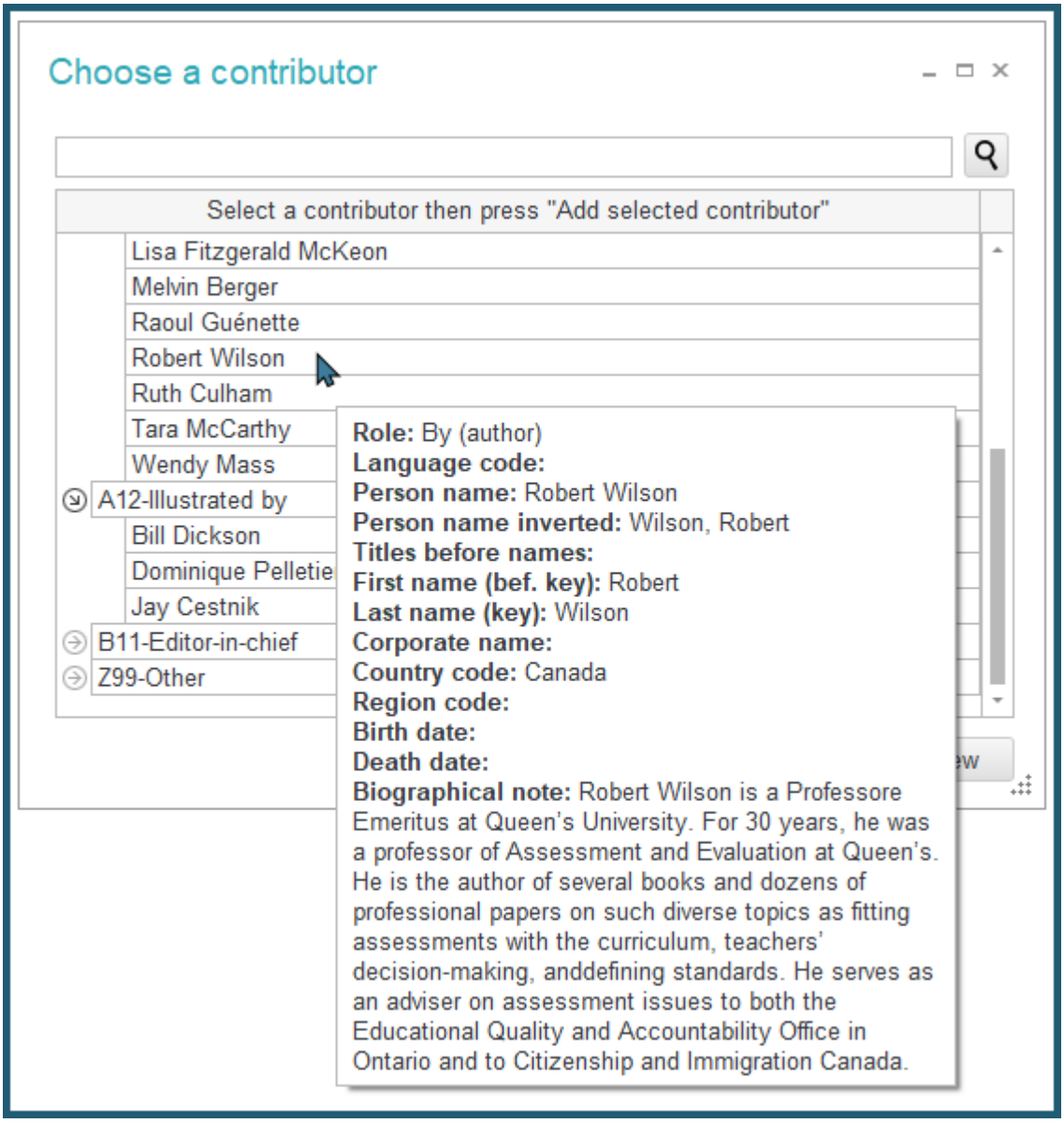



The **multiple selection dialogue**, for countries or territories, allows you to make selections of many ISO country or territory codes, which will then be inserted in the ONIX field, separated by spaces.



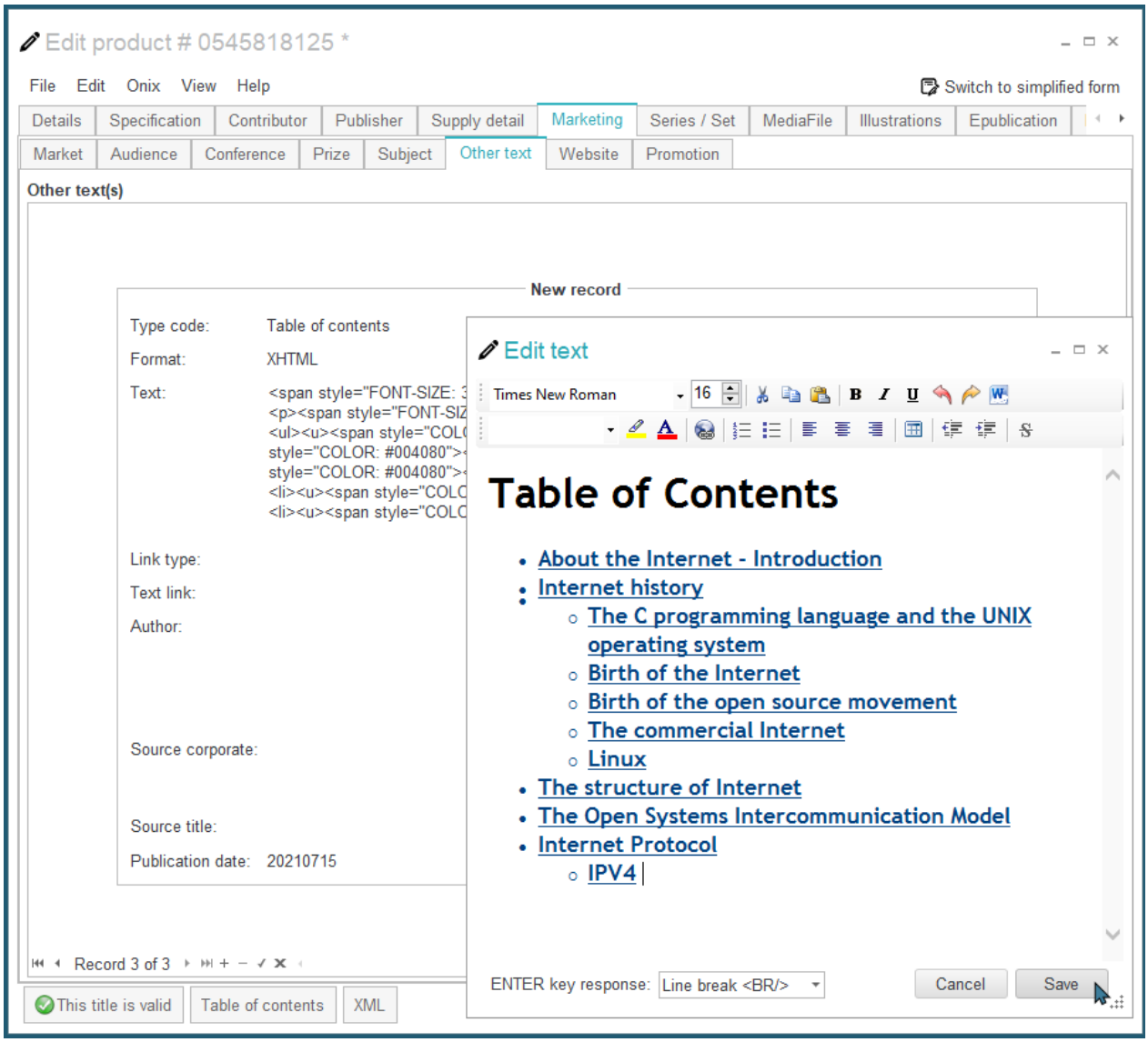

For example, the selection containing Alberta, British Columbia, Manitoba, New Brunswick, Nova Scotia, Nunavut, Ontario, Quebec and Saskatchewan will become: "CA-AB CA-BC CA-MB CA-NB CA-NS CA-NU CA-ON CA-QC CA-SK" in the ONIX field.

The **Select Contributor** (Advanced Form only) control is shown when you try to add a new contributor in the list of contributors for a title. This dialogue presents the complete list of all the distinct contributors contained in ONIX files that you have opened since the last start of **ONIXEDIT**. You can find a specific contributor quickly using the integrated search tool, and check if this is the correct one using the pop-up information tooltip which appears when you hover over the list with the mouse. The selector is presented in the form of a hierarchical list in which the principal nodes are the different types of contributors encountered up to the present time. A contributor is considered distinct if one or the other of the fields has a value never encountered up to the present time. For example, two authors named John Doe could be found on the list if they do not have exactly the same biographical notes. This is a useful tool to allow you to find and regularize the definition of your contributors. Using the contributor selector, you have the choice of adding all the information attached to the selected contributor to the list of contributors of your current title, or to create a new contributor using the appropriate buttons at the bottom of the dialogue. In the case of the addition of a new author, this author will be added to the selector and will be available next time you begin to add a new contributor:




The **HTML/XHTML editor** is available in the **Marketing/Other text** section of **ONIXEDIT**

for ONIX 2.1 files when the format of the text input is **HTML** or **XHTML**. The **HTML/XHTML editor** is thus presented when you click on the contents of an "Other Text" field if the field's format is **HTML** or **XHTML**. Even though the **HTML** format is supported, the ONIX standard recommends using **XHTML** format to insert tagged content. However, some trading partners like Amazon does not support **XHTML** yet and prefer **HTML** or simply, unformatted ASCII text. See Adding XHTML formatted content for more information about this subject and how to define it for ONIX 3.0 files:



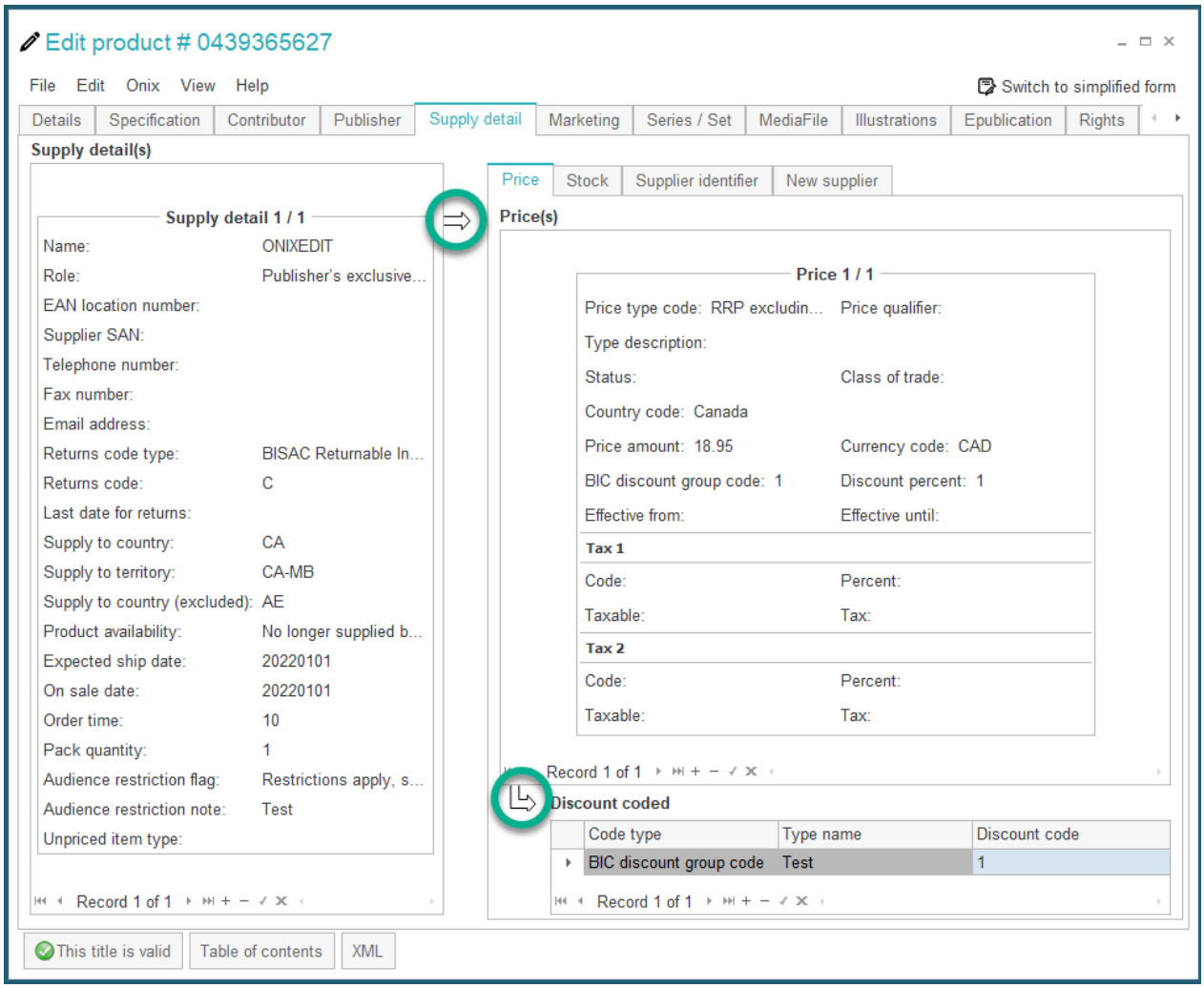

The media file selector allows you to associate GIF, JPEG, PDF, TIF, RealAudio, MP3, MPEG and PNG files to your titles. These external files may come directly from your computer, from a server on your local network, or from elsewhere on the Internet. No matter what their source, all these external files can be collected and classified for you in your Media Space. The Media Space is a service included with the Pro edition of **ONIXEDIT**. It is also available for the regular edition as an option.

The media file selector is presented when you add a new file to the list from the **MediaFile** tab from the title Advanced Form. For the Simplified Form, you will get access to it by clicking on the cover image thumbnail. This selector also displays when you edit the field **Media File link**. Please see the instructions in the Attach JPEG, MP3, MPEG, and Other Files section to obtain more details about the procedure used to add one of these external

files to your titles.

## Relations Between Information Elements

Certain tabs in the advanced form display arrows joining certain information elements to each other:

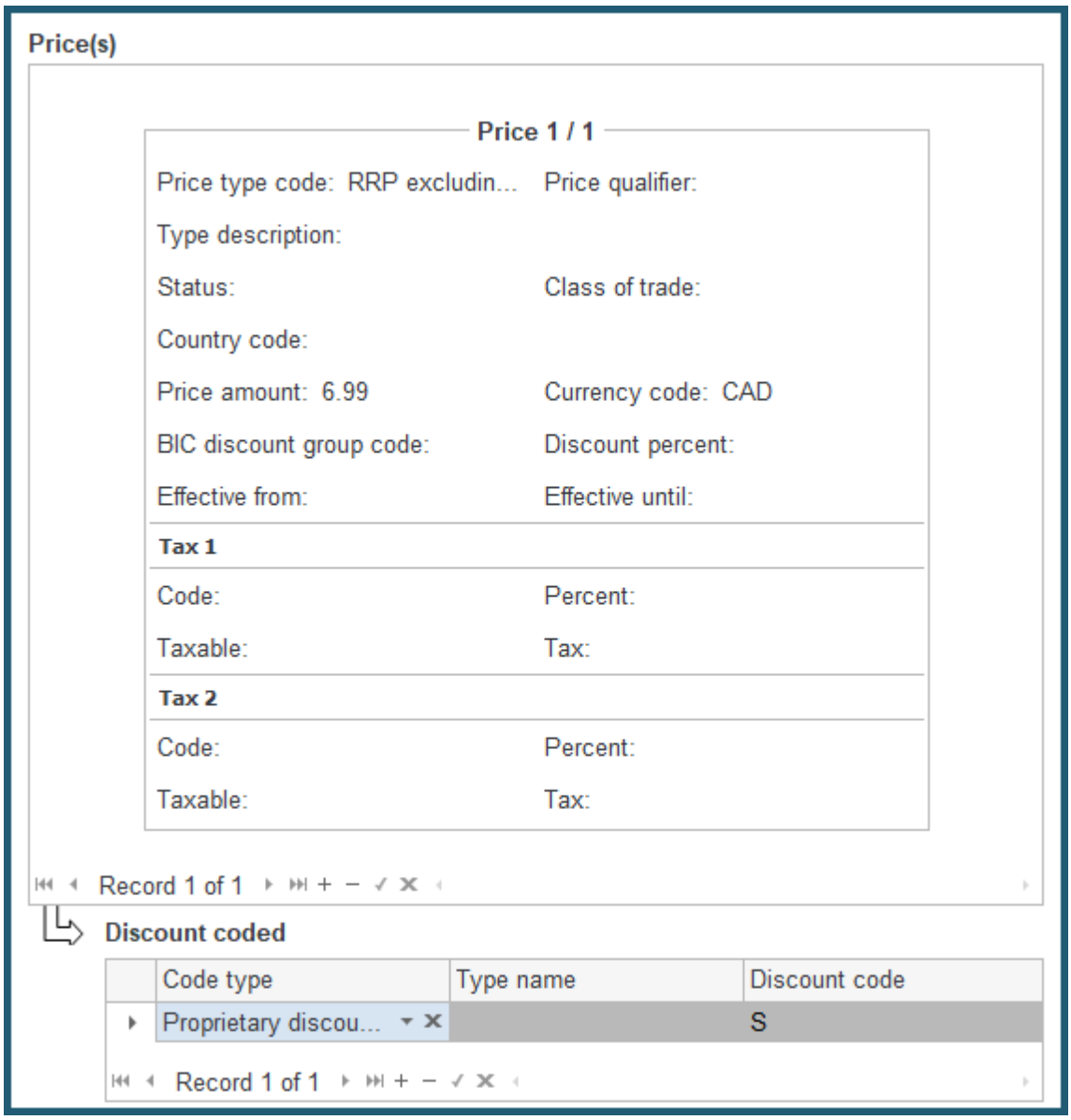



The XML representation of this screen in the ONIX 2.1 norm is as follows:

```
<SupplyDetail>
  <SupplierName>ONIXEDIT</SupplierName>
  <SupplierRole>02</SupplierRole>
  <SupplyToCountry>CA</SupplyToCountry>
  <SupplyToTerritory>CA-MB</SupplyToTerritory>
  <SupplyToCountryExcluded>AE</SupplyToCountryExcluded>
  <ReturnsCodeType>02</ReturnsCodeType>
  <ReturnsCode>C</ReturnsCode>
  <ProductAvailability>43</ProductAvailability>
  <NewSupplier>
    <SupplierIdentifier>
      <SupplierIDType>01</SupplierIDType>
      <IDValue>abc</IDValue>
    </SupplierIdentifier>
    <SupplierName>gpg-solutions</SupplierName>
```

```
</NewSupplier>
<ExpectedShipDate>20220101</ExpectedShipDate>
<OnSaleDate>20220101</OnSaleDate>
<OrderTime>10</OrderTime>
<Stock>
 <LocationName>Warehouse 1</LocationName>
 <OnHand>10</OnHand>
 <OnOrder>20</OnOrder>
 <CBO>30</CBO>
</Stock>
<Stock>
 <LocationName>Warehouse 2</LocationName>
 <OnHand>20</OnHand>
 <OnOrder>30</OnOrder>
 <CBO>40</CBO>
</Stock>
<PackQuantity>1</PackQuantity>
<AudienceRestrictionFlag>R</AudienceRestrictionFlag>
<AudienceRestrictionNote>Test</AudienceRestrictionNote>
<Price>
 <PriceTypeCode>01</PriceTypeCode>
 <BICDiscountGroupCode>1</BICDiscountGroupCode>
 <DiscountCoded>
  <DiscountCodeType>01</DiscountCodeType>
  <DiscountCodeTypeName>Test</DiscountCodeTypeName>
  <DiscountCode>1</DiscountCode>
 </DiscountCoded>
 <DiscountPercent>1</DiscountPercent>
 <PriceAmount>18.95</PriceAmount>
 <CurrencyCode>CAD</CurrencyCode>
 <CountryCode>CA</CountryCode>
</Price>
</SupplyDetail>
```

As you can see, certain elements are contained inside higher-level elements. The presence of arrows in the interface allows it to show this architecture of interlocking elements. The direction of the arrow is important. It indicates the level of dependence between the objects. For example, a **Price** record may have one or more **Discount Coded** records attached:




We say therefore that the Discount Code records are dependent on a Price record. A dependent record can only be added if a higher-level record (reverse direction of the arrow) exists. Each higher-level record thus has its own subset of dependent records. This can be seen easily using the navigation control to move between records.

In this way you can define an unlimited number of dependent records, within the ONIX norms.

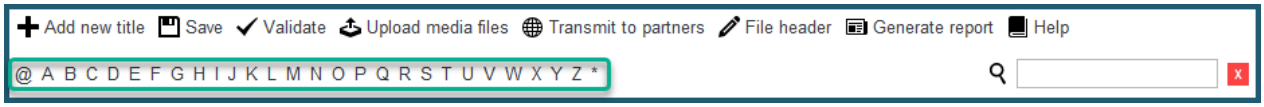
# Tools

## Searching for a title

**ONIXEDIT** offers different search tools to allow you to find your titles easily and rapidly, no matter how many titles you have.

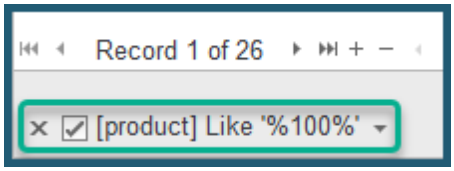
The simplest tool available is the **metadata Search Tool**. You will find it above the main list on the right side of the toolbar. Just type the word or characters string you are searching for and ONIXEDIT will search among all your titles' metadata:

Another handy search tool that you can use is the **Search by Title Index** which appears in the toolbar above the main list at the left of the metadata search tool:




You simply click on a letter to display titles beginning with the chosen letter. The @ key allows you to display all the books with a title beginning with something other than a letter (number, punctuation mark, or other). The last button, represented by an asterisk ("**All**"), allows you to display all the books.

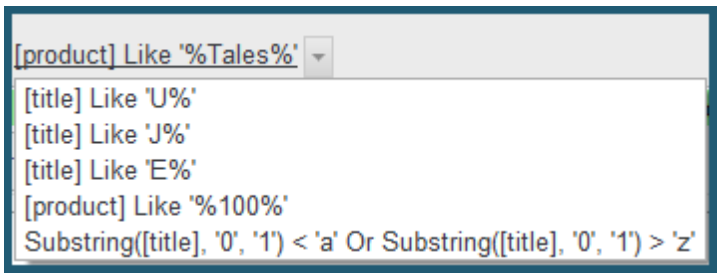
When you perform a search, the titles which do not correspond to the criteria sought still remain in the **ONIXEDIT** memory, they are simply filtered. At the bottom of the main list, you will find control buttons for these filters:



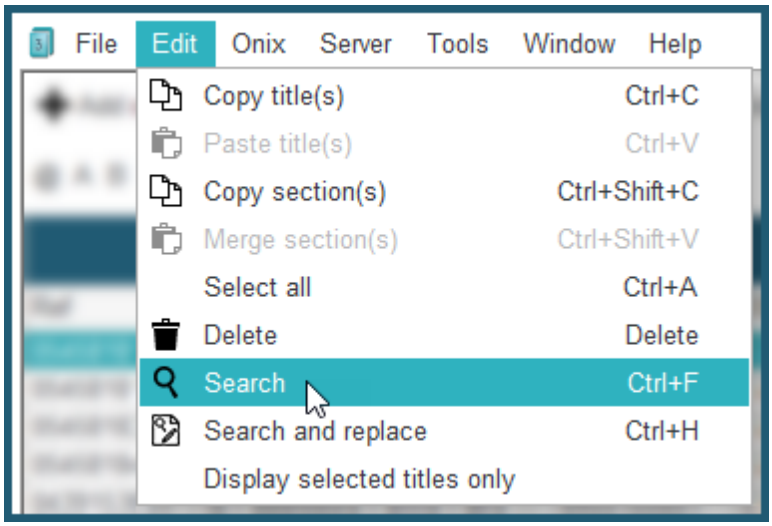

The button ✕ allows you to remove the last filter. Its action is equivalent to clicking on the "All" button in the title search index.

The checkbox ☑ allows you to deactivate the filter in operation temporarily, in the manner of a rocker switch. You can thus activate and deactivate your last search as needed.

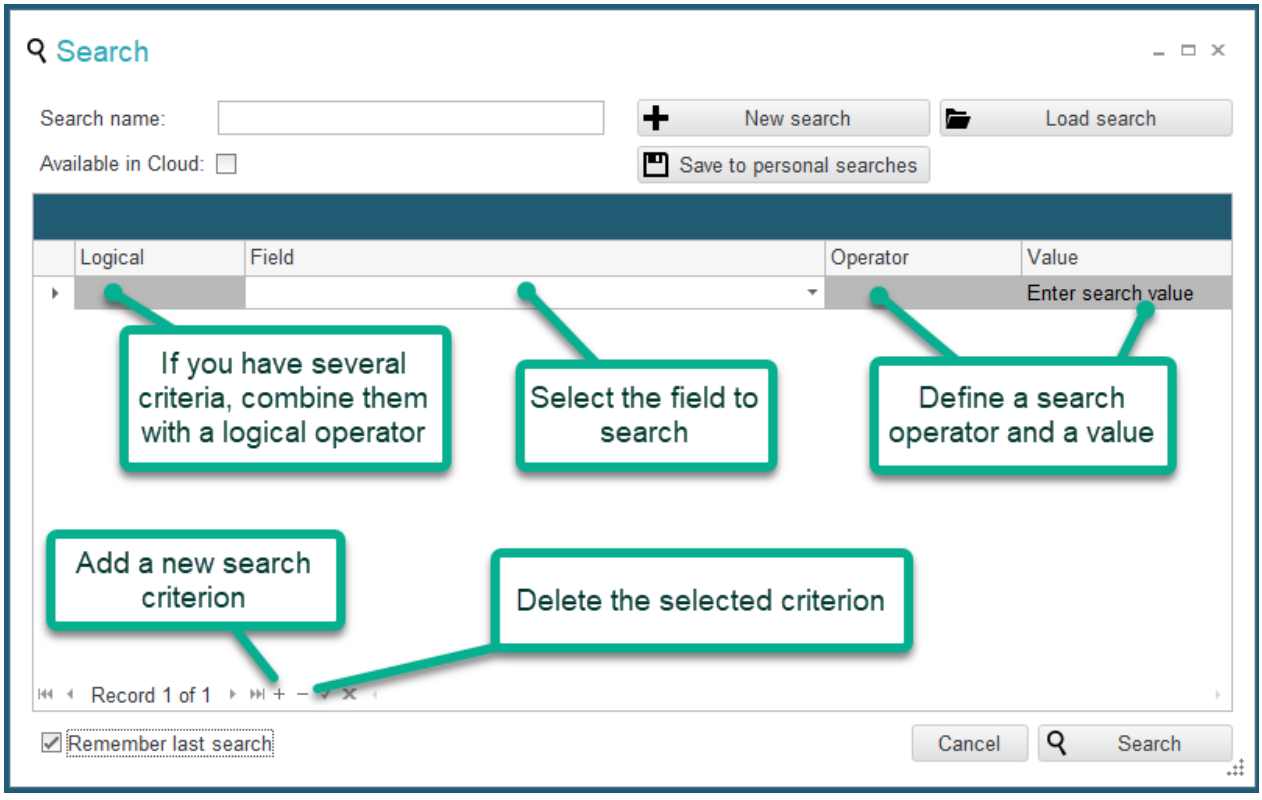
The button ▾ displays a drop-down menu containing your recent searches, which you can reactivate as needed:




If you need a more sophisticated way to search ONIX titles, you can also use the **Search** dialogue from the **Edit/Search** menu (**Ctrl-F**):

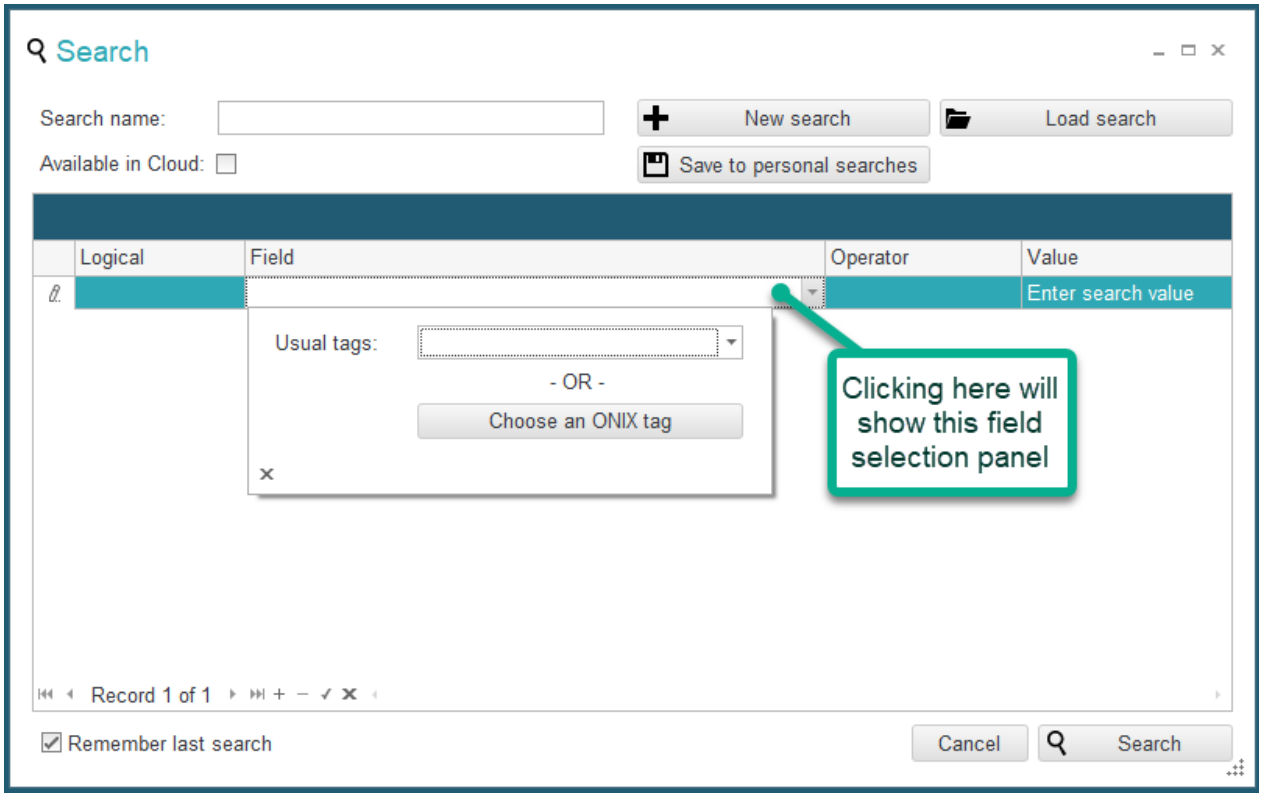



You will get access to a specialized form where you can define one or more search criteria:

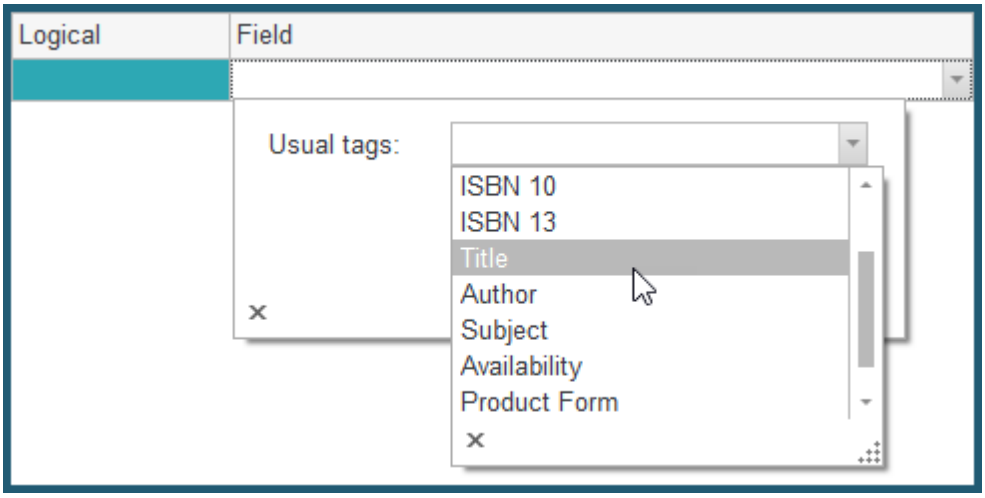


To define a search criterion, proceed as follows:

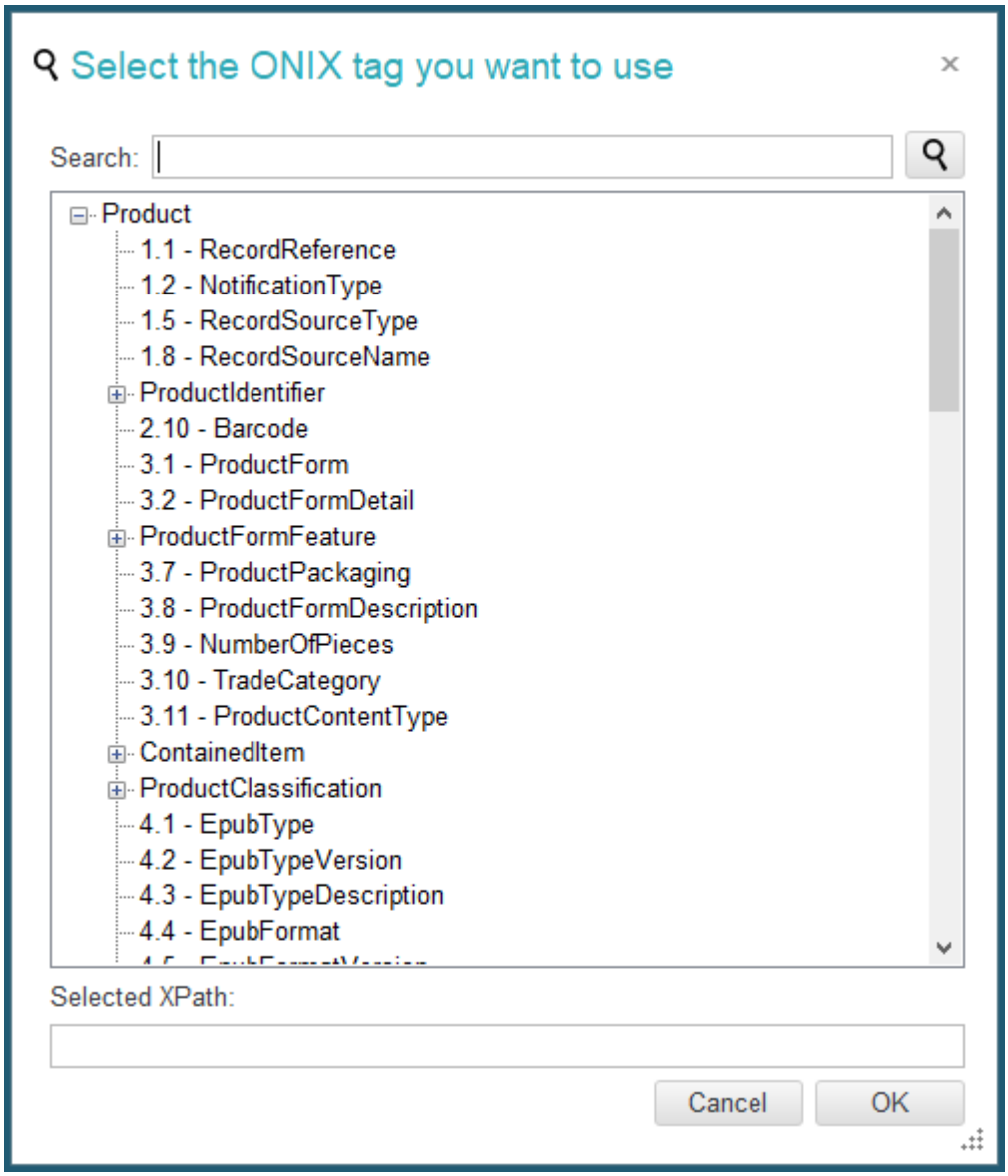
1. If there is no empty line in the Search list, click on the + at the bottom of the list.
2. Select a pre-defined field or ONIX tag by clicking the drop-down menu under Field column to show a special panel:



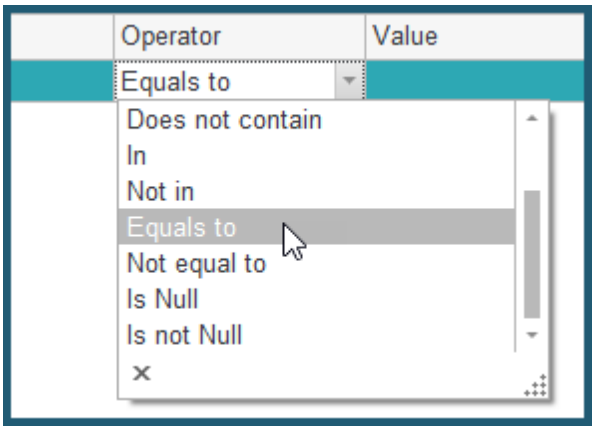

"Usual tags" presents the most common ONIX fields that you can use for searching purpose:




Button named "Choose an ONIX tag" will show a hierarchical list of all the ONIX tags supported by ONIXEDIT. You just have to double-click the one you want to search:

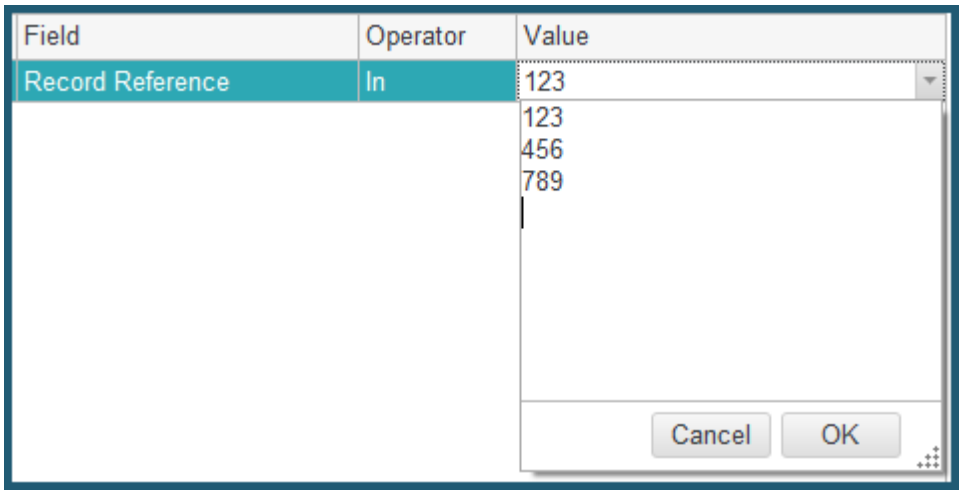


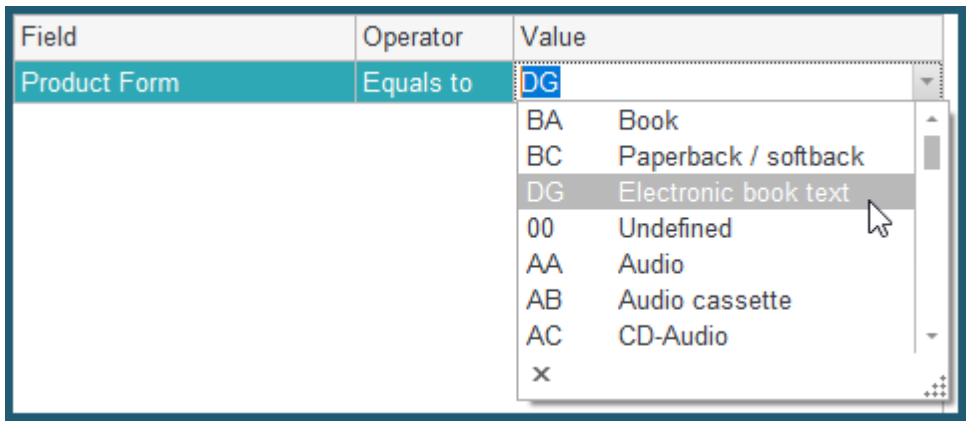

3. You must then select a search operator with the help of another drop-down menu:



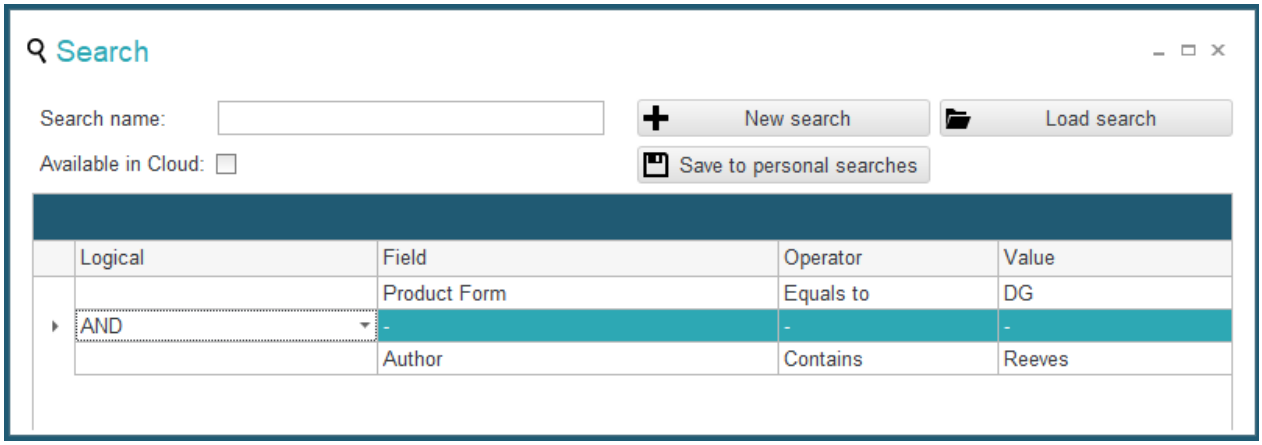

The content of this drop-down menu depends on the chosen field.

4. Finally, you will enter the value you are searching for. Again, ONIXEDIT will help you by providing special value controls depending on the type of field you are searching:



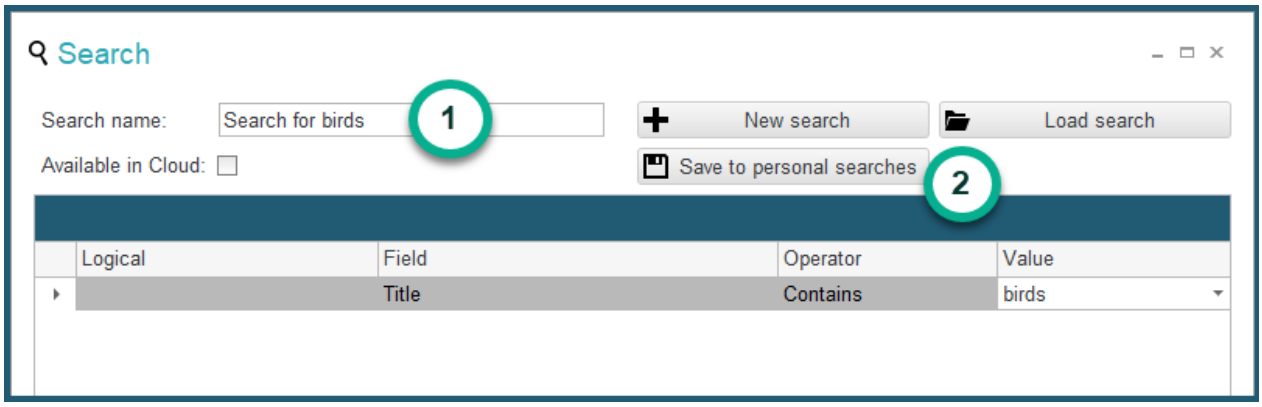




5. Once your criterion is defined, you can click on the search button right away to get the resulting titles shown on your main list, or you can add another criterion and combine it to the first one using a logical operator:

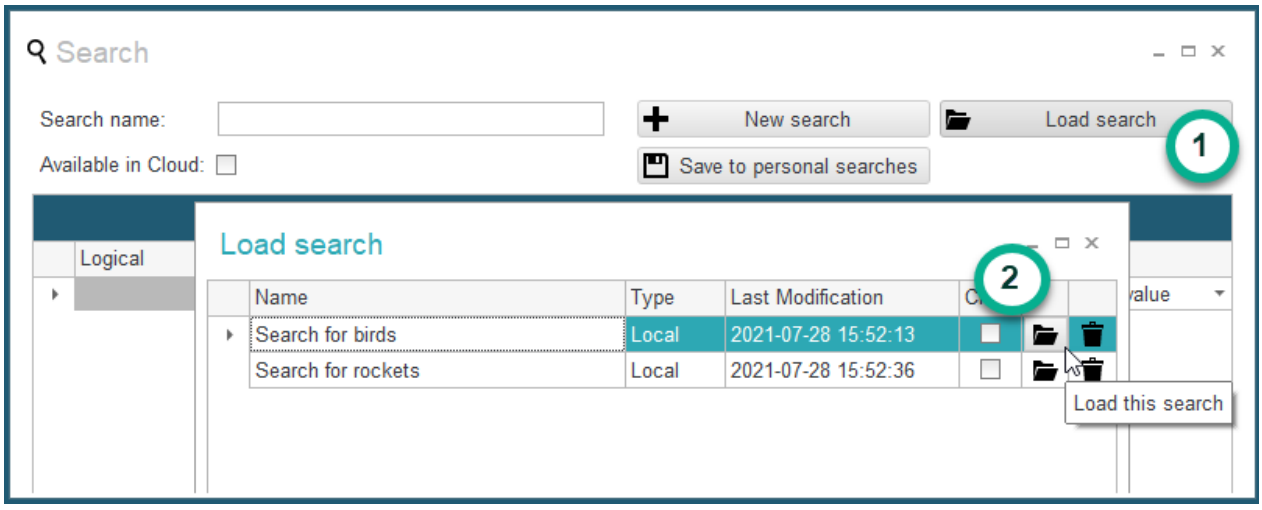



## Saving Usual Searches

Once your search is defined, you can save it for later usage. You must first give it a name and then, click on the "Save to personal searches" button:

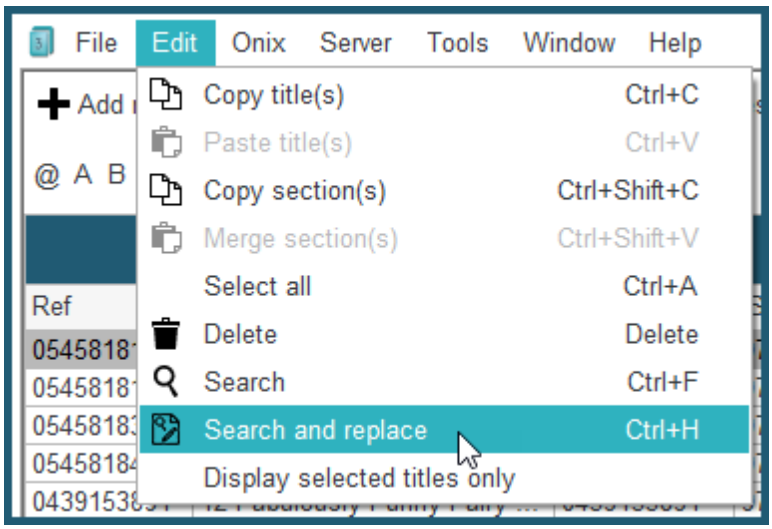



Then, use the Load Search menu to load a previously saved search:

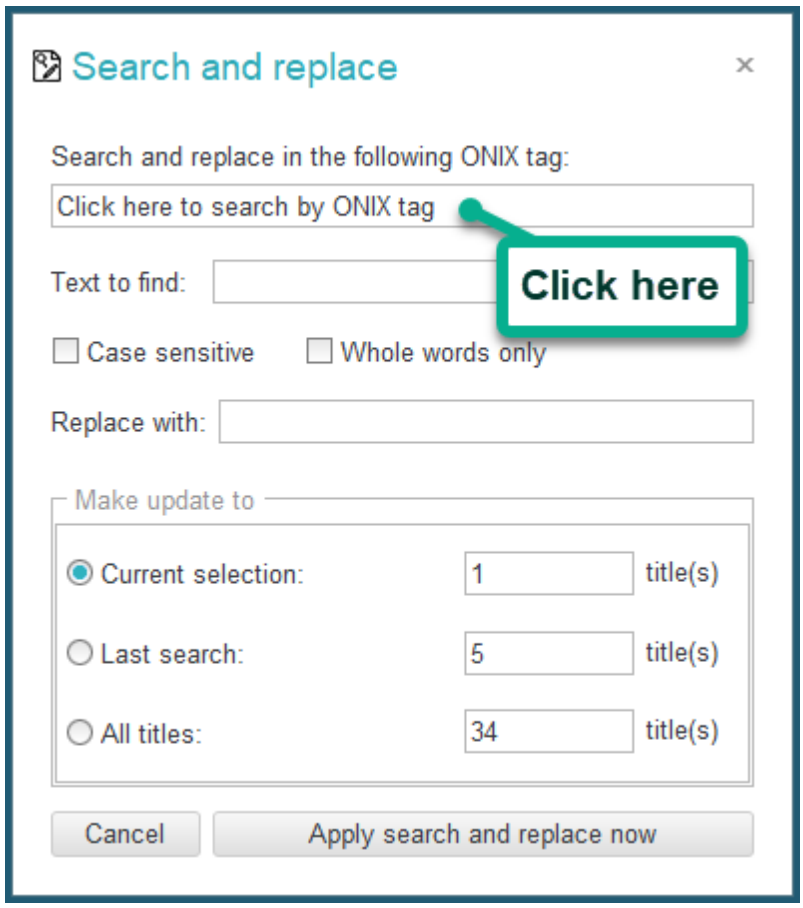



## Search and Replace values

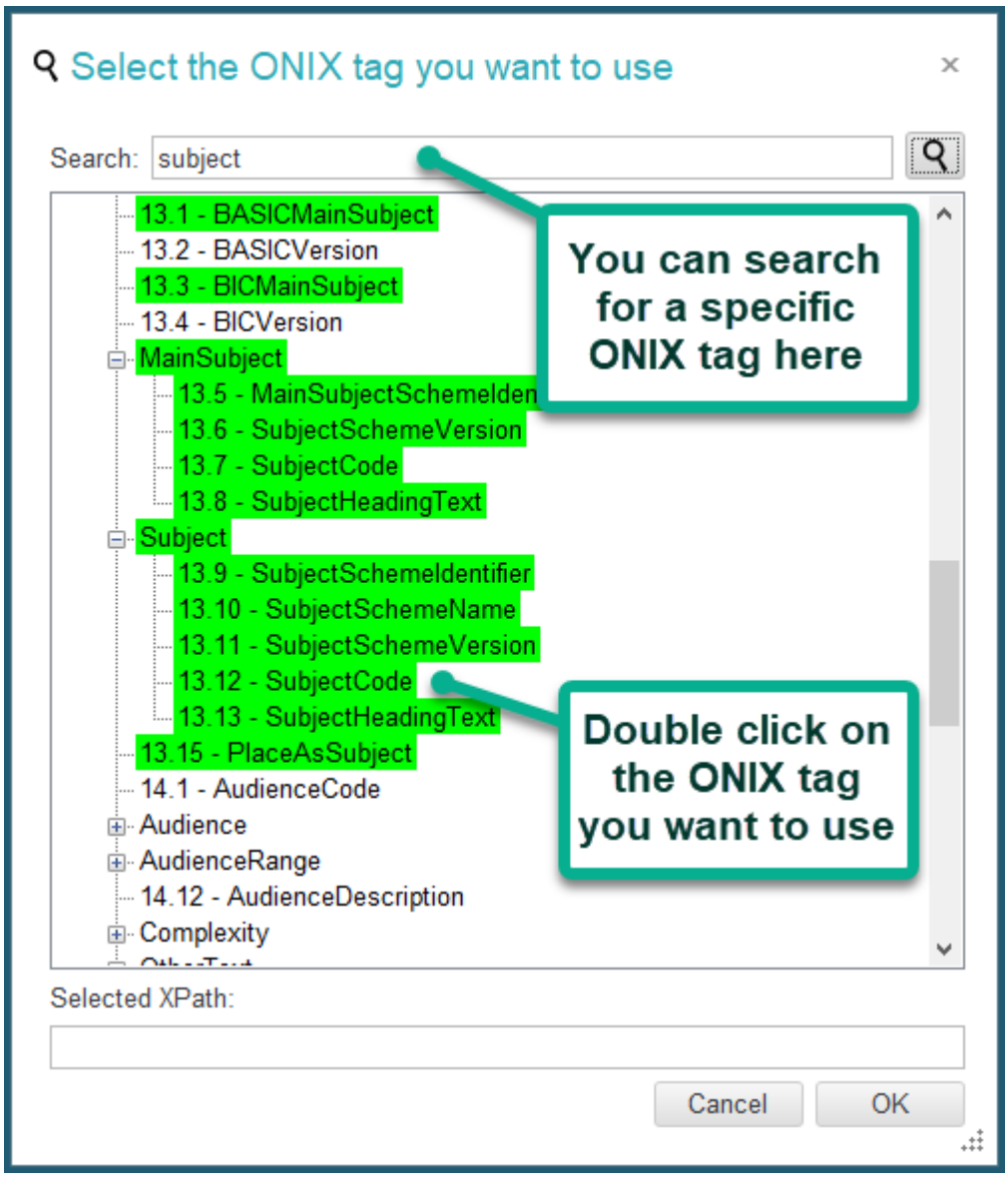
**ONIXEDIT** offers a Search and Replace tool that you can use on a selection of titles or a complete ONIX file to search for a specific value in any ONIX tag and replace it by another. You will find the Search and Replace tool, in the Edit menu of the main titles list or you can simply press **CTRL-H**:



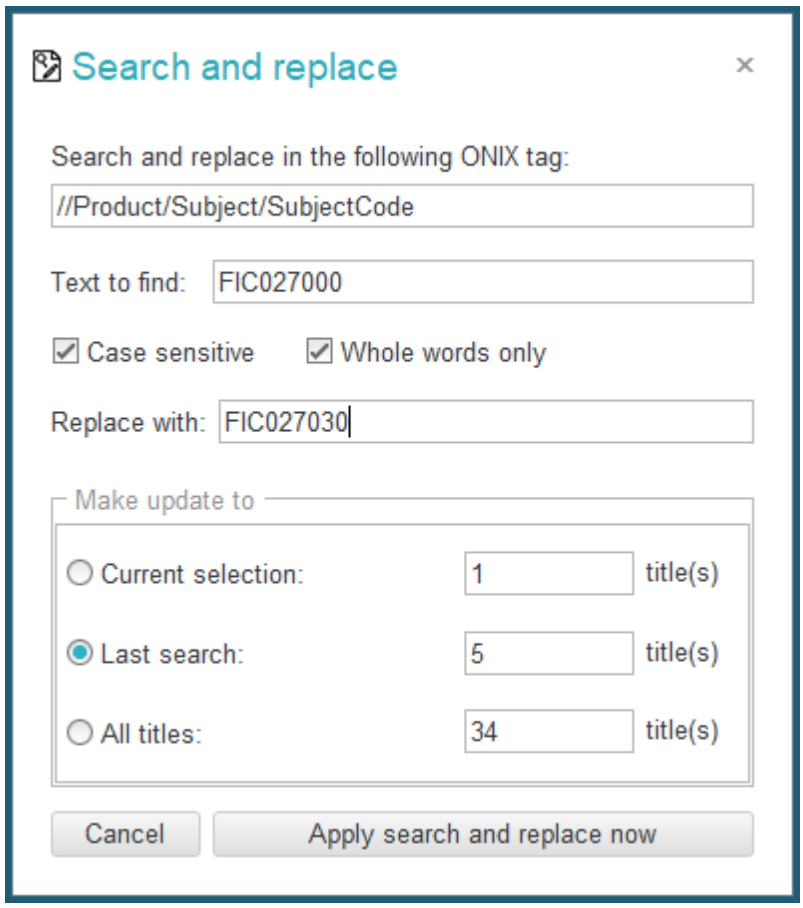

The following form will then be displayed:




You must click in the first text box to select the ONIX tag containing the value you want to change:




You can then complete the Search and Replace form by entering the text to search and the text that will replace it:




You can also set the following options:

- **Case sensitive**: When checked, the search value must match exactly the text to find with the same character case.
- **Whole words only**: When checked, the search value must match exactly the text to find without any extra characters before or after the value. Otherwise, the text to find is considered to have wildcard characters before and after it and consequently a match may be possible with extra characters before or after the search value.

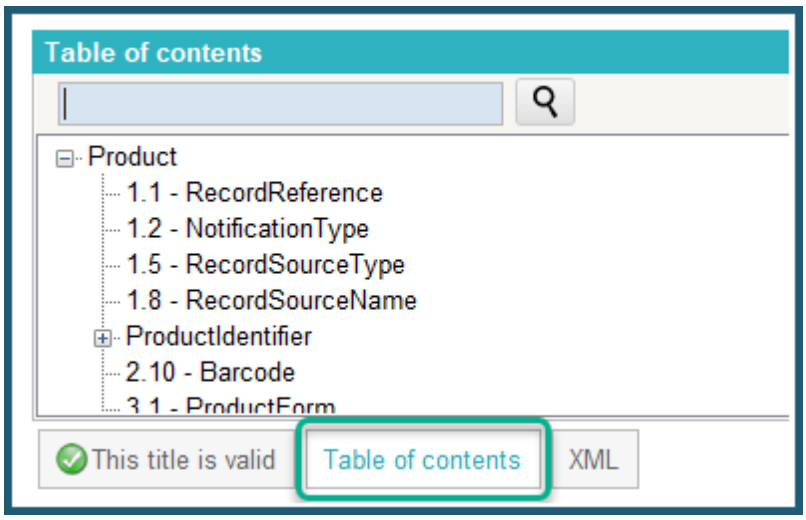
Finally, you must choose on which titles the Search and Replace will be applied. You can choose:

- **Current selection** to apply the Search and Replace on the Selected titles in the main list.
- **Last search** to apply the Search and Replace on the last search you made in the main list.
- **All titles** to apply the Search and Replace on all titles in your ONIX file.

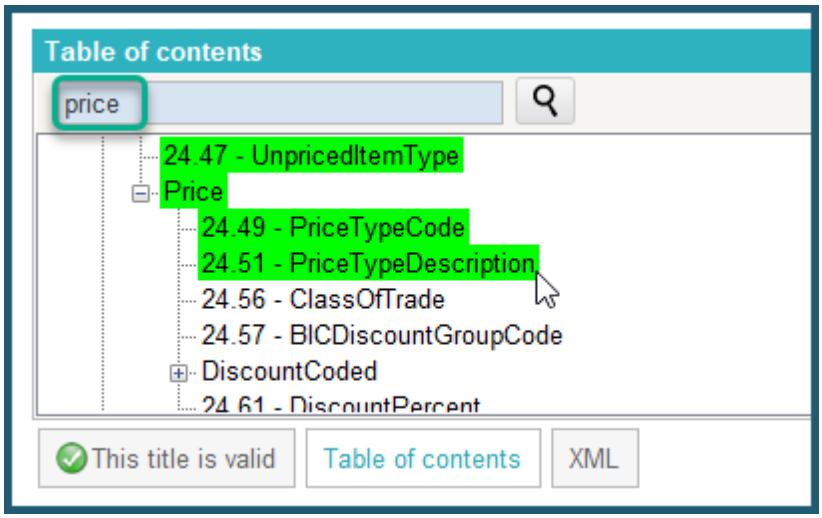
Once your choices are completed, just click on "**Apply search and replace now**" button to proceed with the update.

### Searching for an ONIX tag

From the advanced form, the retractable **Table of Contents** panel brings up a hierarchical list of ONIX tags supported by **ONIXEDIT:**



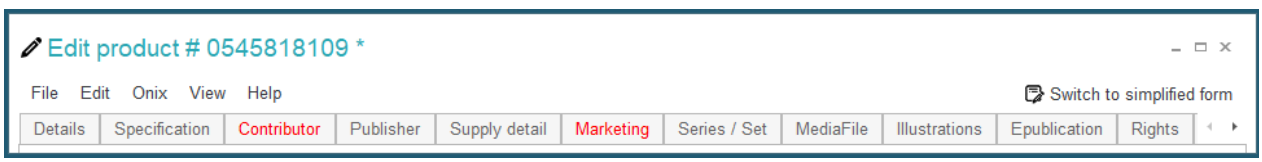

If you are searching for a particular ONIX tag, you can use the search control at the top of the hierarchical list. You may input the first few letters of the tag you want and press the RETURN key or click on the magnifying glass. The corresponding tags will be shown in green on the list:




If you then want to go to the corresponding field in the **ONIXEDIT** interface, you just double-click the tag you want and the program will take you there automatically.

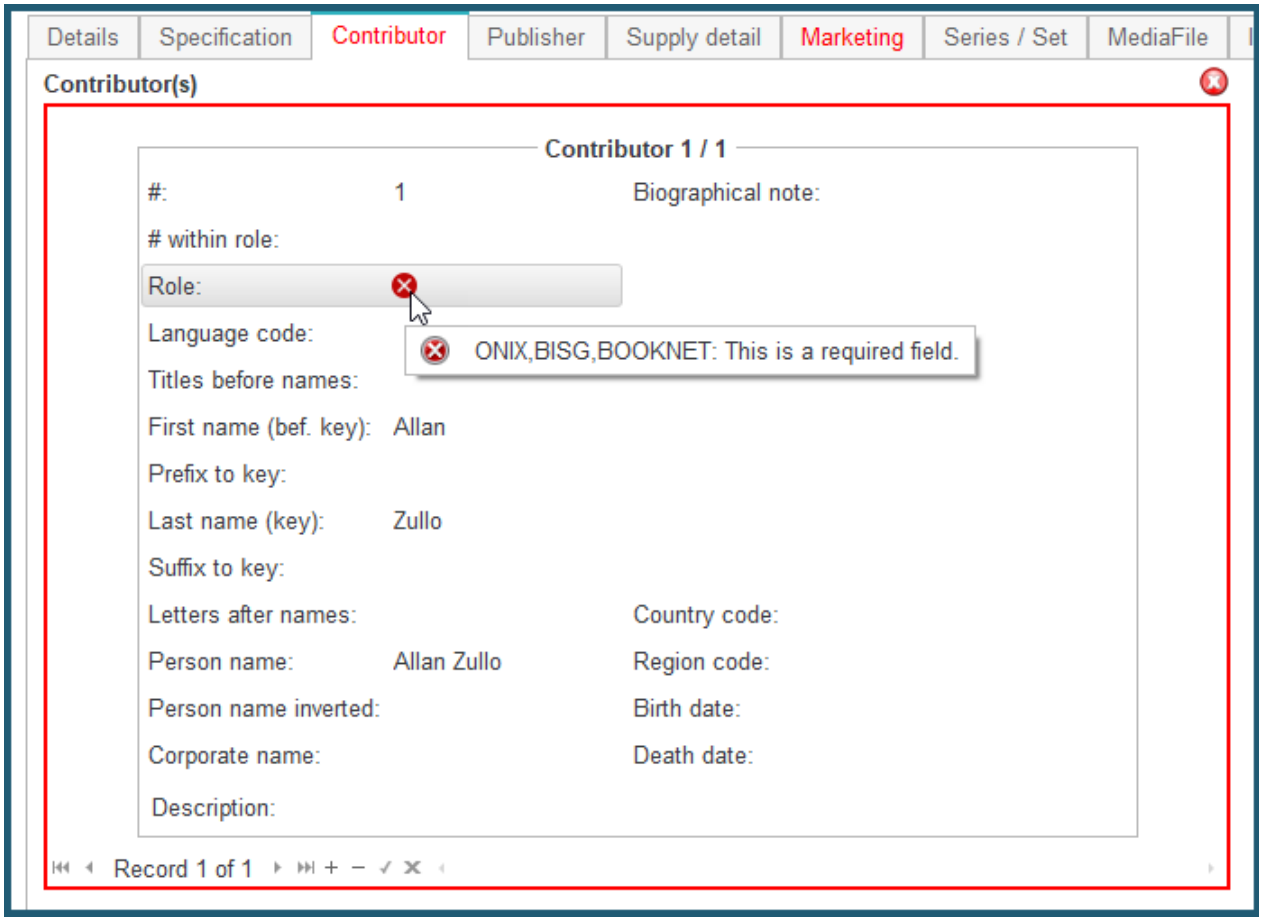
## Correcting Errors

When you edit a title, **ONIXEDIT** informs you if it contains errors, by showing you red tabs where errors exist:

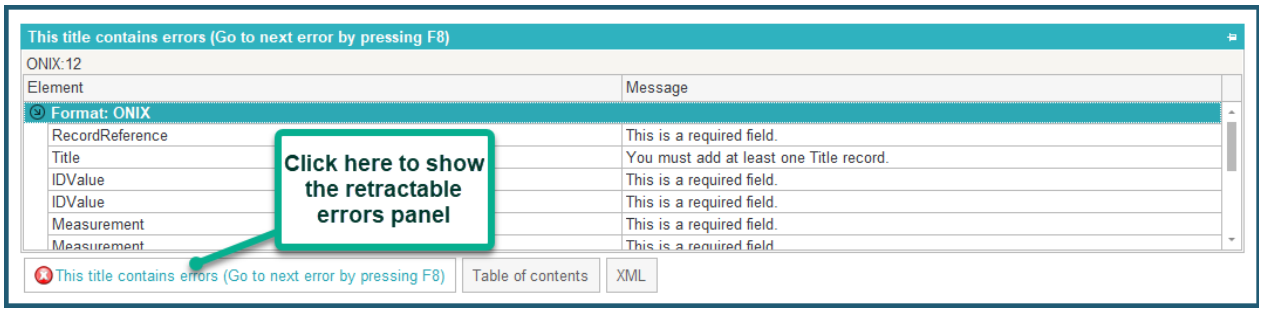



All the fields containing errors appear with a red X, and you may obtain details about the

error by positioning your mouse over each field:




The editing screen also has a retractable panel containing current errors. This panel is presented in the form of a hierarchical list identifying the rules that have been infringed, for each of the different formats:



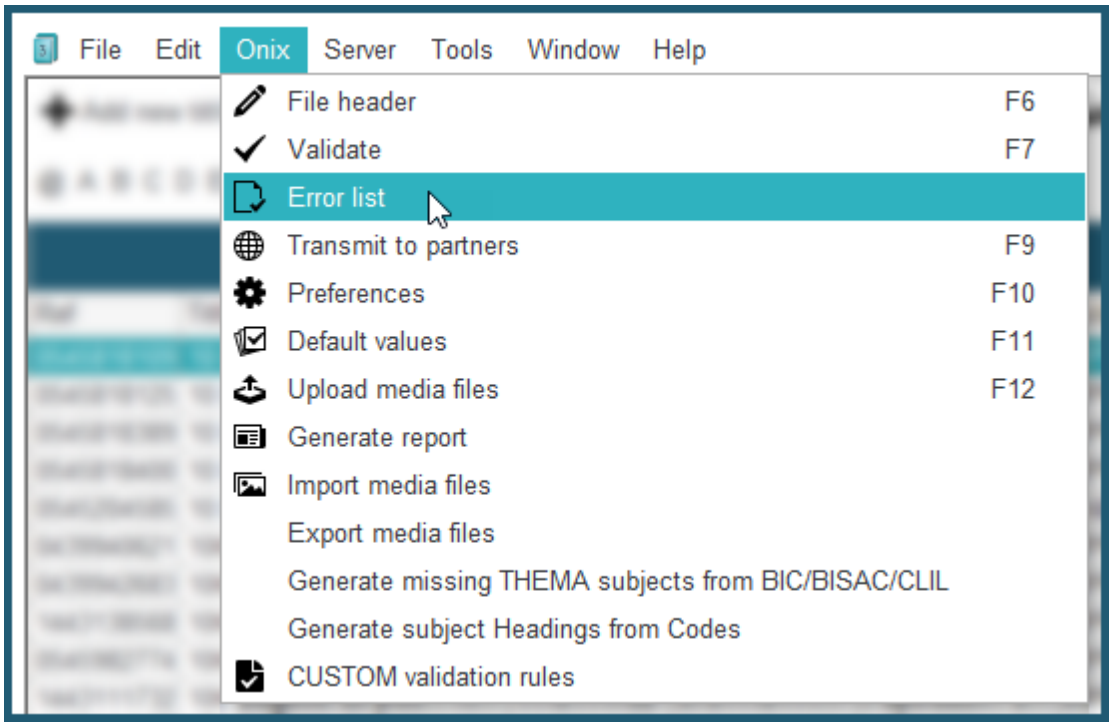

A double-click on an error will take you immediately to the field containing the error, so that you can correct it easily.

You can also go through all errors in turn using the **Go to Next Error** function on the **Onix** menu (**F8**). This function will take you to the field containing the error to allow you to correct it quickly and easily. After correcting an error, you can press **F8** again to go to the next error until all are corrected.

Please see the Validation section for further information.

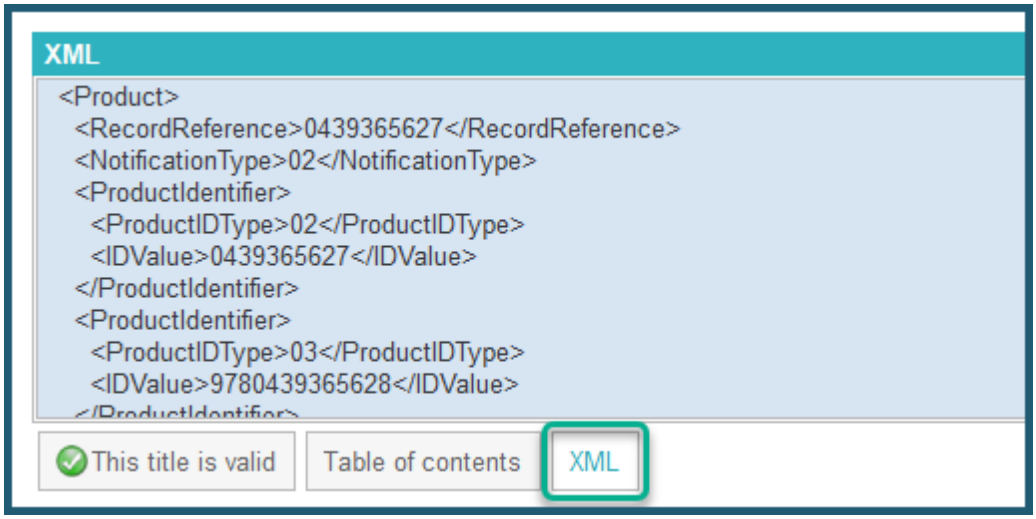
## Errors Report

If your ONIX file contains validation errors, you can get an Error Report in an Excel file with the help of the "**Onix / Error list**" menu:




## The XML Output Viewer

The advanced form has an XML output viewer tool, allowing you a real-time view of the ONIX message resulting from the current title. You access this viewer from the expandable XML panel:




It is possible to copy the XML output in order to paste it into another application. However it is not possible to copy an XML document into the XML panel.

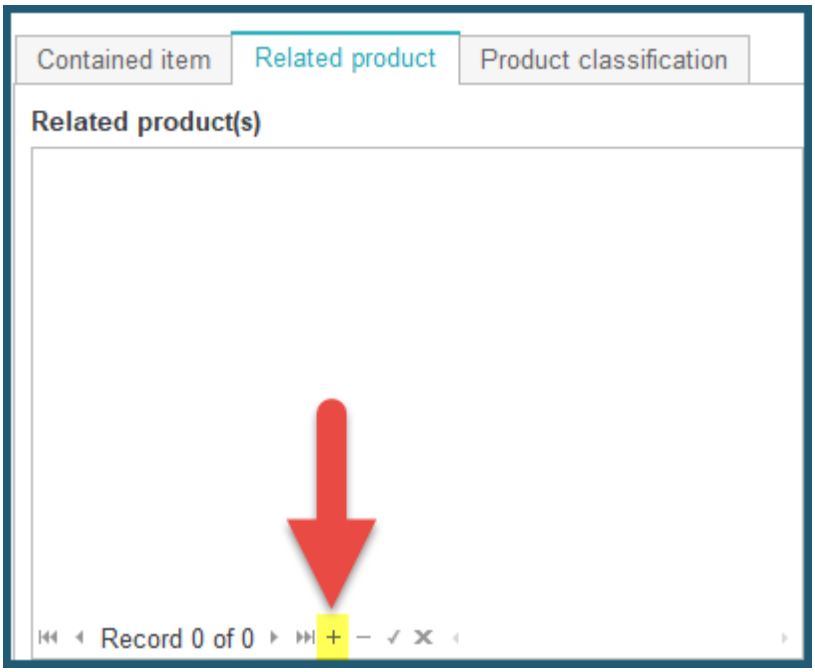
## Transmit to partners tool

See topic Sending ONIX Files.

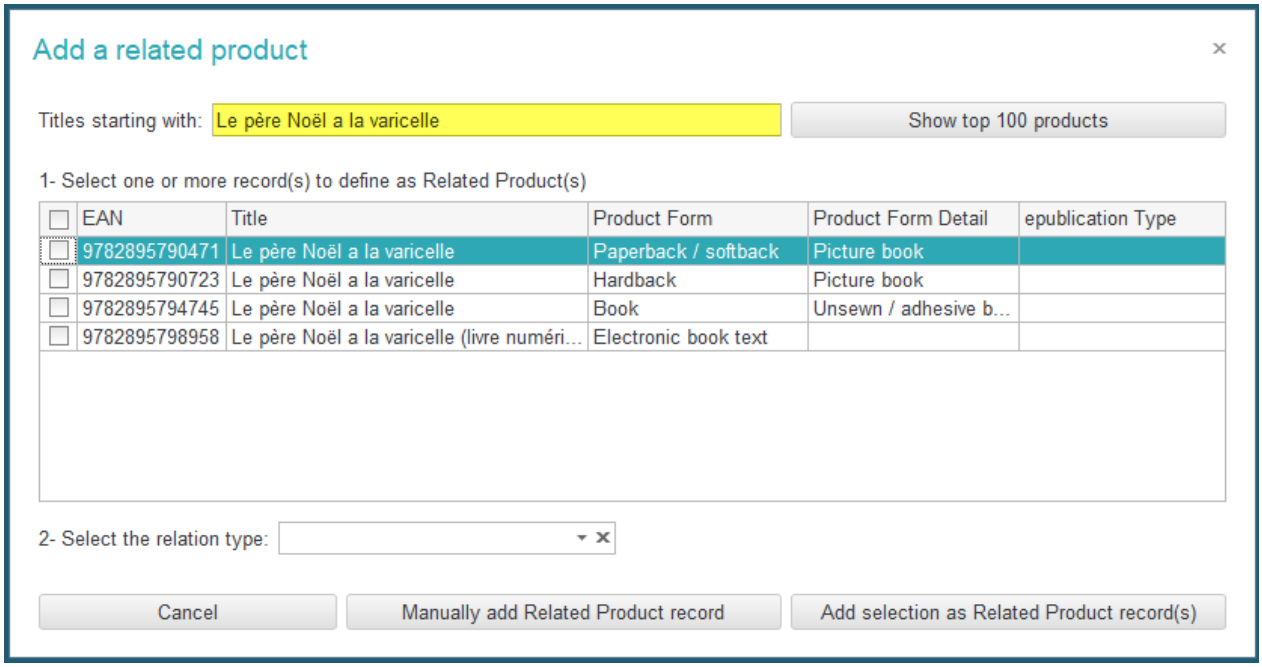
## Related Products tool

Since version 3.4.12, ONIXEDIT provides a new Related Products assistant tool to help you define relationships between your ONIX products.

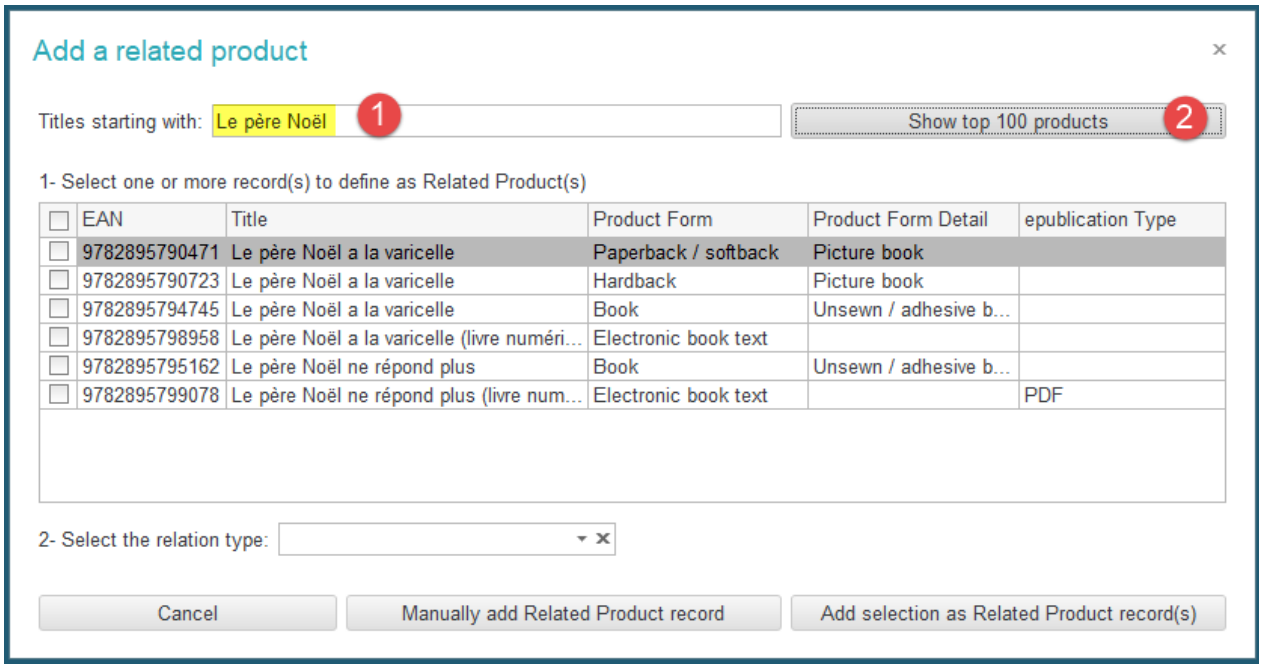
When you add a new RelatedProduct sub-record:




The Related Products tool automatically appears. By default, it will show products from the same ONIX file (or ONIXEDIT Server catalogue) with the same title as the current one:

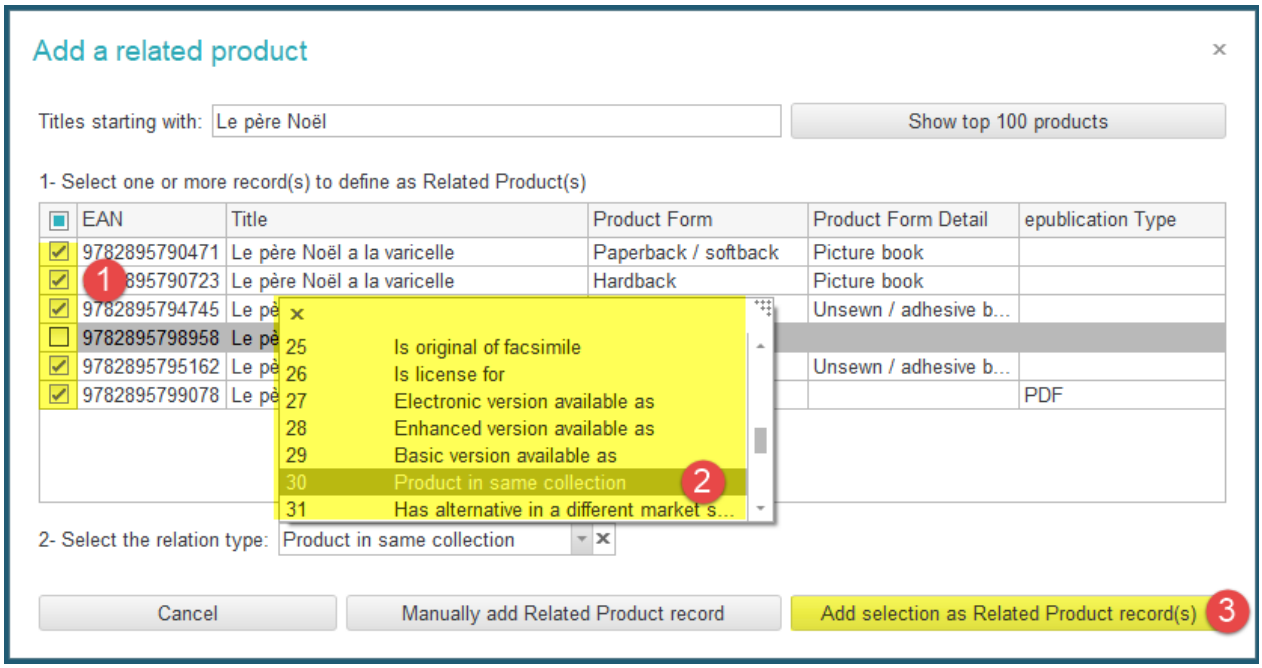



You can edit the search criteria. For instance, by removing some ending characters from the suggested criteria and clicking on the "Show top 100 products" button, we can find all the products of the same collection ("Le père Noël"):

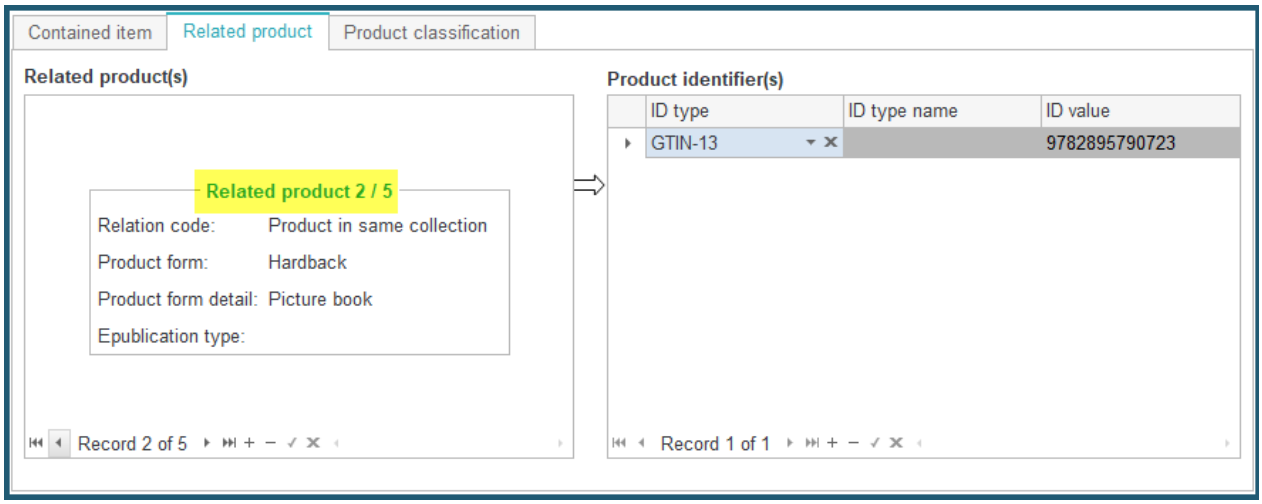



Once you find all the products of interest, you just have to:

1. Select the products you want to relate;
2. Choose the relation type;
3. And click on the "Add selection as Related Product record(s)" button:




As a result, the selected products will be added automatically to the Related product section:




## Other handy tools

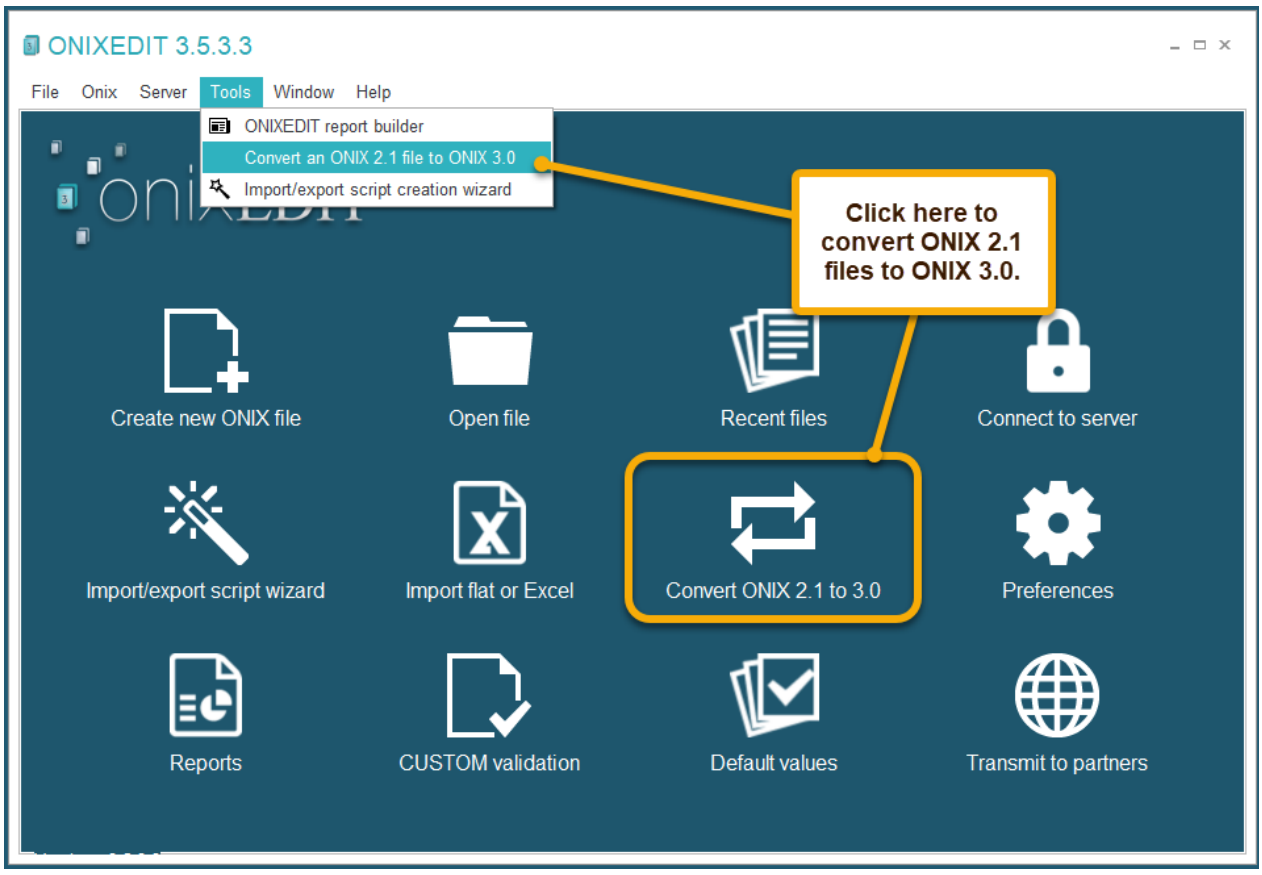
The following "How to..." section provides details about other handy tools that you may need to use. Among those, you will find:

- The automated ONIX 2.1 to ONIX 3.0 converter;
- The copy/Merge tool;
- The flat file and Excel generic import/export tool;
- The automated BIC/BISAC to THEMA converter;
- Generate Subject Headings from codes;
- Importing Cover images and other Asset Files;
- Exporting cover images and other Asset Files;
- Create a report from an ONIX file;

# How to...

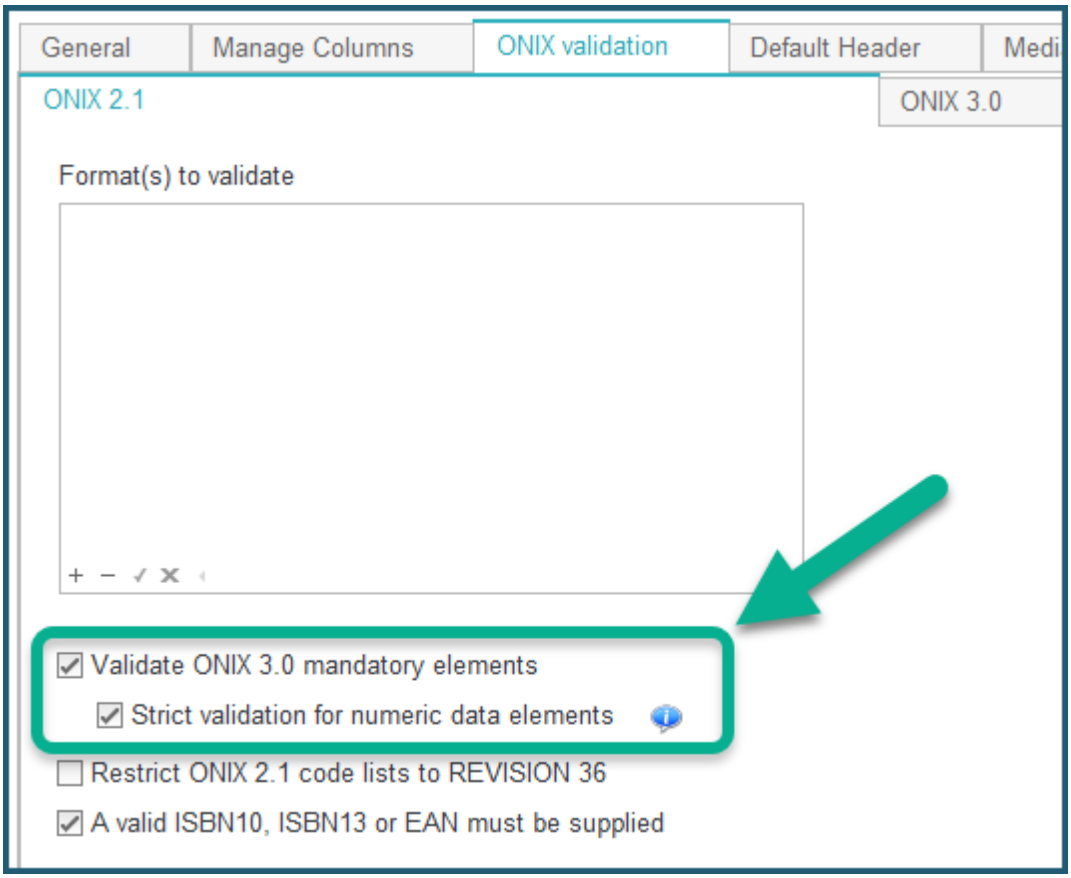
## Convert an ONIX 2.1 file to ONIX 3.0

It is easy to convert an ONIX 2.1 file to ONIX 3.0 with **ONIXEDIT**. From the Start page, click on the "Convert an ONIX 2.1 file to ONIX 3.0" button or use that function from the Tools menu:




You will then have to choose an ONIX 2.1 file and **ONIXEDIT** will automatically convert it to ONIX 3.0 and save it at the same location with suffix "_3" at the end of the filename.

For best results, be sure to validate your ONIX 2.1 file with the option "Validate ONIX 3.0 mandatory elements" activated in your ONIXEDIT preferences before converting it to ONIX 3.0. You can also activate the "Strict validation for numeric data elements" function to ensure that numerical values are valid (no negative quantities, for example). All validation errors must be corrected before conversion.

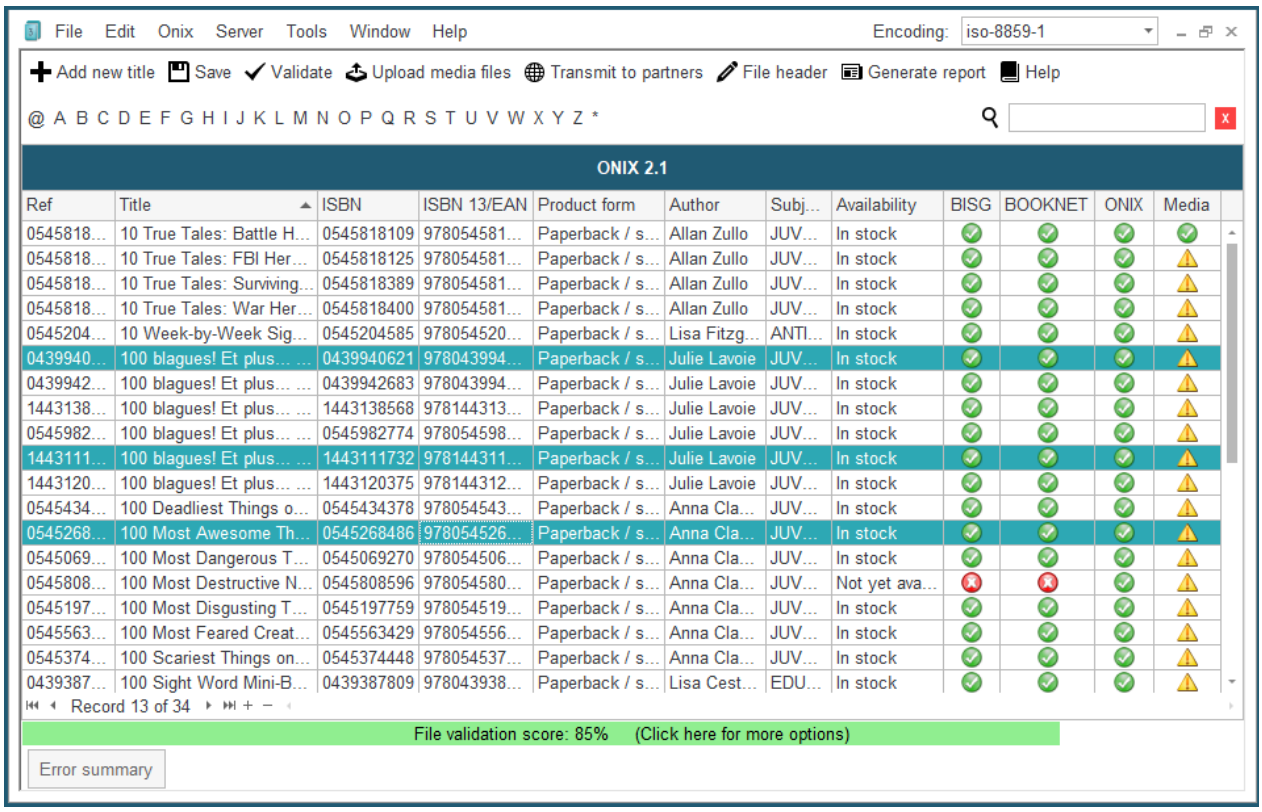



However, a valid ONIX 2.1 file won't necessarily result in a valid ONIX 3.0 file. Once converted, open your new ONIX 3.0 file with **ONIXEDIT** to find and fix potential validation errors.

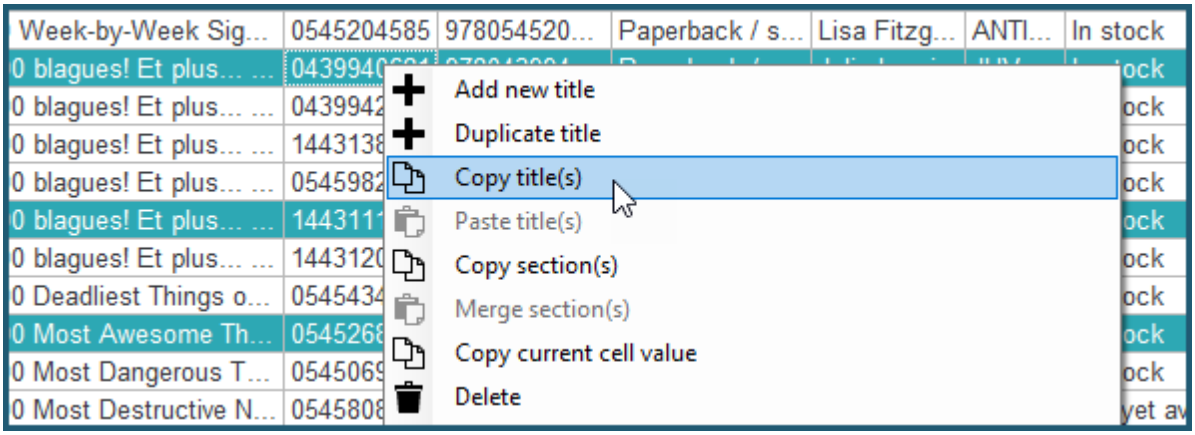
## Copy a Title

To copy a title, use the following procedure:

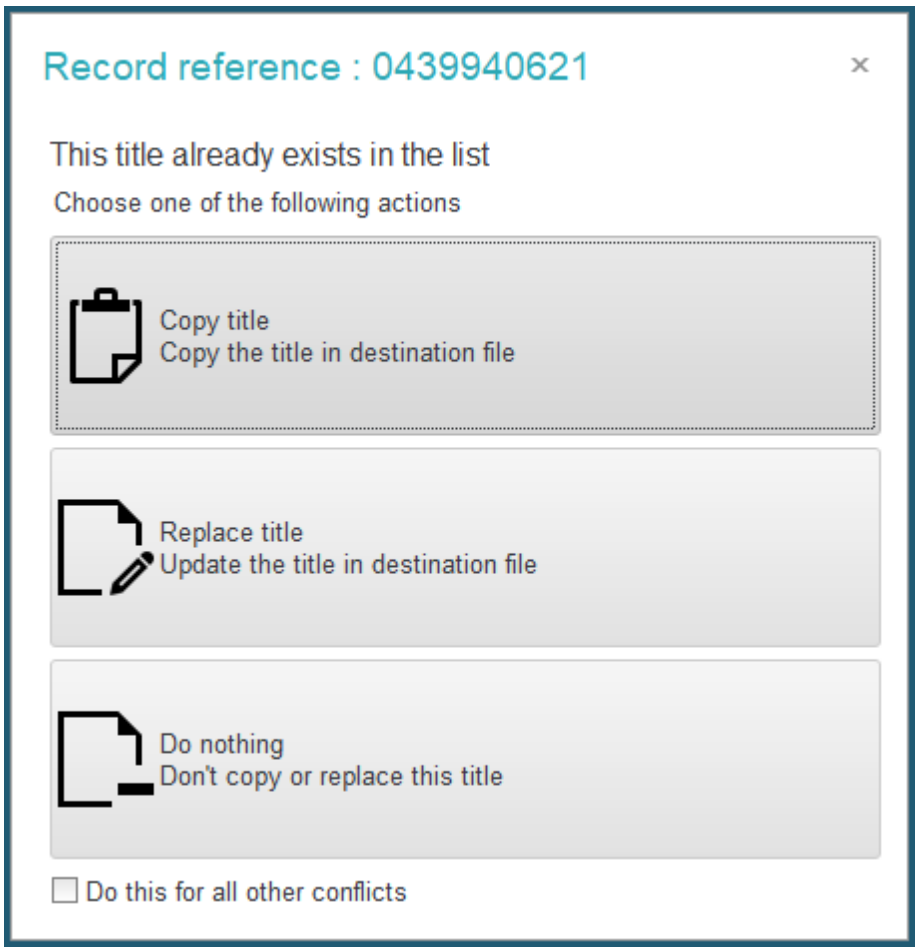
1- Starting from the main list, select the title or titles to copy:  (See the section on Lists for tips and shortcuts for selecting titles).




2- You may then **Drag and Drop** the selected titles from the main list; or, you can bring up the context menu from the list by using the right button on the mouse, starting on one of the selected records, and then choosing the **Copy** function:

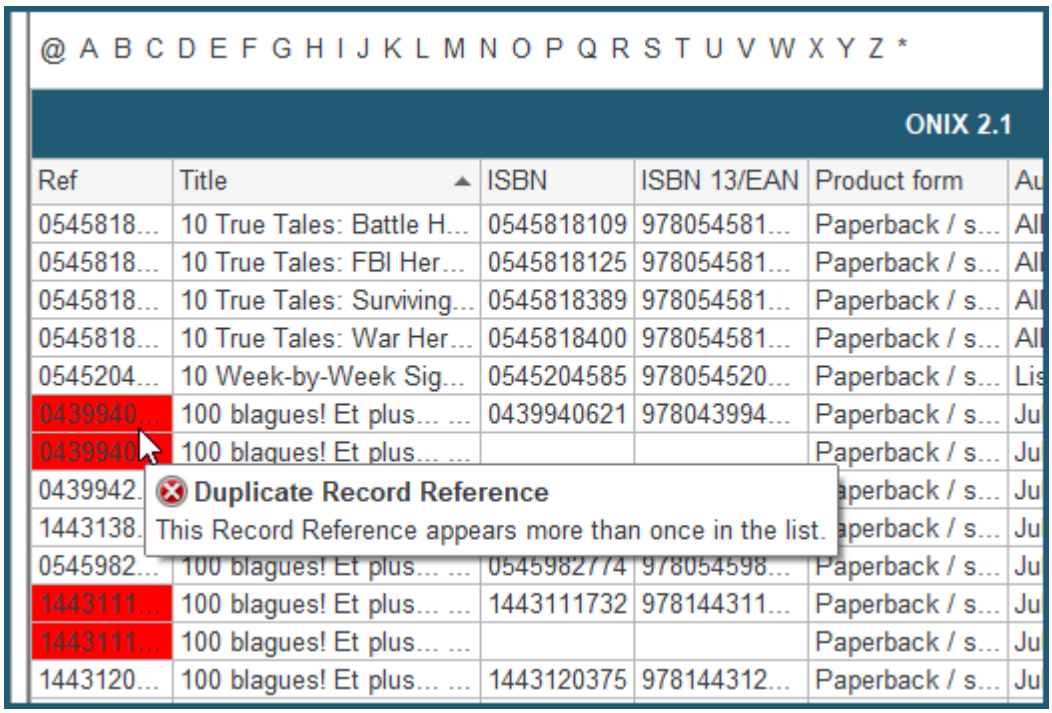



3- If you have started by **Drag and Drop**, the copy dialogue will appear immediately. If you have used the **Copy** function, you now need to use the **Paste** function from the context menu to bring up the copy dialogue:



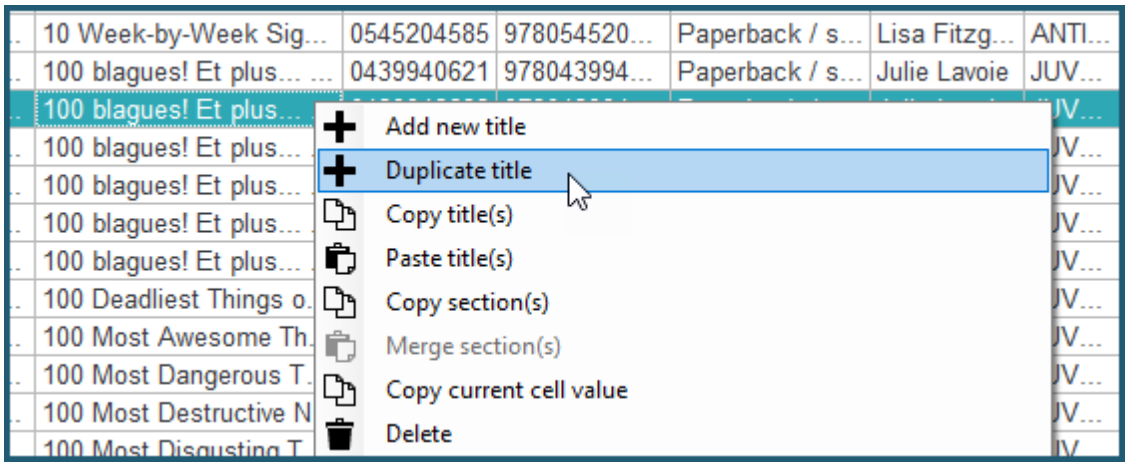

This dialogue will present one by one all the titles that you have chosen to copy. For each title, you may copy it (thus making a duplicate if the copy is made in the same file), replace it (which is the same as no action, if the copy is made in the same file), or to do nothing. The option at the bottom, **Do this for all other conflicts** allows you to apply the most recent action to all the titles remaining to be copied, without having to go through the same dialogue each time.

If you make a copy in the same file, you will obtain duplicates because of identical **RecordReference** tag, and this will constitute an error. The duplicate files will be identified on the list by red markers:




You just need to modify these records to give them each a distinct RecordReference in order to remove the error.

An alternative way of doing the same thing is to use the "Duplicate title" function from the contextual menu:




ONIXEDIT will make a copy of the first selected title and will automatically let you edit it using the Simplified or Advanced form. The duplicated title will have its RecordReference and ProductIdentifier fields cleared to let you define new ones.

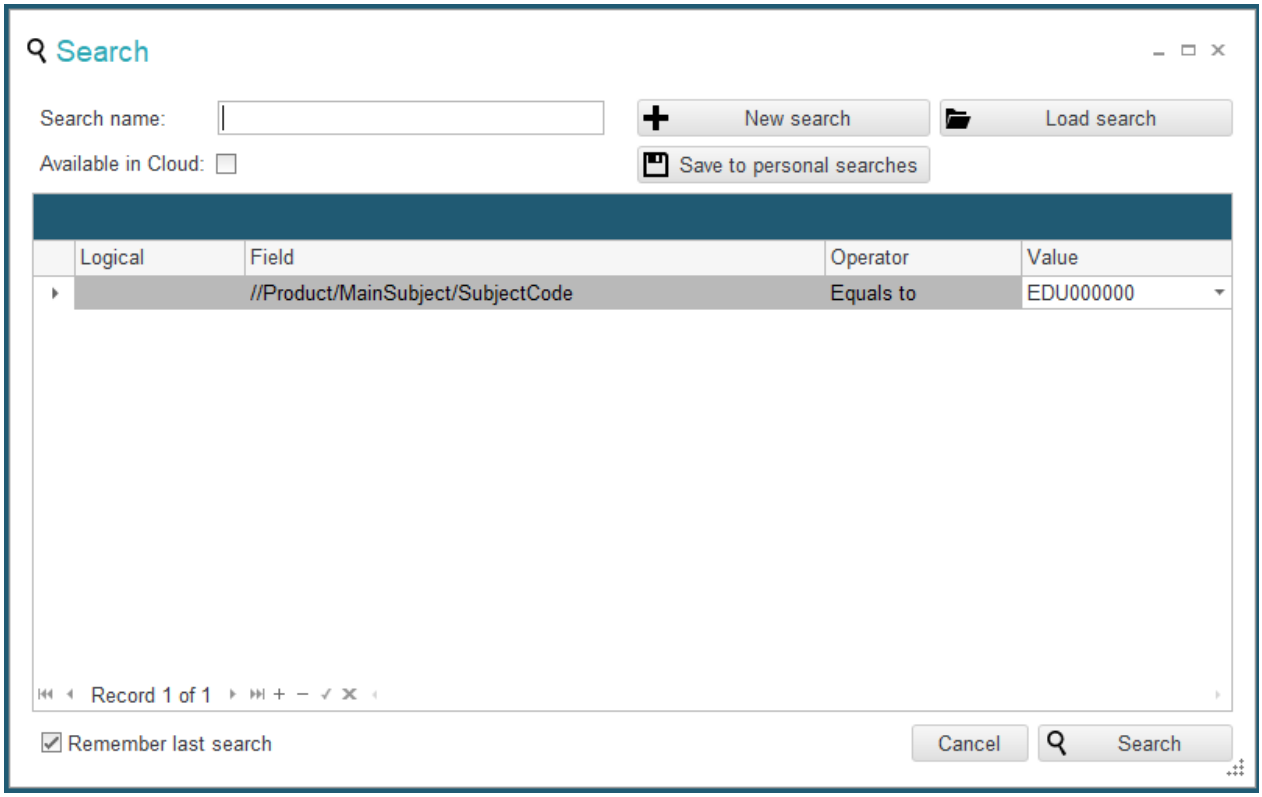
## Merge a section from a Title

With **ONIXEDIT**, you can copy a section of an existing title and paste it to one or many other titles. In fact, this action is considered as a "merge" function rather than just a simple "copy/paste" because ONIXEDIT analyze the section from the source title. Then, it will add missing items and update existing ones in destination titles.

Here is an example. Suppose that you want to add a new Main Subject from THEMA to all

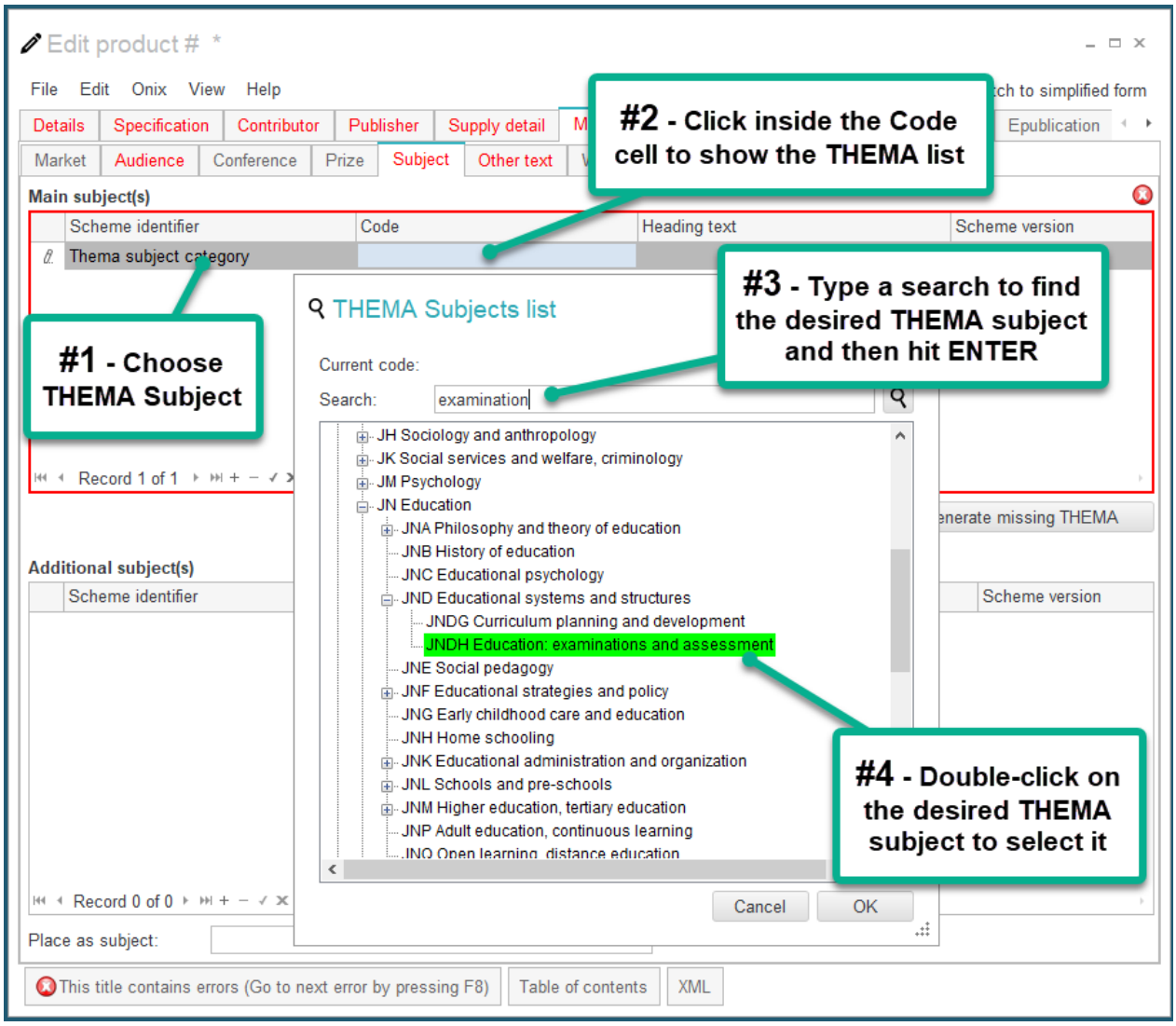
your titles classified as EDUCATION / General (EDU000000) with the BISAC Subject Scheme. You will follow these steps:

1- Open the ONIX file that you want to update and search all your title with a Main Subject EDU000000 using our Search by ONIX tag tool: (See details on Title Search)

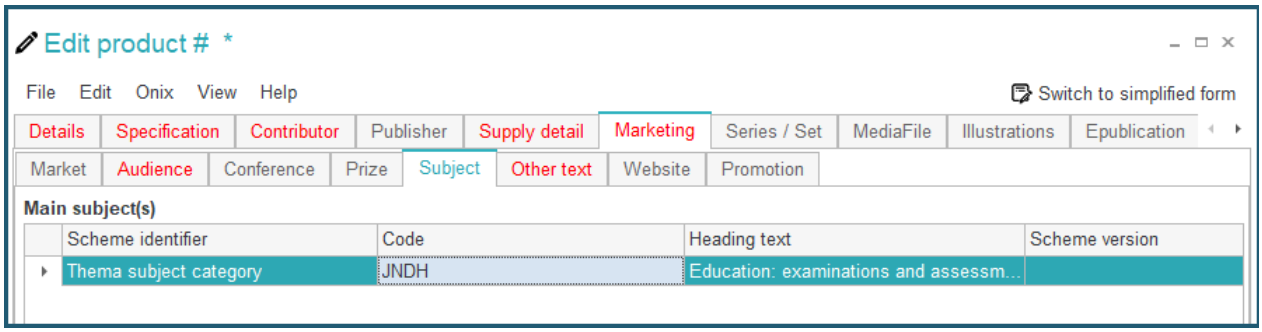



2- Create a new ONIX file and add a new title.

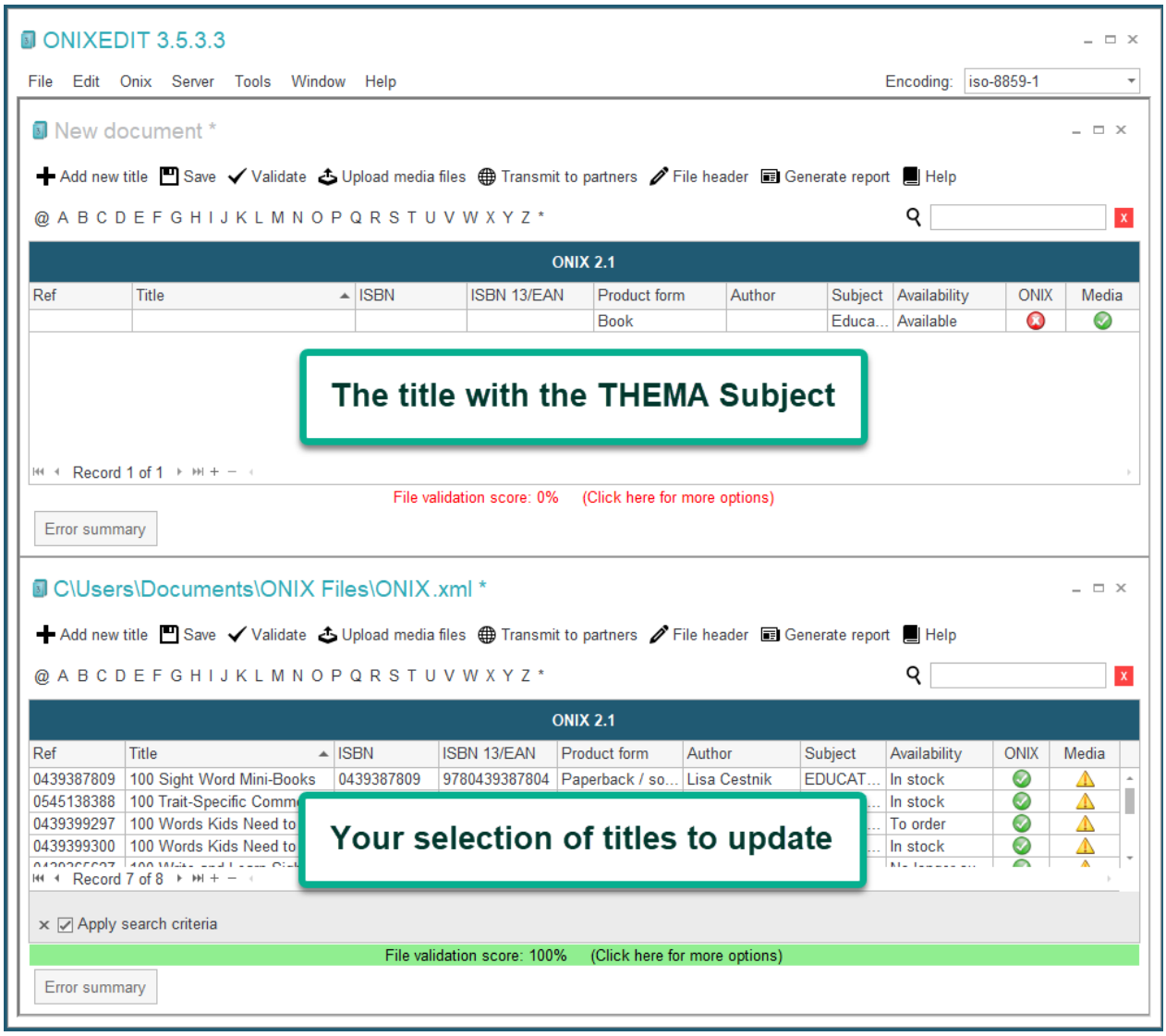
3- Add a new Main Subject and follow the instructions in the screen capture below:



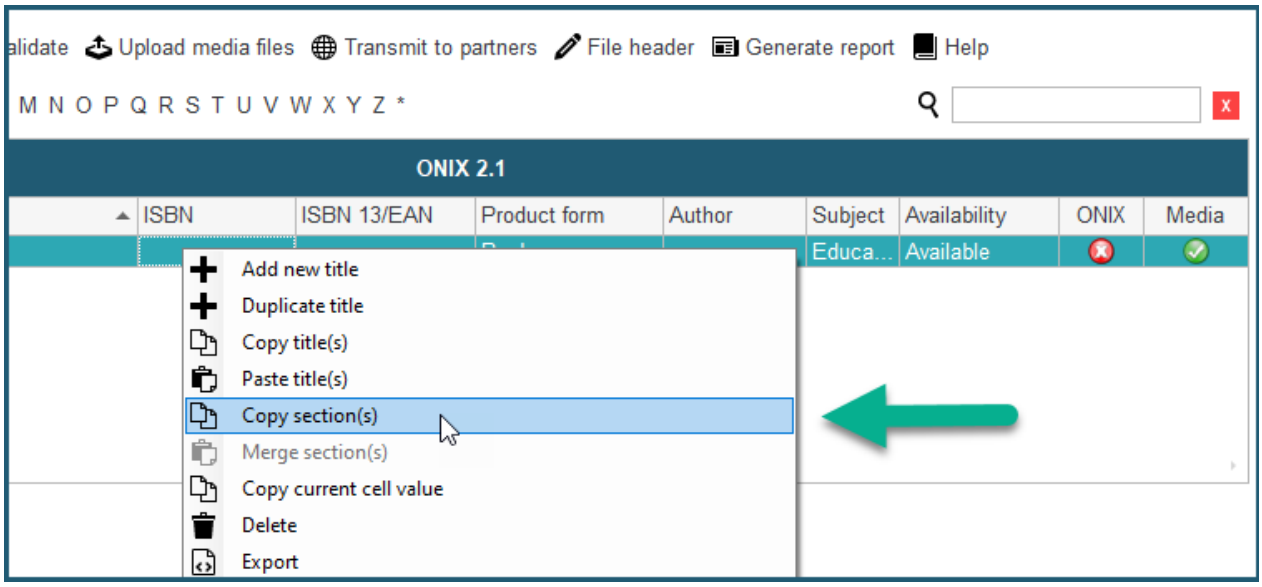

As a result, you should get this:




4- Even if the title is not complete, save it. You should now get a window similar to the following:

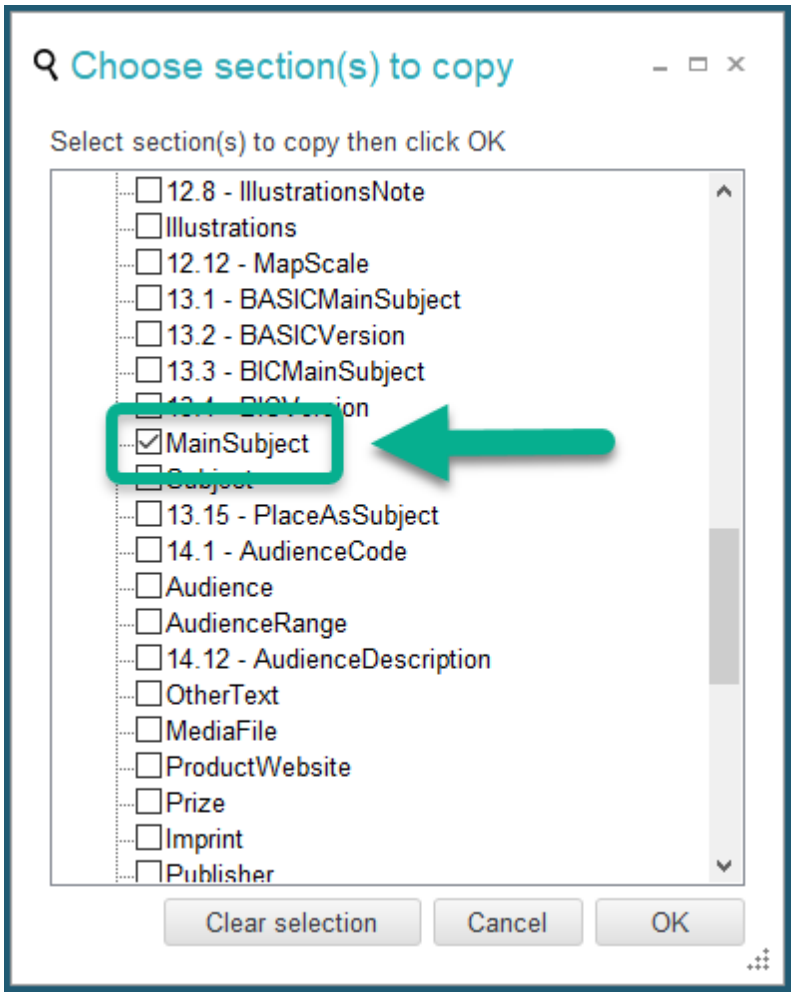



5- Now, right-click on the new title you just created and select item **"Copy section(s)"**:



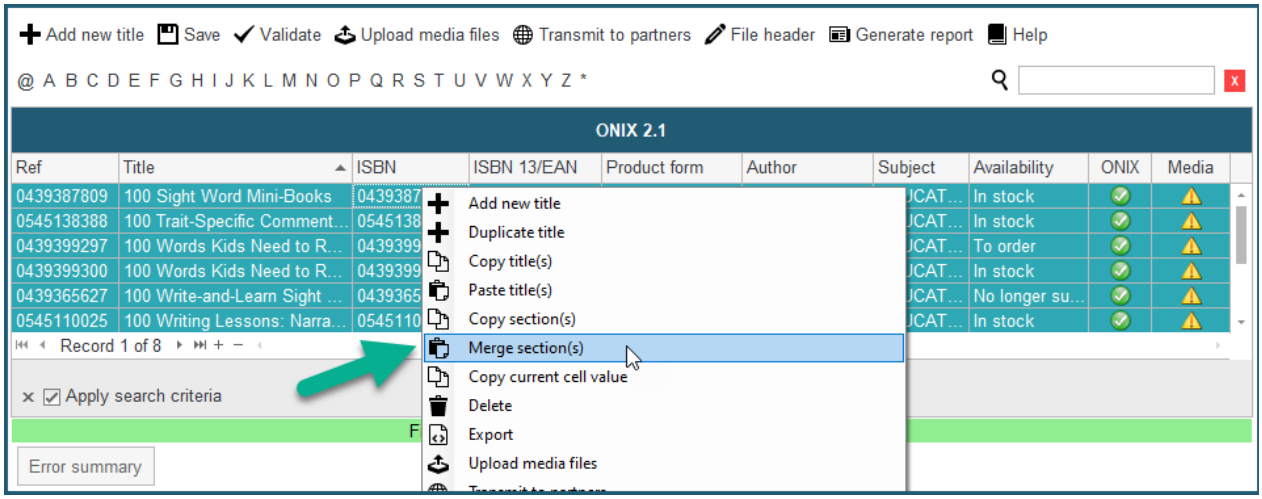

You can also use the **Copy section(s)** item from the **Edit** menu or **Ctrl+Shift+C**.

6- A new window will display presenting the list of possible ONIX sections that you can copy. Scroll down the list, check "**MainSubject**" and click **OK**:

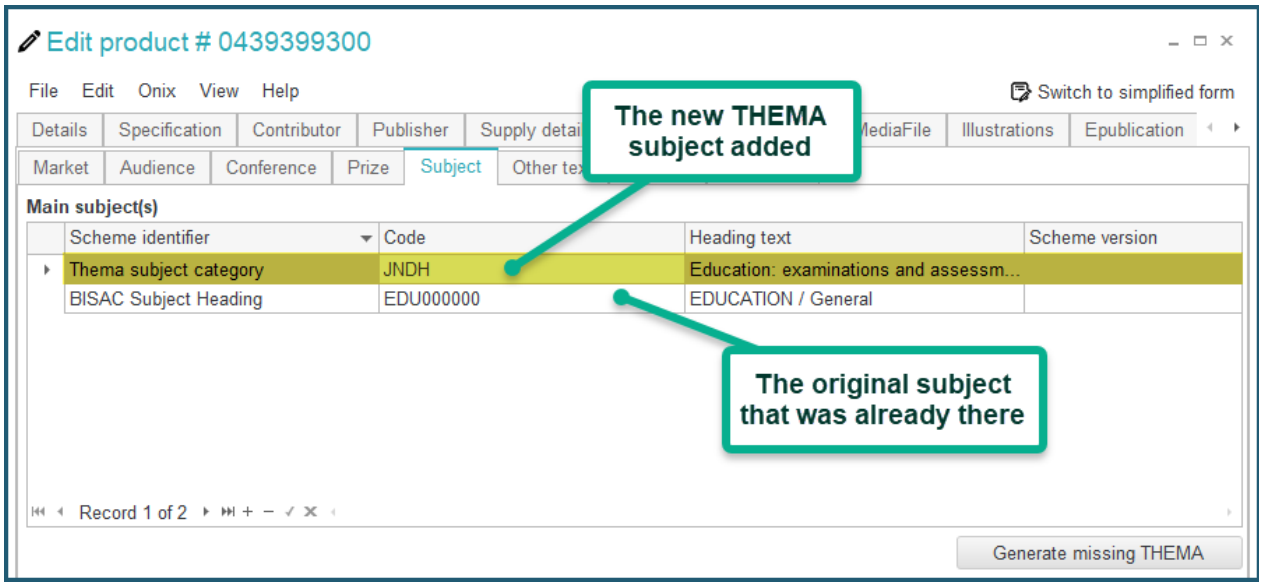



You now have a copy of the Main Subject section having the Thema subject "Historical romance" in your clipboard.

7- Select all the titles in the first list (**CTRL-A**) and right click on any selected title. Choose "**Merge section(s)**":



A confirmation window will pop up and if you click on "**Yes**", the section in your clipboard will be merged to every selected titles. Here is the result of one of those titles:




As you can see, **ONIXEDIT** did not remove the original Subjects of your titles. Indeed, it checks if the records in the Main Subject section from your clipboard exist in each title and adds it where it is missing.

To determine if a record exists or not, **ONIXEDIT** create a key value by concatenation of one or more fields from the copied section. The fields used to create the key depends on the nature of the section copied. For our example, the key was composed of the Scheme Identifier and the Code. Using that technique, **ONIXEDIT** can identify which record to add and which one to modify. When a key already exist in the destination title, the corresponding item is updated by replacing former values. When a key does not exist, the missing record is added to the section.

**ONIXEDIT's** "**Copy/Merge**" function will merge all the missing items in a section. Consequently, you can use it from a copied section having more than just one item.

That new functionality can also be used to make batch updates of existing titles. See section Making batch updates for more details.

**The following tables present the Key fields for every ONIX 2.1 sections**

| ProductIdentifier | |
|---|---|
| Key: | **ProductIDType**<br>**+**<br>**IDTypeName** |

| ProductFormFeature | |
|---|---|
| Key: | **ProductFormFeatureType** |

| ContainedItem | |
|---|---|
| Key: | **First ProductIdentifier block** |

| Series | | |
|---|---|---|
| Key: | **First Title block** | |
| | OR | |
| | **First SeriesIdentifier block** | |

| SeriesIdentifier | | |
|---|---|---|
| Key: | **SeriesIDType** | |
| | + | |
| | **IDTypeName** | |

| Title | | |
|---|---|---|
| Key: | **TitleType** | |
| | + | |
| | **One group below** | |
| | #1 | **TitleText** |
| | #2 | **TitlePrefix** |
| | | + |
| | | **TitleWithoutPrefix** |

| Set | | |
|---|---|---|
| Key: | **First Title block** | |
| | OR | |
| | **First ProductIdentifier block** | |

| ProductIdentifier | | |
|---|---|---|
| Key: | **ProductIDType** | |
| | + | |
| | **IDTypeName** | |

| Title | | |
|---|---|---|
| Key: | **TitleType** | |
| | + | |
| | **One group below** | |
| | #1 | **TitleText** |
| | #2 | **TitlePrefix** |
| | | + |
| | | **TitleWithoutPrefix** |

| Title | |
|---|---|
| Key: | **TitleType** |

| WorkIdentifier | |
|---|---|
| Key: | **WorkIDType** |
| | + |
| | **IDTypeName** |

| Website | |
|---|---|
| Key: | **WebsiteRole** |

| Contributor | |
|---|---|
| Key: | **ContributorRole** |
| | + |
| | **One group below** |
| | #1 PersonNameInverted |
| | #2 PersonName |
| | #3 NamesBeforeKey |
| | + |
| | KeyNames |
| | #4 CorporateName |

| ContributorPersonDate | |
|---|---|
| Key: | **PersonDateRole** |

| ProfessionalAffiliation | |
|---|---|
| Key: | **Affiliation** |
| | + |
| | **ProfessionalPosition** |

| Website | |
|---|---|
| Key: | **WebsiteRole** |

| Conference | |
|---|---|
| Key: | **ConferenceName** |
| | + |
| | **ConferenceDate** |

| Language | |
|---|---|
| Key: | **LanguageRole** |

| Extent | |
|---|---|
| Key: | **ExtentType** |

| Illustrations | |
|---|---|
| Key: | **IllustrationType** |

| MainSubject | |
|---|---|
| Key: | **MainSubjectSchemeIdentifier** |
| | + |
| | **SubjectCode** |

| Subject | |
|---|---|
| Key: | **SubjectSchemeIdentifier** |

| | |
|---|---|
| | + |
| | **SubjectCode** |
| | + |
| | **SubjectSchemeName (for SchemeIdentifier 24 only)** |
| | OR |
| | **SubjectSchemeName (for SchemeIdentifier 20 only)** |

| **Audience** | | |
|---|---|---|
| Key: | **AudienceCodeType** | |

| **AudienceRange** | | |
|---|---|---|
| Key: | **AudienceRangeQualifier** | |

| **Complexity** | | |
|---|---|---|
| Key: | **ComplexitySchemeIdentifier** | |

| **OtherText** | | |
|---|---|---|
| Key: | **TextTypeCode** | |
| | + | |
| | **TextFormat** | |
| | + | |
| | **TextLinkType** | |
| | + | |
| | **TextAuthor** | |
| | + | |
| | **TextSourceCorporate** | |
| | + | |
| | **TextSourceTitle** | |

| **MediaFile** | | |
|---|---|---|
| Key: | **MediaFileTypeCode** | |
| | + | |
| | **MediaFileFormatCode** | |
| | + | |
| | **MediaFileLinkTypeCode** | |
| | + | |
| | **DownloadCaption** | |

| **ProductWebsite** | | |
|---|---|---|
| Key: | **WebsiteRole** | |

| **Prize** | | |
|---|---|---|
| Key: | **PrizeName** | |
| | + | |
| | **PrizeYear** | |

| **Imprint** | | |
|---|---|---|
| Key: | **ImprintName** | |

+
**NameCodeType**
+
**NameCodeTypeName**

| Publisher | |
|---|---|
| Key: | **PublishingRole** |
| | + |
| | **One group below** |
| | #1 NameCodeType |
| | + |
| | NameCodeValue |
| | #2 PublisherName |

| Website | |
|---|---|
| Key: | WebsiteRole |

| SalesRights | |
|---|---|
| Key: | **SalesRightsType** |

| NotForSale | |
|---|---|
| Key: | **RightsCountry** |
| | OR |
| | **RightsTerritory** |

| ProductIdentifier | |
|---|---|
| Key: | **ProductIDType** |

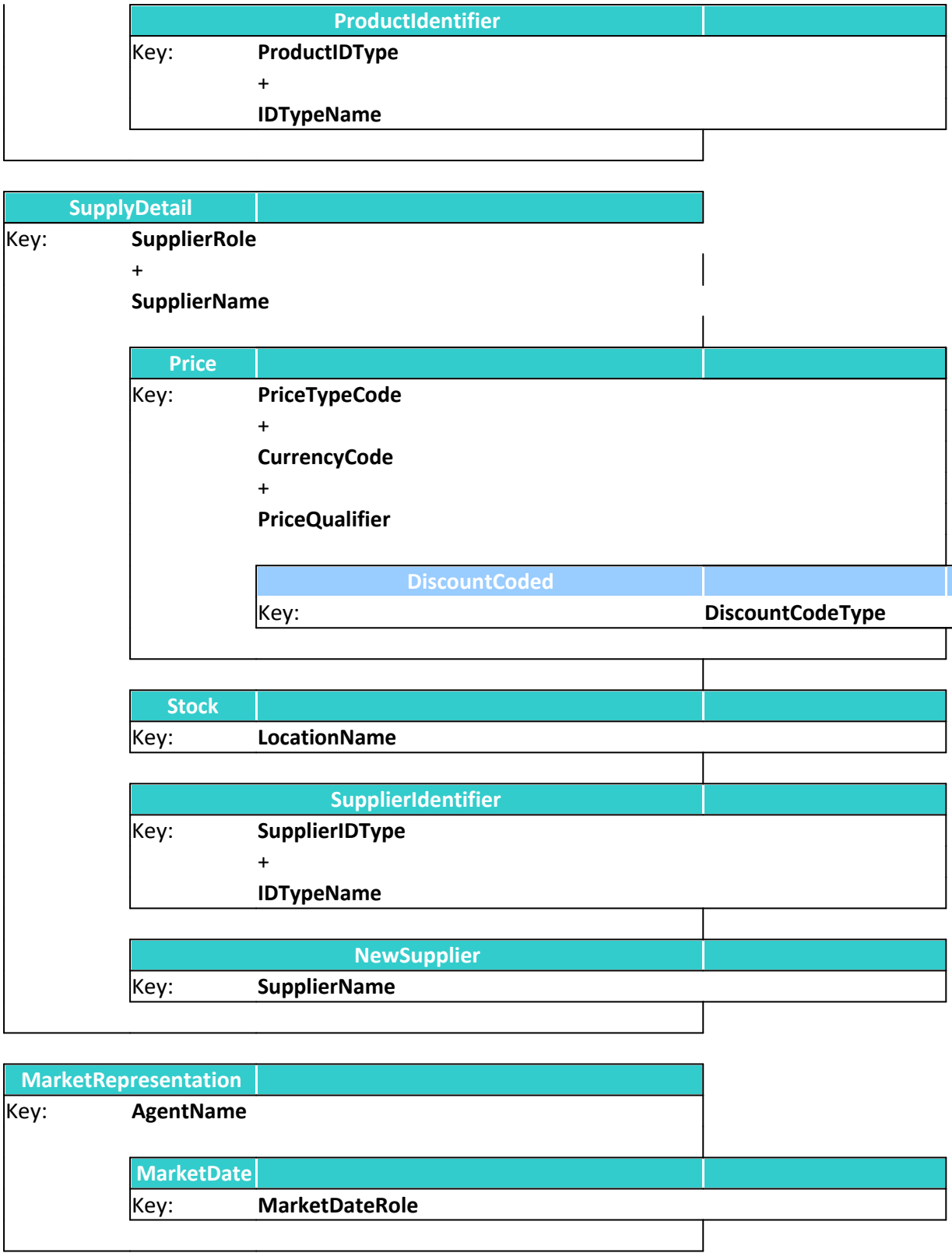
| SalesRestriction | |
|---|---|
| Key: | **SalesRestrictionType** |

| SalesOutlet | |
|---|---|
| Key: | **SalesOutletName** |

| CopyrightStatement | |
|---|---|
| Key: | **CopyrightYear** |

| Measure | |
|---|---|
| Key: | **MeasureTypeCode** |
| | + |
| | **MeasureUnitCode** |

| RelatedProduct | |
|---|---|
| Key: | **RelationCode** |




**The following tables present the Key fields for every ONIX 3.0 sections**

| ProductIdentifier | |
|---|---|
| Key: | **ProductIDType** |
| | + |
| | **IDTypeName** |

| Barcode | |
|---|---|
| Key: | **BarcodeType** |

| DescriptiveDetail | | | |
|---|---|---|---|
| | | | |

| ProductFormFeature | |
|---|---|
| Key: | **ProductFormFeatureType** |
| | + |
| | **ProductFormFeatureDescription*language* attribute** |

| Measure | |
|---|---|
| Key: | **MeasureType** |
| | + |
| | **MeasureUnitCode** |

| EpubUsageConstraint | |
|---|---|
| Key: | **EpubUsageType** |

| EpubUsageLimit | |
|---|---|
| Key: | **EpubUsageUnit** |

| ProductClassification | |
|---|---|
| Key: | **ProductClassificationType** |

| ProductPart | |
|---|---|
| Key: | **First ProductIdentifier block** |

| Collection | |
|---|---|
| Key: | **CollectionType** |
| | + |
| | **First CollectionIdentifier block** |

| CollectionIdentifier | |
|---|---|
| Key: | **CollectionIDType** |
| | + |
| | **IDTypeName** |

| CollectionSequence |
|---|

| | |
|---|---|
| Key: | **CollectionSequenceType** |
| | + |
| | **CollectionSequenceTypeName** |

| TitleDetail | |
|---|---|
| Key: | **TitleType** |

| **TitleDetail** | |
|---|---|
| Key: | **TitleType** |

| TitleElement | |
|---|---|
| Key: | **TitleElementLevel** |

| **Contributor** | |
|---|---|
| Key: | **ContributorRole** |
| | + |
| | **One group below** |
| #1 | PersonNameInverted |
| #2 | PersonName |
| #3 | NamesBeforeKey |
| | + |
| | KeyNames |
| #4 | CorporateName |
| #5 | UnnamedPersons |
| #6 | ISNI (NameIdentifier with type 16) |

| NameIdentifier | |
|---|---|
| Key: | **NameIDType** |
| | + |
| | **IDTypeName** |

| AlternativeName | |
|---|---|
| Key: | **NameType** |

| ContributorDate | |
|---|---|
| Key: | **ContributorDateRole** |

| ProfessionalAffiliation | |
|---|---|
| Key: | **Affiliation** |
| | + |
| | **ProfessionalPosition** |

| BiographicalNote | |
|---|---|
| Key: | ***language* attribute** |

| Website | | |
|---|---|---|

| | |
|---|---|
| Key: | **WebsiteRole** |

| ContributorDescription | |
|---|---|
| Key: | ***language* attribute** |

| ContributorPlace | |
|---|---|
| Key: | **ContributorPlaceRelator** |

| **ReligiousText** | |
|---|---|
| Key: | **No merge - Replace** |

| Bible | |
|---|---|

| ReligiousTextFeature | |
|---|---|
| Key: | **ReligiousTextFeatureType**<br>**+**<br>**ReligiousTextFeatureCode** |

| **Event** | |
|---|---|
| Key: | **EventName**<br>+<br>**EventDate** |

| **Language** | |
|---|---|
| Key: | **LanguageRole** |

| **Extent** | |
|---|---|
| Key: | **ExtentType**<br>+<br>**ExtentUnit** |

| **AncillaryContent** | |
|---|---|
| Key: | **AncillaryContentType**<br>+<br>**AncillaryContentDescription *language* attribute** |

| **Subject** | |
|---|---|
| Key: | **SubjectSchemeIdentifier**<br>**+**<br>**SubjectSchemeName**<br>**+**<br>**SubjectCode or SubjectHeadingText (if SubjectCode is empty)**<br><br>OR |

SubjectSchemeIdentifier=20
+
SubjectSchemeName (for SchemeIdentifier 20 only)

**Audience**
Key: AudienceCodeType

**AudienceRange**
Key: AudienceRangeQualifier

**Complexity**
Key: ComplexitySchemeIdentifier

**CollateralDetail**

**TextContent**
Key: TextType
+
SourceTitle
+
TextSourceCorporate
+
ALL TextAuthors
+
ALL ContentAudience
+
Text *language* attribute

**ContentDate**
Key: ContentDateRole

**CitedContent**
Key: CitedContentType

**ContentDate**
Key: ContentDateRole

**SupportingResource**
Key: ResourceContentType
+
Caption (ResourceFeature/FeatureNote where ResourceFeatureType=02)

**ResourceFeature**
Key: ResourceFeatureType

| ResourceVersion | |
|---|---|
| Key: | **ResourceForm** |

| ContentDate | |
|---|---|
| Key: | **ContentDateRole** |

| ResourceVersionFeature | |
|---|---|
| Key: | **ResourceVersionFeatureType** |

| Prize | |
|---|---|
| Key: | **PrizeName**<br>+<br>**PrizeYear** |

**PublishingDetail**

| Imprint | |
|---|---|
| Key: | **First ImprintIdentifier block**<br><br>OR<br><br>**ImprintName** |

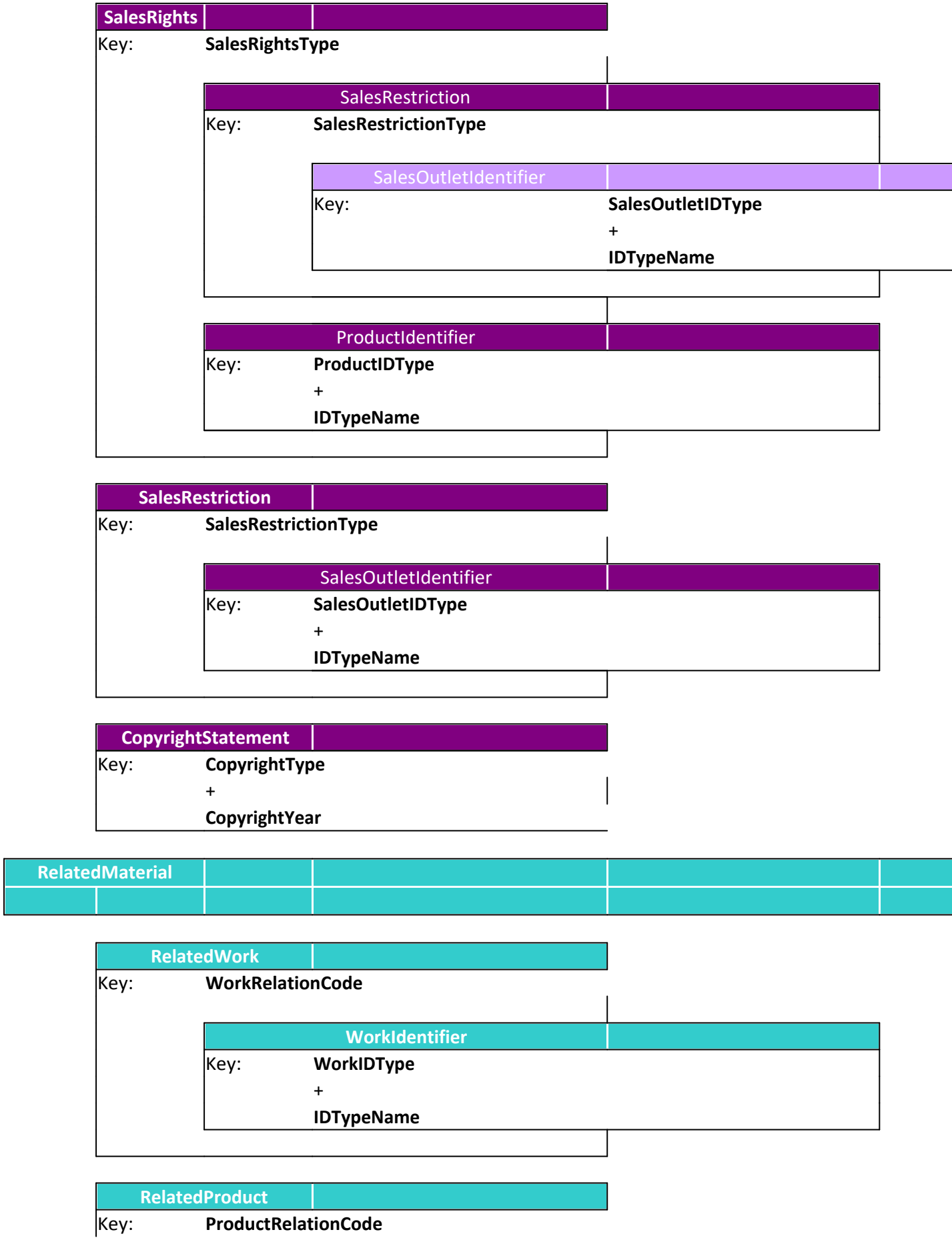
| ImprintIdentifier | |
|---|---|
| Key: | **ImprintIDType**<br>+<br>**IDTypeName** |

| Publisher | |
|---|---|
| Key: | **PublishingRole** |

| PublisherIdentifier | |
|---|---|
| Key: | **PublisherIDType**<br>+<br>**IDTypeName** |

| Website | |
|---|---|
| Key: | **WebsiteRole** |

| PublishingDate | |
|---|---|
| Key: | **PublishingDateRole** |


SalesRights
Key: SalesRightsType
SalesRestriction
Key: SalesRestrictionType
SalesOutletIdentifier
Key: SalesOutletIDType + IDTypeName
ProductIdentifier
Key: ProductIDType + IDTypeName
SalesRestriction
Key: SalesRestrictionType
SalesOutletIdentifier
Key: SalesOutletIDType + IDTypeName
CopyrightStatement
Key: CopyrightType + CopyrightYear
RelatedMaterial
RelatedWork
Key: WorkRelationCode
WorkIdentifier
Key: WorkIDType + IDTypeName
RelatedProduct
Key: ProductRelationCode

| ProductIdentifier | |
|---|---|
| Key: | **ProductIDType**<br>+<br>**IDTypeName** |

| ProductionDetail | | | | |
|---|---|---|---|---|
| | | | | |

| ProductionManifest | |
|---|---|
| Key: | **First ProductIdentifier** |

| BodyManifest-SpecificationFeature | |
|---|---|
| Key: | **SpecificationFeatureType** |

| BodyManifest-BodyResource | |
|---|---|
| Key: | **ResourceFileLink** |

| ProductSupply | | | | |
|---|---|---|---|---|
| | | | | |

Key: **Market.Territory.CountriesExcluded**
+
**Market.Territory.CountriesIncluded**
+
**Market.Territory.RegionsExcluded**
+
**Market.Territory.RegionsIncluded**

| SalesRestriction | |
|---|---|
| Key: | **SalesRestrictionType** |

| SalesOutletIdentifier | |
|---|---|
| Key: | **SalesOutletIDType**<br>+<br>**IDTypeName** |

| MarketPublishingDetail | |
|---|---|
| Key: | **MarketPublishingStatus** |

| PublisherRepresentative | |
|---|---|
| Key: | **AgentName** |

| ProductContact | |
|---|---|
| Key: | **ProductContactRole** |

| | | |
|---|---|---|
| | + | |
| | **One group below** | |
| | #1 | ProductContactName |
| | #2 | ContactName |

| **MarketDate** | | |
|---|---|---|
| Key: | **MarketDateRole** | |

| **SupplyDetail** | | |
|---|---|---|
| Key: | **First Supplier.SupplierRole** | |
| | + | |
| | **First Supplier.SupplierName** | |

| **SupplierIdentifier** | | |
|---|---|---|
| Key: | **SupplierIDType** | |
| | + | |
| | **IDTypeName** | |

| **ReturnsConditions** | | |
|---|---|---|
| Key: | **ReturnsCodeType** | |

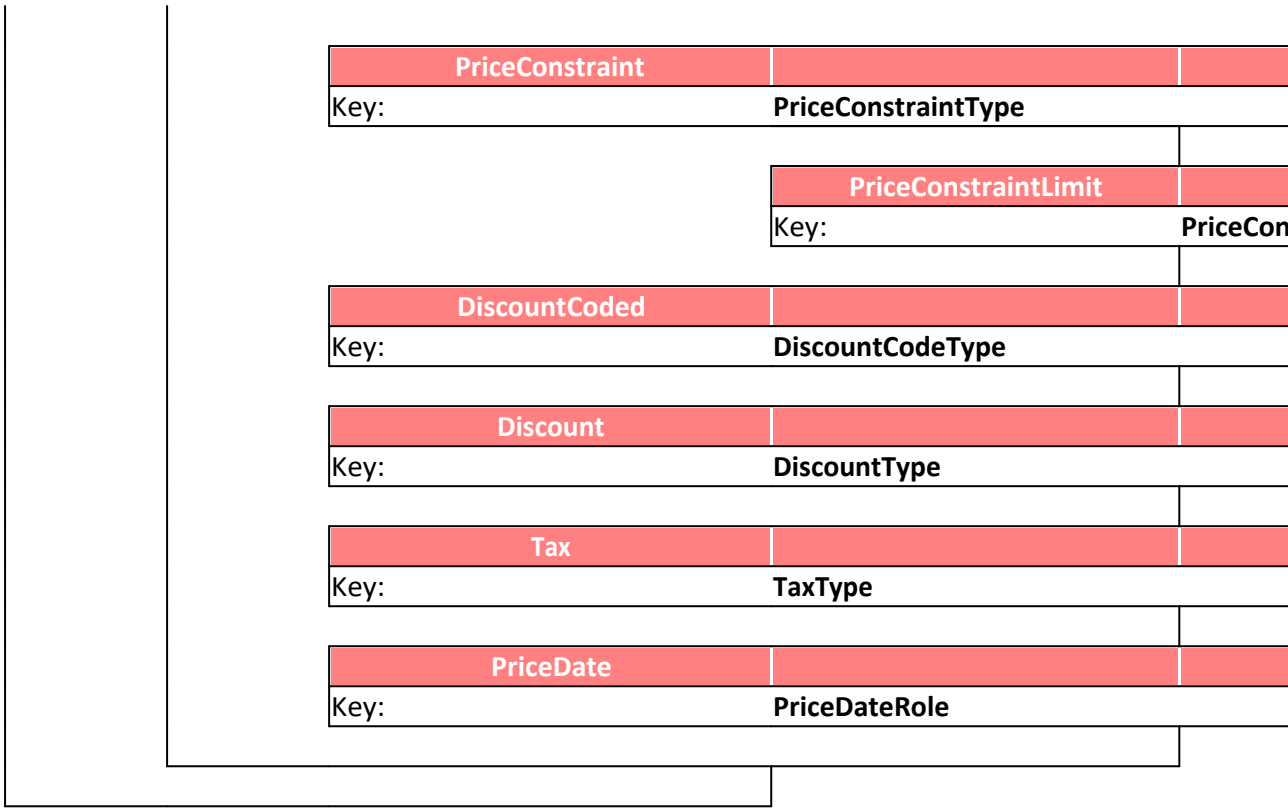
| **SupplyDate** | | |
|---|---|---|
| Key: | **SupplyDateRole** | |

| **Stock** | | |
|---|---|---|
| Key: | **LocationName** | |

| **NewSupplier** | | |
|---|---|---|
| Key: | **One group below** | |
| | #1 | SupplierName |
| | #2 | SupplierIDType |
| | | + |
| | | IDTypeName |

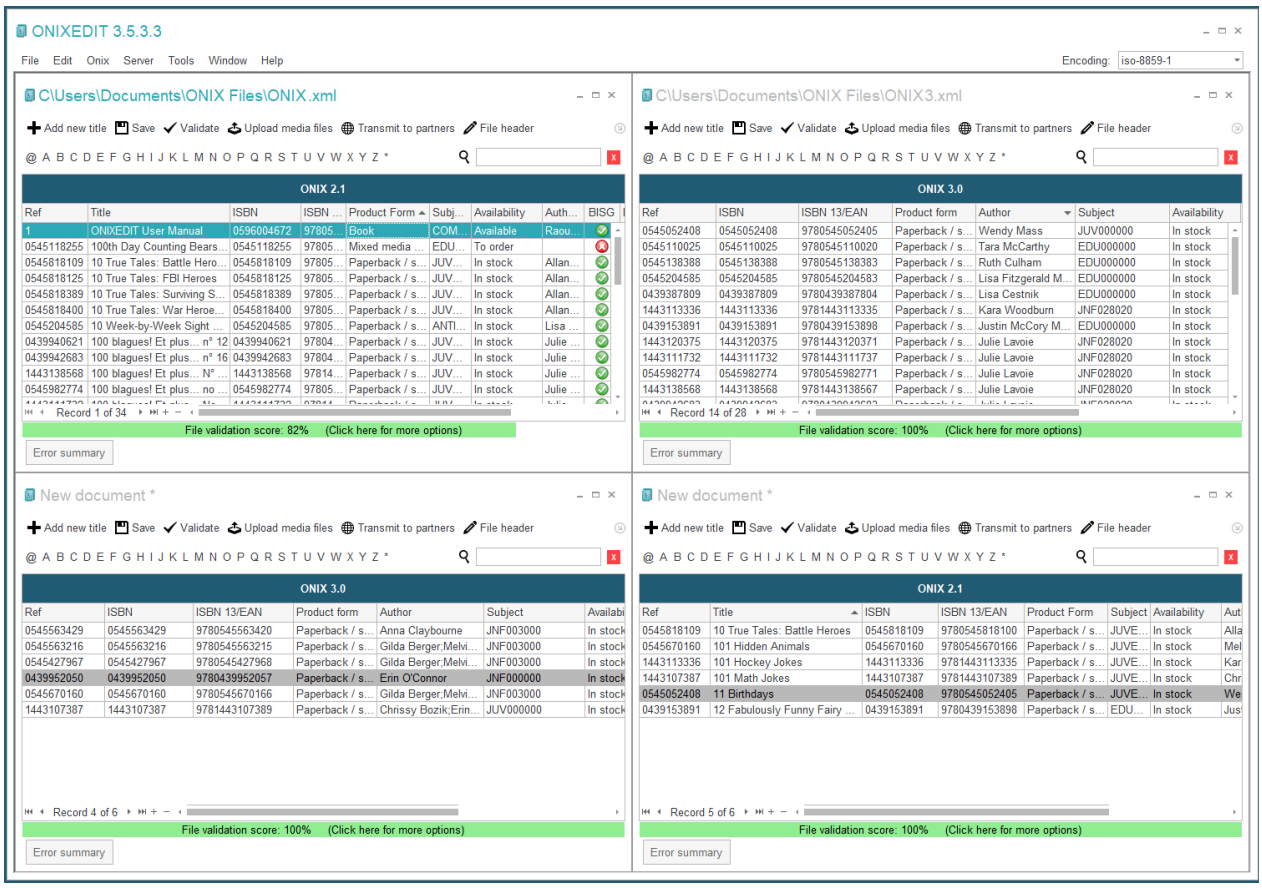
| **Price** | | |
|---|---|---|
| Key: | **PriceType** | |
| | + | |
| | **CurrencyCode** | |
| | + | |
| | **PriceQualifier** | |
| | + | |
| | **PriceDate Role and Date (if option is activated in the import rules)** | |

| **PriceIdentifier** | | |
|---|---|---|
| Key: | **PriceIDType** | |
| | + | |
| | **IDTypeName** | |

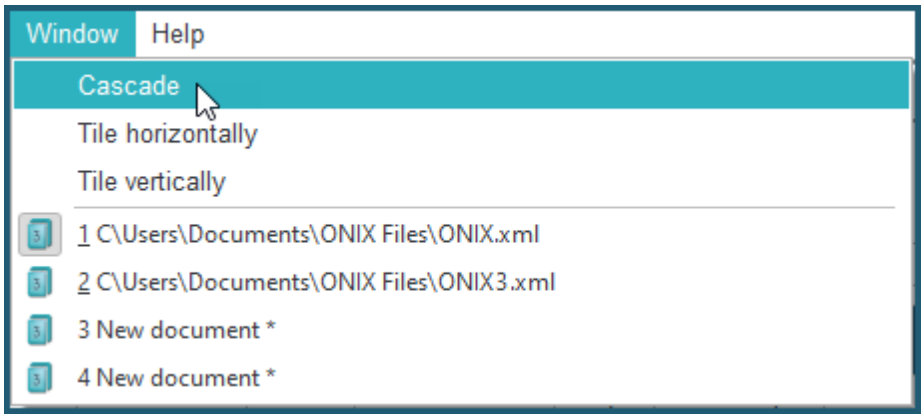



## Open Several ONIX Files

**ONIXEDIT** allows you to open several files at the same time. To do this, you just open the files you want to work with in order to see them:




You can also add a window using the menu **File/New** (CTRL-N). The **Window** menu will then allow you to manipulate open files to place them any way you like on the screen:




When you have several files open, you can maximize or minimize one or more of these windows by using the standard buttons in the upper right corner of each window:

When you maximize a window, it will hide the others. You then need to use the Window menu to reorganize the placement of your windows or to bring another to the top.

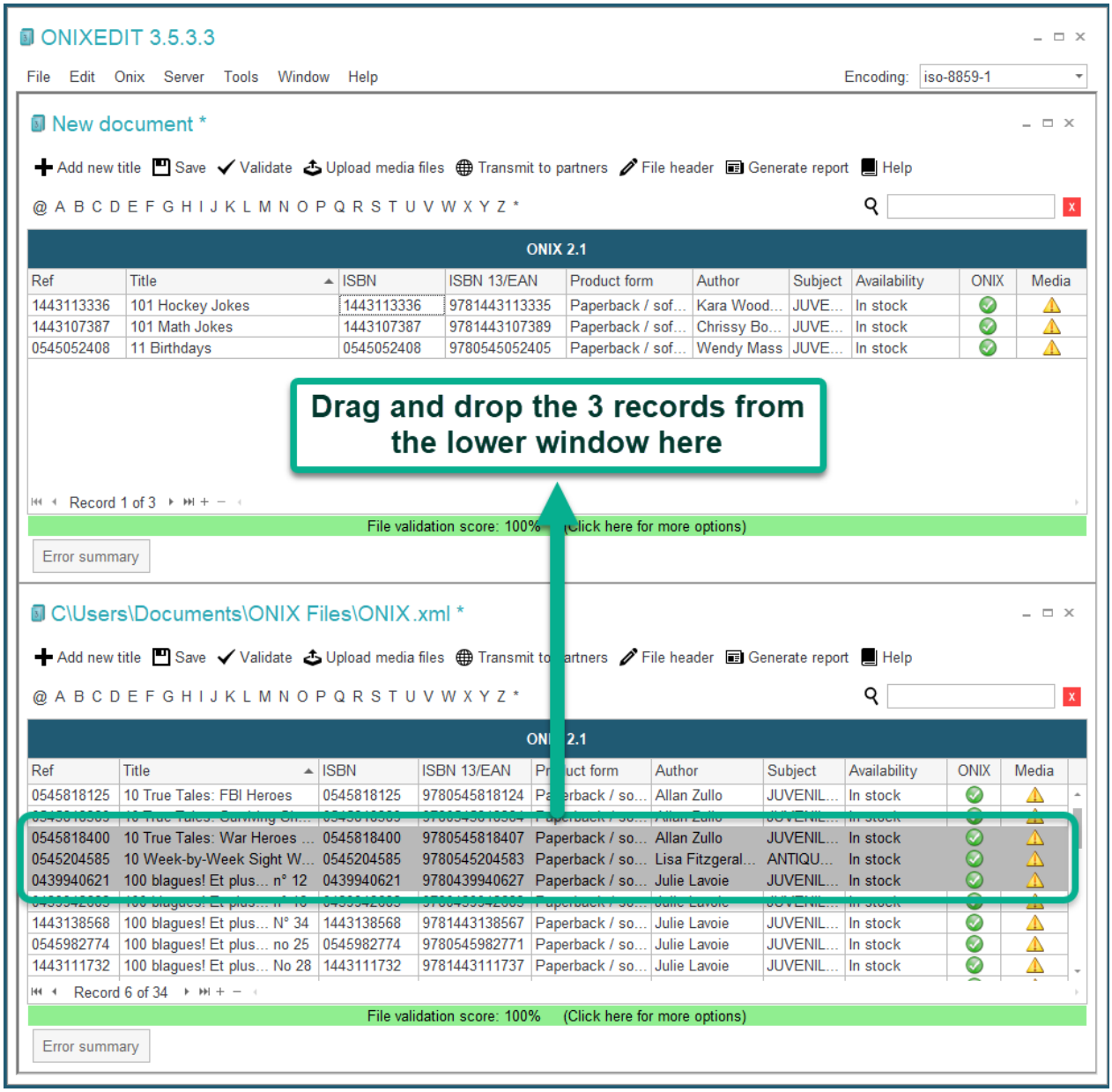
When several windows are open, you can then perform the operation of transfers between files (Please see the following section, Transferring a title from one file to another).

## Transfer a title from one file to another

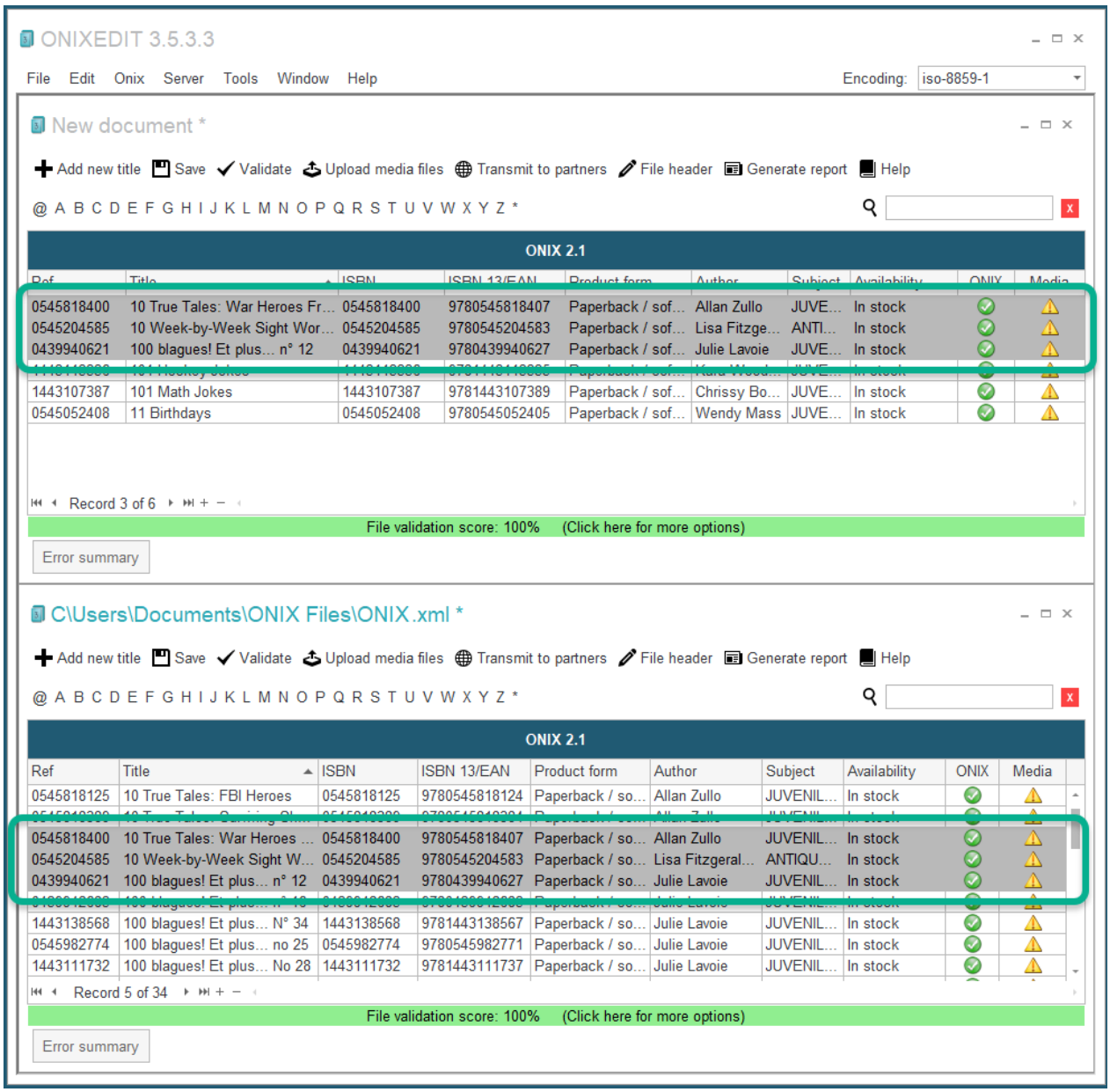
It is very easy to transfer one or more titles from one file to another with **ONIXEDIT**. To do

this, you simply open the source file and the destination file. (Please see the section Opening several ONIX files). Then you just proceed as explained to copy a title using Drag and Drop or using the context menu **Copy/Paste**.

In the following example, we are going to copy three titles from the lower file to the upper file:




After this, we obtain:




The result is an identical copy of the three selected titles in the destination file. If you want to make a transfer, you should then delete the selected titles from the original file.

If you copy an ONIX 2.1 file to an ONIX 3.0 file, it will be automatically converted.

## Import from a Flat File or Excel

**ONIXEDIT** PRO allows you to import all types of flat files as well as Excel and to convert them automatically into ONIX files. You have a specialized module (optional with the regular edition) that will help you create, save, open, and exchange import scripts adapted to your needs.

**ONIXEDIT** can import and convert these four types of flat files:

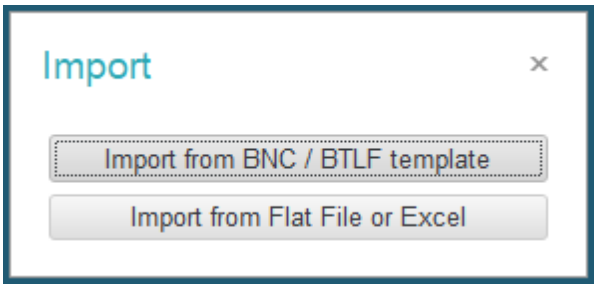
- CSV Files
- Tabulated Files
- Fixed-length Files
- Excel 2003 or higher

If your files contain descriptive text which may include carriage returns, you must use CSV, fixed-length or Excel files. Tabulated files cannot be used for this purpose.

If you import Excel files, be sure that:

- Your data begin at the first or second line of the Excel sheet. Your import script may be configured to ignore the first line if this one contains labels.
- Your data are located in the first Excel sheet.
- Your Excel file was produced by Excel 2003 or higher.

To access the import module, use the "**Import**" function from the **File** menu (**F4**). A dialogue will appear, giving a choice of two options:

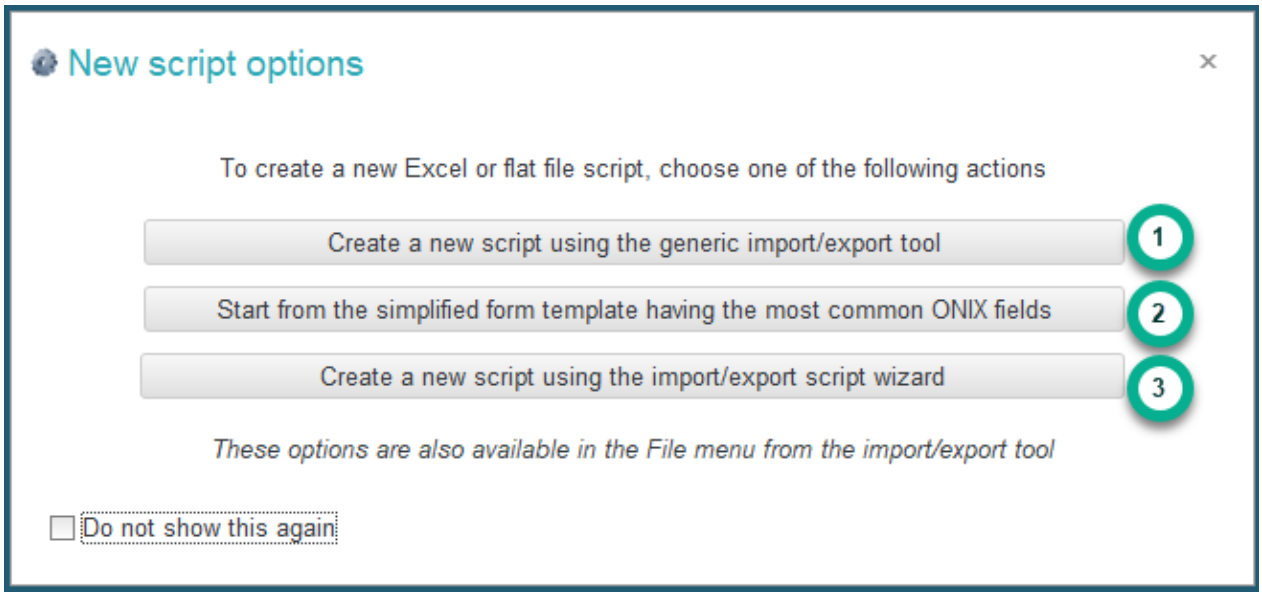



Choose "**Import from Flat File or Excel**".

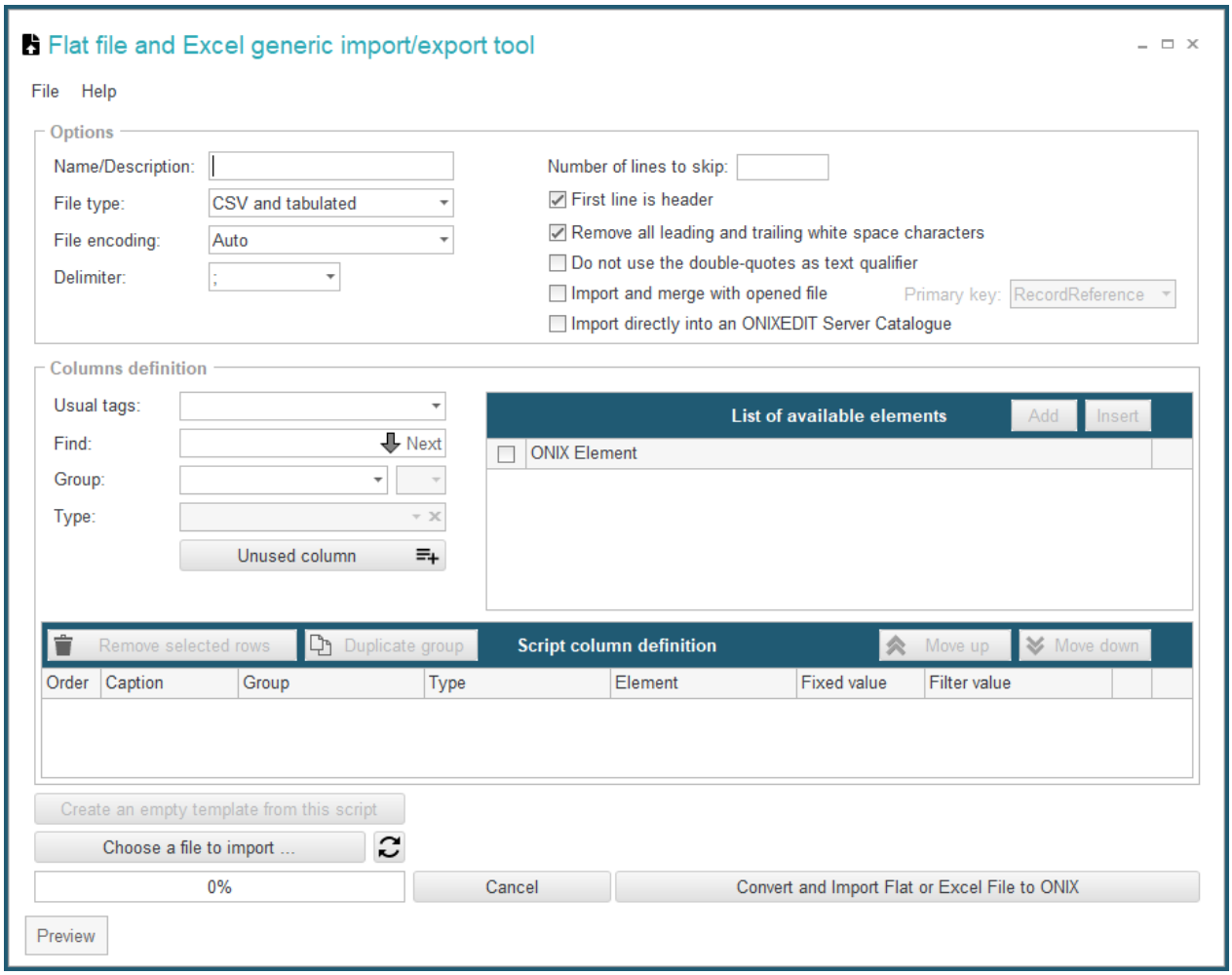
Then, you must choose if you want to create an Import Script that will produce an ONIX 2.1 or ONIX 3.0 file. Because ONIX 2.1 and 3.0 are so different, an import or export script is dedicated to a specific ONIX standard:

Click on the button that corresponds to your choice.

The **Flat File Generic Import/export tool** appears with a selection dialogue offering 3 options:

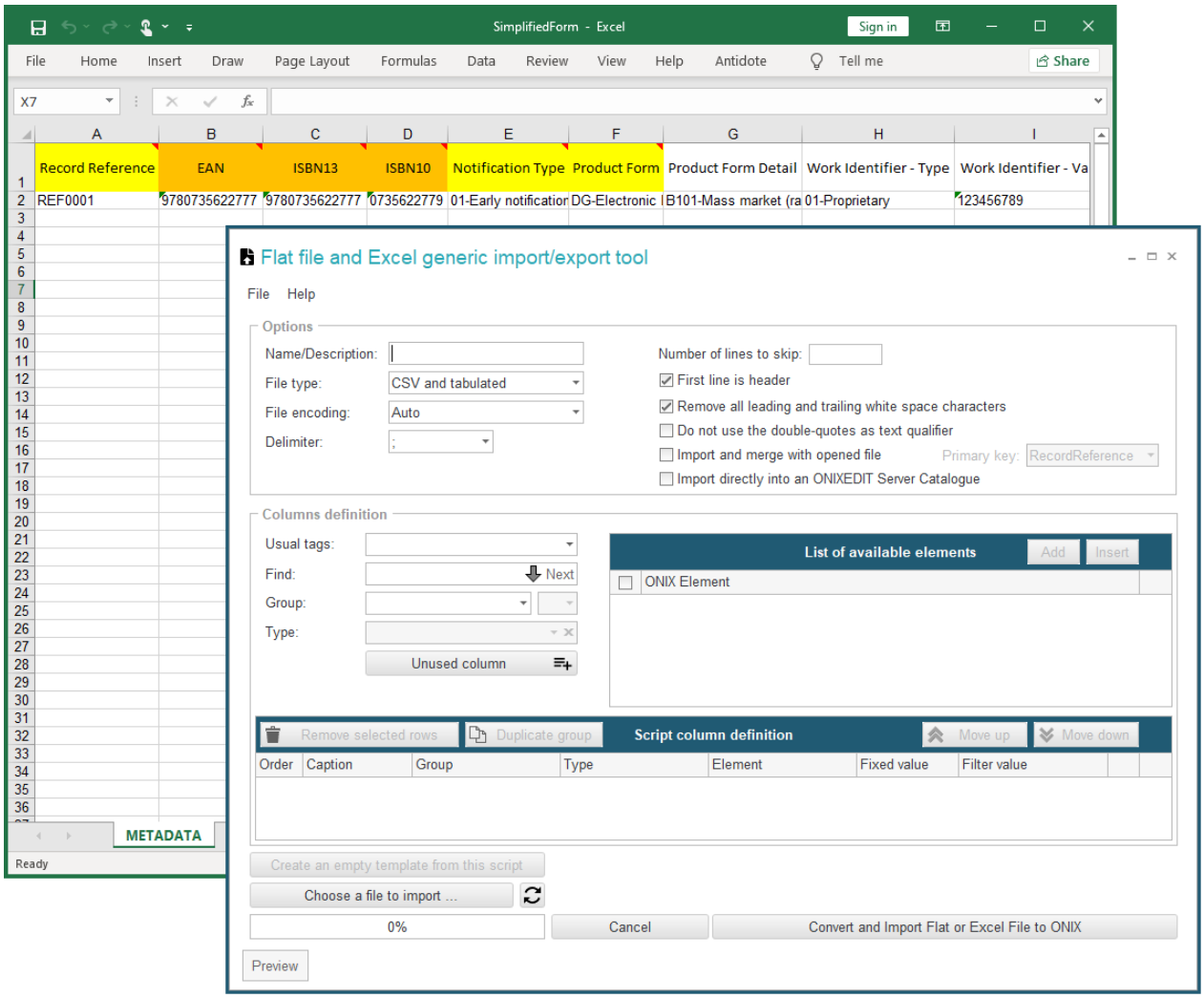



1. If you click on the first button "Create a new script...", the selection dialogue will close and you will get access an empty Flat File Generic Import/export tool:



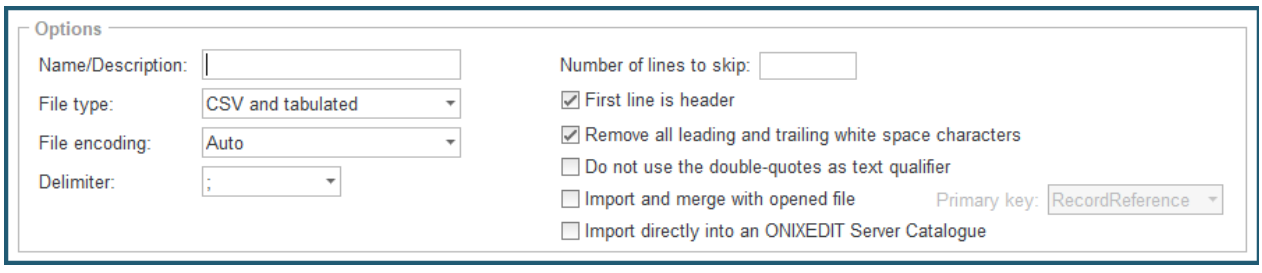

2. If you click on the second button "Start from the simplified form template...", ONIXEDIT will make a copy of a predefined import/export script with its corresponding Excel file that provide all the ONIX fields available in the simplified form. You will then be asked to indicate where ONIXEDIT should save

the copy and it will show you the corresponding import script and it will also open the Excel template matching it:



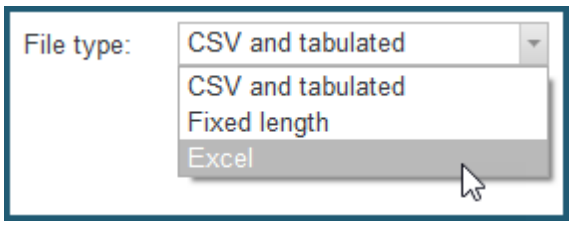

3. If you click on the third button "Create a new script using the import/export script wizard", ONIXEDIT will then open a specialized wizard that will help you create your import/export script. See Using the Import/Export wizard section for more details.

The Flat File Generic Import/export tool dialogue allows you to create new import/export scripts and to save them for later use. At the top of the dialogue, you will see the Options panel:

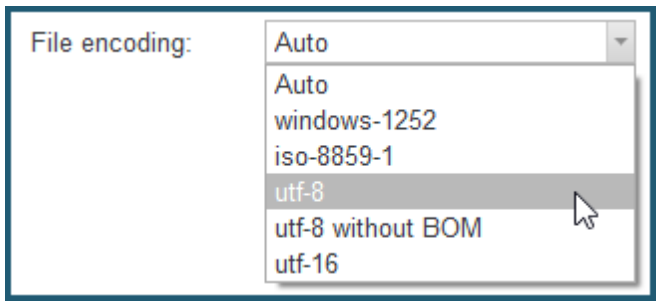



- **Name/Description** of your script is mandatory. It is used by ONIXEDIT to default the name of your import/export script file.

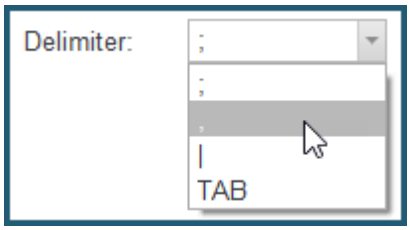
- Choose the **file type** that your script will manage. You have three possible choices:



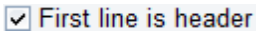

- If the file type is not Excel, you must indicate the **File encoding** which is "Auto" by default. With Auto encoding, ONIXEDIT will try to determine the file encoding of the flat file to import. You may also force the file encoding to a specific value among the following:



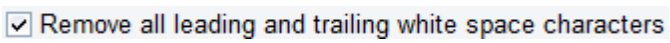

- If you chose **CSV and tabulated** in the step above, you must next choose the character which separates the columns of the file to be imported:




- At the top right of the Options panel, Indicate whether the first line of your file is a data line or a header line. If it is a header line, you should check the following box:

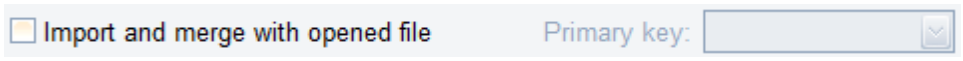



- Then, decide if you want to remove space characters at the beginning and at the end of all the values that will be imported from your source file. This option is checked by default:

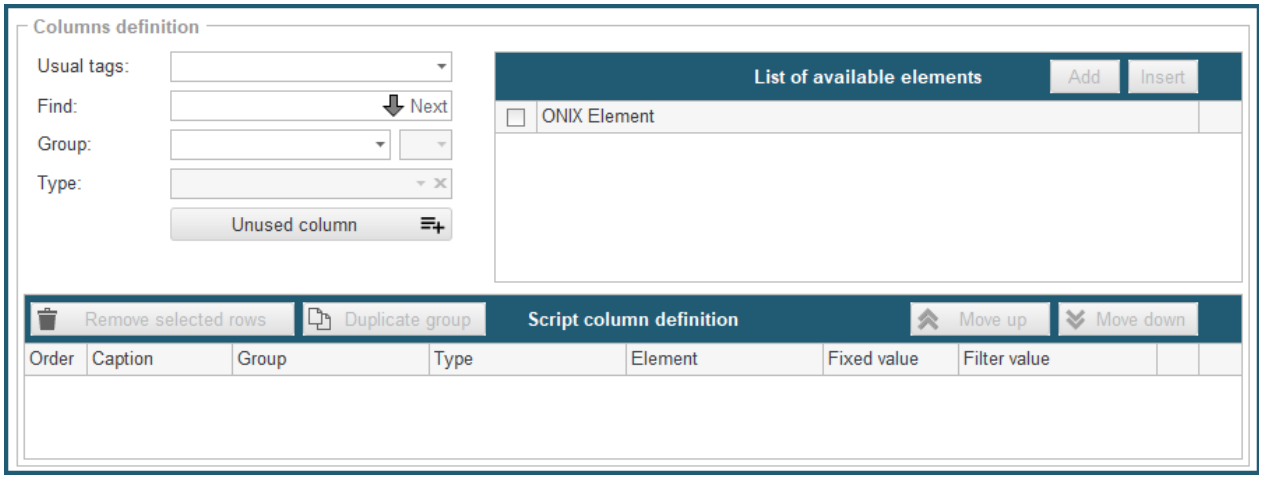



- If your file enclosed text values with double quotes, check the following option. This option is unchecked by default:

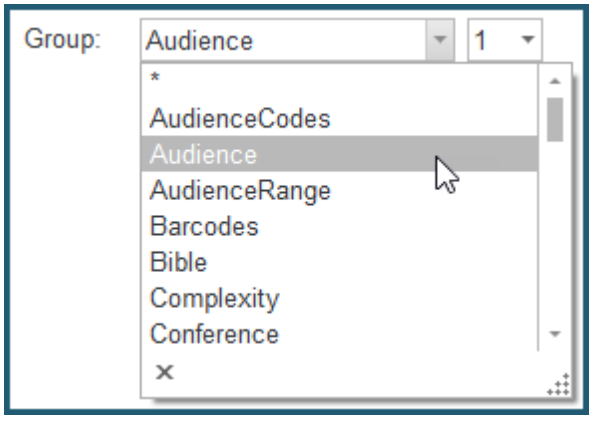
- You may also use ONIXEDIT Import/Export tool to make batch updates to your ONIX files. See section Making batch updates for more details.




The **Columns definition panel** is where you will define which column of your flat file corresponds to which ONIX field:



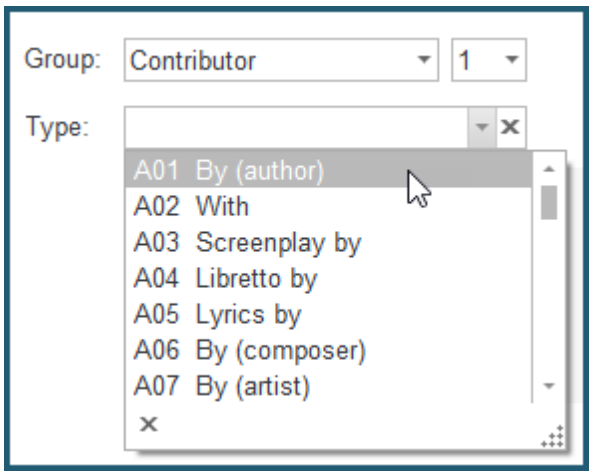

In the left-hand side section, you will find the different ONIX elements, labelled with their original English names from the ONIX standard. These elements are classified by ONIX groups:




The "*****" group contains all the fields that are found in the first level of an ONIX title and which are not repeatable. When a group is selected, the scrolling menu at the right indicates that it is repeatable when it is activated and shows a number from 1 to n. This is the menu for sequence of the group:

A repeatable group may thus be used as many times as you wish, as dictated by the number of columns in relation with this group in your flat file. For example, if you have three columns Author1, Author2, and Author3, you should then use three "**Contributor**" groups.

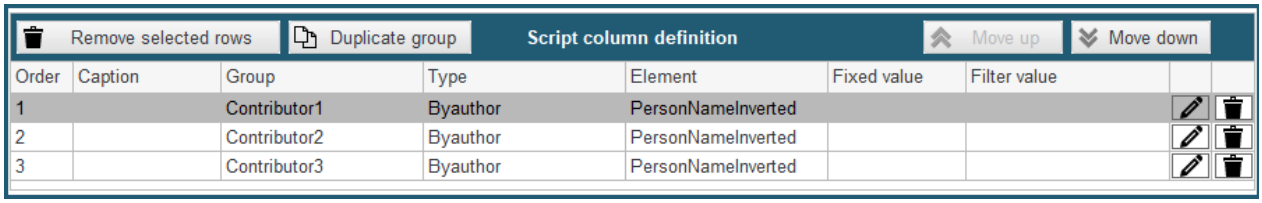
Once the group is identified, you may optionally choose to indicate the **Type** of the group that you want to add. The type is used within an ONIX group to define the nature of the information to be imported. For a contributor, for example, type is the ContributorRole:




If you do not indicate a type, you may ignore this information, which will then be left blank in your resulting ONIX file; or import it if it is part of your flat file. Let's look at an example in the Contributor group. If your flat file is set up like this with the possibility of three authors per title:

| Author1 | Author2 | Author3 | Title |
|---|---|---|---|
| Petrus, Richard | Defoy, Simone | | My last time |
| Collins, Keanu | | | Could you re |

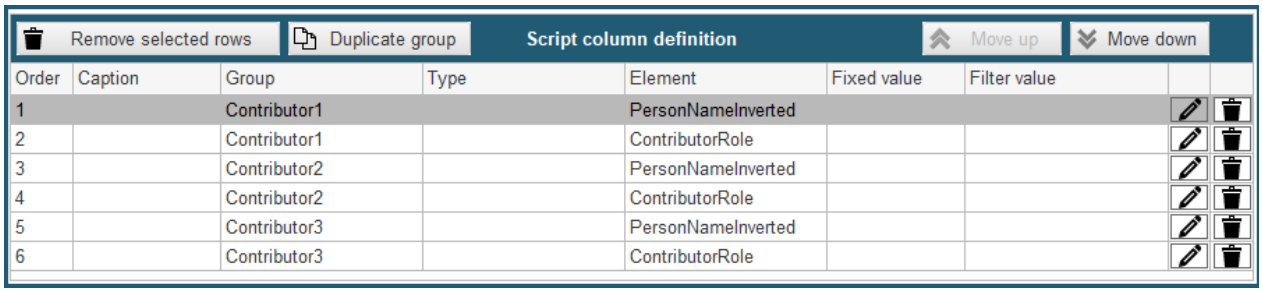
You will thus choose the type **A01-By (Author)** since you know that the contributors found in this file are authors, not illustrators or translators. You will then place the three authors in the column definitions list for your flat file:




On the other hand, if your flat file contains a definition of the type of contributor for each entry like this:

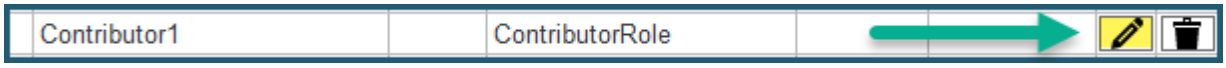
| Contributor1 | Type1 | Contributor2 | Type2 | Contributor3 | Type3 | Title |
|---|---|---|---|---|---|---|
| Petrus, Richard | Author | Defoy, Simone | Photographer | | | My last time |
| Collins, Keanu | Author | | | | | Could you re |

As the type is not known in advance, you place it in the column definition list to correspond with your flat file as follows:

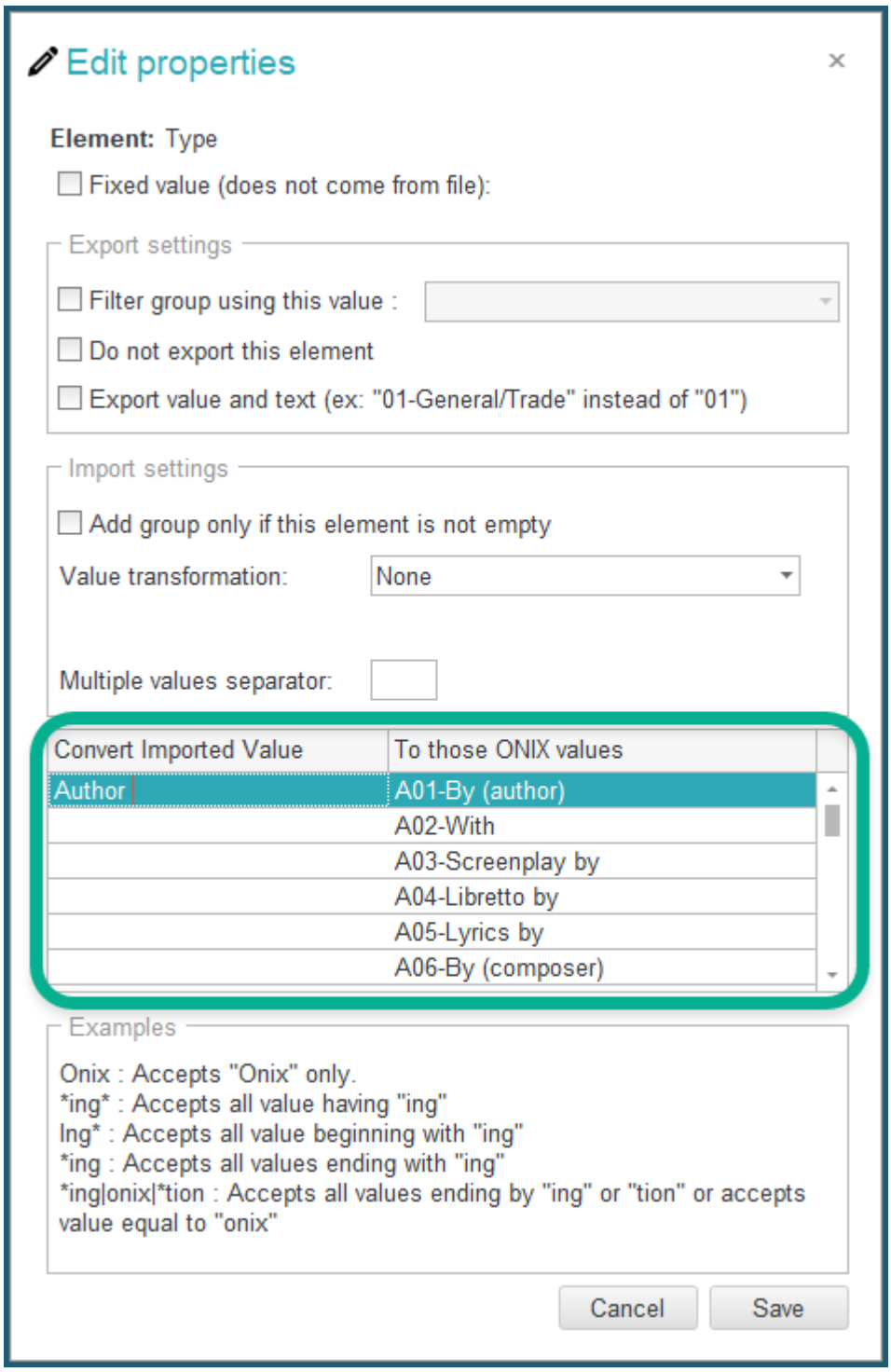



| Order | Caption | Group | Type | Element | Fixed value | Filter value | | |
|---|---|---|---|---|---|---|---|---|
| 1 | | Contributor1 | | PersonNameInverted | | | | |
| 2 | | Contributor1 | | ContributorRole | | | | |
| 3 | | Contributor2 | | PersonNameInverted | | | | |
| 4 | | Contributor2 | | ContributorRole | | | | |
| 5 | | Contributor3 | | PersonNameInverted | | | | |
| 6 | | Contributor3 | | ContributorRole | | | | |

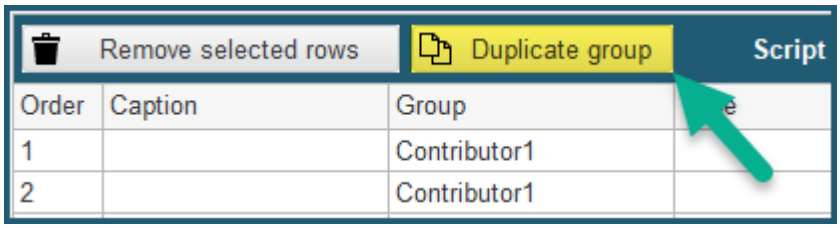
However, values which are found in our flat file for the ContributorRole element do not correspond at all with the values expected by the ONIX norm. We must therefore establish a lookup table identifying each possible value in our flat file. To do this, you just click on the property editing button for the first Type element (Line 2):



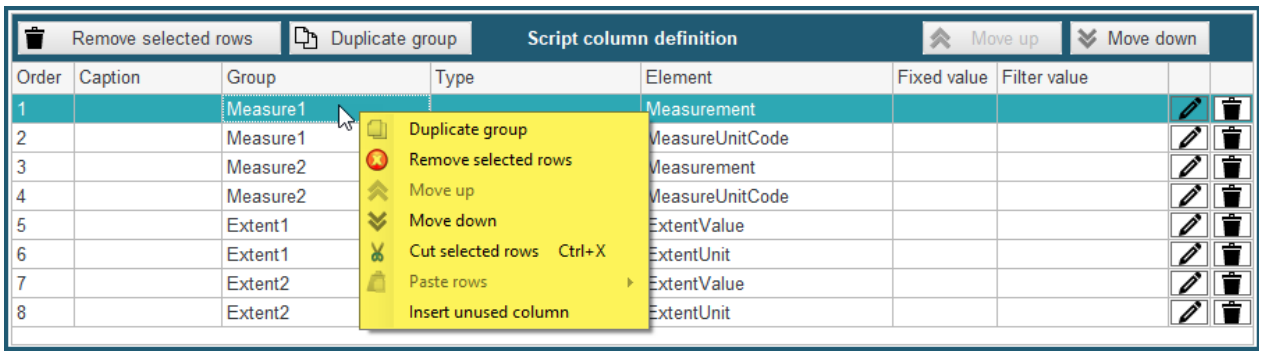

A dialogue appears with all the values accepted by the ONIX norm. You just input the corresponding values from your data file:




**Helpful Hint #1**: If you don't want to repeat this data capture for the same matching values for the two other authors, you can just use the **Duplicate Group** button at the bottom of the list. The properties of all the elements of the group will be copied in the same way, so you will not have to input them over again:



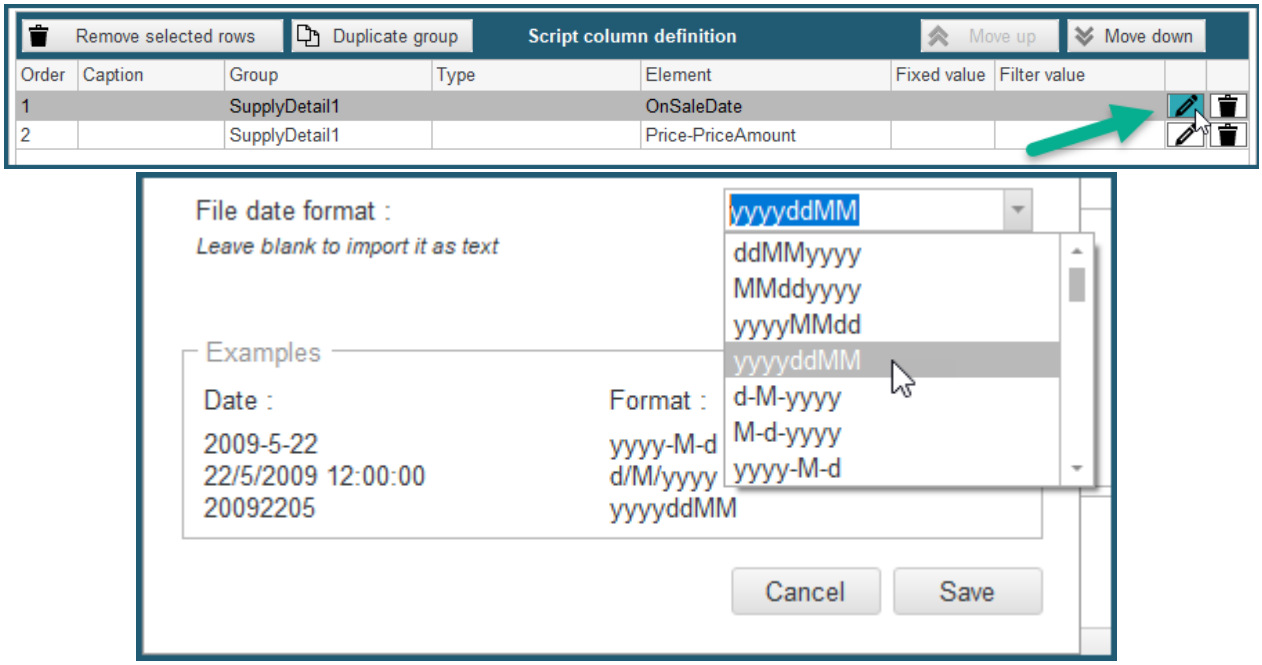
**Helpful Hint #2**: The Import Column Definition provides a contextual menu that you can show a right click of your mouse inside the Import Column Definition area:

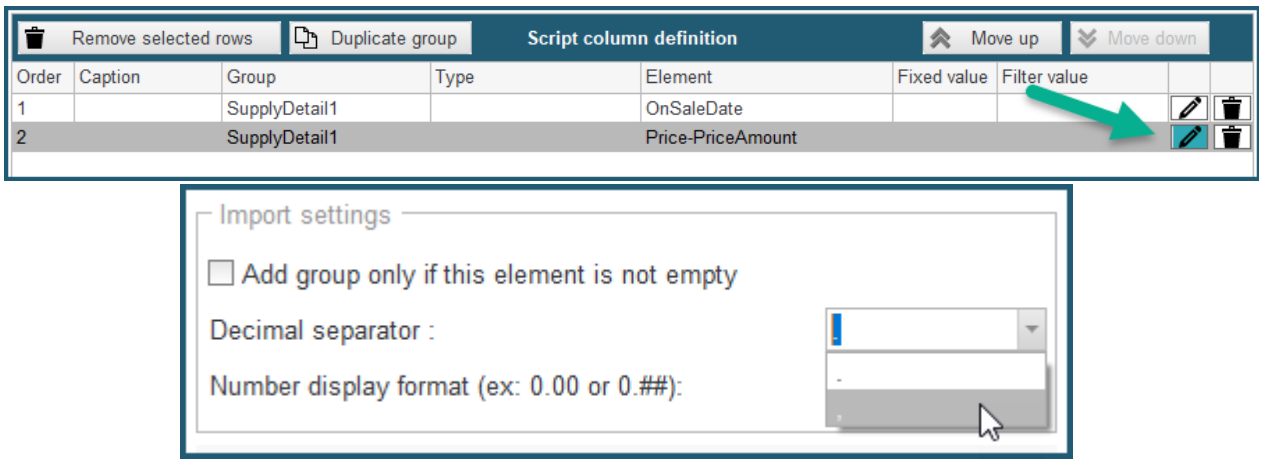



With the help of this menu, you can:

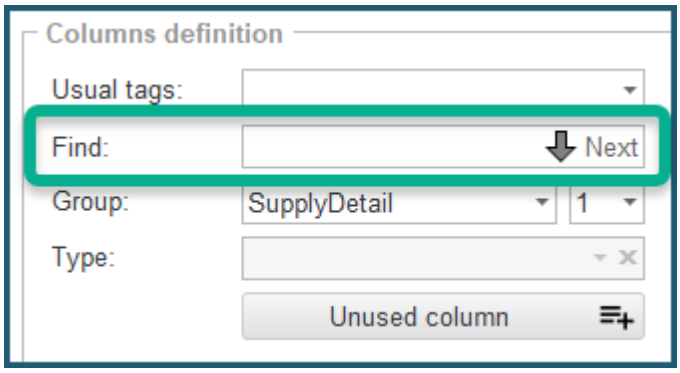
- Move up or down one or more lines;
- Duplicate a group;
- Remove one or more lines;
- Cut and paste one or more lines;
- Insert anywhere an unused column.

**Helpful Hint #3**: Fields of the type Date and numerical fields such as the price of a book requires special attention and you may need to edit their properties. If you don't get the expected result, you can try to define the date format that is found in a flat file as well as the decimal character. It is important to note that a single date format and a single decimal character can be supported in any one column from a flat file:






**Helpful Hint #4**: If you don't know which group contains a particular ONIX field, you can use the search tool. You just input the word you need and **ONIXEDIT** will automatically position you on the first ONIX tag which contains this word. Then use the **Next** button to review all the ONIX tags targeted by your search until you find the one you are looking for:

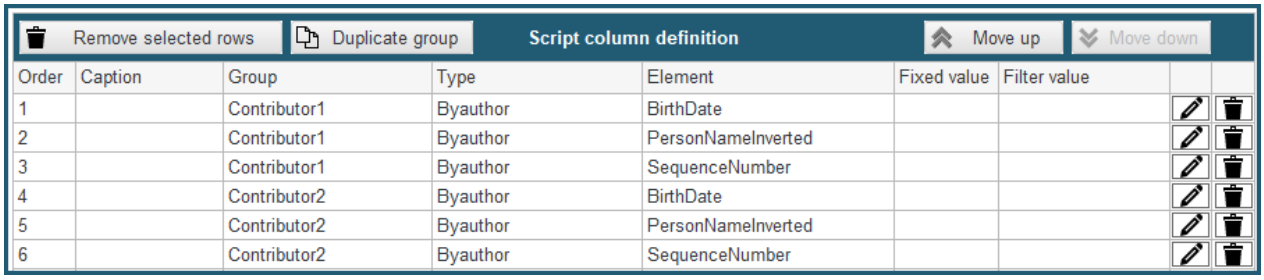



When you want to use the same ONIX data group several times, proceed as follows:

A - Select the ONIX elements to use and click on the **Add** button:

B - Then use the menu for the sequence of the group to go to the next in sequence:

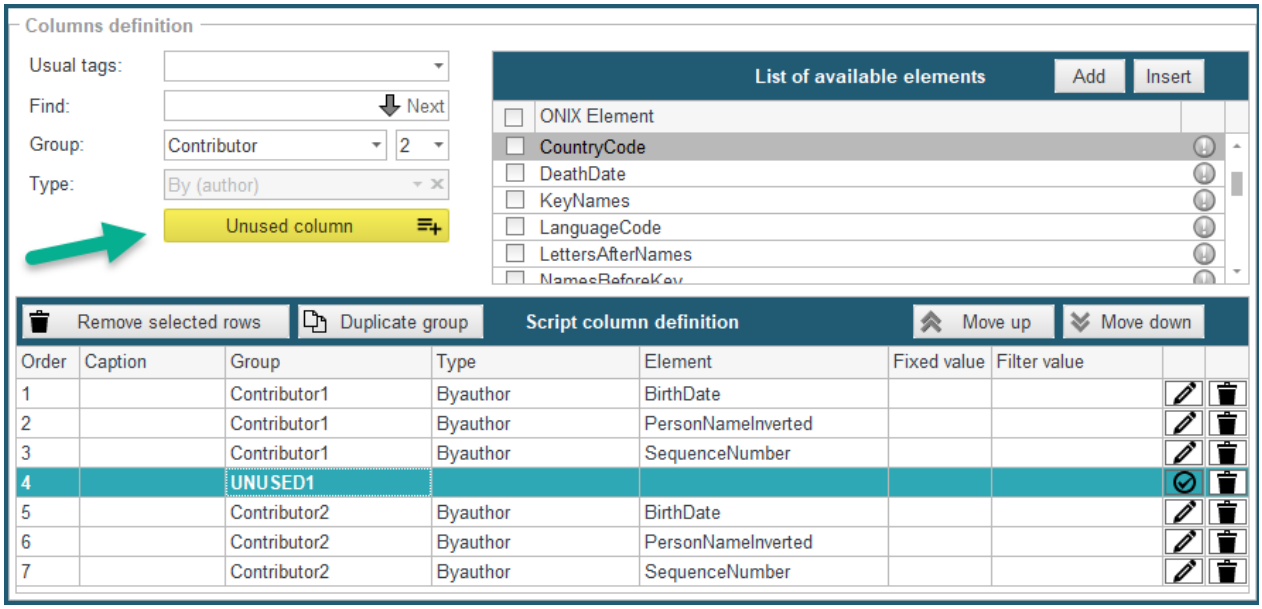
C - Repeat step A. You will obtain this:




| Order | Caption | Group | Type | Element | Fixed value | Filter value |
|---|---|---|---|---|---|---|
| 1 | | Contributor1 | Byauthor | BirthDate | | |
| 2 | | Contributor1 | Byauthor | PersonNameInverted | | |
| 3 | | Contributor1 | Byauthor | SequenceNumber | | |
| 4 | | Contributor2 | Byauthor | BirthDate | | |
| 5 | | Contributor2 | Byauthor | PersonNameInverted | | |
| 6 | | Contributor2 | Byauthor | SequenceNumber | | |

Once you have placed them in the list, the elements can be moved or deleted as needed.

If the flat file contains one or more columns that you want to ignore, you can add an unused column and move it as required:



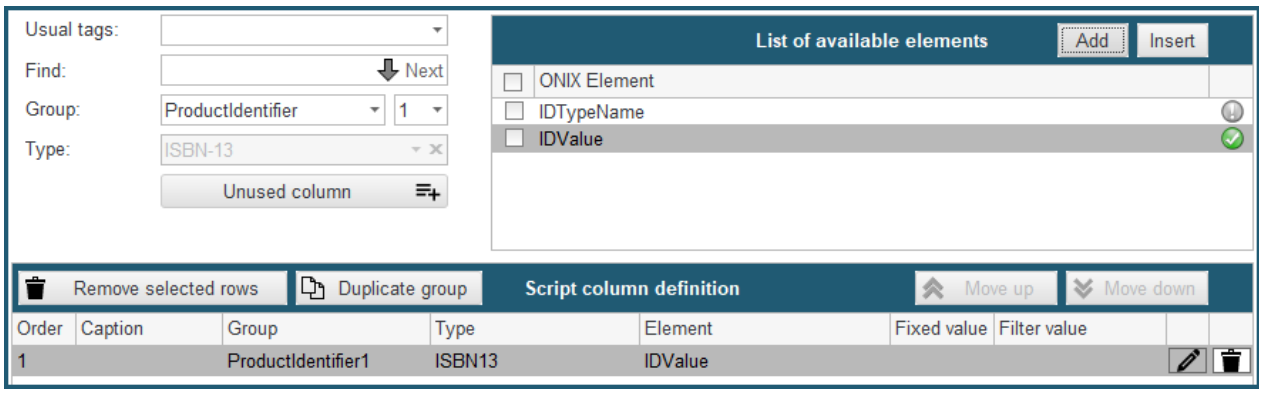

| Order | Caption | Group | Type | Element | Fixed value | Filter value |
|---|---|---|---|---|---|---|
| 1 | | Contributor1 | Byauthor | BirthDate | | |
| 2 | | Contributor1 | Byauthor | PersonNameInverted | | |
| 3 | | Contributor1 | Byauthor | SequenceNumber | | |
| 4 | | UNUSED1 | | | | |
| 5 | | Contributor2 | Byauthor | BirthDate | | |
| 6 | | Contributor2 | Byauthor | PersonNameInverted | | |
| 7 | | Contributor2 | Byauthor | SequenceNumber | | |

If your flat file contains superfluous columns positioned to the right of the columns to be imported, you do not need to add corresponding unused columns in your column definition list. The columns which don't have a correspondence will simply be ignored by the import mechanism.

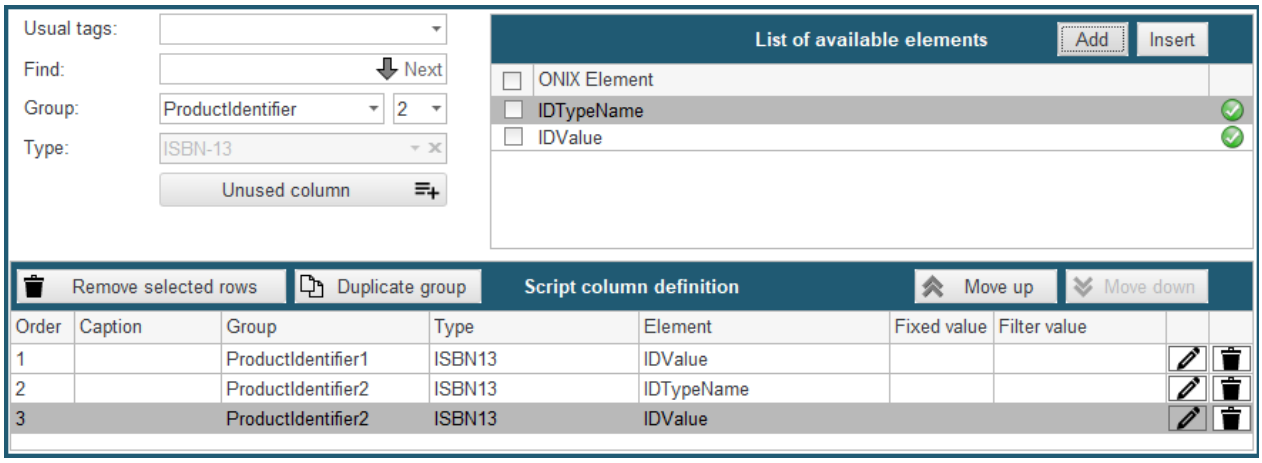
You can also fix an ONIX element value. For example, if you have an internal identifier within your company, in addition to an ISBN-13, to identify each of your titles as follows:

| ISBN-13 | ID INTERNE |
|---|---|
| 9780764536519 | ABC12345 |

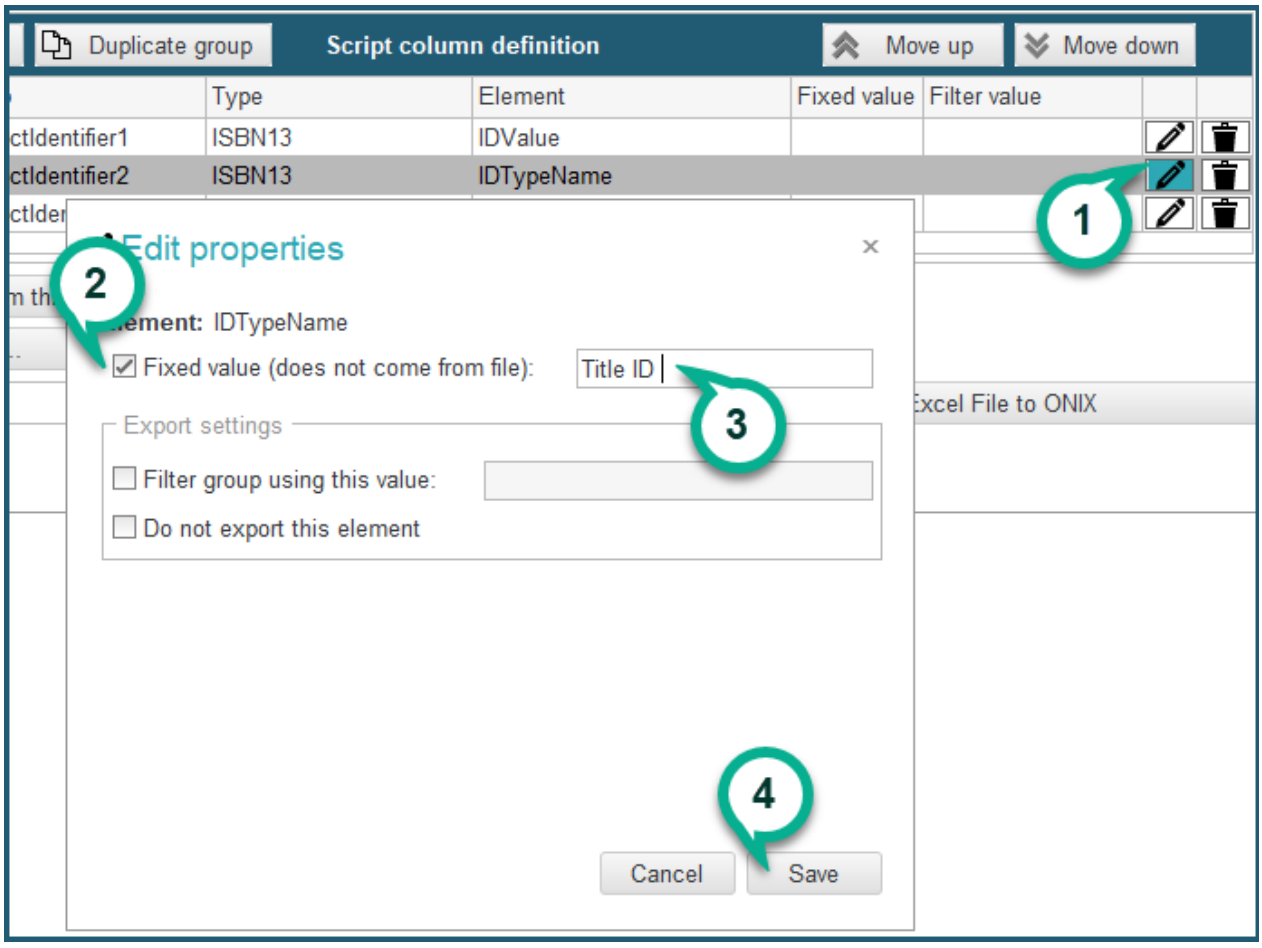
You first place a **ProductIdentifier** of type **ISBN-13**:



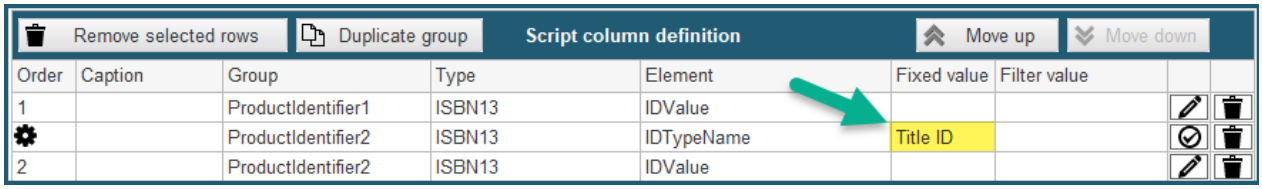

This is followed by another **ProductIdentifier** of type **Proprietary**, to which you add the element **IDTypeName** to specify the name of this proprietary identifier:




Even though a column called **IDTypeName** doesn't exist in your flat file, you can, however, give it a constant value by clicking on the properties button for this field:



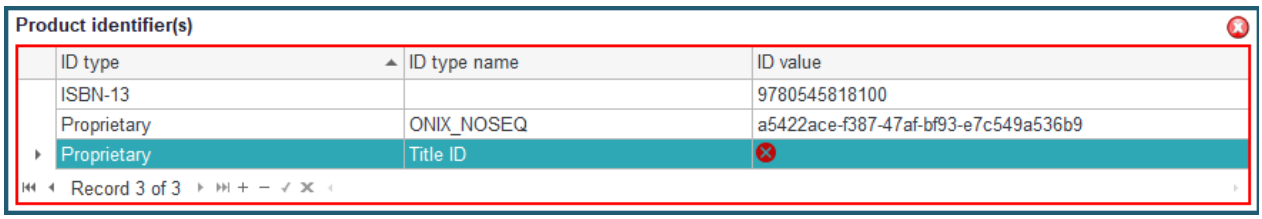

You will then see this:



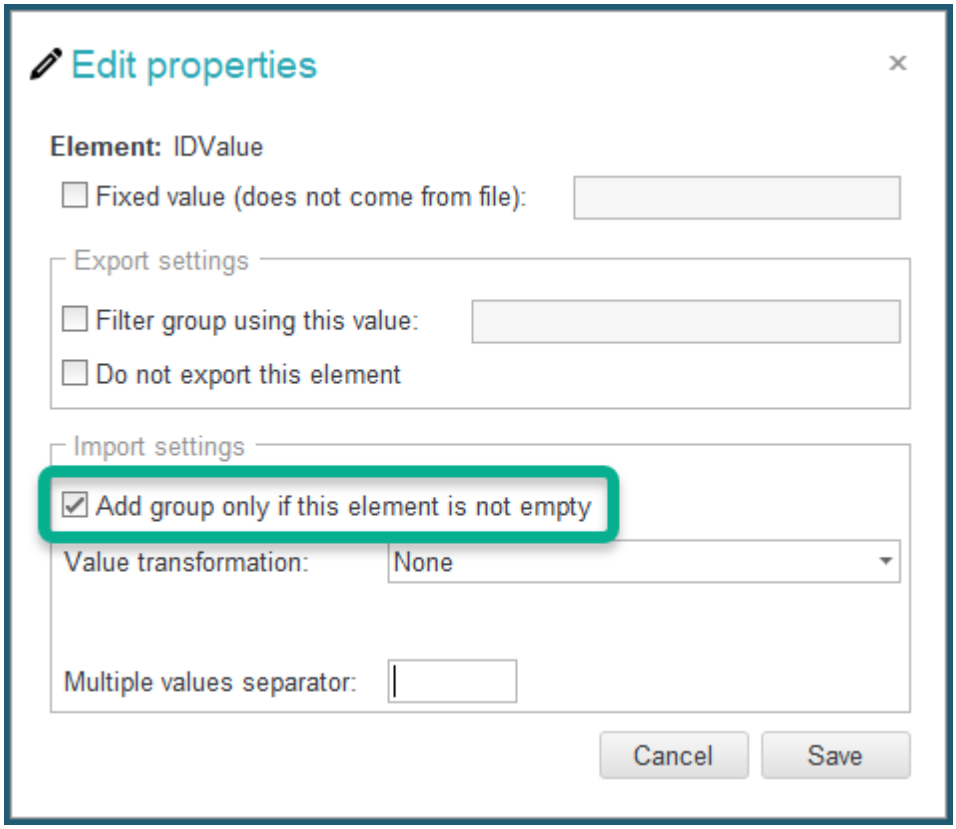

In the resulting ONIX file, you will obtain something like this:

```
    <ProductIdentifier>
        <ProductIDType>15</ProductIDType>
        <IDValue>9780764536519</IDValue>
    </ProductIdentifier>
    <ProductIdentifier>
        <ProductIDType>01</ProductIDType>
        <IDTypeName>Title ID</IDTypeName>
<IDValue>ABC12345</IDValue>
    </ProductIdentifier>
```

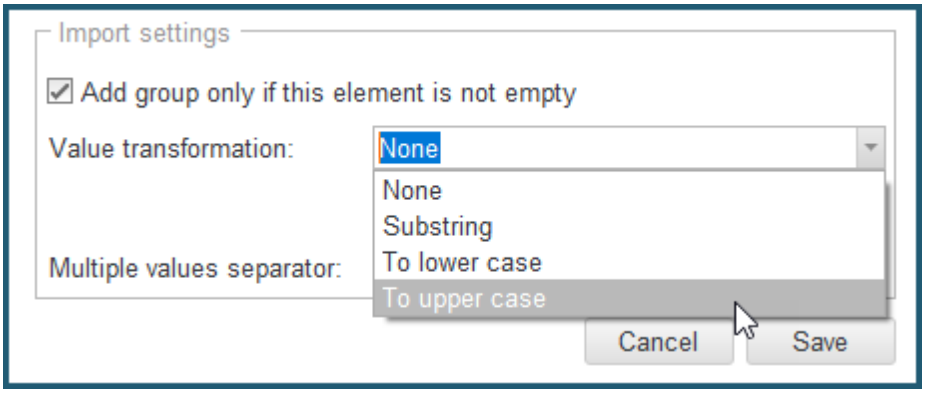
However, setting fixed values may introduce side effects. In the example above, if column 2 is empty, the import will produce a second Proprietary **ProductIdentifier** with the ID Type name "**Title ID**" with no value which is invalid in the ONIX standard because the ID Value is mandatory:




To solve this problem, you just have to click on the property button of the **IDValue** Element and check the option "**Add group only if this element is not empty**":

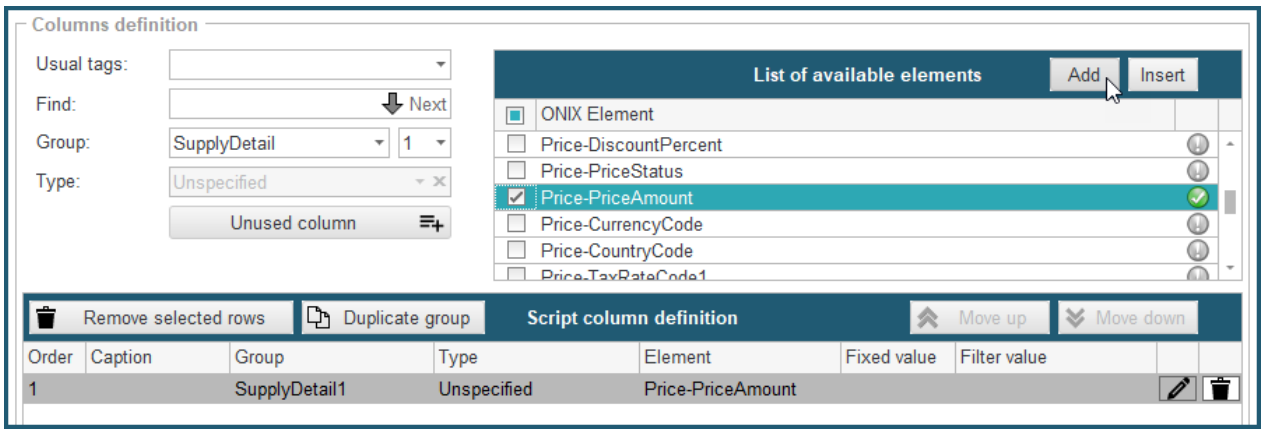



You also have the capability to apply some basic transformation on imported value:

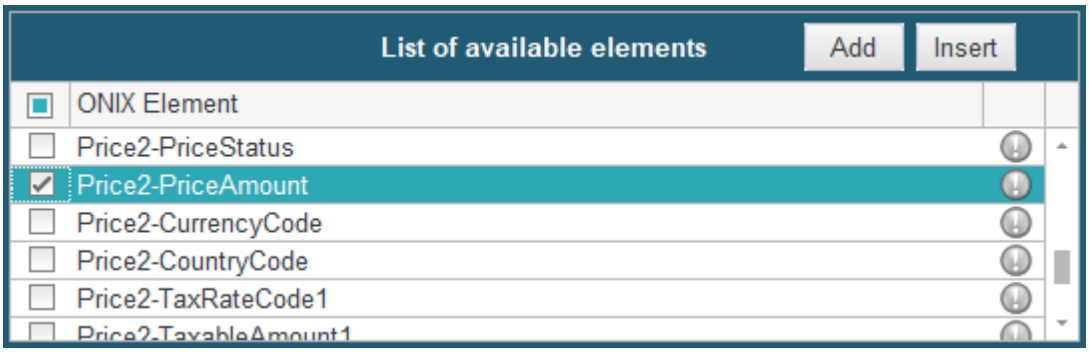



If you want to import multiple prices under the same Supply Detail group, you can proceed as follows:

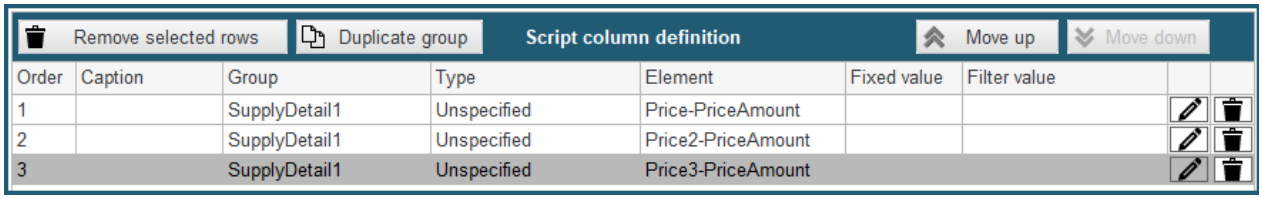
A- Add your first price column:



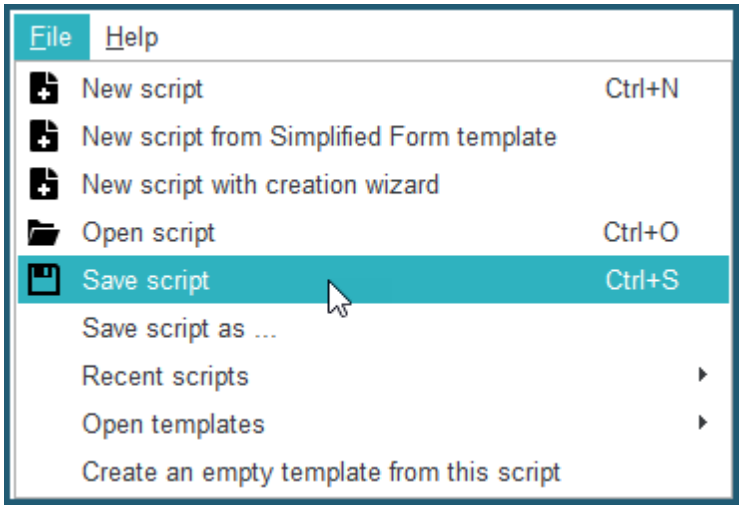

B- As soon as a first "**Price**" element is placed, a new set of price elements are added in the list of available elements:




If you then add a second "**PriceAmount**" to the import/export column definition list, then a third will be made available and so on:



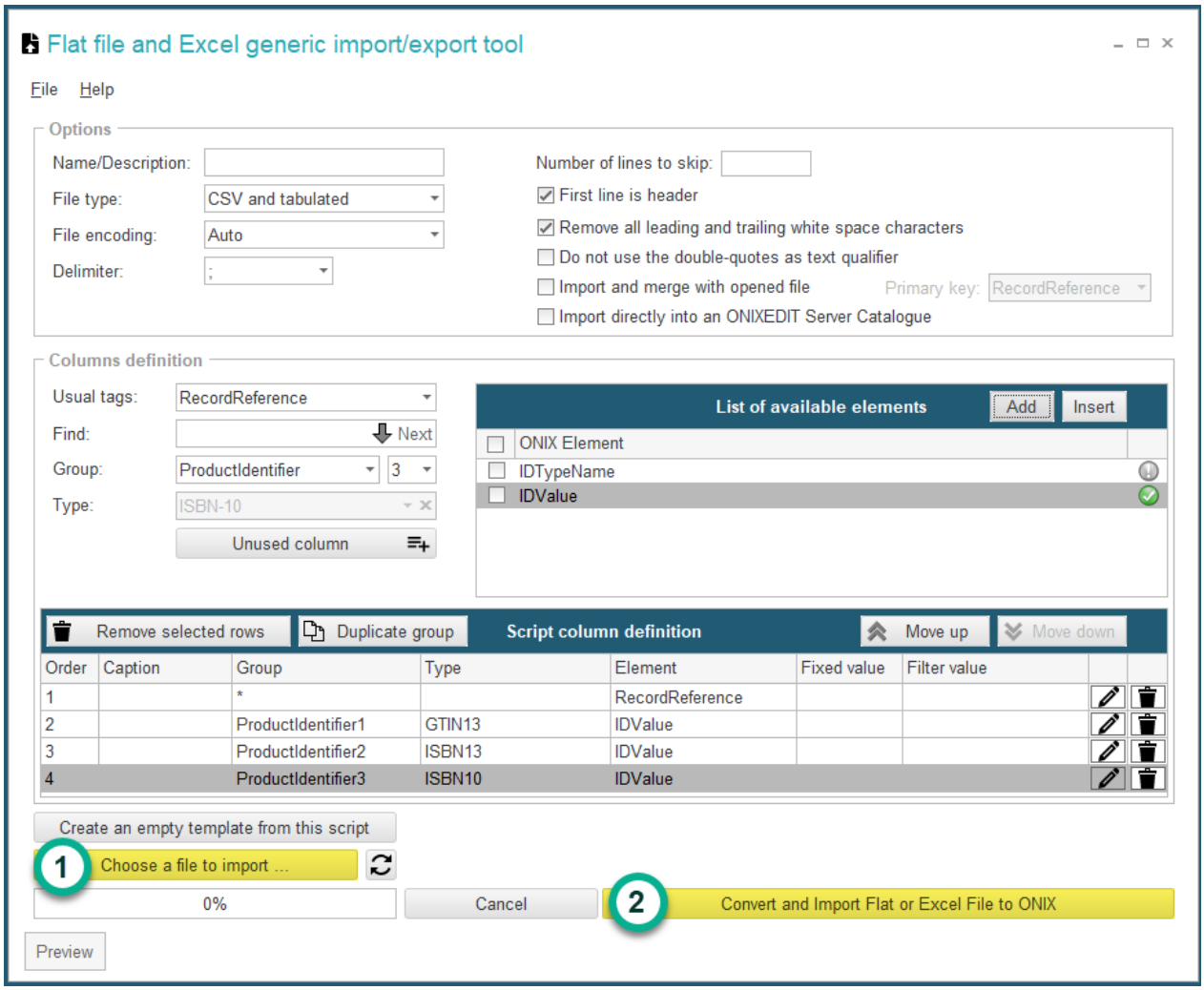

When you have completed the column definitions for your flat file, you must save your import script in a file on your disc, using the **File/Save Import/Export Script** menu:



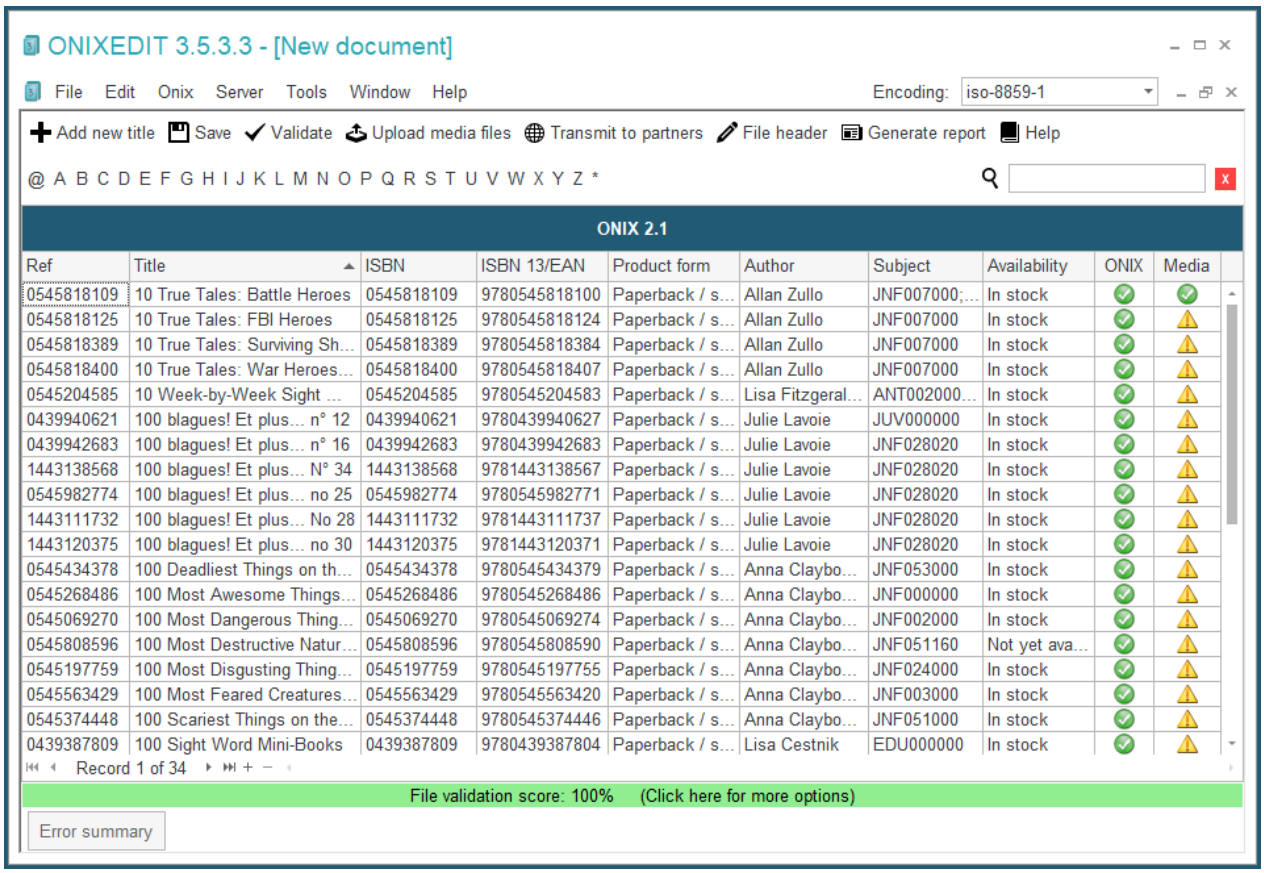
You can always recover this file in order to modify it or simply to apply it to a flat file needing to be converted. These files can be shared with other **ONIXEDIT** users, and can also be used for bulk conversion of flat files to ONIX files, thanks to the console application **OnixEditImport.exe**, which is installed at the same time as your **ONIXEDIT** application (Please see the section Bulk Import of Flat Files).

**Running the import script**.

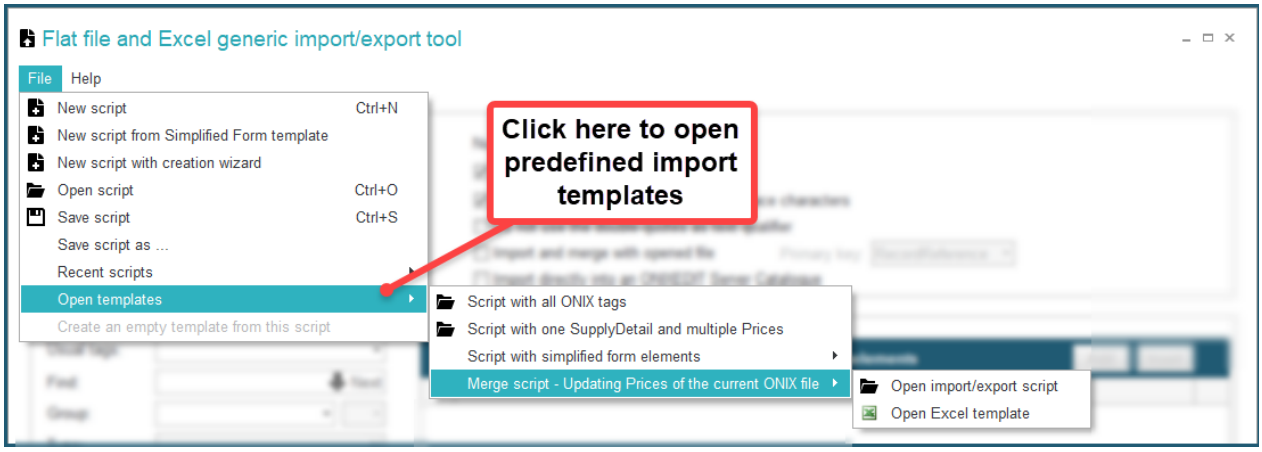
Once the import script is complete, you simply select your flat file using the "**Choose a File**" button, and convert it using the "**Convert and Import a Flat File to ONIX**" button:




Your flat file will be converted into an ONIX file:




For your convenience, **ONIXEDIT** is installed with predefined import templates that you can use and customized to suit your needs. You will find it in the **Open templates** item of the File menu:



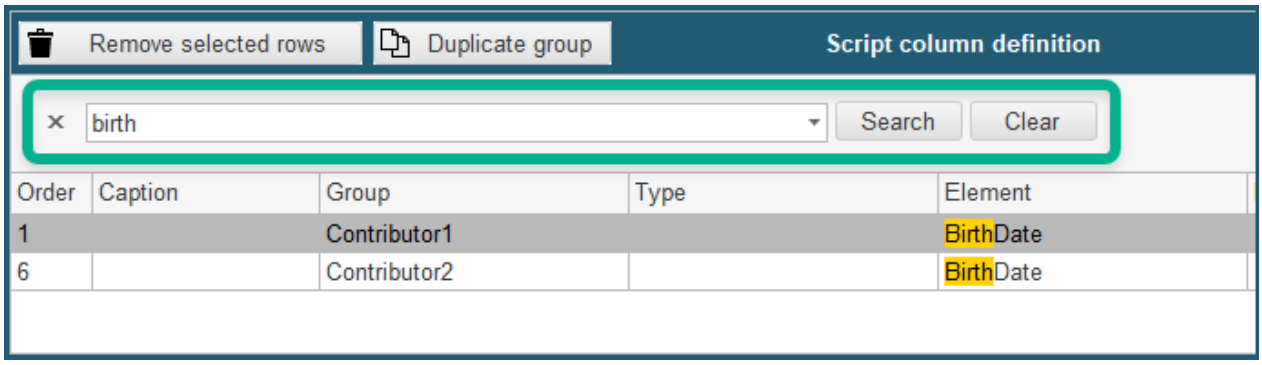

Here are short descriptions for each:

- **Script with all ONIX tags**: This script can be used either as an Import or an Export script and contains all the ONIX tags that are supported by **ONIXEDIT** (see Appendices A and B ).
- **Script with one SupplyDetail and multiple Prices** This template provides an example of how to define a script that is able to import multiple prices in a same Supply Detail group.
- **Script with simplified form elements**: This menu item provides a good learning tool of **ONIXEDIT** import functions. Indeed, you get the **ONIXEDIT** import script

("Load script") as well as the corresponding Excel template with predefined data. The script contains all the ONIX tags supported in the simplified form. Both files are located in your **ONIXEDIT** program folder (usually "C:\Program Files (x86)\ONIXEDIT") and are ready to use.

- **Merge script - Update Prices of the current ONIX file**: See section Making batch updates for details about this template.

**Helpful Hint #5**: If your import script contains many columns, it could be useful to use the search function. In ONIXEDIT, all lists have an embedded search tool that you can activate using **CTRL-F** key:




## Export to a Flat File or Excel

**ONIXEDIT** PRO allows you to export the contents of an ONIX file to a Flat File (CSV, tab-delimited or fixed length) as well as Excel files. If you bought **ONIXEDIT** Pro or the optional Import/Export generic tool offered with the regular edition, you will be able to use this module. The export function is identical to the import function (see section Importing a Flat File ). In fact, import scripts and export scripts are interchangeable. It is therefore possible to create an import script to read and convert a Flat File in ONIX, then perform the inverse operation using the same script.

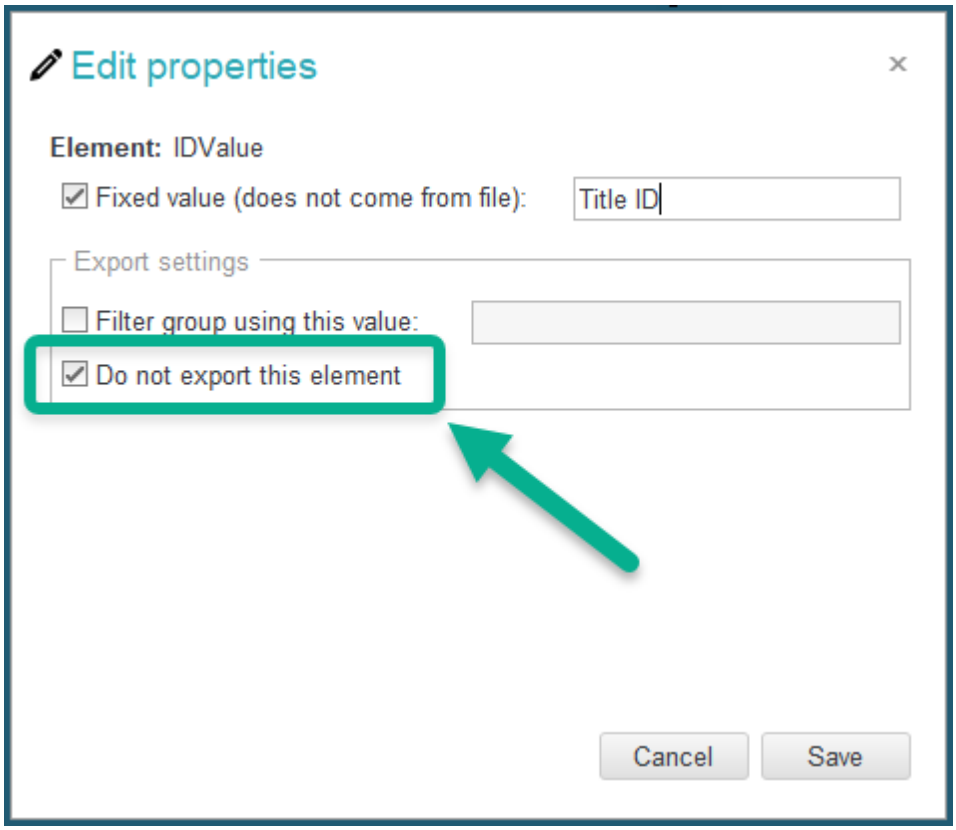
To access the export function to a Flat File, simply follow these steps:

1- Open the ONIX file you want to export.
2- In the main list, select the titles you want to export.
3- In the **File** menu, choose "**Export**" (**F5**).
4- Choose whether you want to export only the selected titles or all titles of the current file.
5- Then click on the "**Export to Flat File**" button.

The Flat File import/export tool appears. Refer to section Importing a Flat File for details on its usage.

**Helpful Hint #1**:

Above, we said that ONIXEDIT import and export scripts are interchangeable. However, this is possible only if the import script does not contain any Fixed Values or if the Fixed values are set to be non-exportable within the script.




Indeed, to be interchangeable, the flat files exported must have the same number of columns required by the import script. When you set a fixed value for a column of an import script, that column is not really defined in your flat file. The fixed value is dynamically added at runtime by ONIXEDIT. But the behaviour of fixed values differ for exports. By default, a fixed value is exported to the flat file creating an additional column that you don't expect if you are importing the flat file with that same script later. For that reason, we have the option "Do not export this element" that will make import/export files with the same count of columns.

**Helpful Hint #2**:

A console application named **OnixEditImport.exe** can be used to perform batch processing with your ONIXEDIT import/export scripts. Refer to section Bulk import of Flat Files for details on its usage.

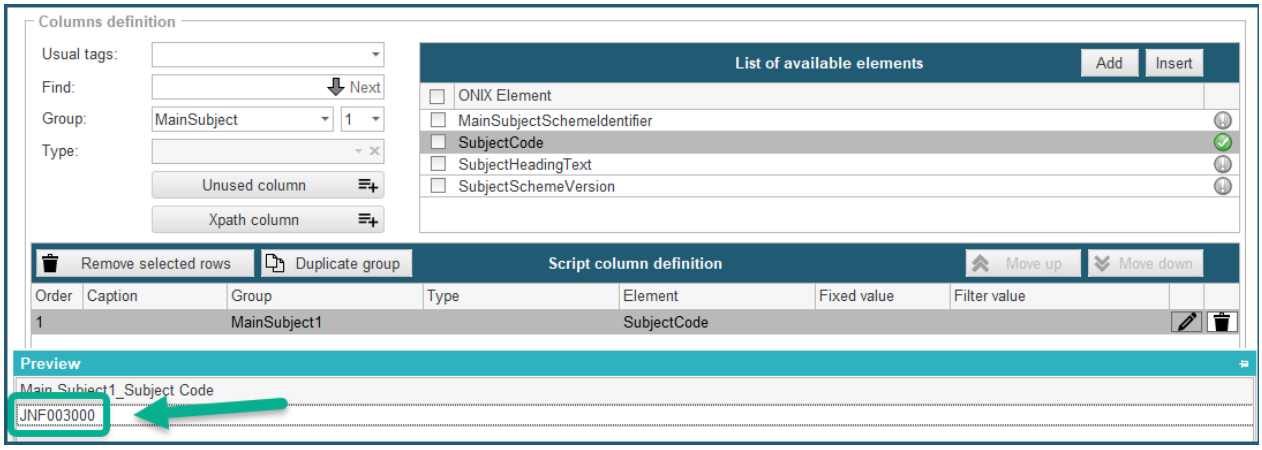
**Helpful Hint #3**:

If you have multiple records of a specific ONIX composite like for the MainSubject in the example below:

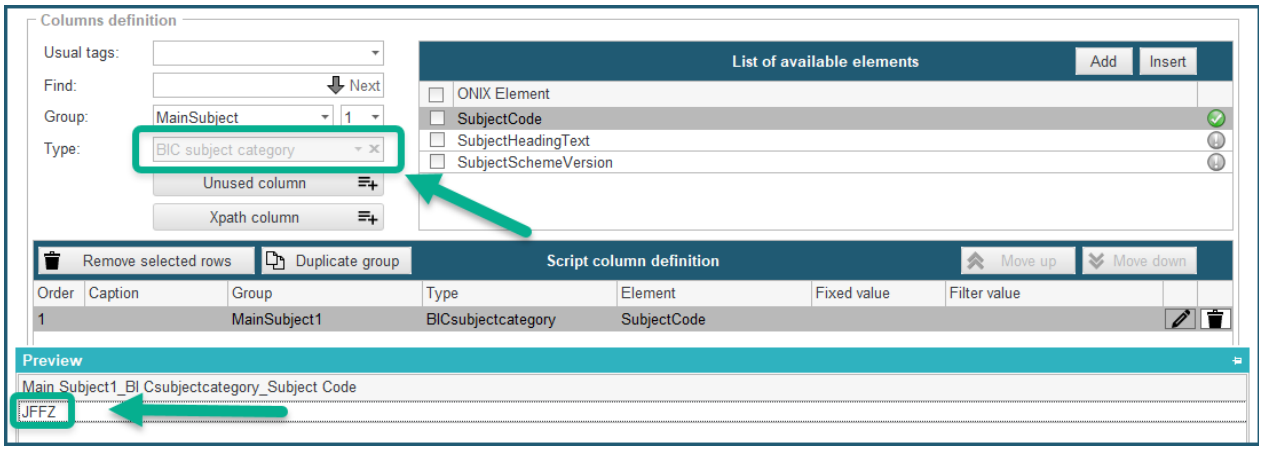
```
  <MainSubject>
    <MainSubjectSchemeIdentifier>10</MainSubjectSchemeIdentifier>
    <SubjectCode>JNF003000</SubjectCode>
    <SubjectHeadingText>JUVENILE NONFICTION / Animals /
General</SubjectHeadingText>
  </MainSubject>
  <MainSubject>
    <MainSubjectSchemeIdentifier>12</MainSubjectSchemeIdentifier>
    <SubjectCode>JFFZ</SubjectCode>
```

```
  <SubjectHeadingText>Animals & society</SubjectHeadingText>
</MainSubject>
<MainSubject>
  <MainSubjectSchemeIdentifier>93</MainSubjectSchemeIdentifier>
  <SubjectCode>AGNA</SubjectCode>
  <SubjectHeadingText>Animals in art</SubjectHeadingText>
</MainSubject>
```

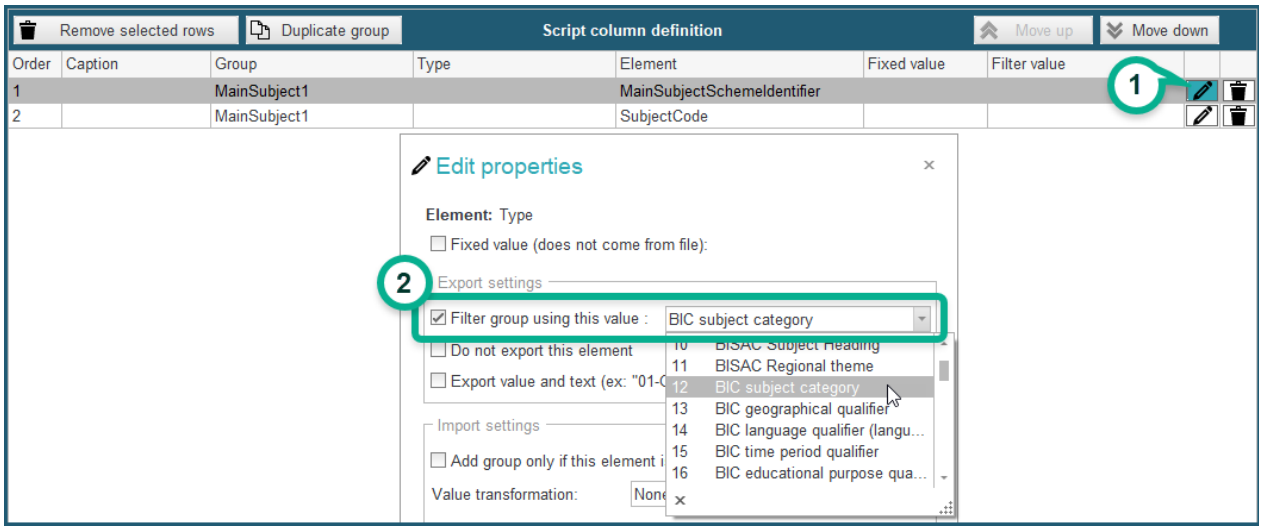
If you just place the SubjectCode ONIX element as an export column, ONIXEDIT will export the first subject it will find (the BISAC one):




But what if you need to export the BIC subject instead? A first solution is to specify the type BIC for the MainSubject group:



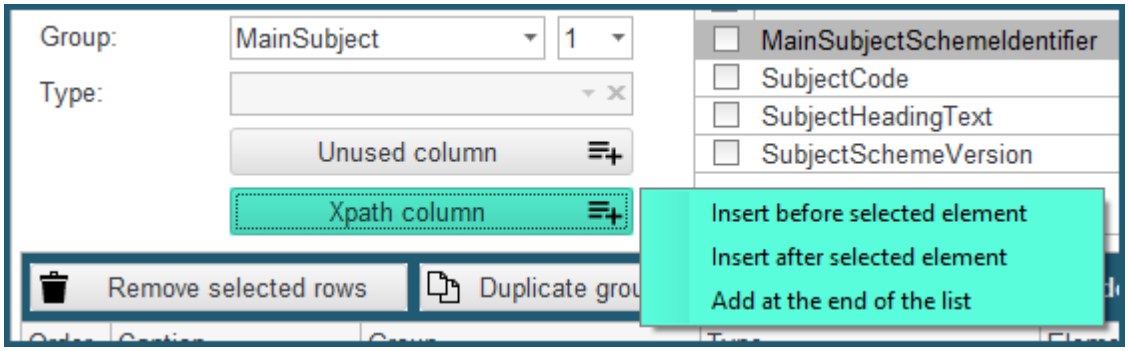

But if you need to export the MainSubjectSchemeIdentifier ONIX Element to the flat file, this won't work. For that reason, it is possible to filter a group using a specific value:

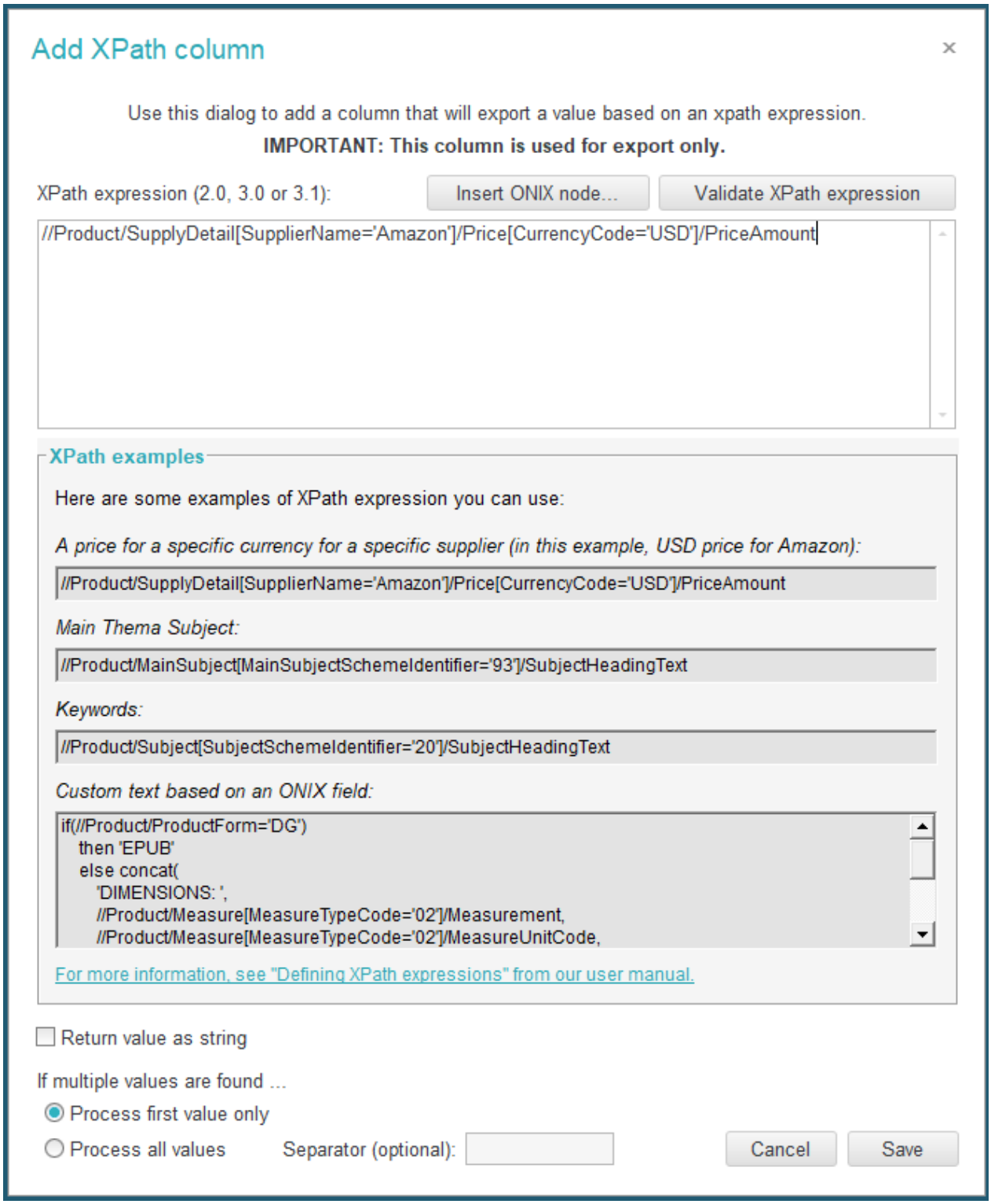



However, you can set only one filter per group. If you need more precision and flexibility, you can define an XPATH column (next hint).

**Helpful Hint #4**:

When setting a group type or filter is not enough to get exactly the result that you need, your best weapon is the XPATH column:



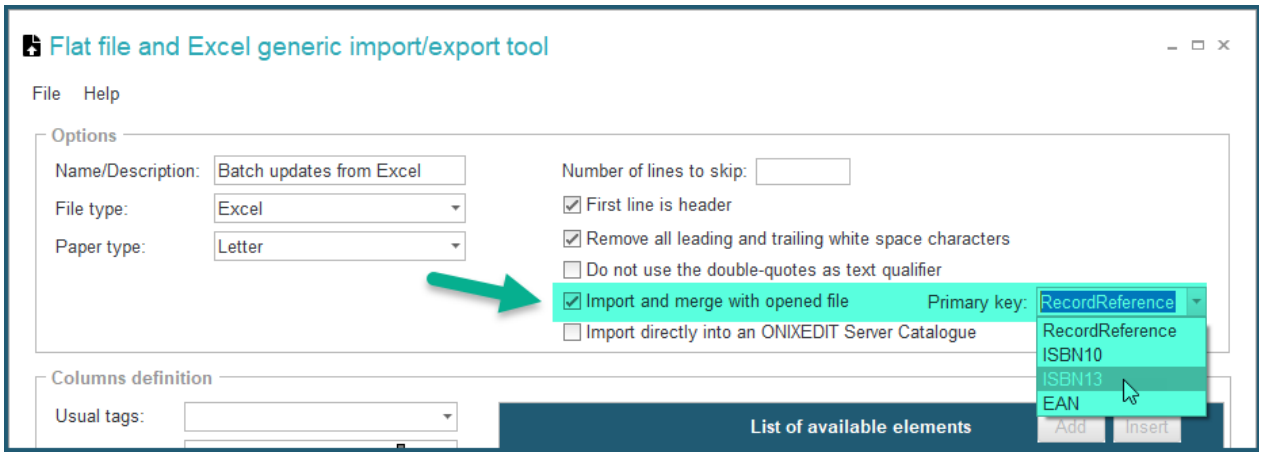



Please, consult section Defining XPATH expressions for more details.

## Make batch updates

**ONIXEDIT** provides a new way to make batch updates on existing titles using a combination of our Copy/Merge section tool and our Flat File Import tool.

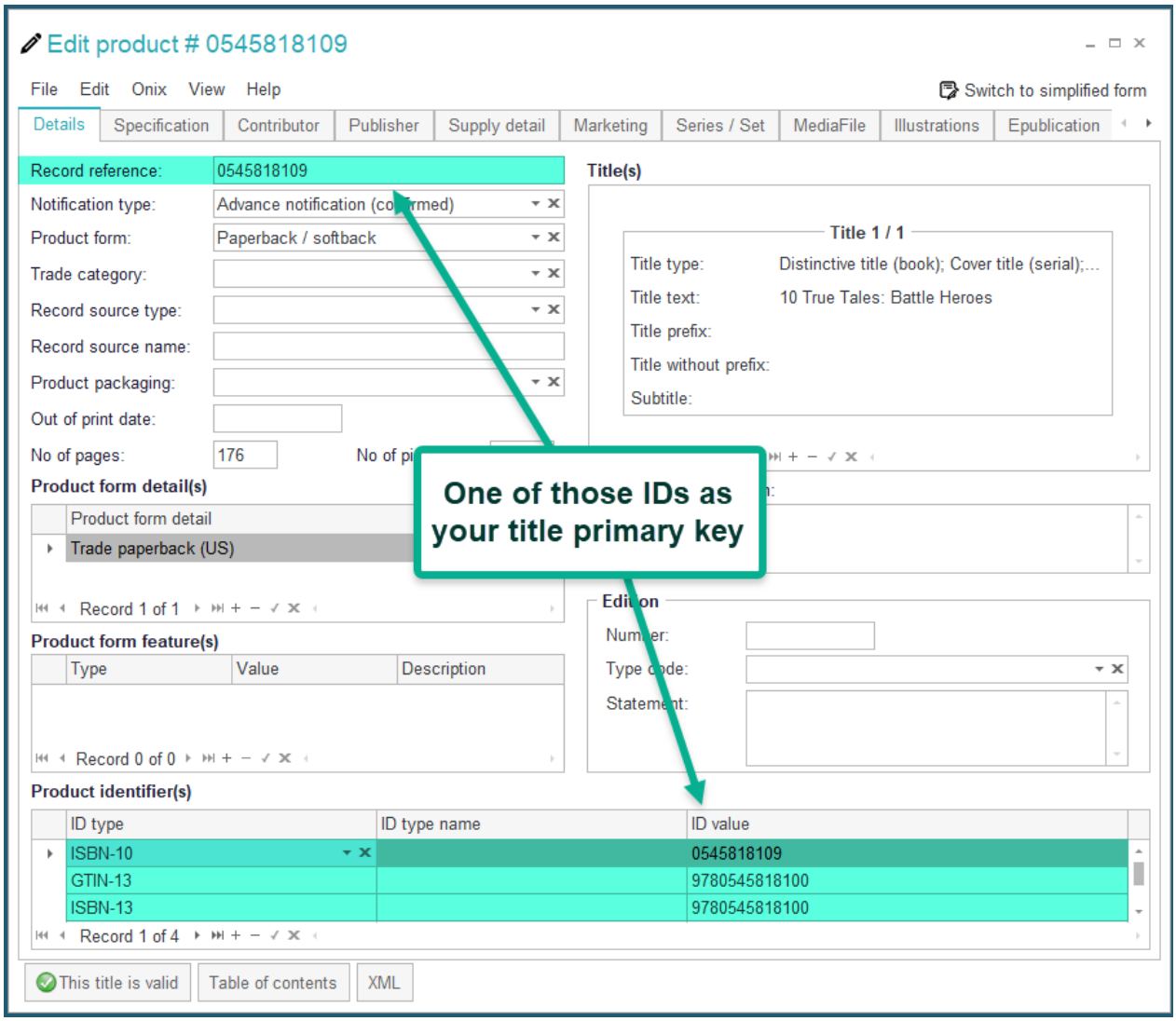
By simply checking "**Import and merge with opened file**" and choosing a primary key for your titles, you can transform any Import script into a powerful batch updates tool:




The important thing to know is that **ONIXEDIT** need to identify each ONIX section to merge, using a unique key. For example, if you want to update prices of an ONIX file, you will need to define at least the following ONIX elements:

Title primary key + SupplierName + SupplierRole + PriceTypeCode + CurrencyCode

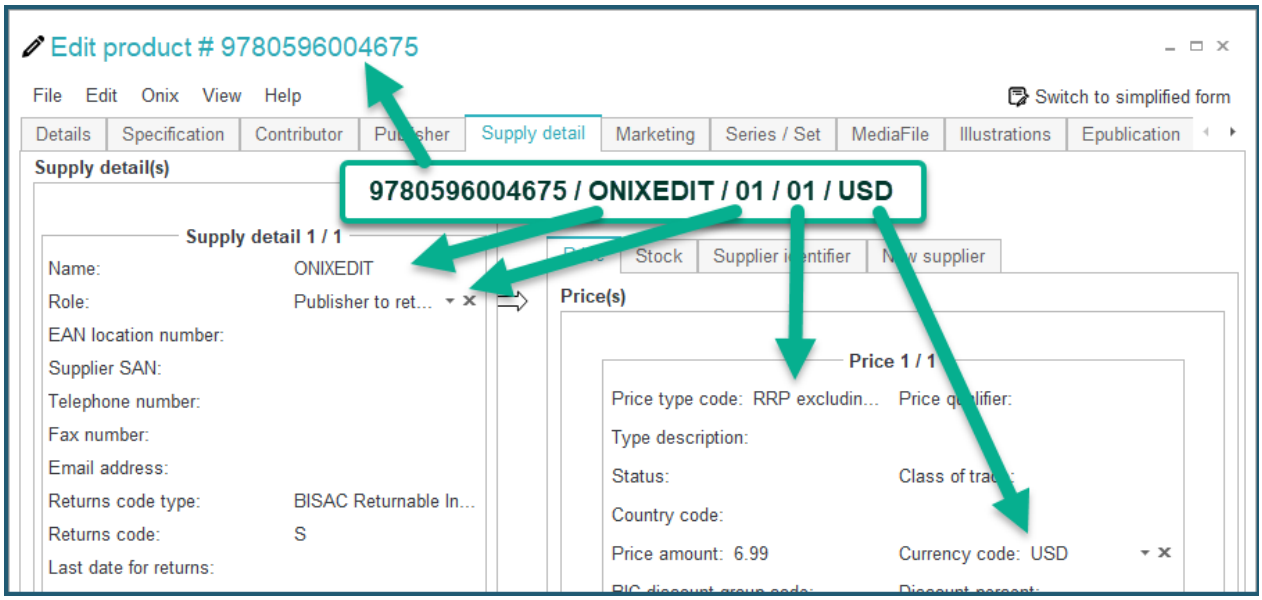
The first part (the primary key) is always needed no matter what the ONIX sections you need to update. It allows **ONIXEDIT** to uniquely identify a title. It could be the RecordReference, the ISBN-10, the ISBN-13 or the EAN:




The other ONIX elements are used by **ONIXEDIT** to uniquely identify the section to update. Each ONIX section has its own key fields. See Merging a section from a title for more details.

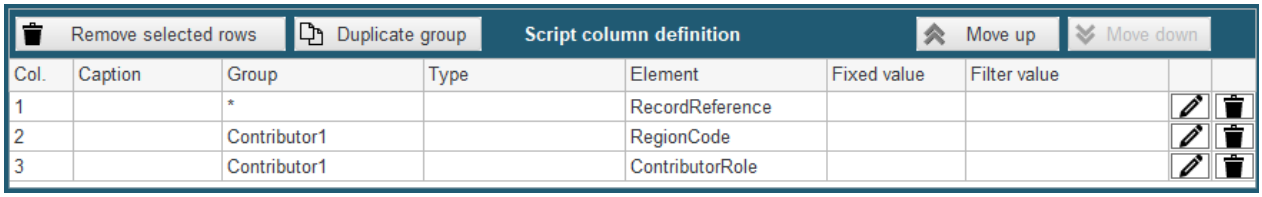
The following is an example of a complete Price key:

9780596004675/ONIXEDIT/01/01/USD



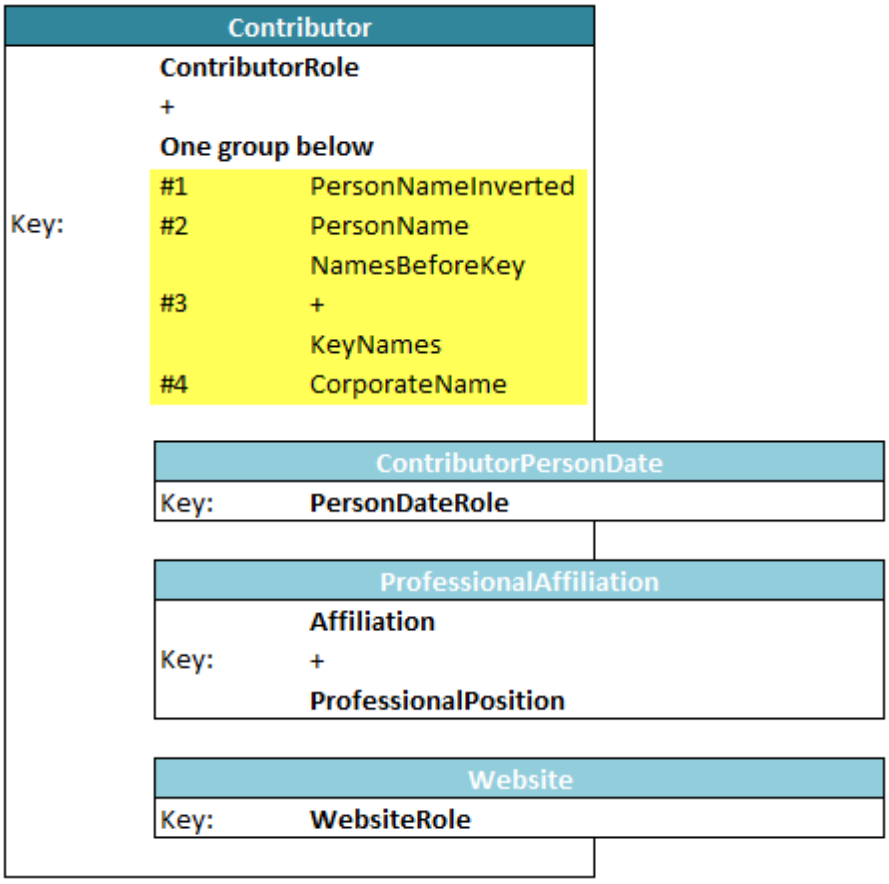

If **ONIXEDIT** finds an occurrence of that key in the file to update, the target values (in this case, the price) will be updated. Otherwise, a new price entry will be added.

Fortunately, if you add to your import script an ONIX element without providing the required Key Fields, you will be informed by the "**Merge Errors**" retractable panel. For example, if you want to update Contributor RegionCode, and you create an import script like this:

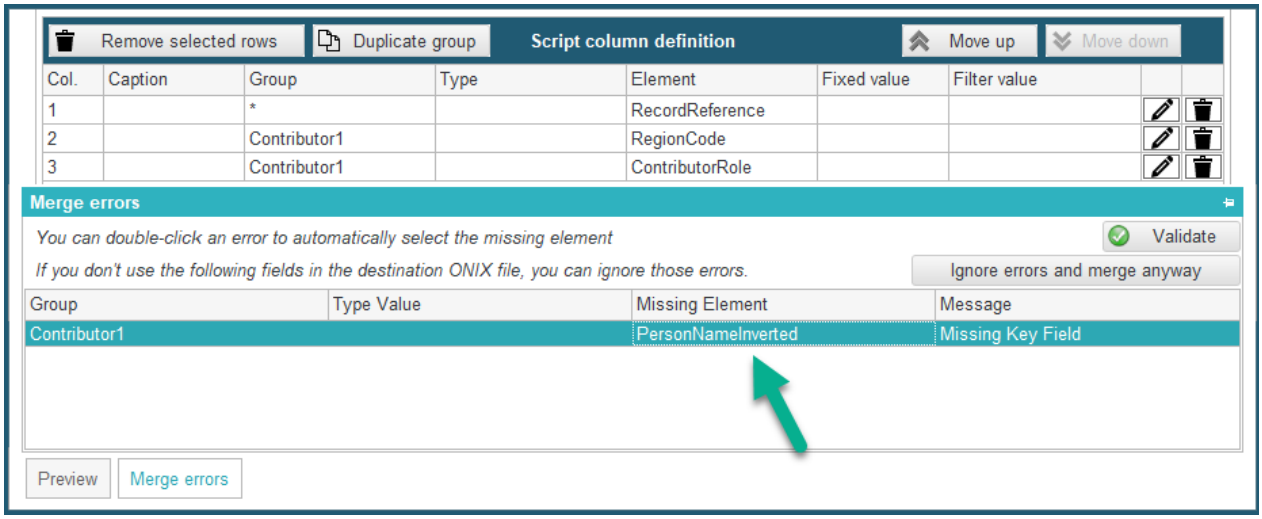



| Col. | Caption | Group | Type | Element | Fixed value | Filter value |
|---|---|---|---|---|---|---|
| 1 | | * | | RecordReference | | |
| 2 | | Contributor1 | | RegionCode | | |
| 3 | | Contributor1 | | ContributorRole | | |

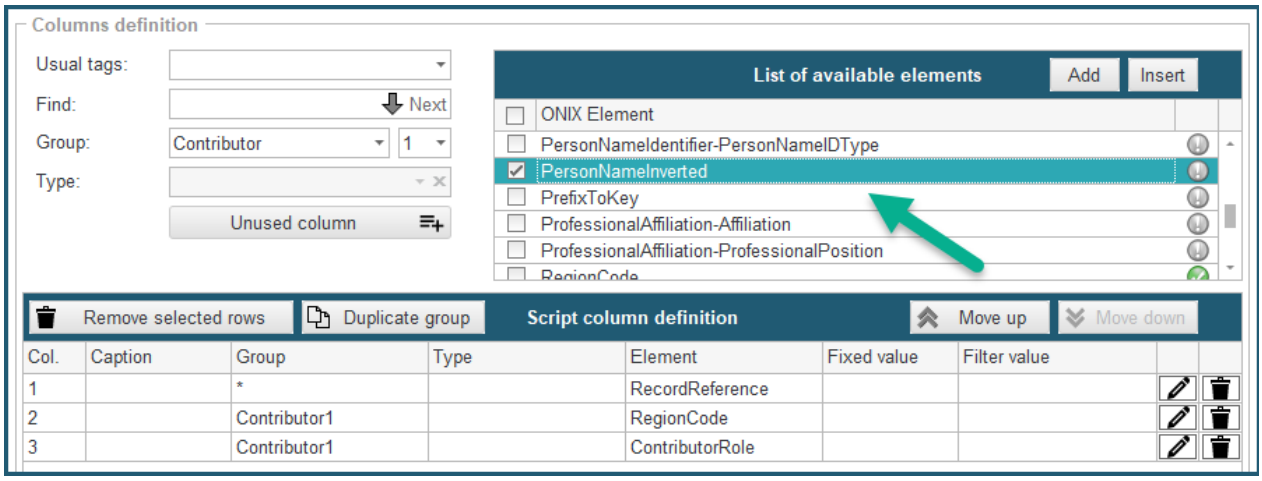
**ONIXEDIT** won't be able to target the right contributor to update. Based on the Key fields table for Contributor (See Merging a section from a title), there is a missing element among *PersonNameInverted* or *PersonName* or *NamesBeforeKey and Keynames* or *CorporateName*:




Consequently, when you try to apply this script to an ONIX file, **ONIXEDIT** will deploy the Merge Errors panel telling you that a Key field is missing and it will suggest one of the possible fields to add:




Just by double-clicking the suggestion in Merge Errors list, **ONIXEDIT** will select it automatically, making it ready to insert in your script with the **Add** button.



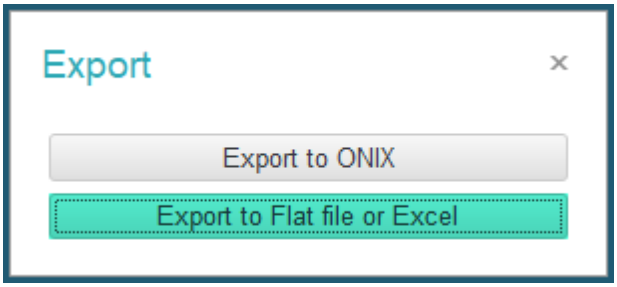

Here is a complete "step by step" example to update all the prices of an ONIX file by 10%:

1- Using **ONIXEDIT**, open the ONIX file you want to update.

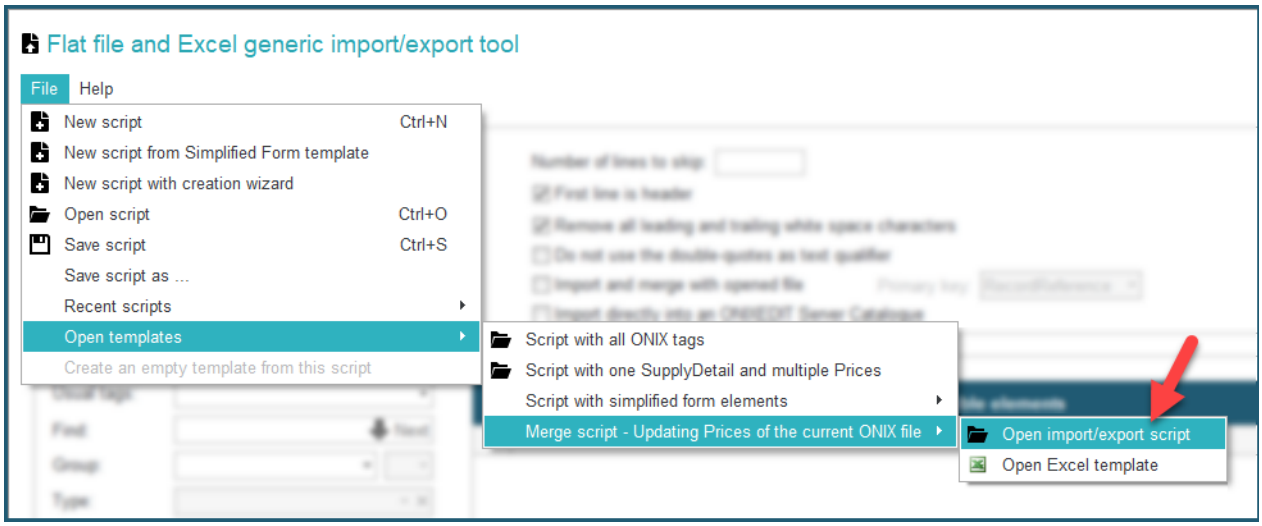
2- Export your titles to an Excel file. You will need to export at least:

- A primary key field (RecordReference, ISBN-10, ISBN-13 or EAN)
- The Supplier Role
- The Supplier Name
- The Price Type
- The Currency Code
- The Price Amount

To create your Excel file with your titles prices, select all your titles from the Main List and use the menu **File/Export** (**F5**). Choose option "**Export to Flat file or Excel":**



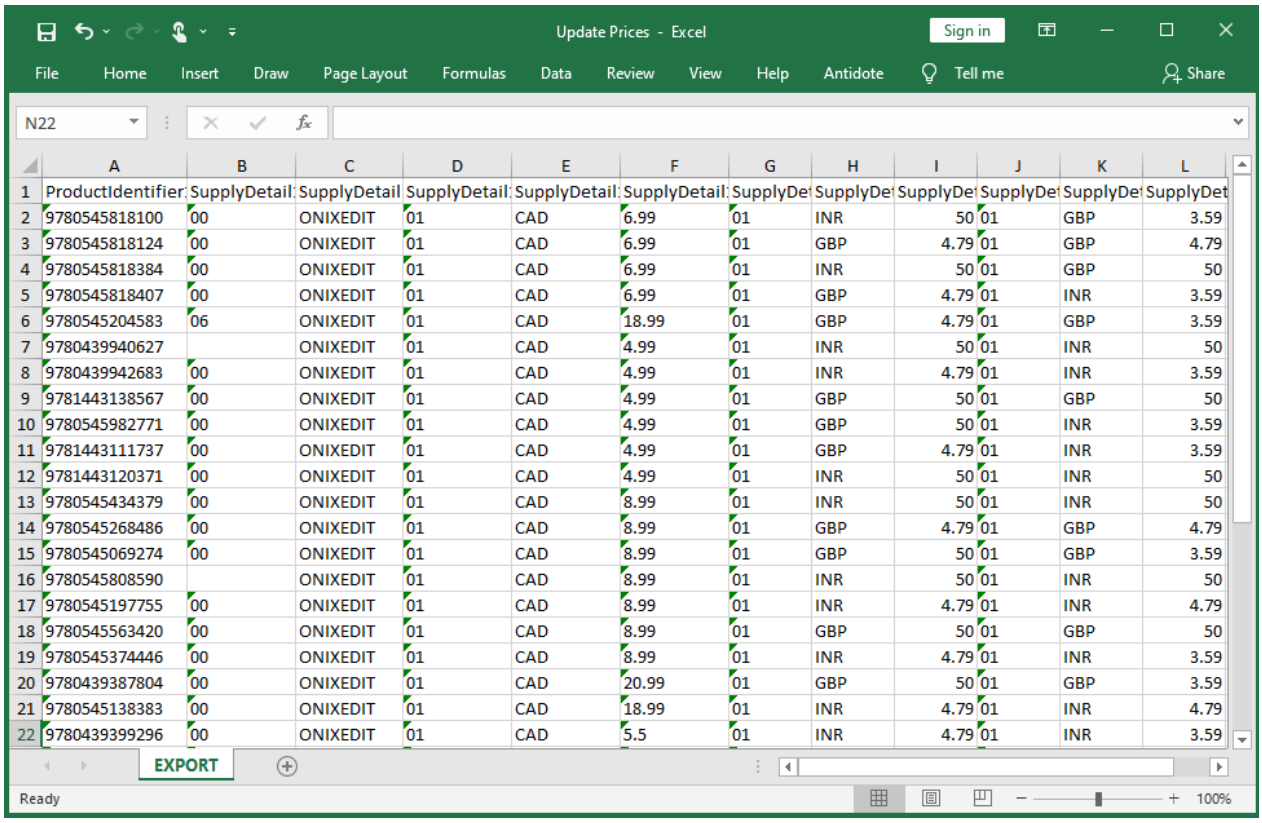

Once in the Export tool, you can prepare the script by yourself or use the template "**Merge script - Update Prices**" that is delivered with **ONIXEDIT** (starting from version 3.0.5). You will find it in the "**File / Open templates / Merge script - Updating Prices of the current ONIX file / Open import-export script**" menu:




This script is made to import/export every title with a maximum of 3 different prices. You can remove or add prices depending on your requirements.

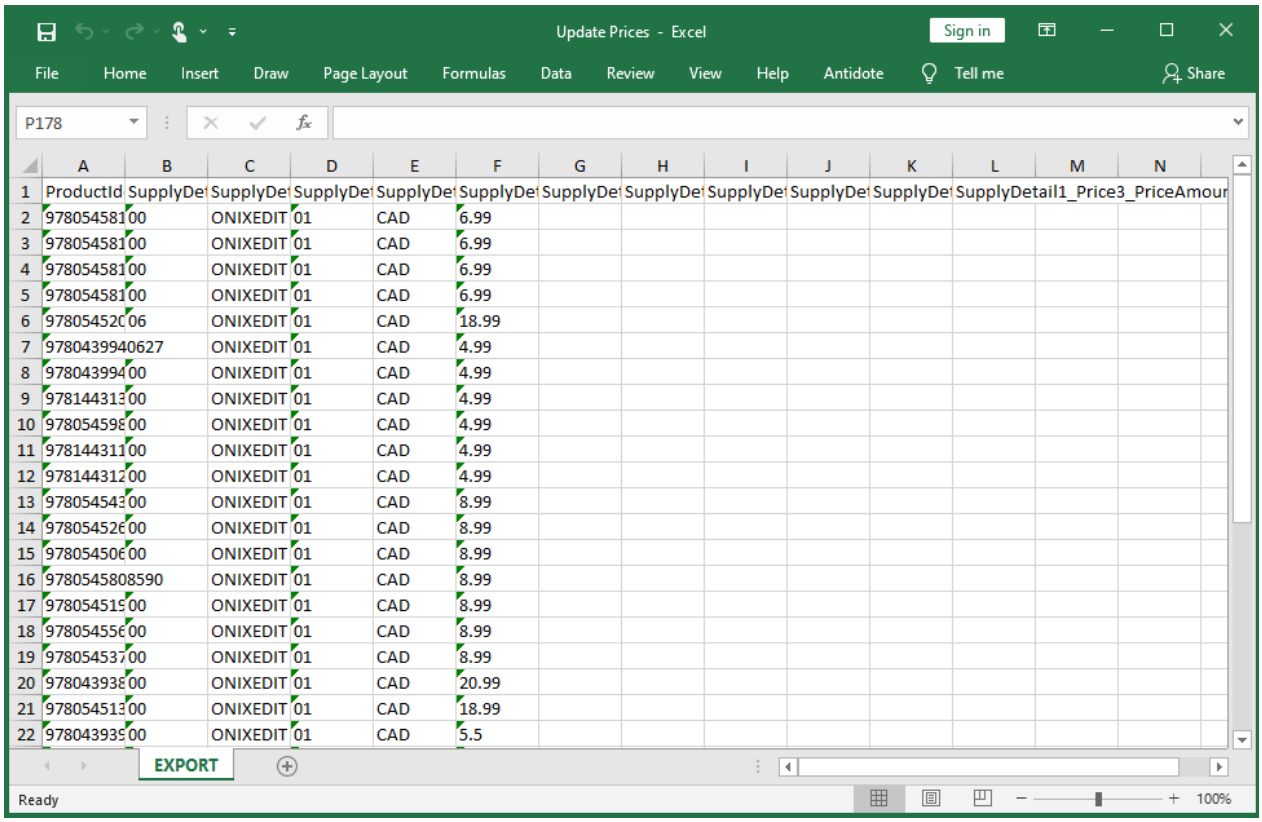
Click on the button "Convert and export ONIX to Flat or Excel File" and give a name to your Excel file.

3- Open the resulting Excel file. If your ONIX file contains titles having at least 3 prices, it will look like this:




| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | ProductIdentifier | SupplyDetail | SupplyDetail | SupplyDetail | SupplyDetail | SupplyDetail | SupplyDe | SupplyDe | SupplyDe | SupplyDe | SupplyDe | SupplyDet |
| 2 | 9780545818100 | 00 | ONIXEDIT | 01 | CAD | 6.99 | 01 | INR | 50 | 01 | GBP | 3.59 |
| 3 | 9780545818124 | 00 | ONIXEDIT | 01 | CAD | 6.99 | 01 | GBP | 4.79 | 01 | GBP | 4.79 |
| 4 | 9780545818384 | 00 | ONIXEDIT | 01 | CAD | 6.99 | 01 | INR | 50 | 01 | GBP | 50 |
| 5 | 9780545818407 | 00 | ONIXEDIT | 01 | CAD | 6.99 | 01 | GBP | 4.79 | 01 | INR | 3.59 |
| 6 | 9780545204583 | 06 | ONIXEDIT | 01 | CAD | 18.99 | 01 | GBP | 4.79 | 01 | GBP | 3.59 |
| 7 | 9780439940627 | | ONIXEDIT | 01 | CAD | 4.99 | 01 | INR | 50 | 01 | INR | 50 |
| 8 | 9780439942683 | 00 | ONIXEDIT | 01 | CAD | 4.99 | 01 | INR | 4.79 | 01 | INR | 3.59 |
| 9 | 9781443138567 | 00 | ONIXEDIT | 01 | CAD | 4.99 | 01 | GBP | 50 | 01 | GBP | 50 |
| 10 | 9780545982771 | 00 | ONIXEDIT | 01 | CAD | 4.99 | 01 | GBP | 50 | 01 | INR | 3.59 |
| 11 | 9781443111737 | 00 | ONIXEDIT | 01 | CAD | 4.99 | 01 | GBP | 4.79 | 01 | INR | 3.59 |
| 12 | 9781443120371 | 00 | ONIXEDIT | 01 | CAD | 4.99 | 01 | INR | 50 | 01 | INR | 50 |
| 13 | 9780545434379 | 00 | ONIXEDIT | 01 | CAD | 8.99 | 01 | INR | 50 | 01 | INR | 50 |
| 14 | 9780545268486 | 00 | ONIXEDIT | 01 | CAD | 8.99 | 01 | GBP | 4.79 | 01 | GBP | 4.79 |
| 15 | 9780545069274 | 00 | ONIXEDIT | 01 | CAD | 8.99 | 01 | GBP | 50 | 01 | GBP | 3.59 |
| 16 | 9780545808590 | | ONIXEDIT | 01 | CAD | 8.99 | 01 | INR | 50 | 01 | INR | 50 |
| 17 | 9780545197755 | 00 | ONIXEDIT | 01 | CAD | 8.99 | 01 | INR | 4.79 | 01 | INR | 4.79 |
| 18 | 9780545563420 | 00 | ONIXEDIT | 01 | CAD | 8.99 | 01 | GBP | 50 | 01 | GBP | 50 |
| 19 | 9780545374446 | 00 | ONIXEDIT | 01 | CAD | 8.99 | 01 | INR | 4.79 | 01 | INR | 3.59 |
| 20 | 9780439387804 | 00 | ONIXEDIT | 01 | CAD | 20.99 | 01 | GBP | 50 | 01 | GBP | 3.59 |
| 21 | 9780545138383 | 00 | ONIXEDIT | 01 | CAD | 18.99 | 01 | INR | 4.79 | 01 | INR | 4.79 |
| 22 | 9780439399296 | 00 | ONIXEDIT | 01 | CAD | 5.5 | 01 | INR | 4.79 | 01 | INR | 3.59 |

If your file contains titles having just one price, it will look like this:

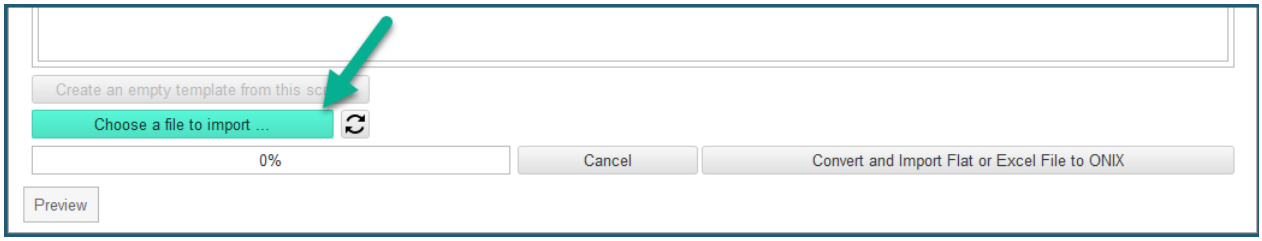



4- Using Excel, increase the prices by 10%. You can also produce this kind of flat file (Excel, Tabulated, CSV or Fixed Length) from an external source or your legacy system.

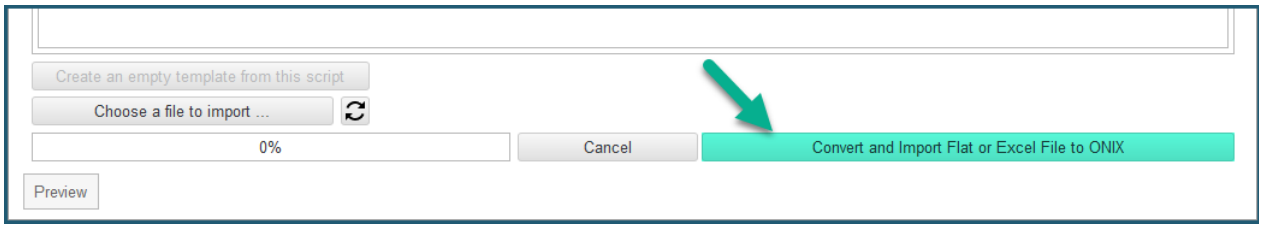
5- Get back to **ONIXEDIT** with your file to update still opened. Select **File/Import** (**F4**) from the main list.

6- Load the same import/export script as the one you used to generate the Excel File at step #2. For our example, you will find it in the "**File / Open templates / Merge script - Updating Prices of the current ONIX file / Open import-export script**" menu. If you created the import script yourself, be sure to activate the check box "**Import and merge with opened file**".

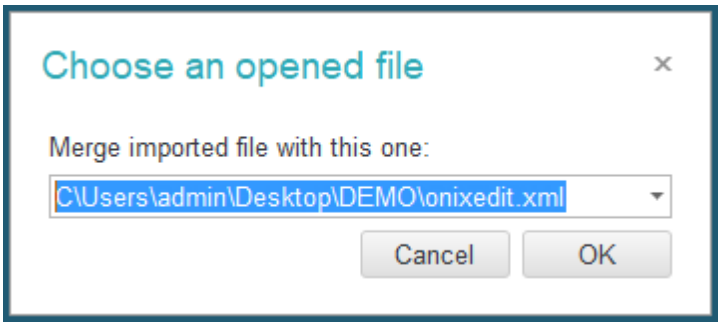
7- Click on button "**Choose a file to import**" and select the Excel file you updated at step #3:




8- Click on button "**Convert and Import Flat or Excel File to ONIX**":




9- Choose the opened ONIX file to update and click OK:




You will see a progress bar and when completed, all your titles prices will be updated.

## Bulk import Flat Files

When you install **ONIXEDIT**, an application console called **OnixEditImport.exe** is also installed in the **ONIXEDIT** package (normally C:\Program Files\ONIXEDIT). If you bought **ONIXEDIT** Pro or the optional Import/Export generic tool offered with the regular edition, you will be able to use this special application. This console application can be used to perform bulk import/export of flat/ONIX files. For example, it can be launched daily as a task on your operating system called up by an agent on your SQL server or by any other program. The goal is to allow you to automatize the transformation of flat files to ONIX files.

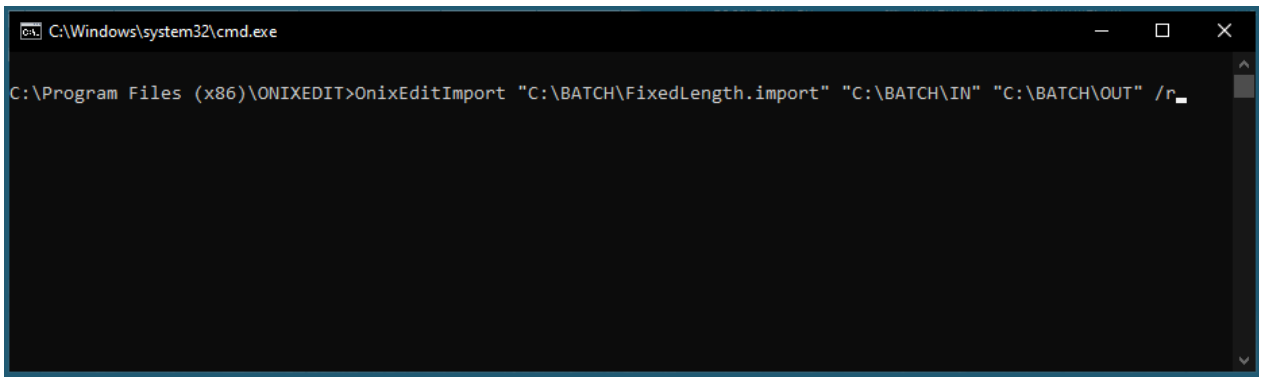
Usage of this application is simple:

The application manages each file found in an input folder and converts it into an ONIX file by applying an import script created using **ONIXEDIT**. The ONIX files which are generated are then saved in an output folder with the same name as the input file, however, with the extension ".xml"

To launch the **OnixEditImport** application manually, you need to start with a **Command Prompt** window. The console application requires the following parameters, in order:

- Complete access path to the import script
- Complete access path to the input folder
- Complete access path to the output folder
- **/r** optional parameter indicating that the application should delete the treated files from the input folder after their conversion
- **/h** optional parameter which will hide the Command Prompt window

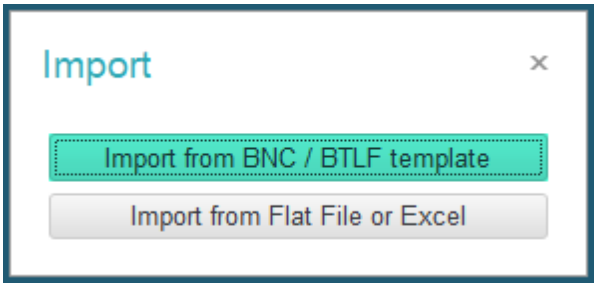
Example:



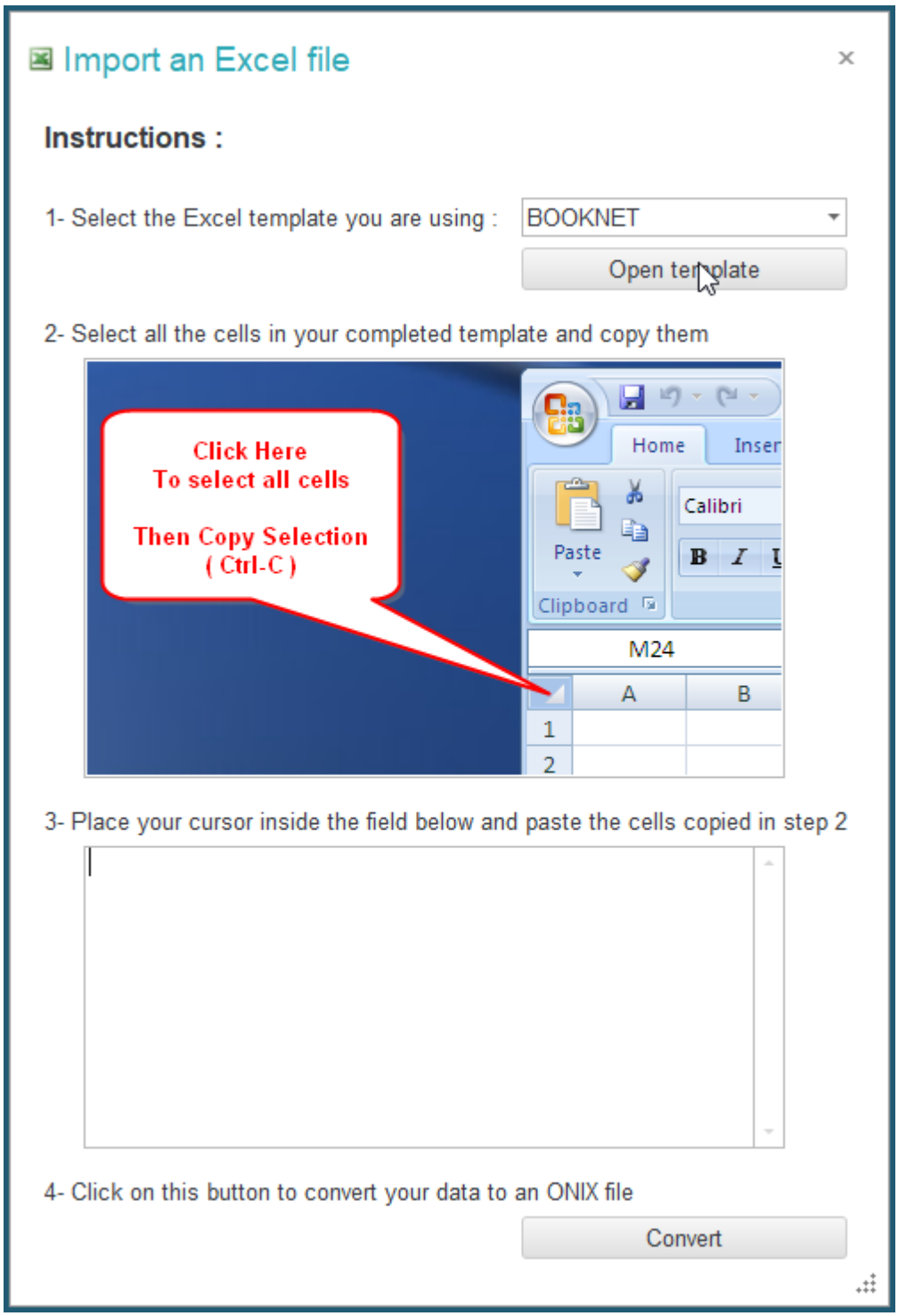

If everything goes well, the application will treat all the files from the entry folder and will exit without error at the end. If a problem occurs, an error code will be returned and the complete description of the error will be saved in the system log; open Event Viewer to see.

## Import BNC / BTLF template

**ONIXEDIT** offers you a specialized Import function using the same Excel models as are found online at BTLF and BookNet, using their respective online data conversion tools. Using the Import tool is easy. You simply use the **Import** function from the **File** menu (F4) and then choose **Import from BNC / BTLF template:**




The Import dialogue will then be shown on the screen. You then just follow the instructions on the dialogue:




The **Open Template** button on top will start Excel automatically, opening the selected template file (BTLF or BookNet) that is included in the **ONIXEDIT** installer. You simply fill in this Excel file with your information and copy all the contents in the text zone provided. The **Convert** button will do the rest and will import your titles from the Excel file into a new **ONIXEDIT** document.

## Save a file in a specialized format

**ONIXEDIT** allows you to export your metadata in one of the specialized ONIX 2.1 validation formats supported. Also, the ONIX standard support 2 different XML tags representation: Short and long reference. To do this, use the following procedure:

1. Open your ONIX data file.
2. Make sure that the files you plan to export are valid in the specialized format desired.
3. From the main menu, select the titles to export.
4. Use the **Export** function (**F5**) from the **File** menu or from the context menu and select to export the complete ONIX file or just the selected titles.
5. Then, in the dialogue that will follow, click on the **Export to ONIX** button.

If you are exporting from an ONIX 2.1 file, you will then get a dialog allowing you to choose the desired specialized format and the type of ONIX tag to use (long tag by default). If you check the ONIX 3.0 box, the exported file will be converted to ONIX version 3.0.

If you are exporting from an ONIX 3.0 file, you will only have the option of exporting in long or short tags.

Regardless of the ONIX version, you will also have the following options:

- Define the File Encoding to use.
- Apply an XSLT file to make the desired changes to the resulting XML file.
- Create a separate file for each of the titles and choose the identifier that will represent the file names.

Then click on the Export button and give your file a name.

## Export to Short ONIX tags

The ONIX standard supports 2 different types of ONIX tags representation: Short and long reference. **ONIXEDIT** produces ONIX files with long reference tags. If you open an ONIX file with short reference tags, it will be automatically converted to long reference tags. But you can always convert an ONIX file with long reference tags to its equivalent short tags by using the Export to ONIX function.

## Send a File to a Partner by Email

Files that have been read and saved by **ONIXEDIT** are valid ONIX files. You can thus send them as is to your business partners by email. However, it is preferable to submit your ONIX files in the format expected by your trading partner. To do so, you may first convert your files into one of the Specialized Formats that are supported by **ONIXEDIT** and then send the resulting file by email (Please see the section Saving a File in a Specialized Format ) On the other hand, the easiest and most automatic way to send your ONIX files remains the integrated Transmit to Partners tool.

## Attach JPEG, MP3, MPEG and other files

The Advanced Form of **ONIXEDIT** allows you to associate GIF, JPEG, PDF, TIF, RealAudio, MP3, MPEG and PNG files to your titles. You can also import a series of cover images or other type media files with the Import cover images function.

These external files may originate directly from your computer, from a server, from your

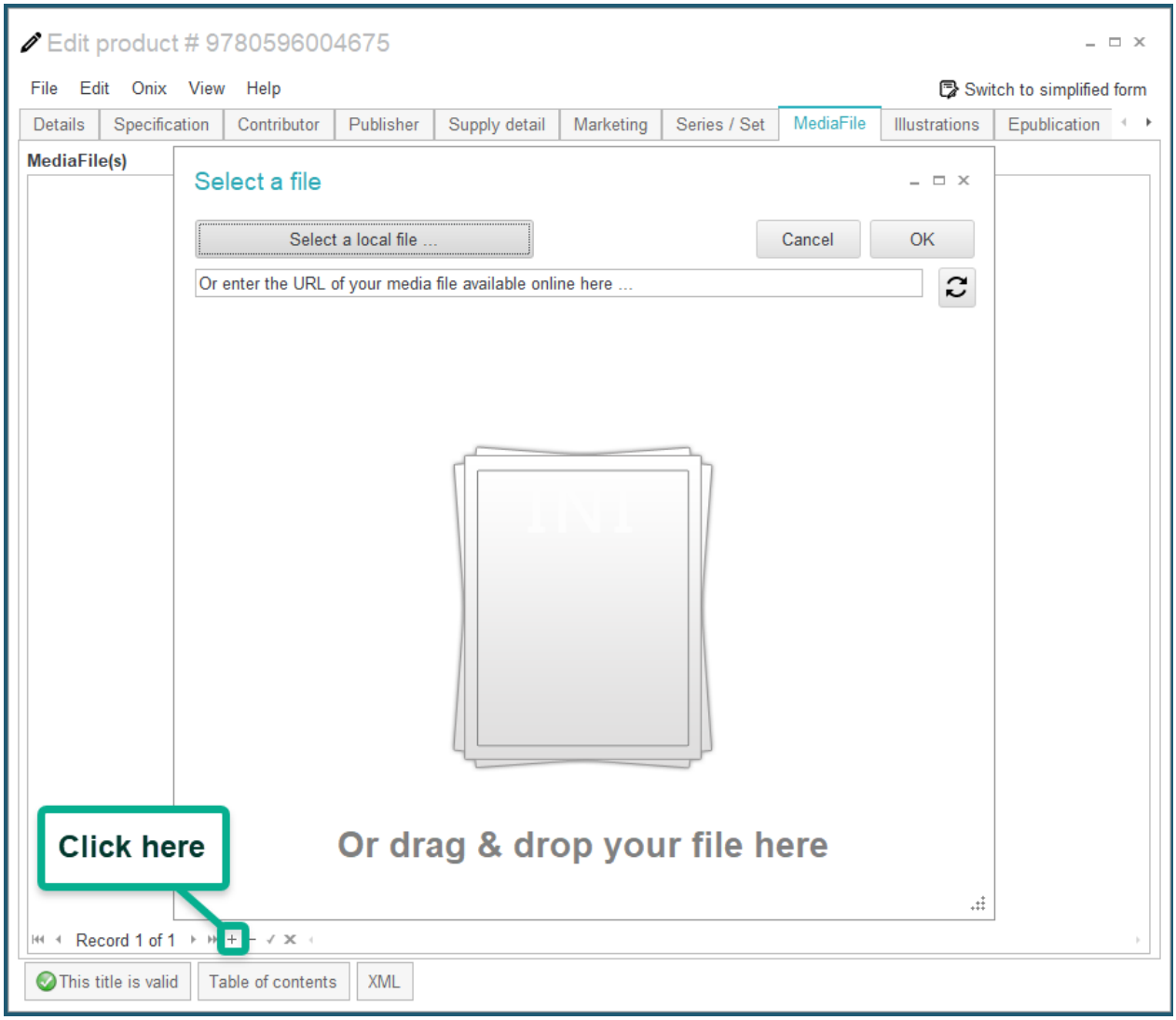
local network, or from elsewhere on the Internet. No matter what their origin, all these external files can be collected and filed for you in your Media Space if you bought this service (included with Pro edition).

**With an ONIX 2.1 file:**

If you are editing an ONIX 2.1 file, the media file selector is shown when you add a new sub-record in the list on the **MediaFile** tab, from the Advanced Form. This selector is also shown when you edit the **Media File Link** field.

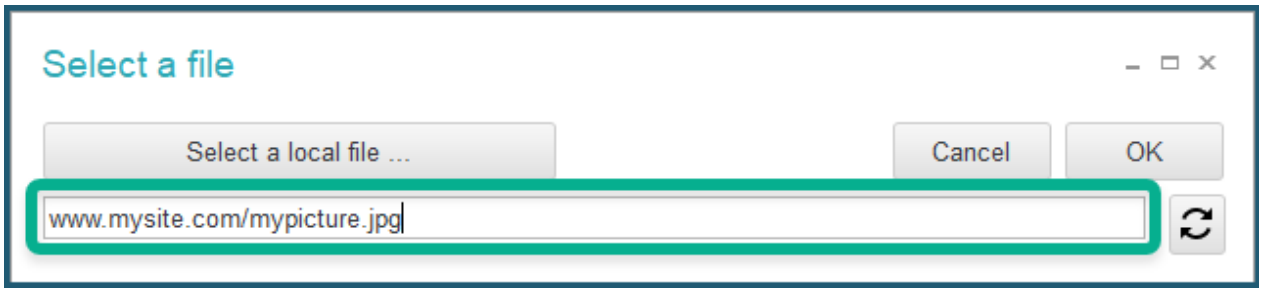
To add a media file to a title, use the following procedure:

1- Starting from the main list of your ONIX file, double-click on the record to be modified in order to get to the title editing dialogue.
2- Go to the **MediaFile** tab.
3- Add a file by clicking on the + on the navigation control of the list included in the media files:



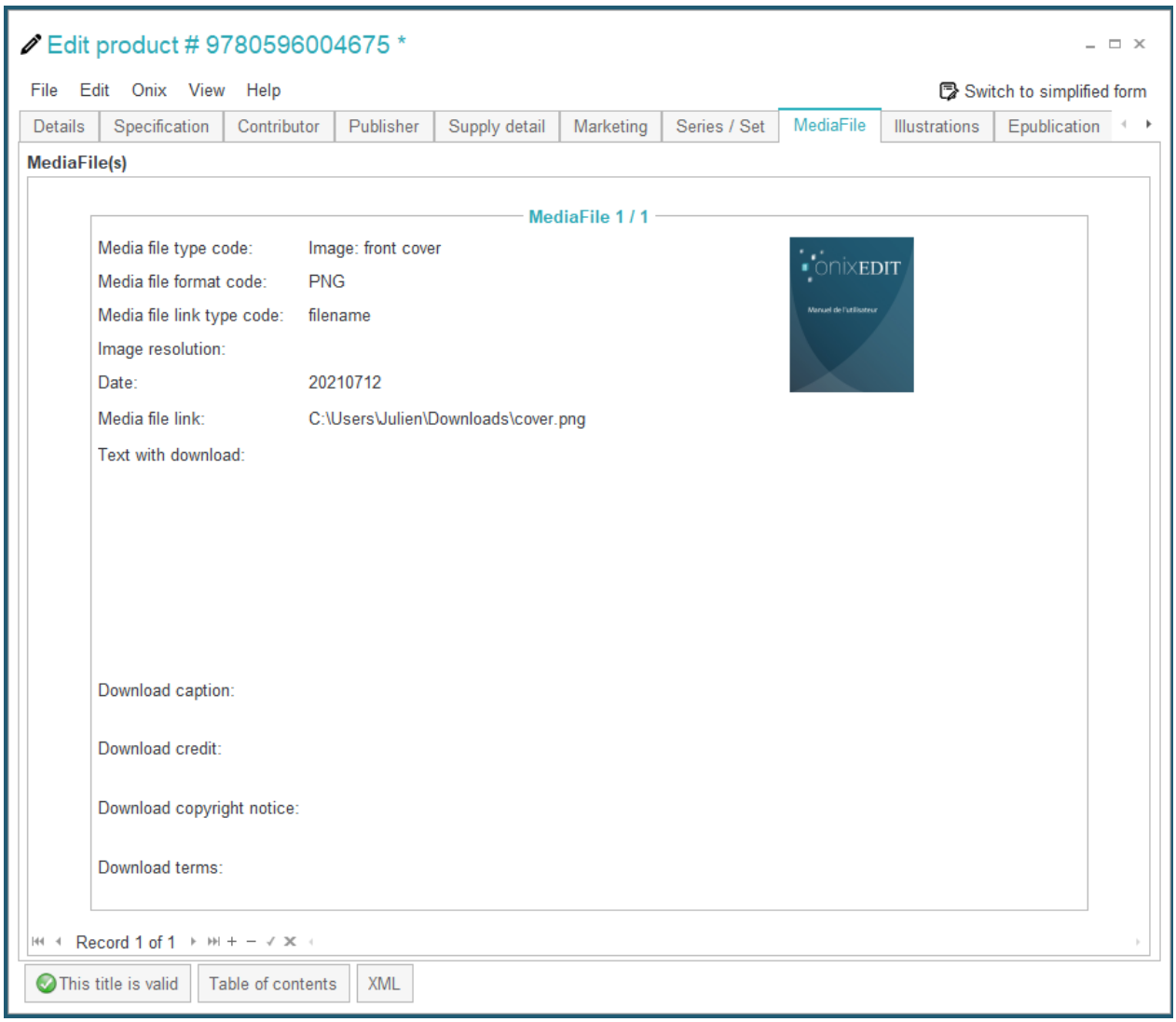

4- If your media file is on your computer or on a server from your local network that is accessible from your computer, click on the **Select a Local File** button and locate your media file using the standard file opening dialogue. If your media file is accessible on a website, input the complete URL address of this file in the space provided and then click on

the **Refresh** button at the right of this space:



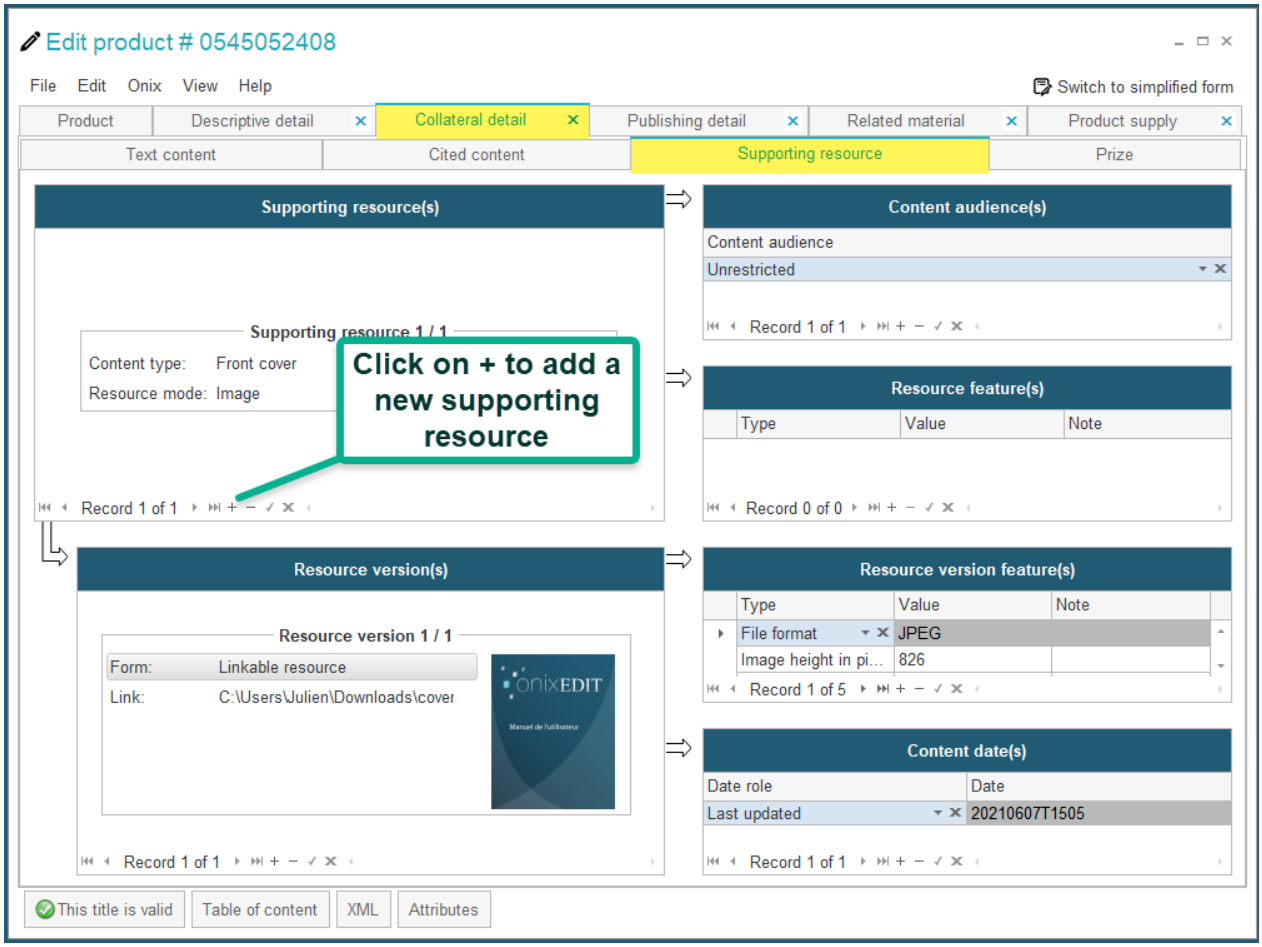

Whatever the origin of your media file, if it is compatible, it will be shown in the dialogue:

5- When your image is clearly identified, click on the **OK** button. A media file will then be created for you automatically. You have nothing more to do but complete the Media File Sub-record data:

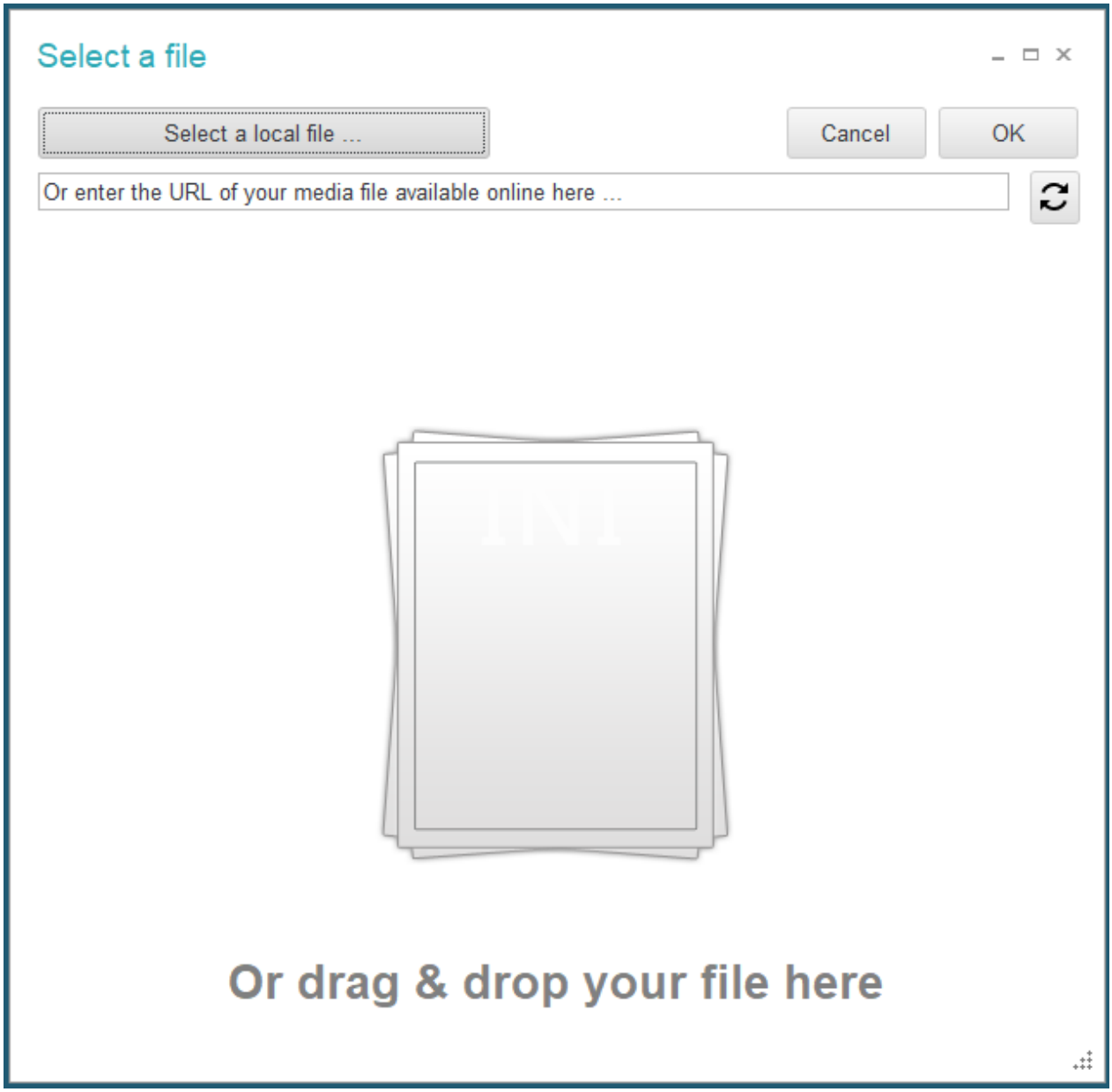



**With ONIX 3.0 files:**

Attaching media files to an ONIX 3.0 title is very similar than for an ONIX 2.1 title. The main difference is that media files are now located in the **Collateral detail** section under **Supporting resource** tab:




The same media file selector will then appear, letting you choose a photo, video, or even an eBook file:




You continue the same way for all the other types of media files supported by the ONIX standard.

When images or pictures are concerned, **ONIXEDIT** does verification for you so that they will meet the size and resolution norms generally recognized in the industry for web publication. These settings can be changed with the Preferences dialogue under Media Space tab. The verification and adjustments which are performed by default each time you add a new image are:

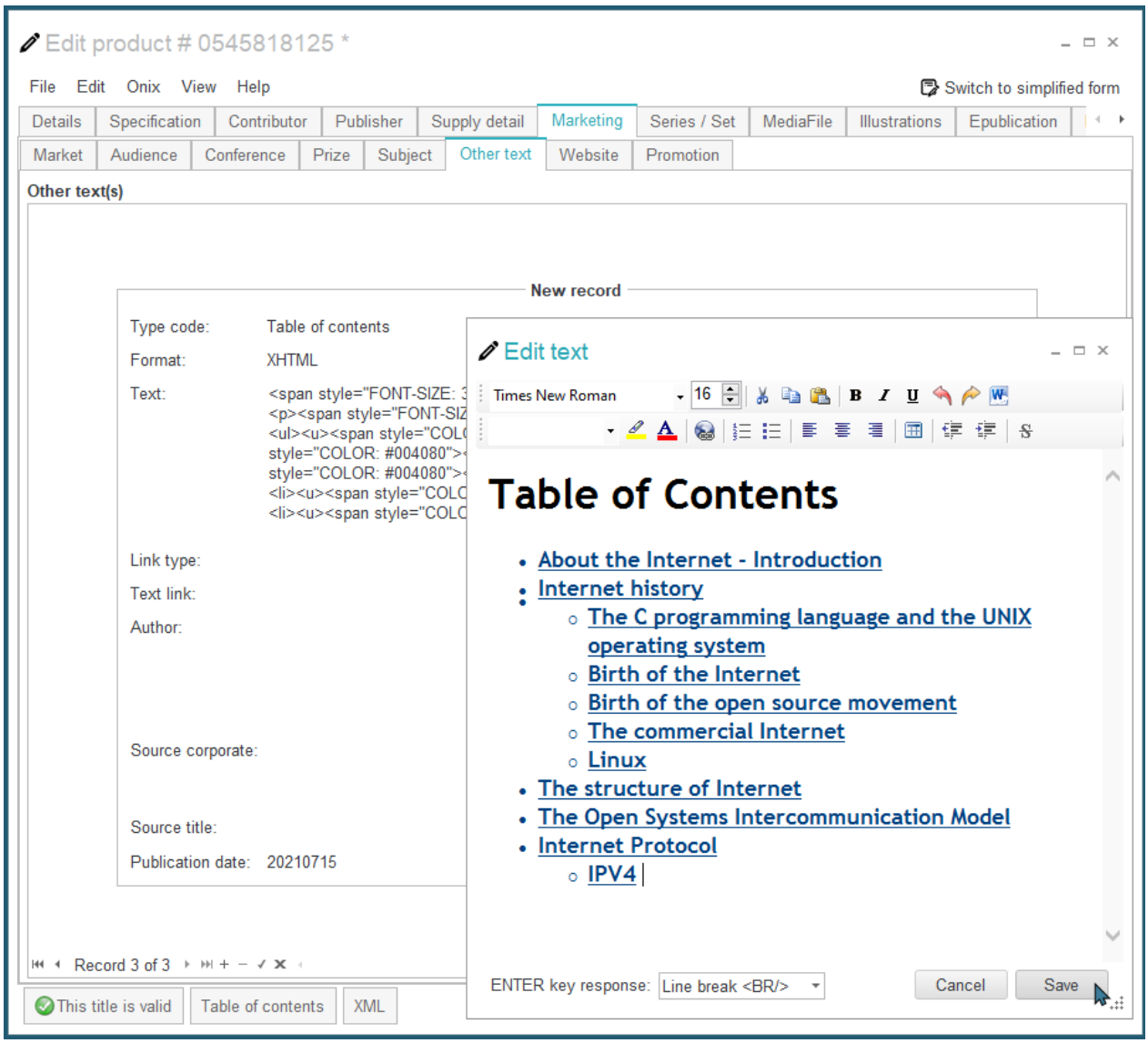
- The width of the image must be no less than 400 pixels. If it is smaller, the image will be refused.
- Every image with a width more than 400 pixels will be reduced to this size, and the height also reduced in the same proportion.
- Resolution of images must be no less than 72 dpi. If it is of lower quality, the image will be refused.
- Every image with resolution higher than 72dpi will be converted to this resolution.

These measures are aimed at furnishing your partners with images that are lightweight but have enough precision and quality to be posted on the web. Also, we take care to reduce the weight of your images so as to optimize the use of your Media Space if you bought this service.

## Add XHTML formatted content

**With ONIX 2.1 files**:

In the ONIX 2.1 Advanced Form, the **HTML/XHTML editor** is available in the **Marketing/Other Text** tab of **ONIXEDIT** when the text format chosen is **HTML** or **XHTML**. The **HTML/XHTML editor** is shown when you click on the contents of the **Text** field, if the field format is **HTML** or **XHTML**. Although HTML is supported, the ONIX standard recommends the use of the XHTML format to insert tagged content. Please see the following section, Adding on a PDF or MS-Word file, to find more detail about adding **Other Text** files:




**With ONIX 3.0 files**:

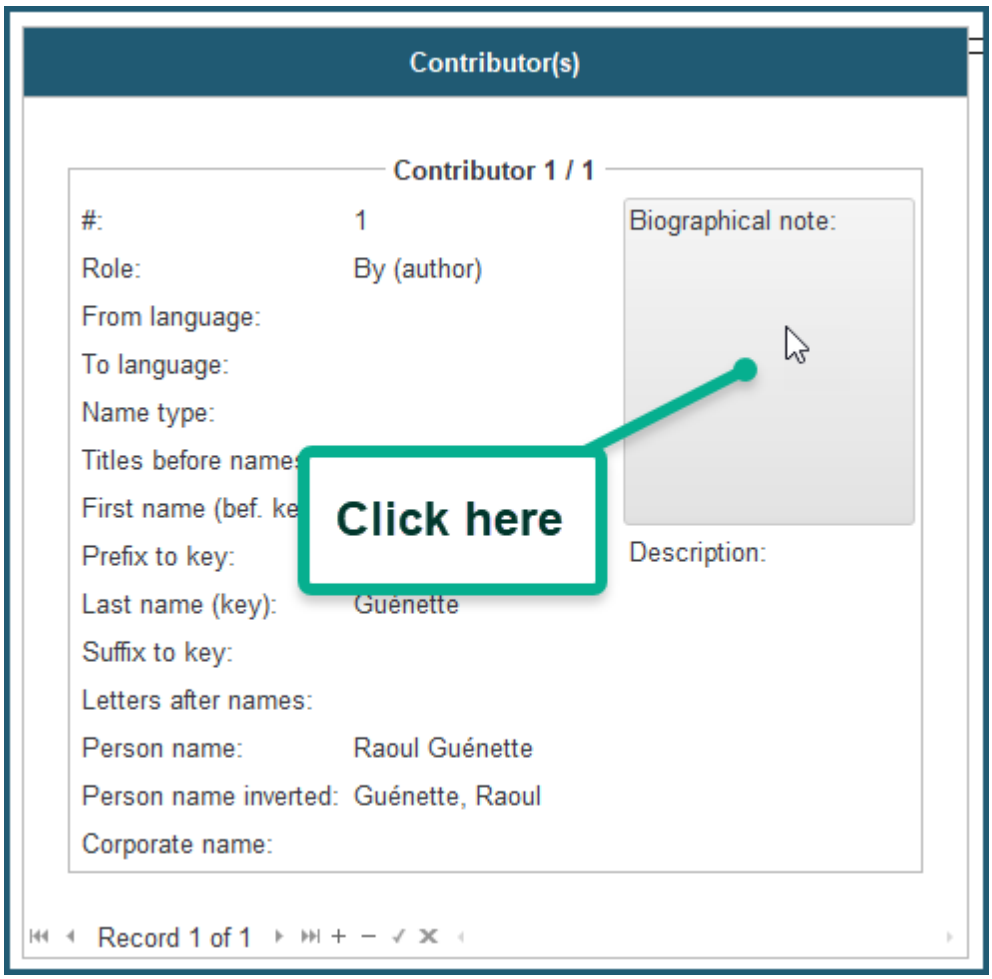
From an ONIX 3.0 file with the Advanced Form, you can add formatted text to the following

ONIX elements by setting first their "**textformat**" attribute to "**HTML**" or "**XHTML**" (preferred option):

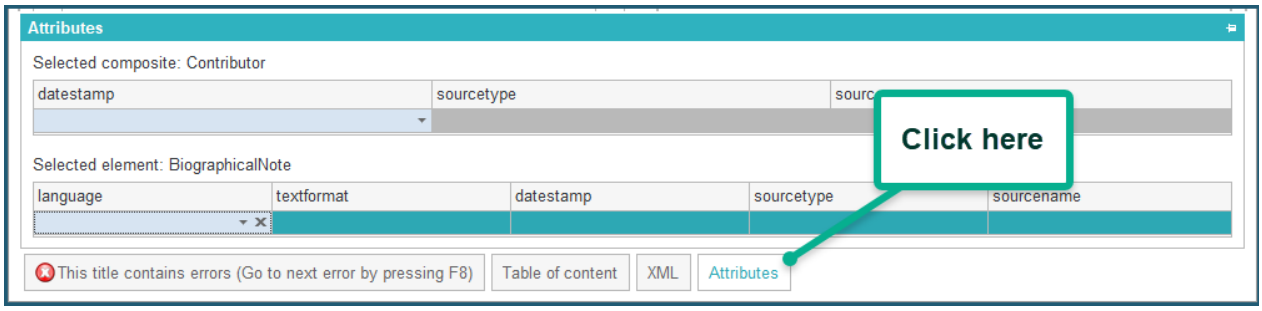
- AncillaryContentDescription
- AudienceDescription
- BiographicalNote
- CitationNote
- ConferenceTheme
- ContributorDescription
- ContributorStatement
- FeatureNote
- IllustrationsNote
- InitialPrintRun
- PrizeJury
- PromotionCampaign
- PromotionContact
- PublishingStatusNote
- SalesRestrictionNote
- Text

To set the textformat attribute to **XHTML** with the Advanced Form, follow these steps:

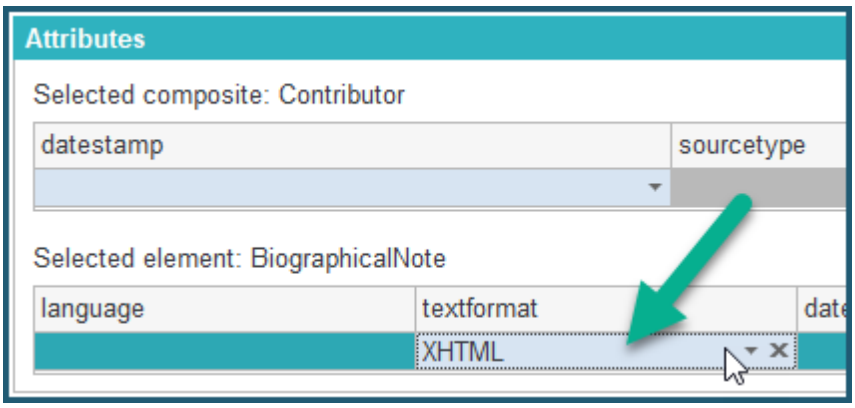
1- Click inside one of the above ONIX field, for example:



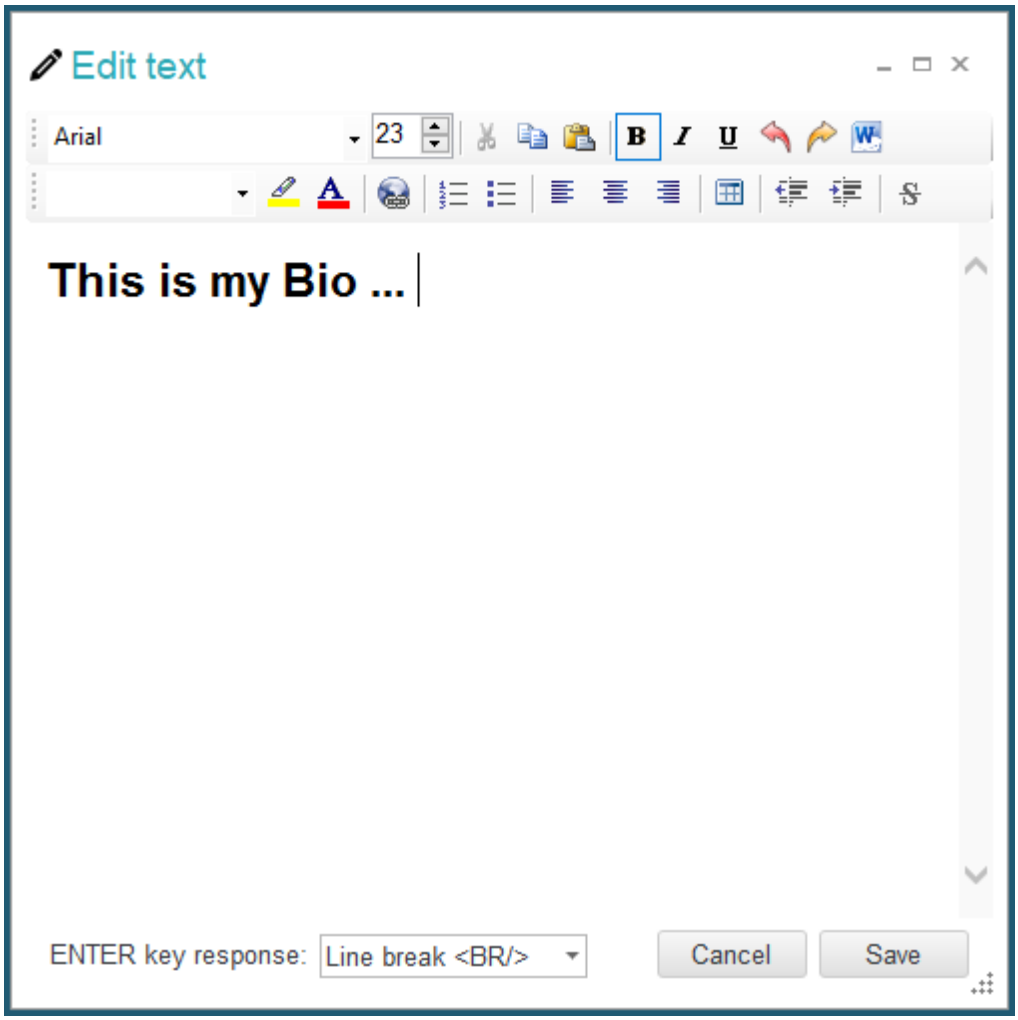

2- Click on the "**Attributes**" tab at the bottom of the form to deploy the Attributes Panel:



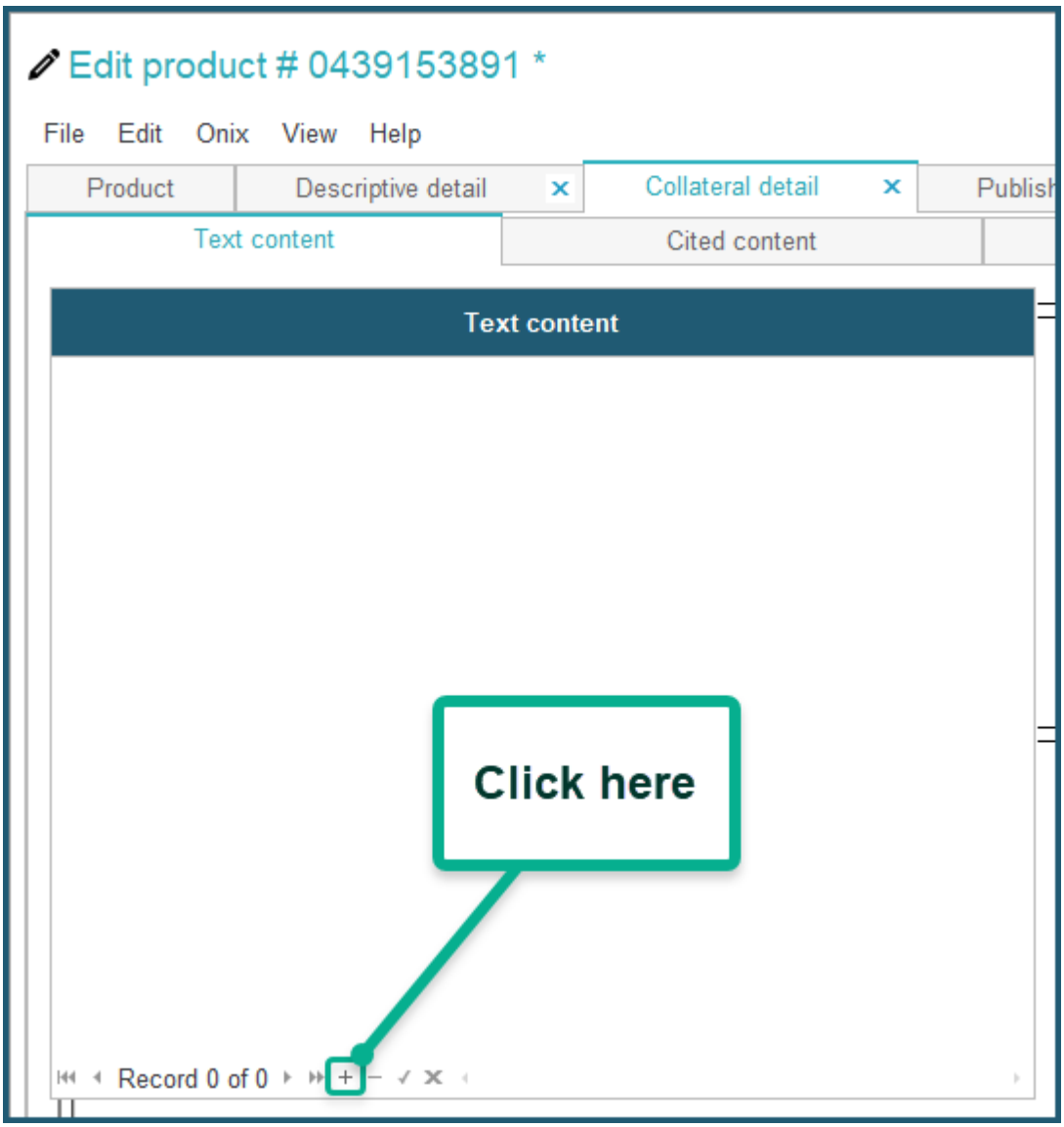

3- Choose textformat attribute "**XHTML**":




4- Click again in the field you want to edit. When the textformat attribute is set to **HTML** or **XHTML**, the **XHTML** editor appears when you enter in edit mode for that field:

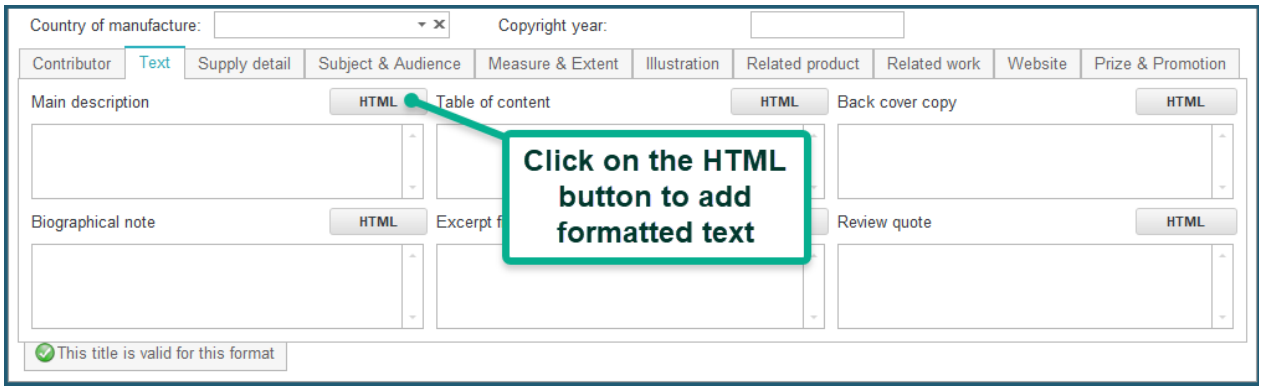



For some ONIX fields where entering formatted text is more usual (like Collateral detail / Text content), you will get a special choices dialogue that will automatically set the correct attributes for you:




**With ONIX 2.1 or ONIX 3.0 files and the Simplified Form** :

With the help of the Simplified Form, it is really easy to add formatted text in the Text tab. Just click on the **HTML** button to show the **XHTML** editor:



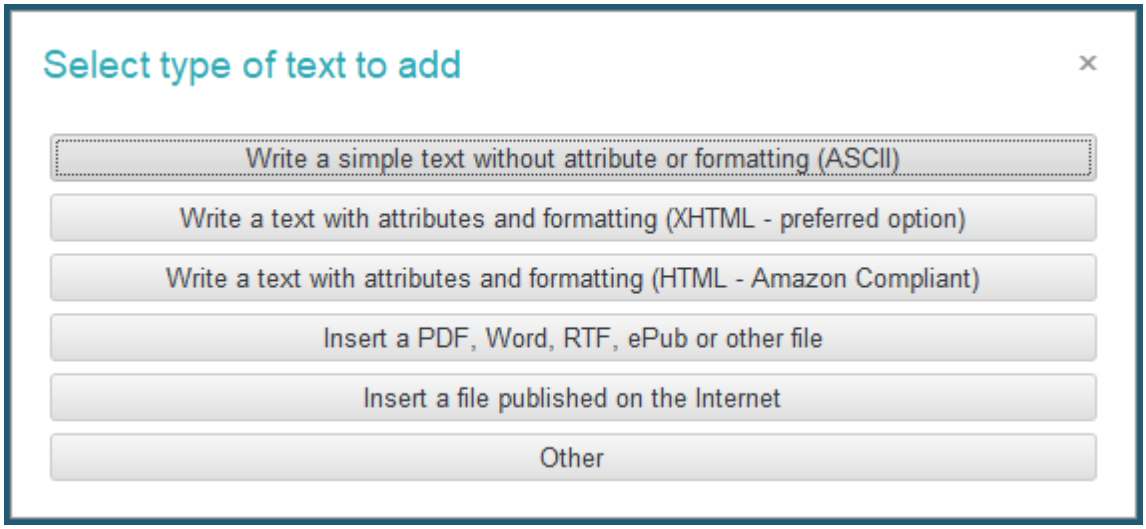

## Add eBooks files

If you want to transmit complete or partial eBook material to your trading partners, it is

possible with the help of the Advanced Form and the ONIXEDIT Media Space (included with **ONIXEDIT** Pro and optional with the **ONIXEDIT** regular version).

**From an ONIX 2.1 file**:

In conformity with the ONIX 2.1 norms, the Advanced Form of **ONIXEDIT** allows you to add on text in different formats in the **Marketing/Other Text** tab from the title editing screen of the program. When you click on the + button in the navigation control of the other text list, the following dialogue appears:




Description of the use of each of these options:

- **Write a simple text without attributes or special formatting (ASCII)**. This option will add a record in the **Other Text** list and will allow you to enter a simple text item directly in the **Other Text** field. This text may not be formatted or have any character attributes (font, size, bold, italic, or other.)

- **Write a text with attributes and formatting (XHTML)**. This option will add a record in the **Other Text** list and will allow you to enter a complex text item with all attributes and formatting using our integrated **XHTML** editor. The **XHTML** text item will be inserted directly into your ONIX document.

- **Write a text with attributes and formatting (HTML - Amazon Compliant)**. This option will add a record in the **Other Text** list and will allow you to enter a complex text item with all attributes and formatting using our integrated **HTML** editor. The **HTML** text item will be inserted directly into your ONIX document.

- **Insert a PDF, Word, RTF, ePub, or other file**. This option will add a record in the **Other Text** list; it will allow you to select a file from your computer, or one that is accessible on your local network. The access path to the selected file will be referenced in the title file. For users who bought this service, these files may then be sent automatically to your Media Space.

- **Insert a file published on the Internet**. This option will add a record in the **Other Text** list and will allow you to select a file that is accessible on the Internet by inputting its URL. This URL will be added to the title record. For users who bought

this service, these files may then be sent to your Media Space.

- **Other**. This option will simply add an Other Text record and will allow you to configure it according to your particular specifications.

**From an ONIX 3.0 file**:

eBook files and any other kind of external files can be associated with ONIX titles using Collateral Detail/Supporting Resource section of the Advanced Form. See section Attaching JPEG, MP3, MPEG and other files for more details.

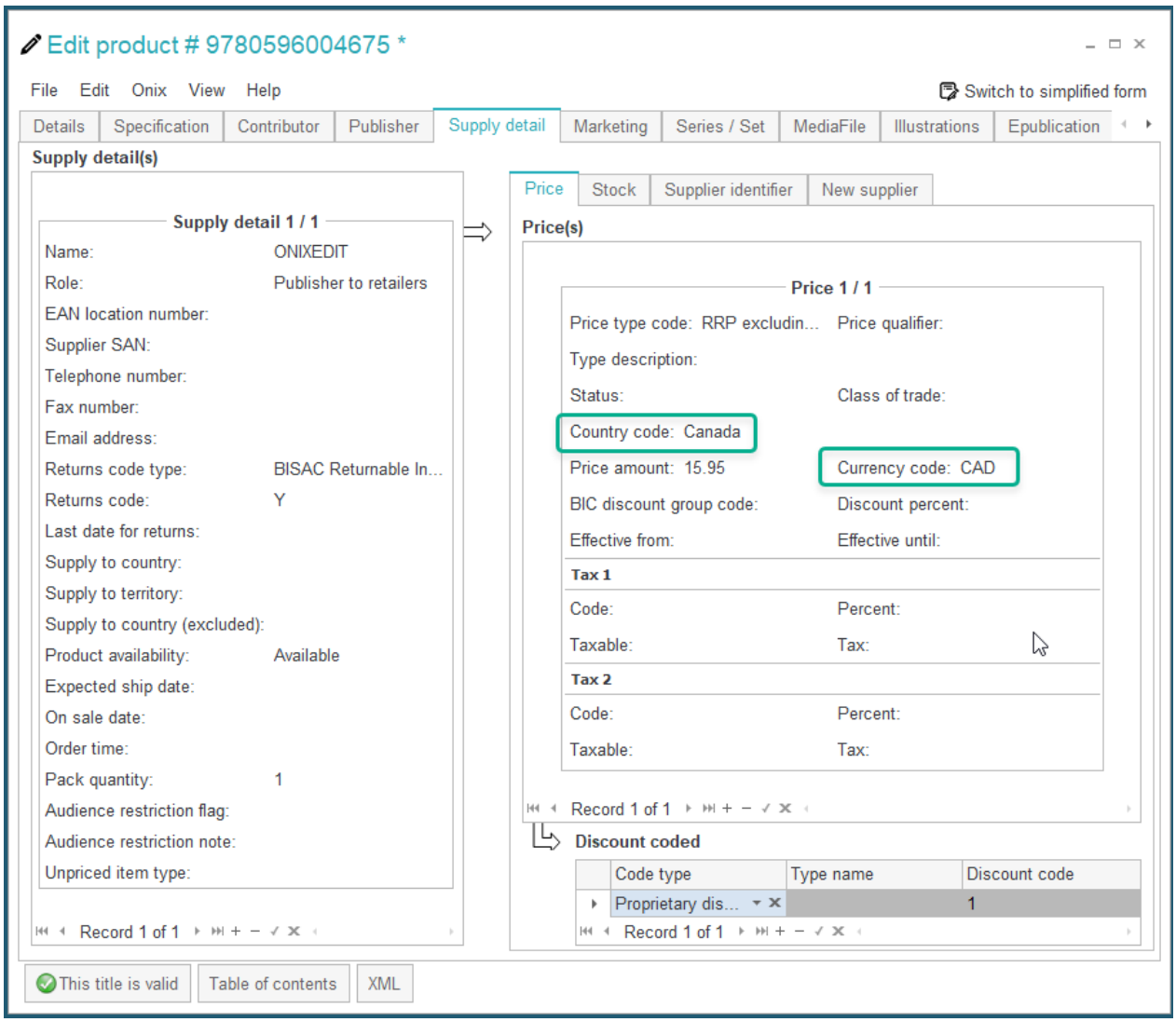
## Define different prices by country

To define several distinct prices for the different countries you deal with, you need only to create as many Price sub-records as necessary. To do this, use the following procedures.

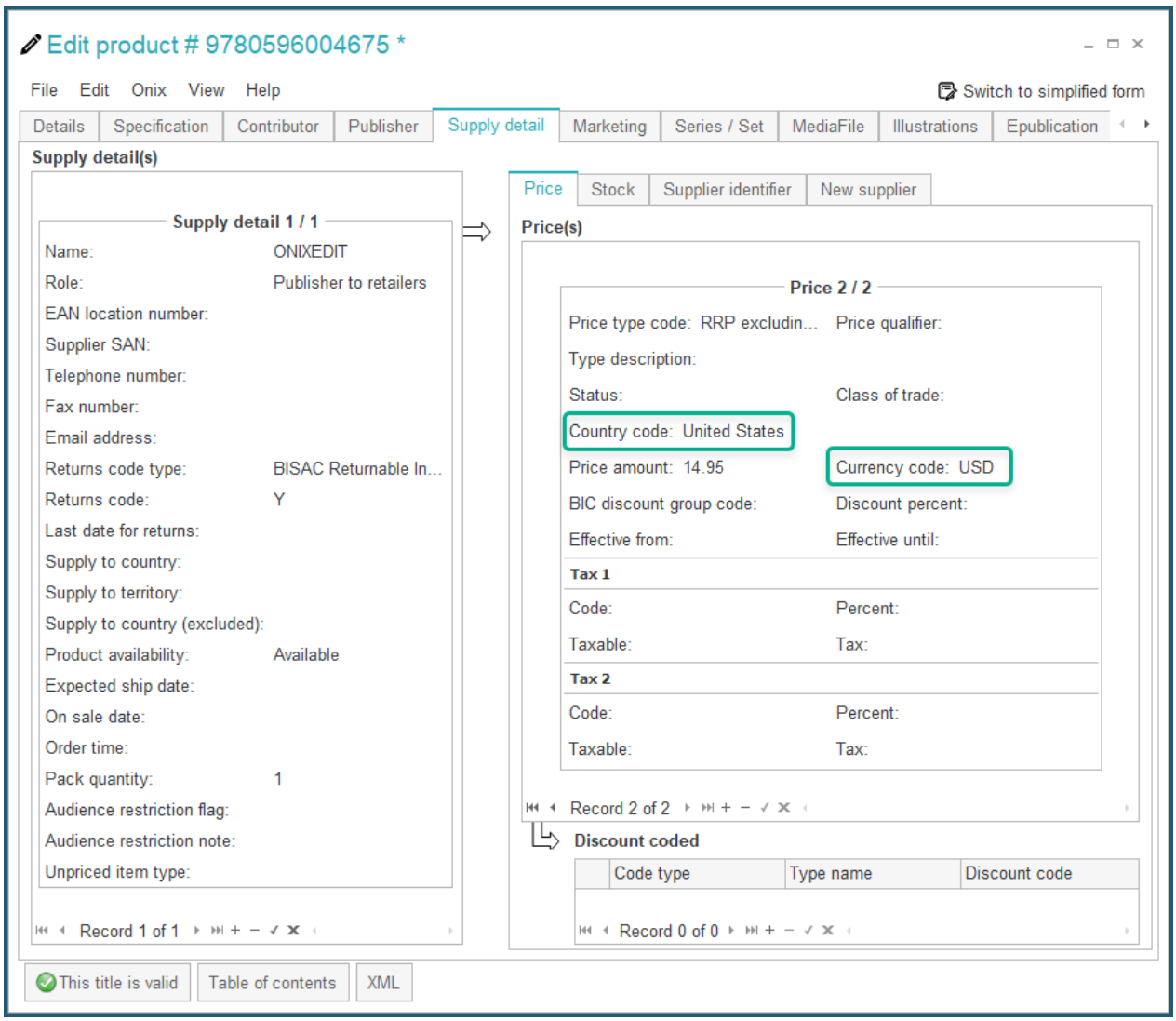
**From an ONIX 2.1 file**:

1- Make sure to have at least one **Supply Detail** record under the **Supply Detail** tab. One such record must be defined before adding price sub-records since these are dependent on the supply detail record. (Please see the section Relations Between Information Elements ).

2- Then you just add a first price record in this field, and define the price of your book in a first country:




3- Continue adding another record for each of the other countries where your book is sold:



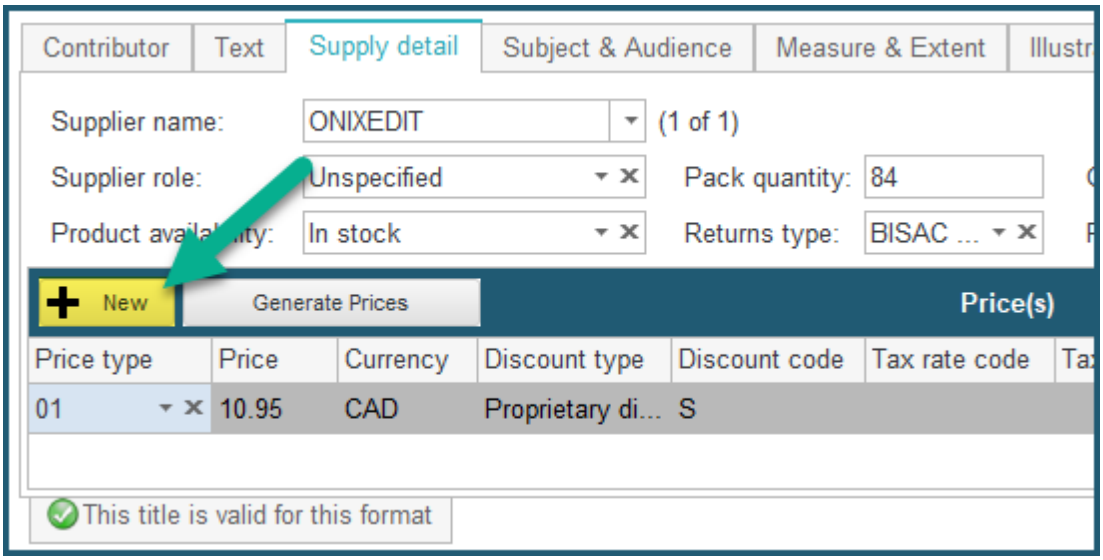

**From an ONIX 3.0 file**:

This is done using a similar procedure as for ONIX 2.1. You just have to add as many price sub-records as you need and for each, define price, currency, and countries where the price is applied:

**From the Simplified Form**:

Simply click on the **Add** button above Price list under the Supply Detail tab to define as

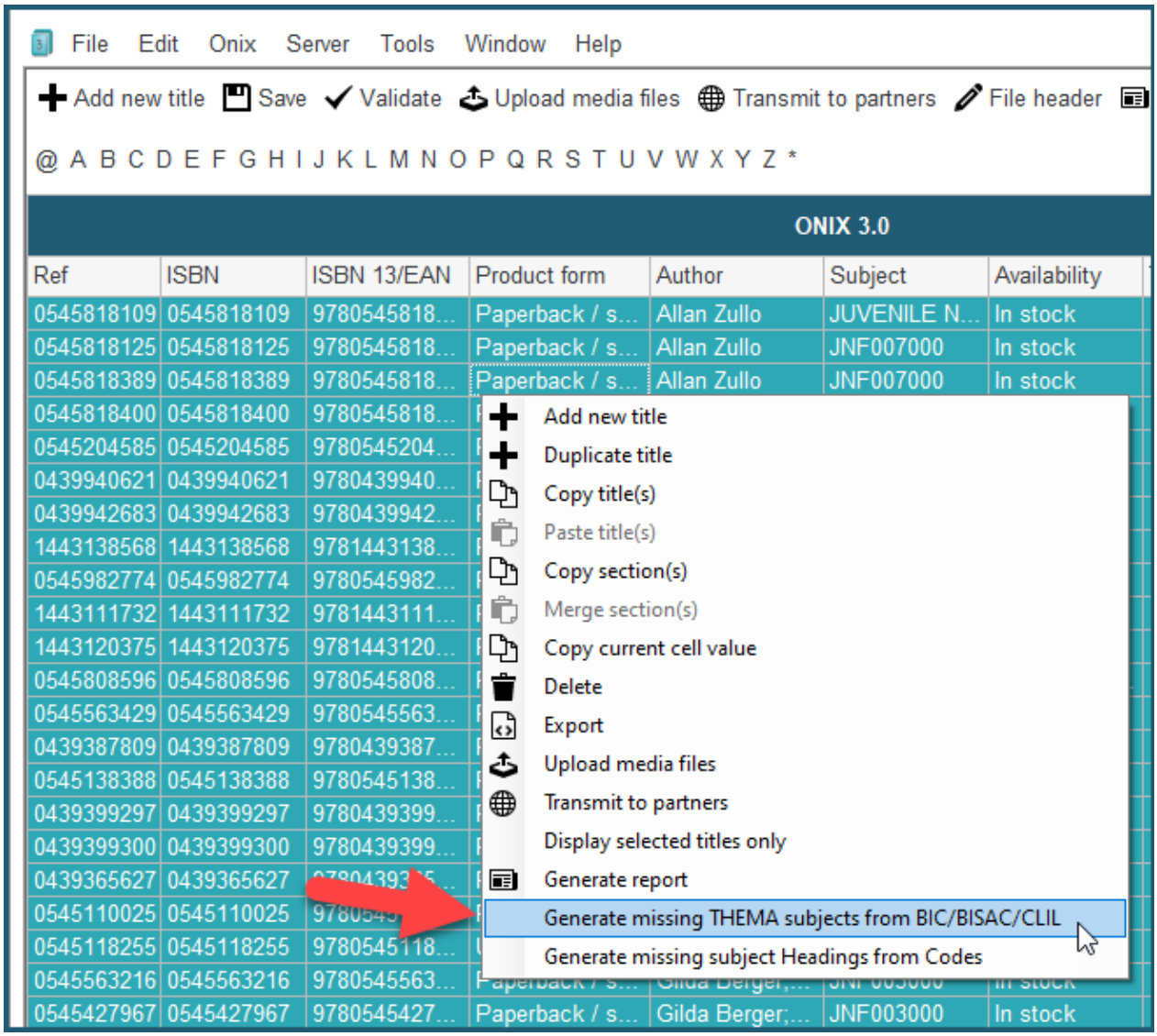
many prices as you need:



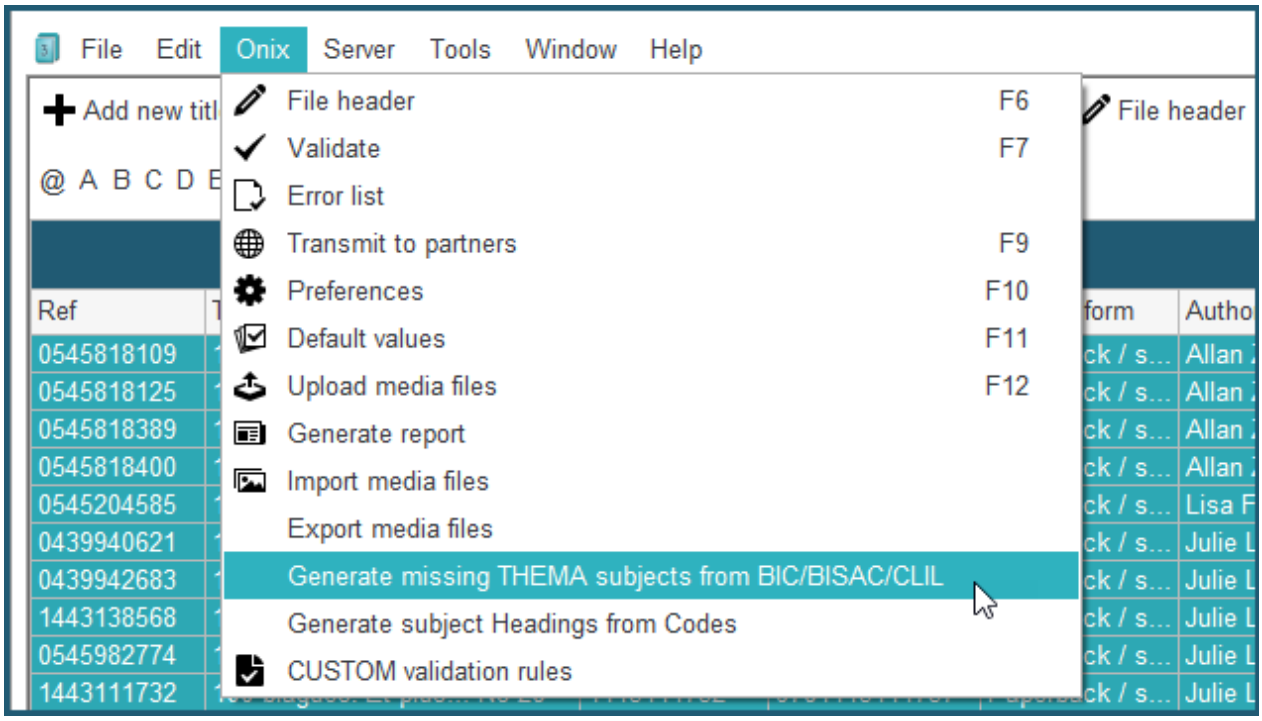

## Convert BIC/BISAC subjects to THEMA

If your ONIX file already contains BIC or BISAC subjects, it is possible to automatically add the corresponding THEMA subjects. To do so, follow these steps:

1- First, make a backup copy of the ONIX file that you want to process.
2- Using **ONIXEDIT**, open your ONIX file.
3- Select the title on which you want to apply the automatic converter.
4- Do a Right-Click on one of the selected titles to show the contextual menu and choose "**Generate missing THEMA subjects from BIC/BISAC**":



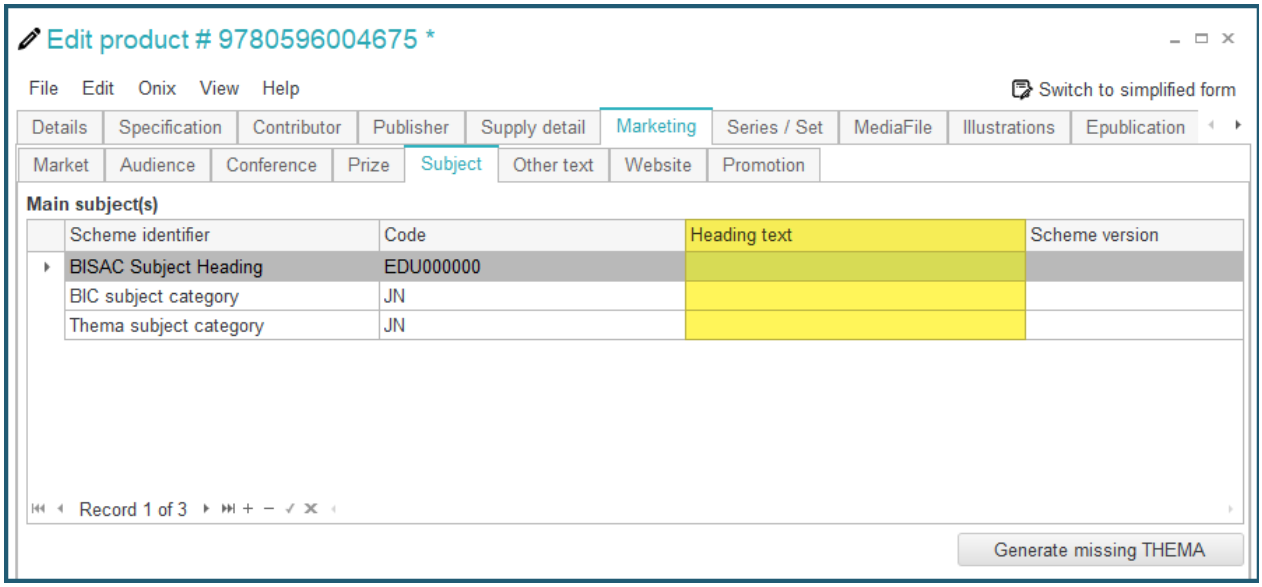

You can also find this option in the **Onix** menu :




5- Wait until the processing is completed and then, save your ONIX file.

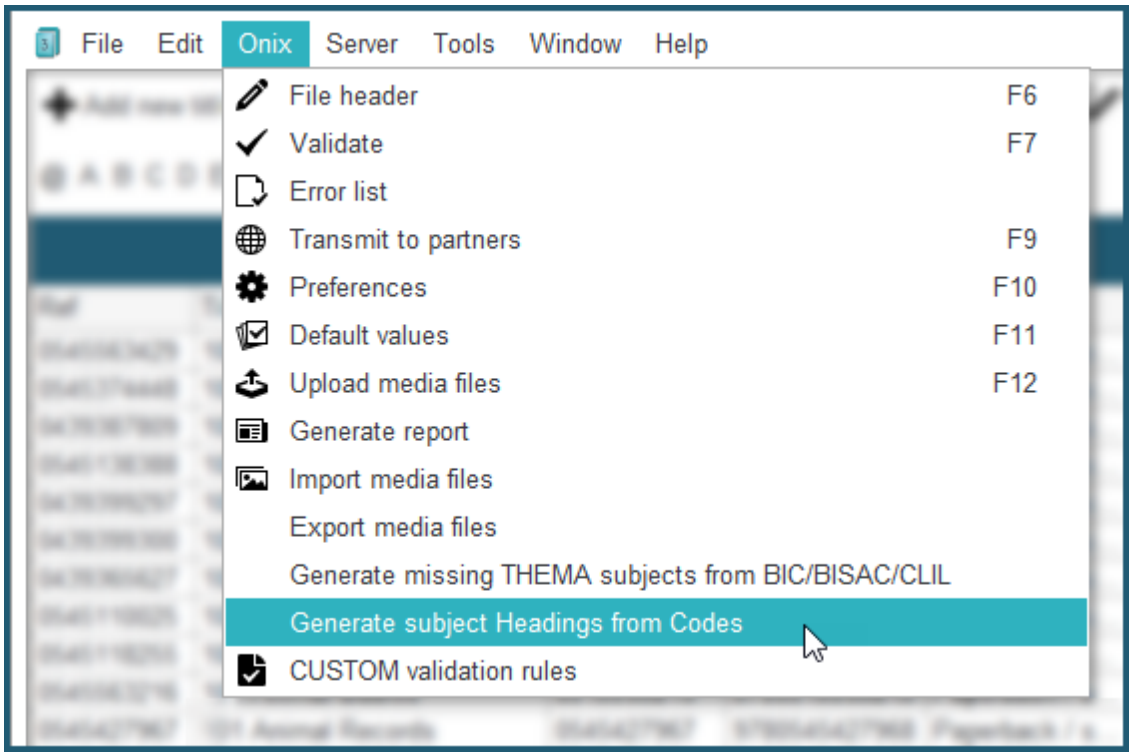
## Generate Subject Headings from codes

As subject heading text is not mandatory, it is perfectly legit to provide only codes for your subjects leaving "Heading text" column empty:




But by adopting this practice, you may reduce the discoverability of your books and eBooks. Indeed, some search engines, bookstores and other online systems will produce better classification/indexation of your titles if you also provide headings.

ONIXEDIT provides a handy tool to do it easily and automatically:

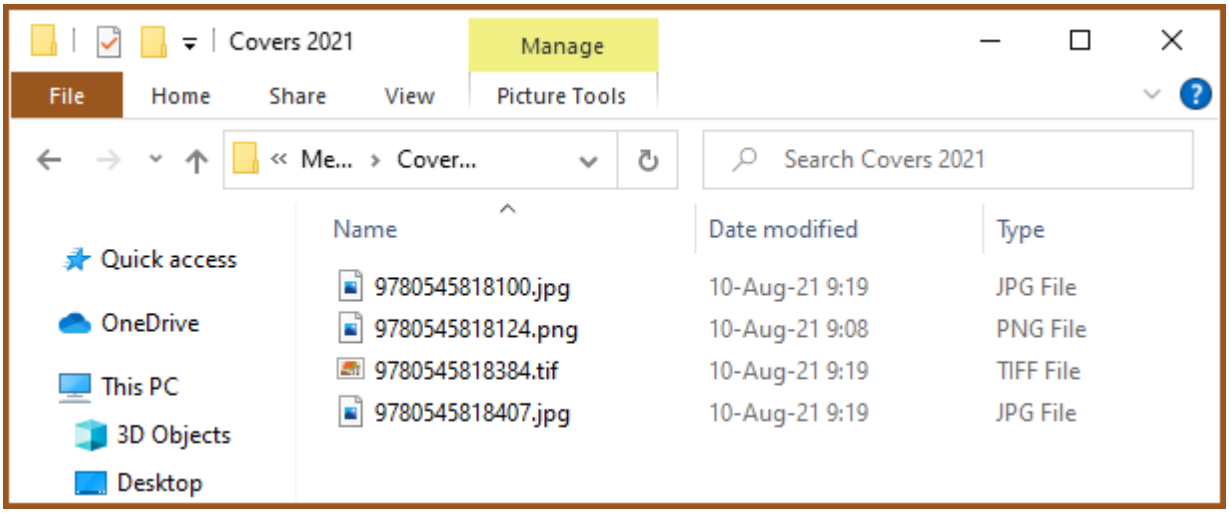



Just open the ONIX file you want to process, select all the titles it contains (**CTRL-A**) and choose "**Generate missing subject Headings from Codes**" in the **Onix** menu. You can also find this option in the contextual menu that appears by right-clicking on the selected titles.

## Import cover images and other assets

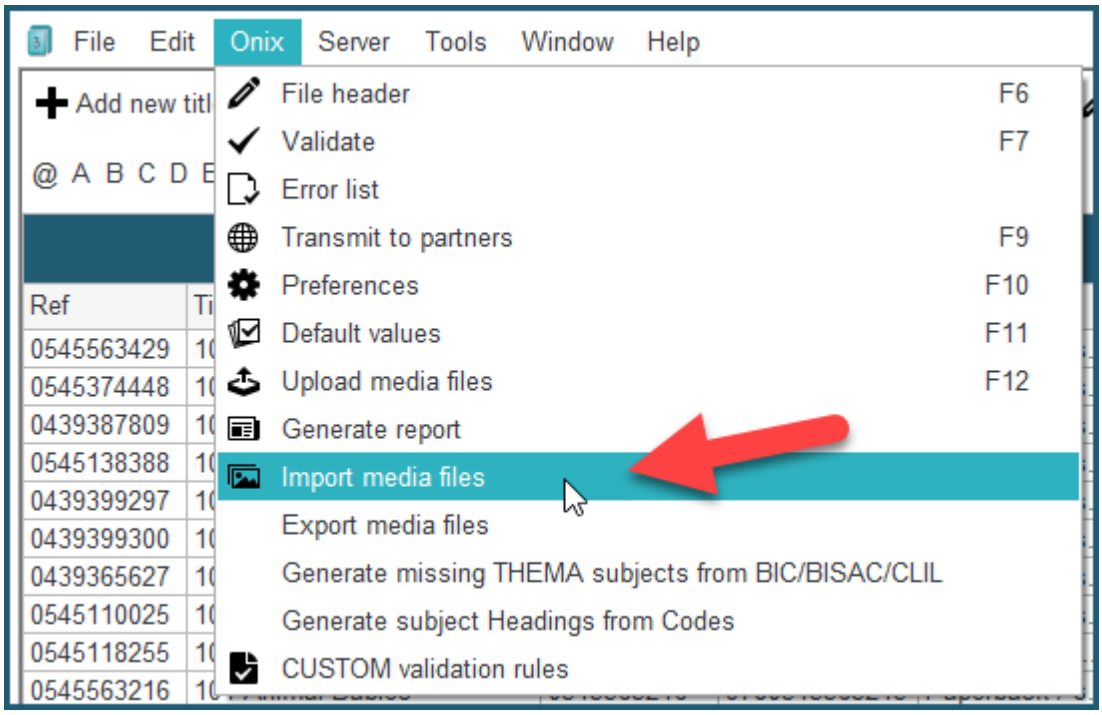
With ONIXEDIT, you can easily import a series of cover images (or any other type of media files) and automatically associate it to corresponding titles. To do so, follow these steps:

1- Prepare your cover images or other media files (GIF, JPEG, PDF, TIF, RealAudio, MP3, MPEG or PNG) in a folder on your PC. You can also add it to a .zip or .gz archive. You must name each file using the ISBN, ISBN 13, EAN or Record Reference of the corresponding title (ex: 9780123456789.jpg):

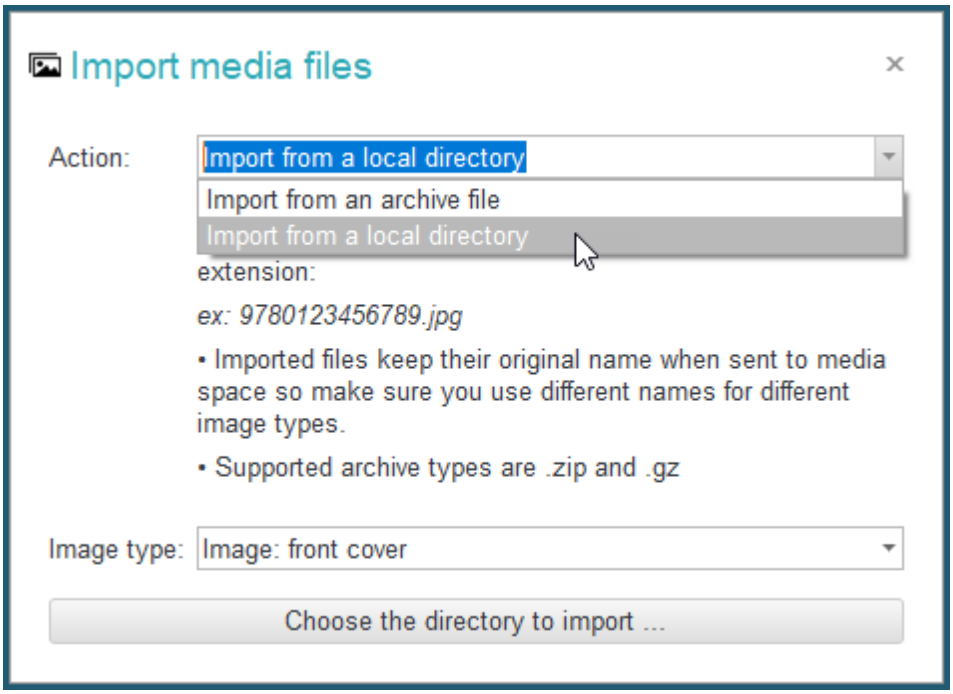



2- With **ONIXEDIT**, open your ONIX file.

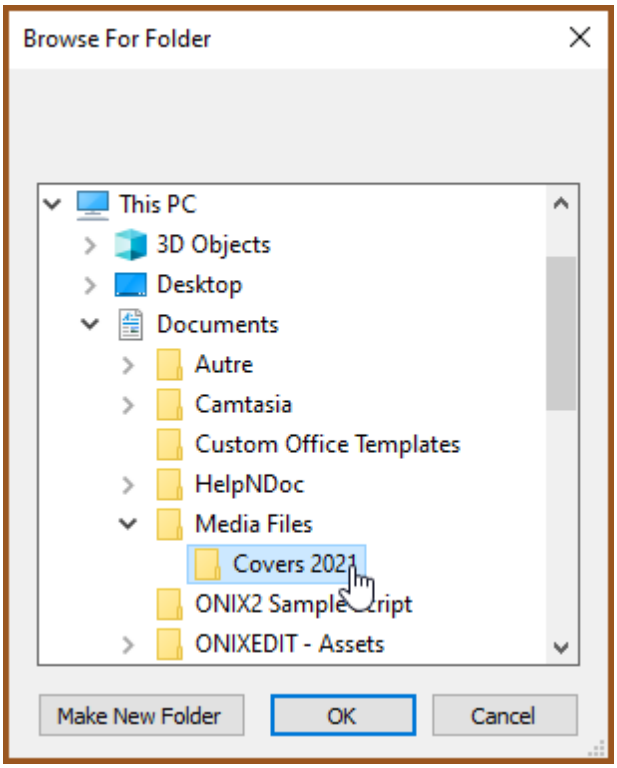
3- Click on the **Onix** menu and select "**Import media files**":



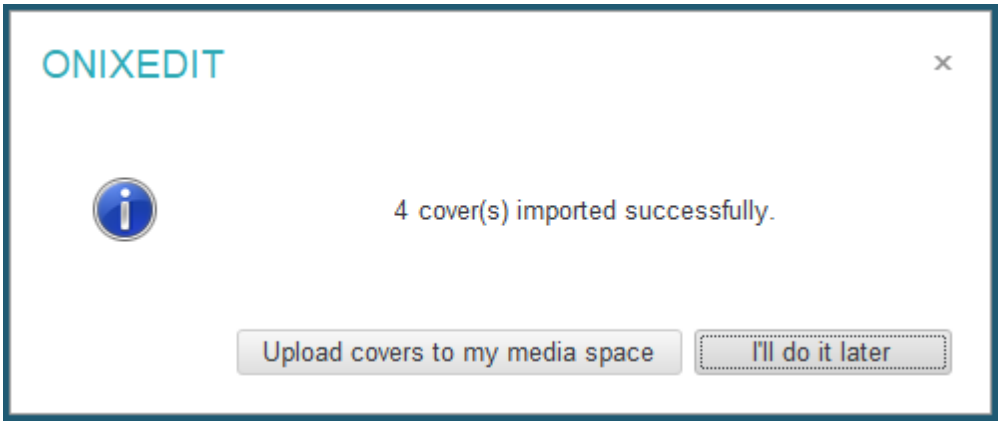

4- Select "**Import from a local directory**" if your media files are in a folder or "**Import from an archive file**" if your media files are in an archive. Then select the type of media file that corresponds to the files you prepared at step #1. By default, it is set to "front cover":




5- Click on "**Choose the directory/archive to import**" button and select the corresponding folder/file on your PC.



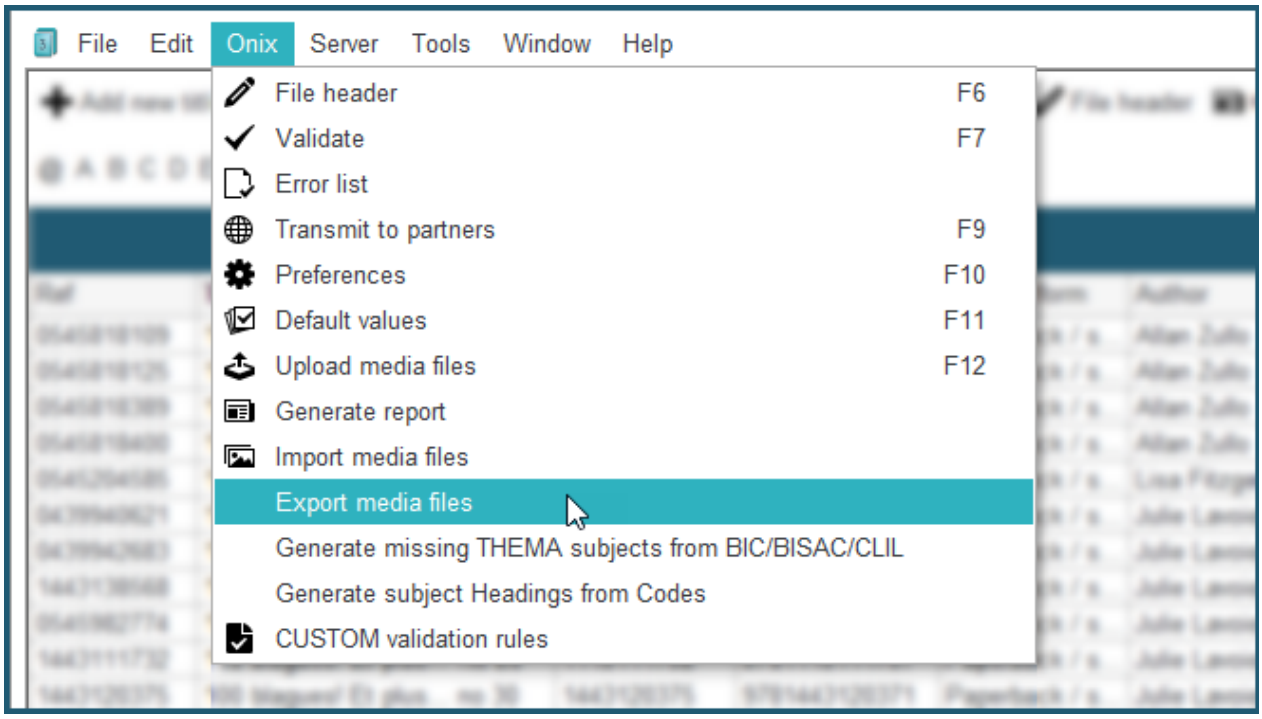

6- When the import is completed, **ONIXEDIT** will tell you how many positive matches were found.



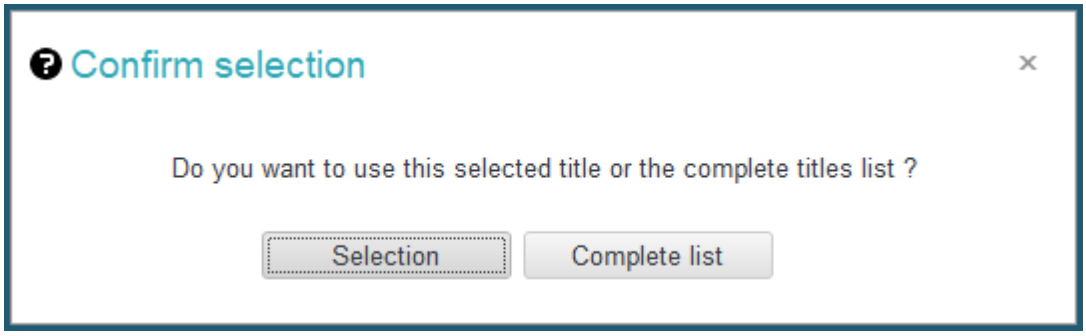

7- Next click on "**Upload covers to my media space**" to publish your new cover images on the Internet in your ONIXEDIT Media Space, making it available to your trading partners.

## Export cover images and other assets

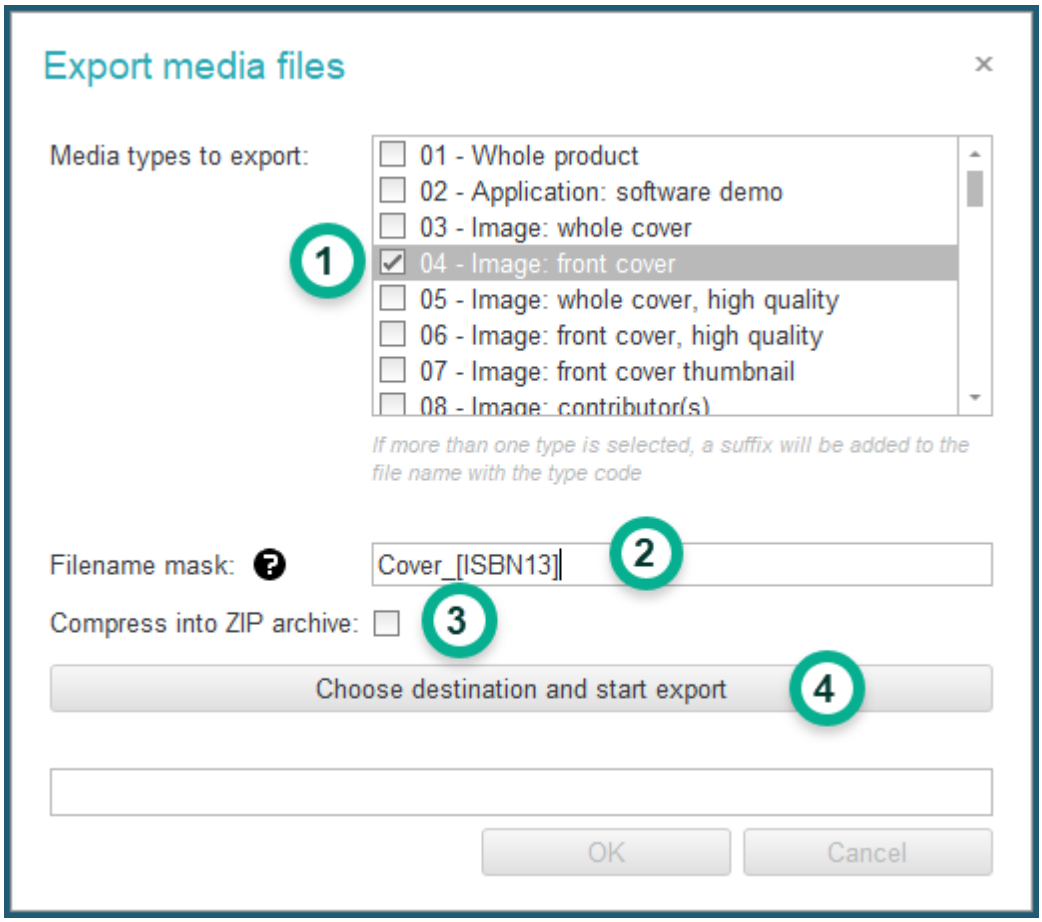
ONIXEDIT provides a very handy tool to export cover images and other media files referred in an ONIX file (2.1 and 3.0). Indeed, no matter if the media file is in your **ONIXEDIT** Media Space or elsewhere, you can use the "**Onix / Export media files**" menu to get a local copy of it providing that the URL of those files be valid and accessible:




Export of media files can be done on the complete ONIX file (or ONIX catalogue for ONIXEDIT Server users) or a selection of ONIX titles. After selection of the "Export cover images" function, you should see this:

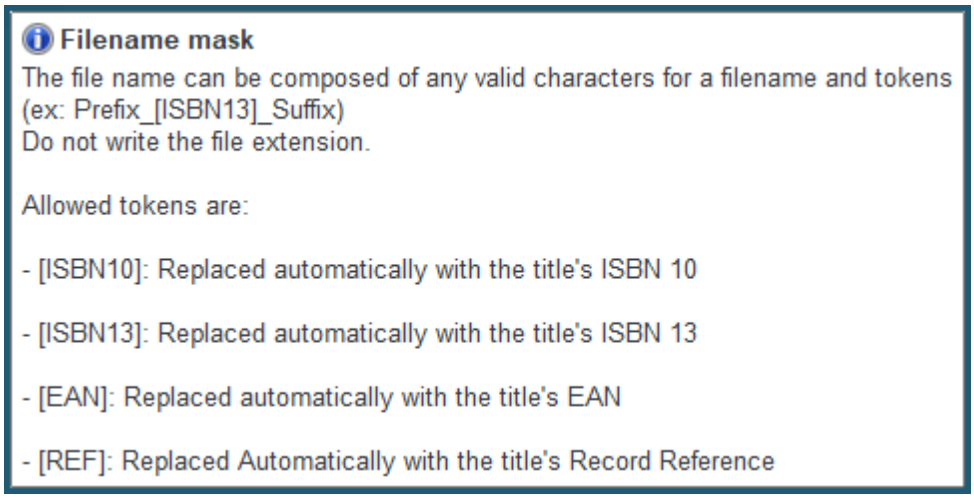



Click on "**Selection**" if you want to export only selected titles. Click on "**Complete list**" if you want to export media files for all the products in your ONIX file or catalogue. You should then see the following dialog:




1. Select the Media Types that you want to export.

2. Optionally,  type a filename mask (without the file extension). If you don't set one, ONIXEDIT will keep the original filename as defined in the URL (MediaFileLink tag for ONIX 2.1 and ResourceLink for ONIX 3.0).




3. Choose if you want to save all the media files into a single ".ZIP" archive file or not.

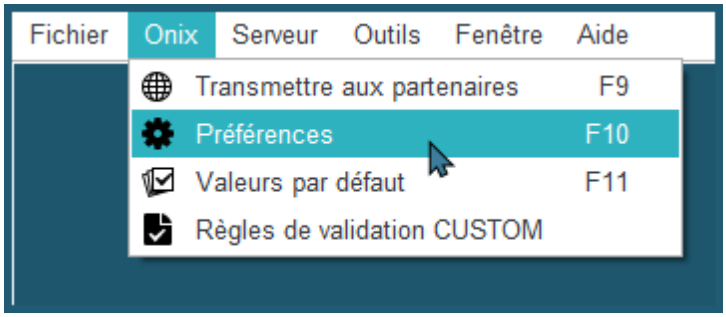
4. Click on the button named "**Choose destination and start export**" to select where the media files should be exported on your PC.

## Change Main list columns

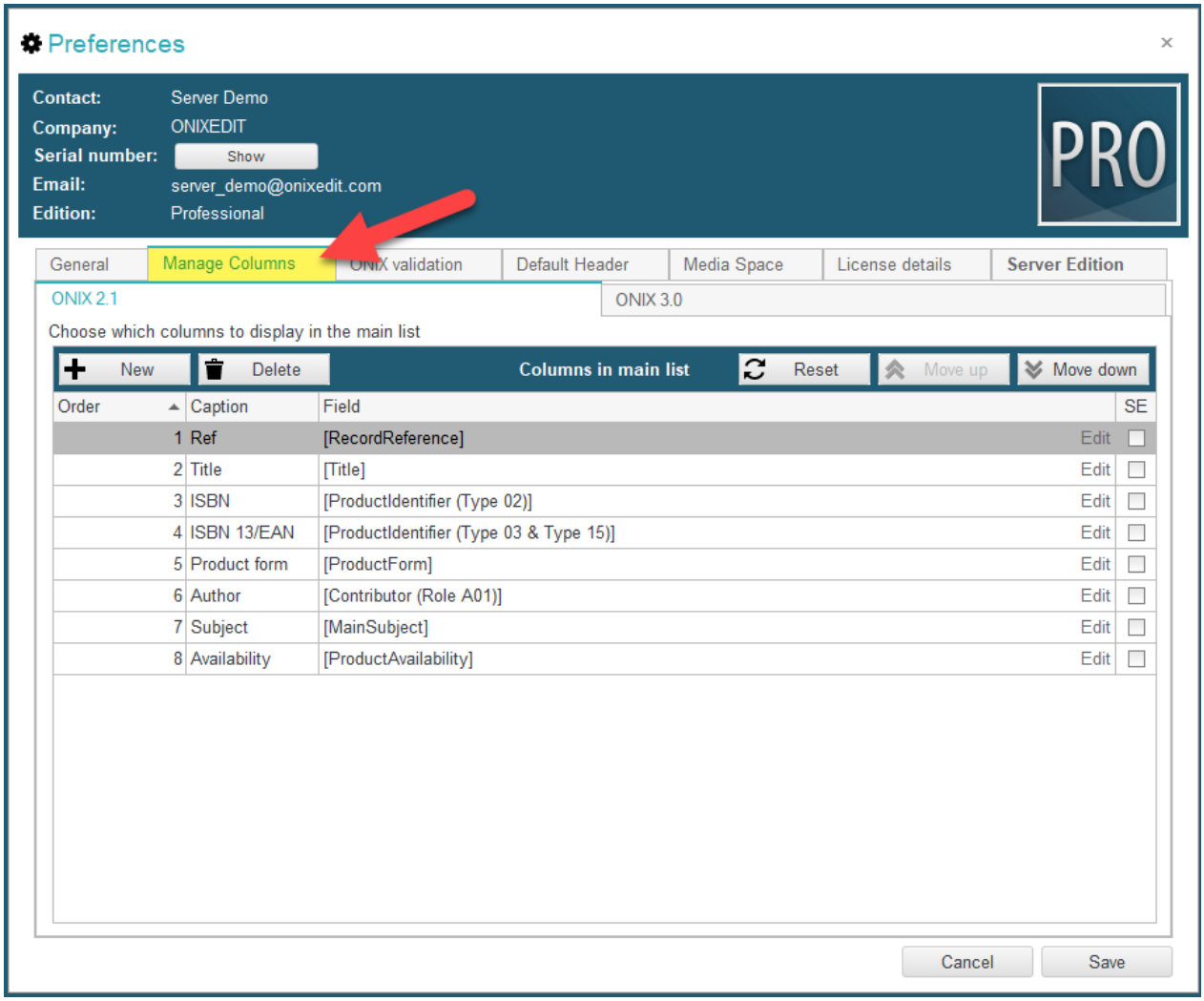
You can easily change the columns that are shown on the main list when an ONIX file is open.

For instance, if you want to add the ONIX tag PublishingStatus to the main list instead of the ProductAvailability which is the default, you will follow these steps:

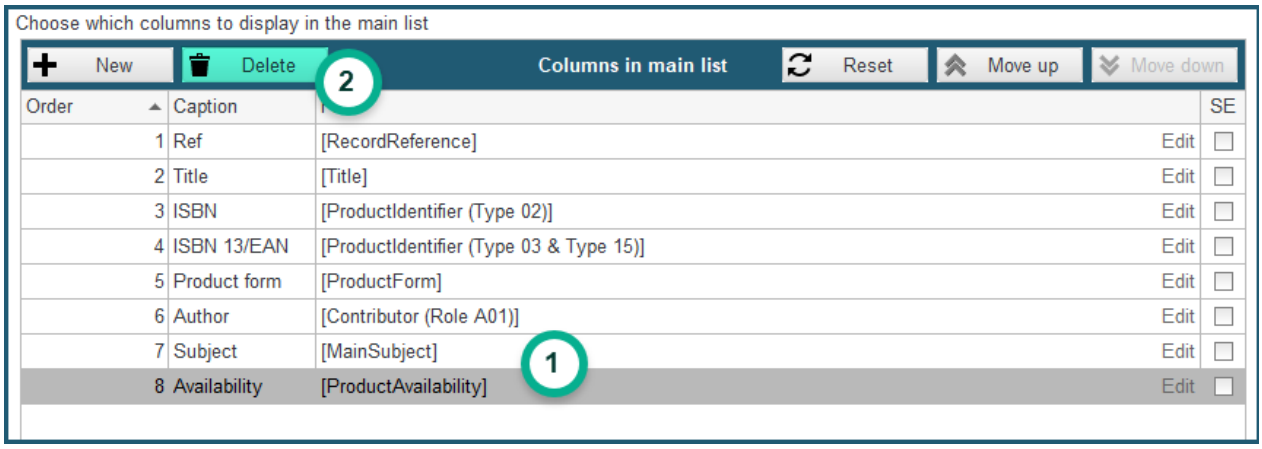
1- Go to **ONIXEDIT** preferences or press F10 to do so:



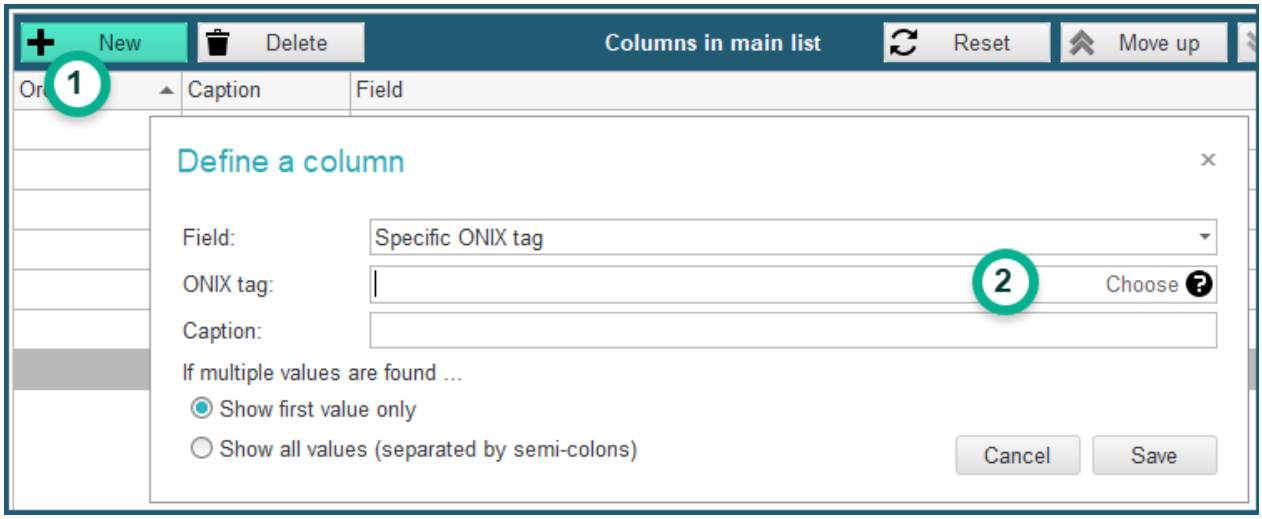

2- Click on the **Manage Columns** tab:



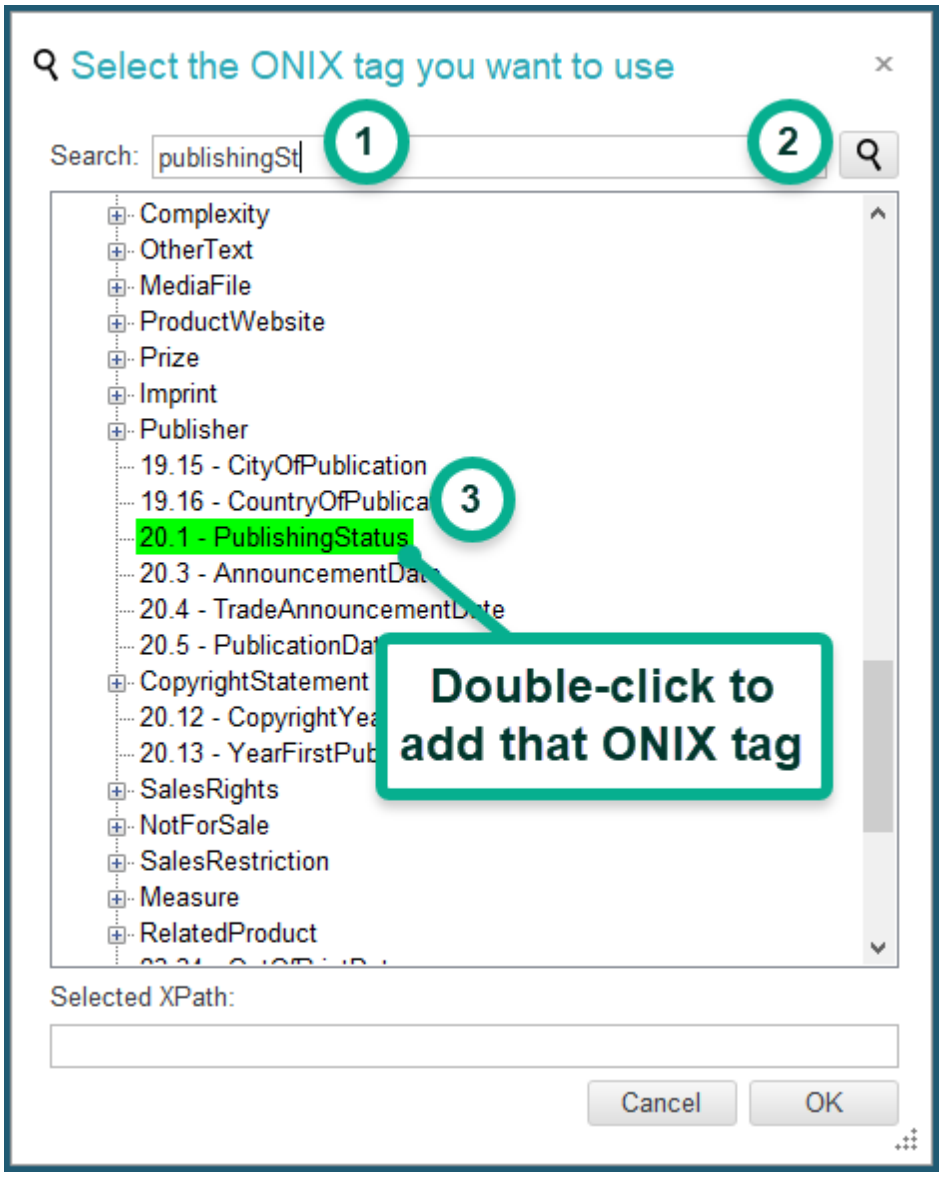

3- Select Availability and click on Delete to remove it:



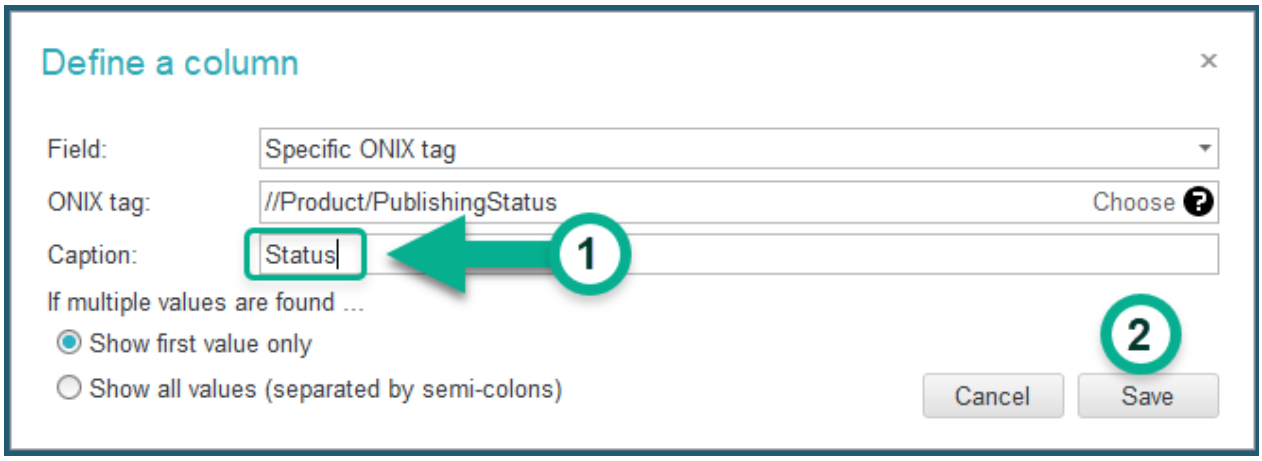

4- Next, click on the **New** button. You will find some common ONIX fields in the "Field" drop-down list. If you don't find what you are looking for in that list, click on the **Choose** button at the right of the ONIX tag field:



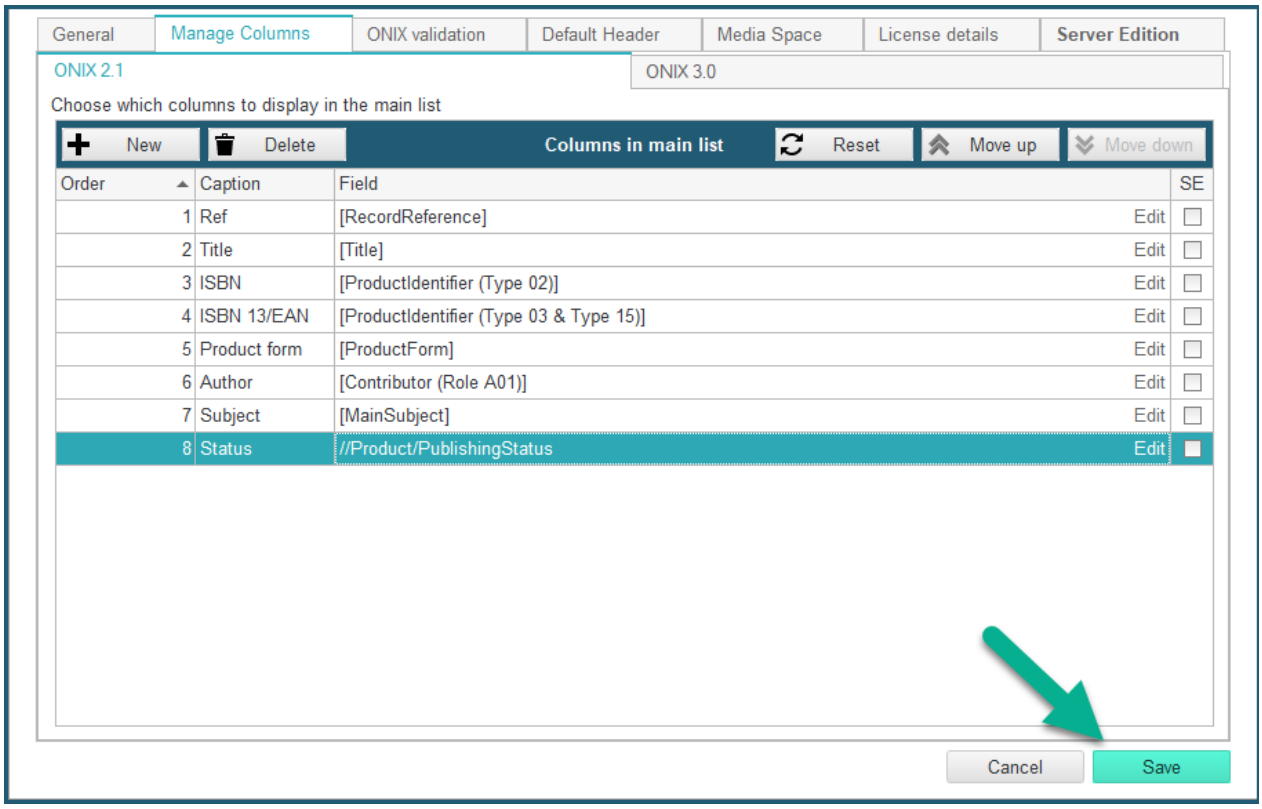

5- Type the ONIX tag that you are searching, press enter (or click on the magnifier icon) and finally, double-click on the field you want to add in the main list:



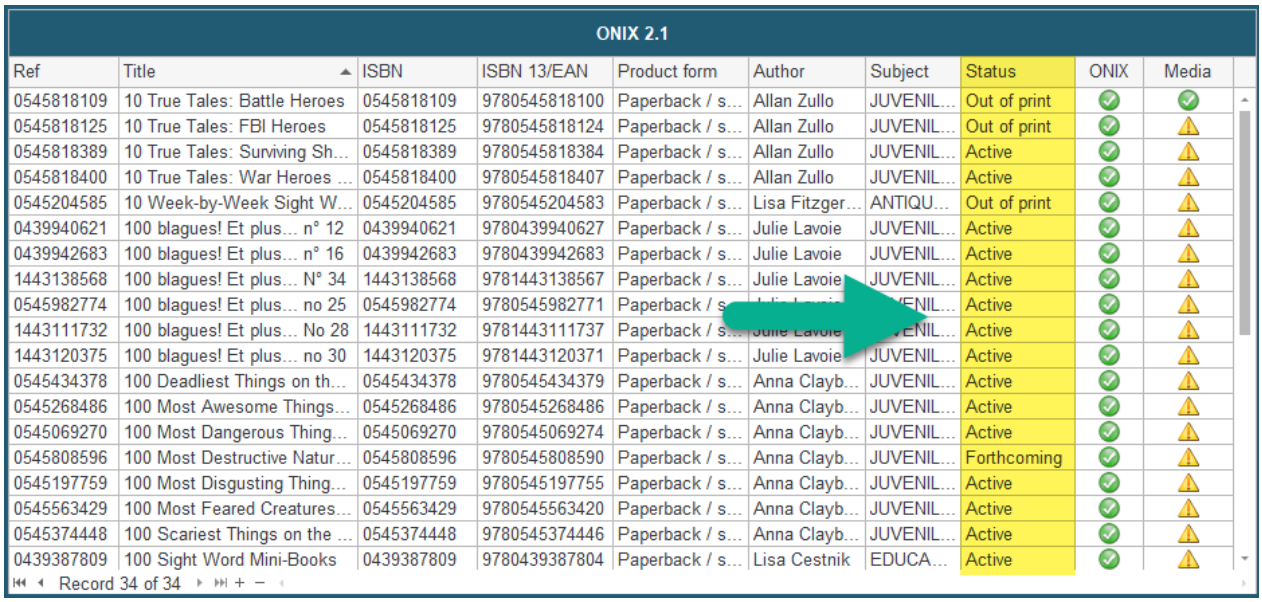

6- Give a name to the column in the Caption field and click on Save:




7- Finally, Save your **ONIXEDIT** Preferences:



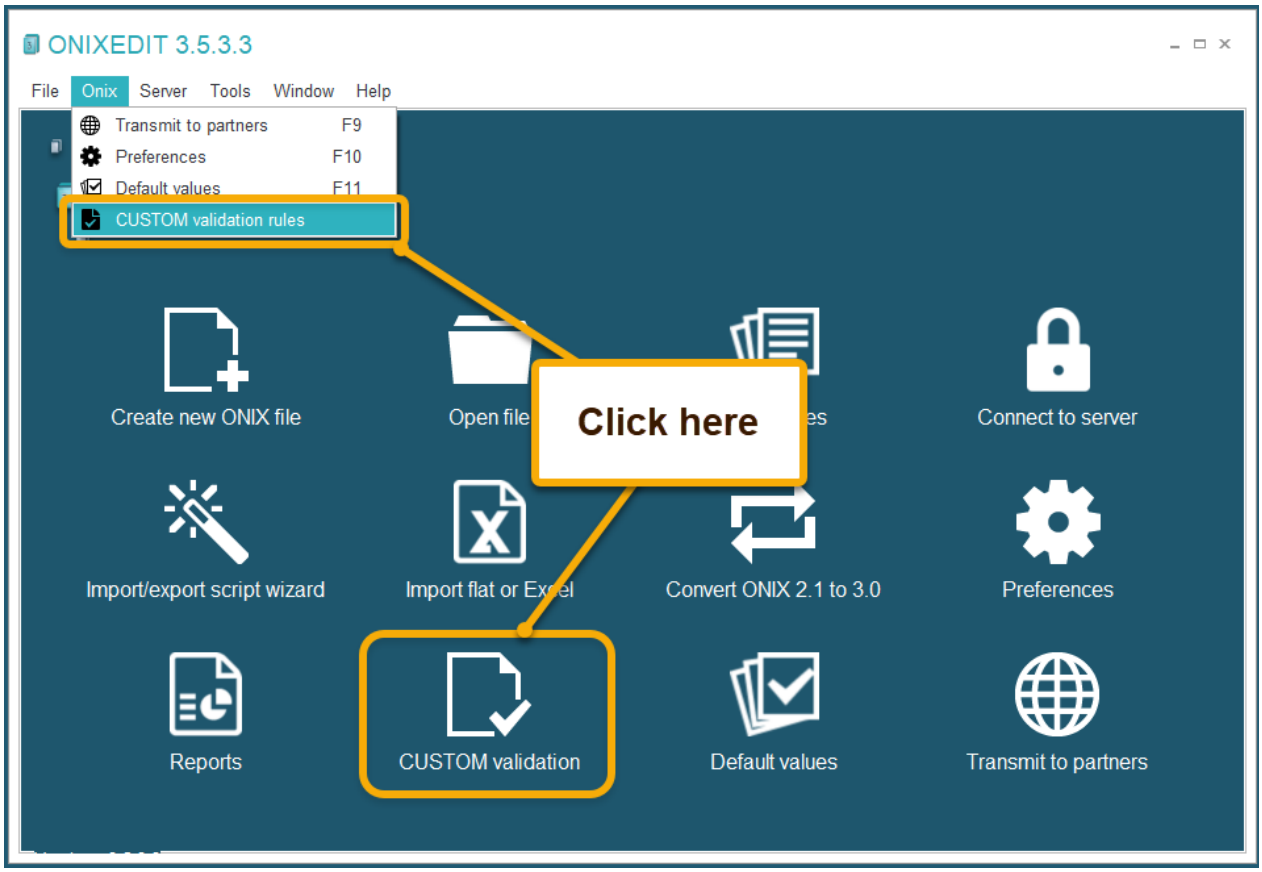

You should now see the new column for all your ONIX files:



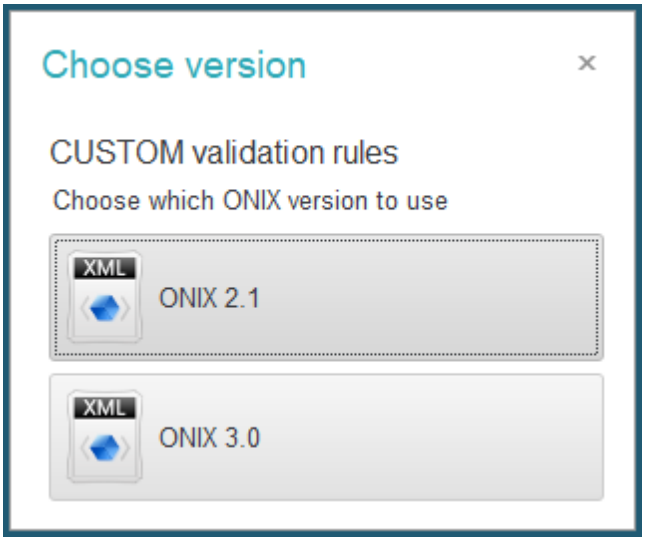

This is also working if you are using ONIXEDIT Server. Also note that you can define different columns for ONIX versions 2.1 and 3.0. See the section on the Manage Column tab for more information on this subject.

## Set Custom Validation

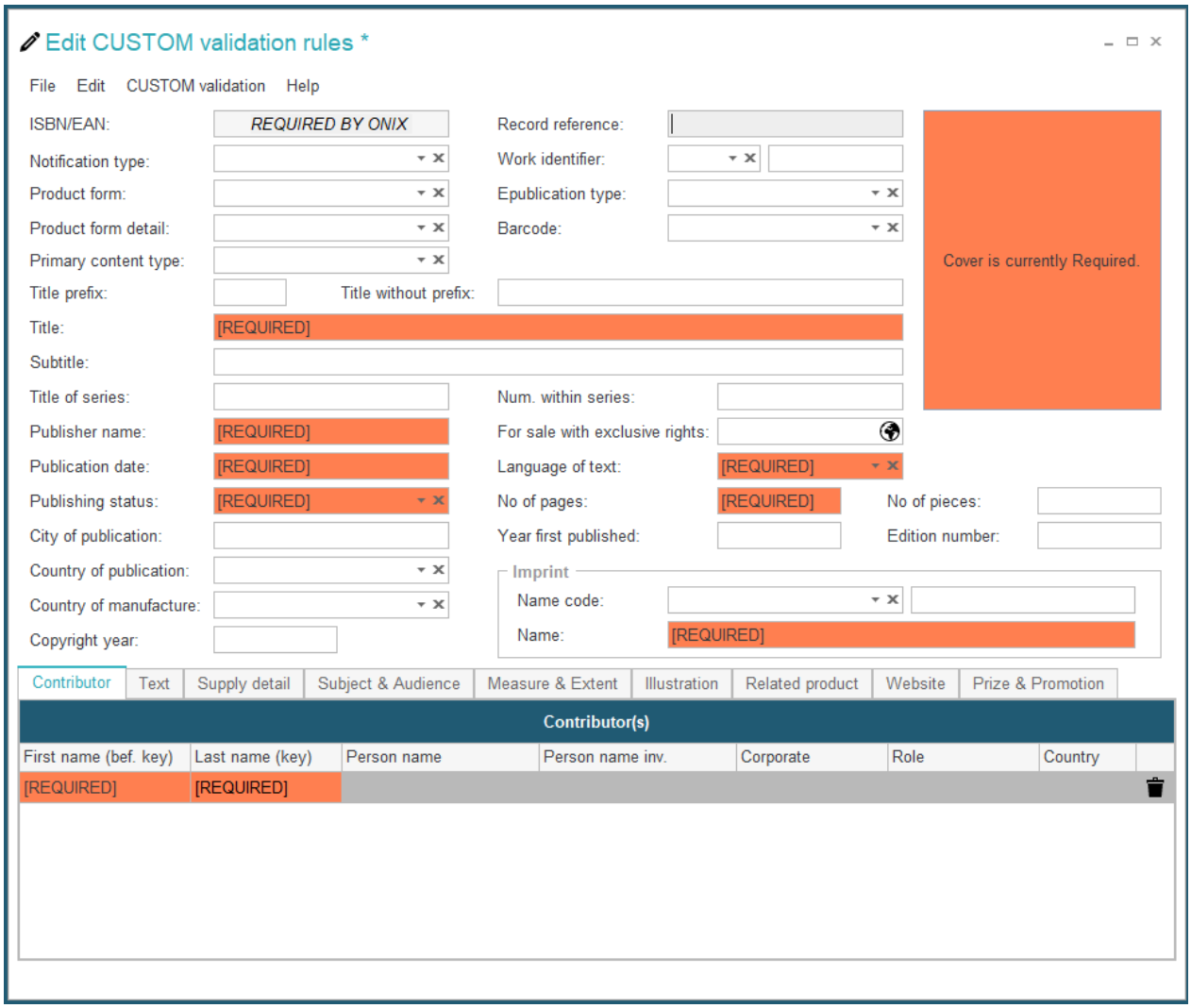
If your organization has special requirements about their ONIX metadata, you have a new tool available since version 3.1.9 of **ONIXEDIT**: The Custom Validation Rules:



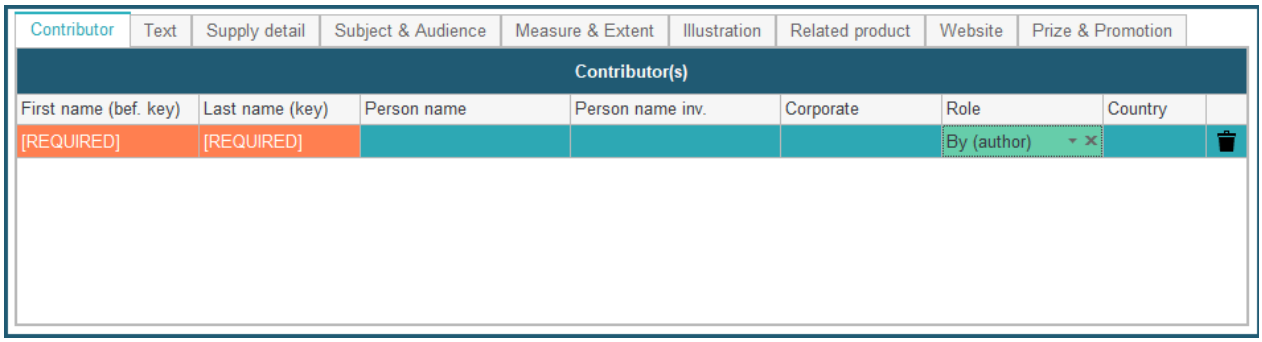

You can set different Custom Validation rules for ONIX 2.1 and ONIX 3.0:



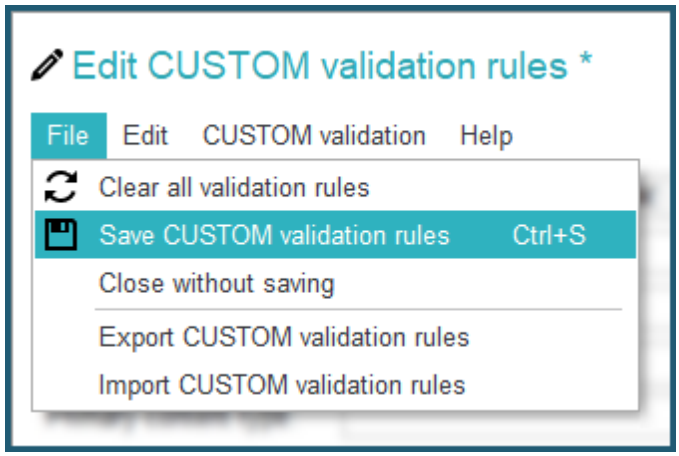

Using a special form of either the simplified or the advanced interface, you just have to identify your mandatory fields with the **F3** key. You simply have to click on the field you want to make mandatory and press **F3**. The new mandatory field will show [REQUIRED] with a distinctive background color. Pressing it again will remove the [REQUIRED] status:



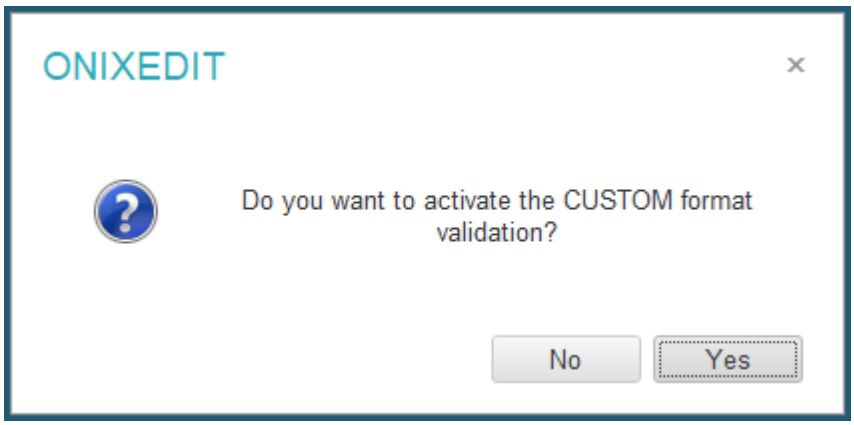

You can also set mandatory values. For instance, if you want to have at least one contributor having a First name, a Last name and the role set to "By (author)", you will define it like this:



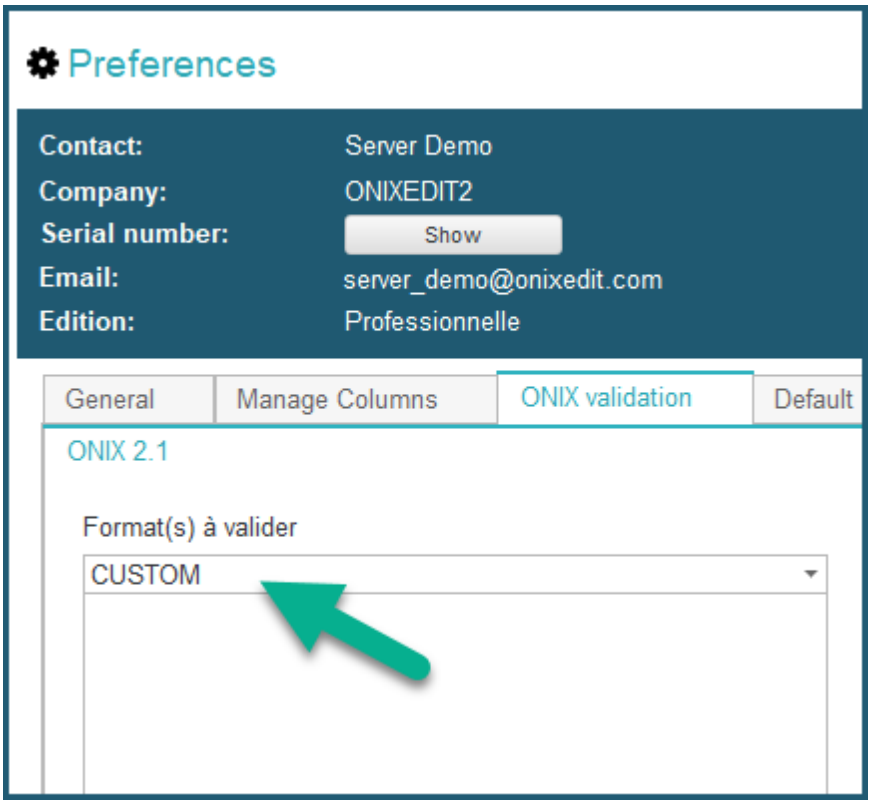

Once done, save your custom validation rules and close the custom validation form.




**ONIXEDIT** will ask you if you want to activate your custom rules right now:

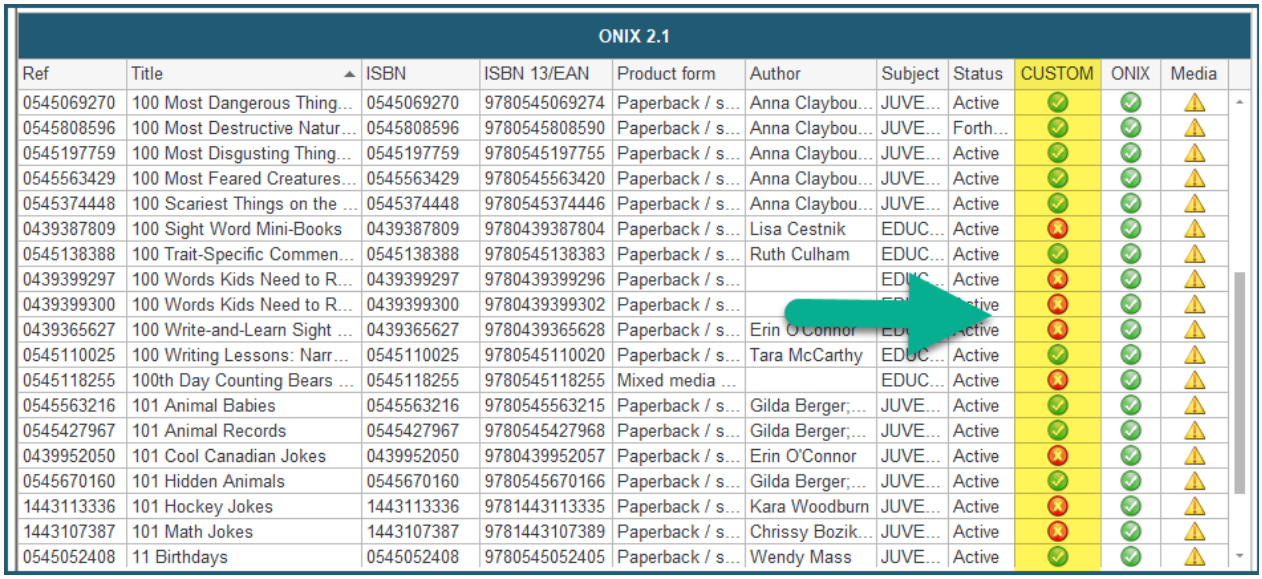



If you click on Yes, you will find it in the Specialized validation formats of your **ONIXEDIT** Preferences:




You can also activate or deactivate it later in the preferences.

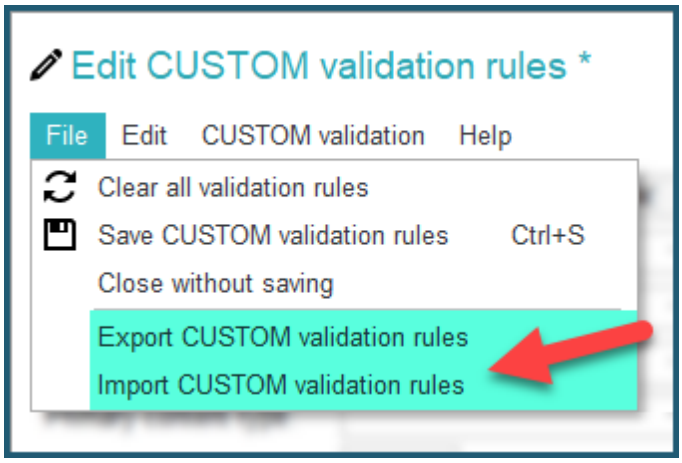
Once activated, you will find a new "CUSTOM" column in the main list of your ONIX file showing the titles that are compliant to your custom rules:



ONIX 2.1

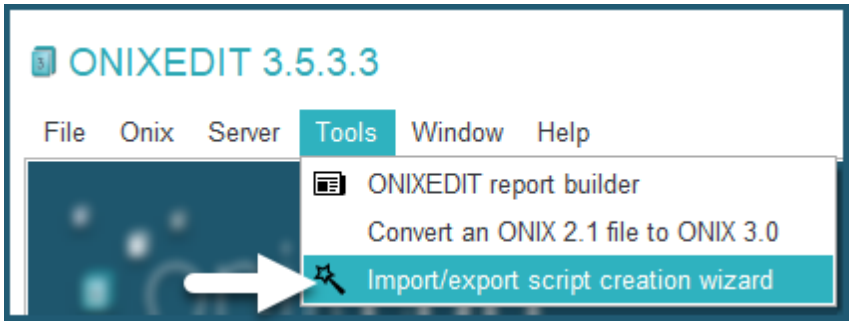
| Ref | Title | ISBN | ISBN 13/EAN | Product form | Author | Subject | Status | CUSTOM | ONIX | Media |
|---|---|---|---|---|---|---|---|---|---|---|
| 0545069270 | 100 Most Dangerous Thing... | 0545069270 | 9780545069274 | Paperback / s... | Anna Claybou... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 0545808596 | 100 Most Destructive Natur... | 0545808596 | 9780545808590 | Paperback / s... | Anna Claybou... | JUVE... | Forth... | ✓ | ✓ | ⚠ |
| 0545197759 | 100 Most Disgusting Thing... | 0545197759 | 9780545197755 | Paperback / s... | Anna Claybou... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 0545563429 | 100 Most Feared Creatures... | 0545563429 | 9780545563420 | Paperback / s... | Anna Claybou... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 0545374448 | 100 Scariest Things on the ... | 0545374448 | 9780545374446 | Paperback / s... | Anna Claybou... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 0439387809 | 100 Sight Word Mini-Books | 0439387809 | 9780439387804 | Paperback / s... | Lisa Cestnik | EDUC... | Active | ✗ | ✓ | ⚠ |
| 0545138388 | 100 Trait-Specific Commen... | 0545138388 | 9780545138383 | Paperback / s... | Ruth Culham | EDUC... | Active | ✓ | ✓ | ⚠ |
| 0439399297 | 100 Words Kids Need to R... | 0439399297 | 9780439399296 | Paperback / s... | | EDU... | Active | ✗ | ✓ | ⚠ |
| 0439399300 | 100 Words Kids Need to R... | 0439399300 | 9780439399302 | Paperback / s... | | EDU... | tive | ✗ | ✓ | ⚠ |
| 0439365627 | 100 Write-and-Learn Sight ... | 0439365627 | 9780439365628 | Paperback / s... | Erin O'Connor | EDU... | Active | ✗ | ✓ | ⚠ |
| 0545110025 | 100 Writing Lessons: Narr... | 0545110025 | 9780545110020 | Paperback / s... | Tara McCarthy | EDUC... | Active | ✓ | ✓ | ⚠ |
| 0545118255 | 100th Day Counting Bears ... | 0545118255 | 9780545118255 | Mixed media ... | | EDUC... | Active | ✗ | ✓ | ⚠ |
| 0545563216 | 101 Animal Babies | 0545563216 | 9780545563215 | Paperback / s... | Gilda Berger;... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 0545427967 | 101 Animal Records | 0545427967 | 9780545427968 | Paperback / s... | Gilda Berger;... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 0439952050 | 101 Cool Canadian Jokes | 0439952050 | 9780439952057 | Paperback / s... | Erin O'Connor | JUVE... | Active | ✗ | ✓ | ⚠ |
| 0545670160 | 101 Hidden Animals | 0545670160 | 9780545670166 | Paperback / s... | Gilda Berger;... | JUVE... | Active | ✓ | ✓ | ⚠ |
| 1443113336 | 101 Hockey Jokes | 1443113336 | 9781443113335 | Paperback / s... | Kara Woodburn | JUVE... | Active | ✗ | ✓ | ⚠ |
| 1443107387 | 101 Math Jokes | 1443107387 | 9781443107389 | Paperback / s... | Chrissy Bozik... | JUVE... | Active | ✗ | ✓ | ⚠ |
| 0545052408 | 11 Birthdays | 0545052408 | 9780545052405 | Paperback / s... | Wendy Mass | JUVE... | Active | ✓ | ✓ | ⚠ |

You can also share your custom validation rules with colleagues with the Import/Export function of the Custom validation rules form:



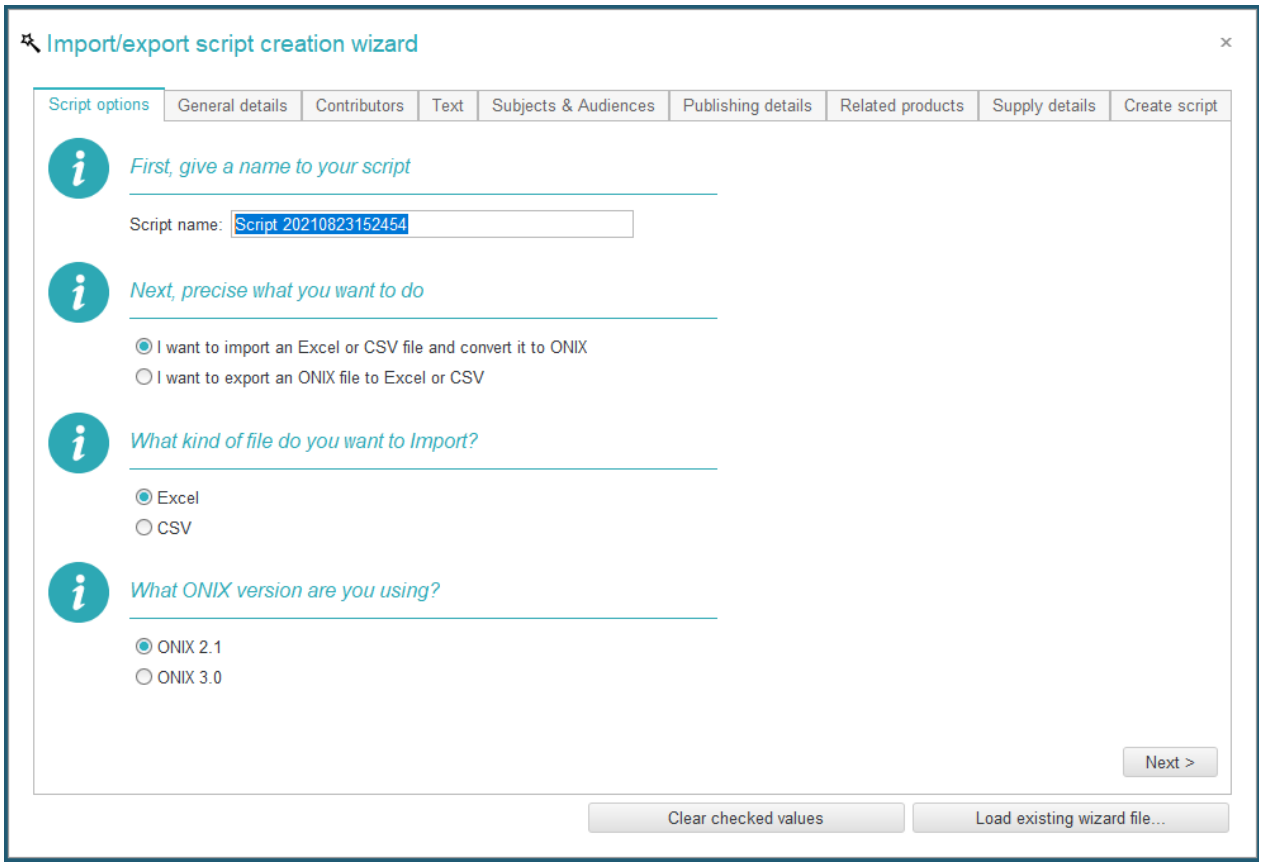

## Use the Import/Export wizard

Since version 3.1.9, **ONIXEDIT** now provides a new easy way to create flat files and Excel files import/export scripts with the use of a specialized wizard:

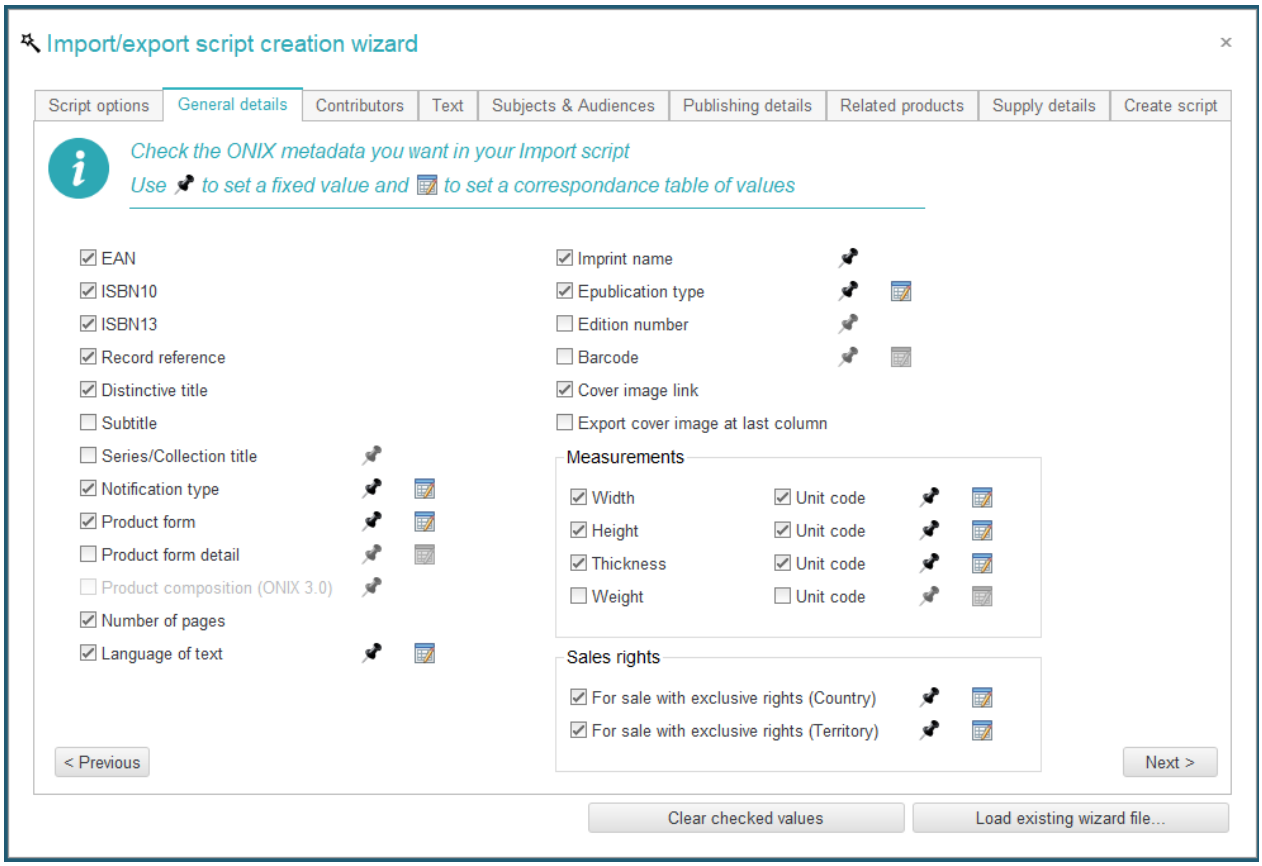



Using the wizard is easy as 1, 2, 3.

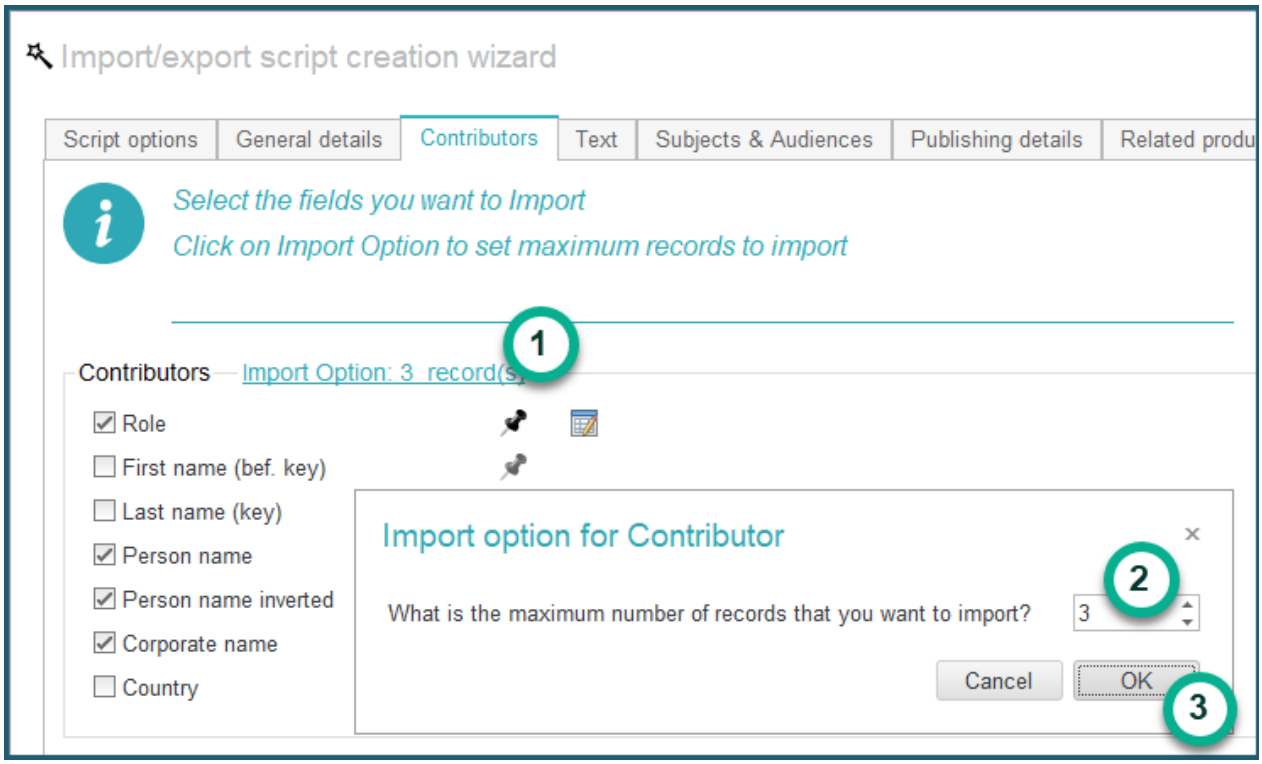
First, you answer some questions:




Then you select the ONIX fields that you want to include in your script:

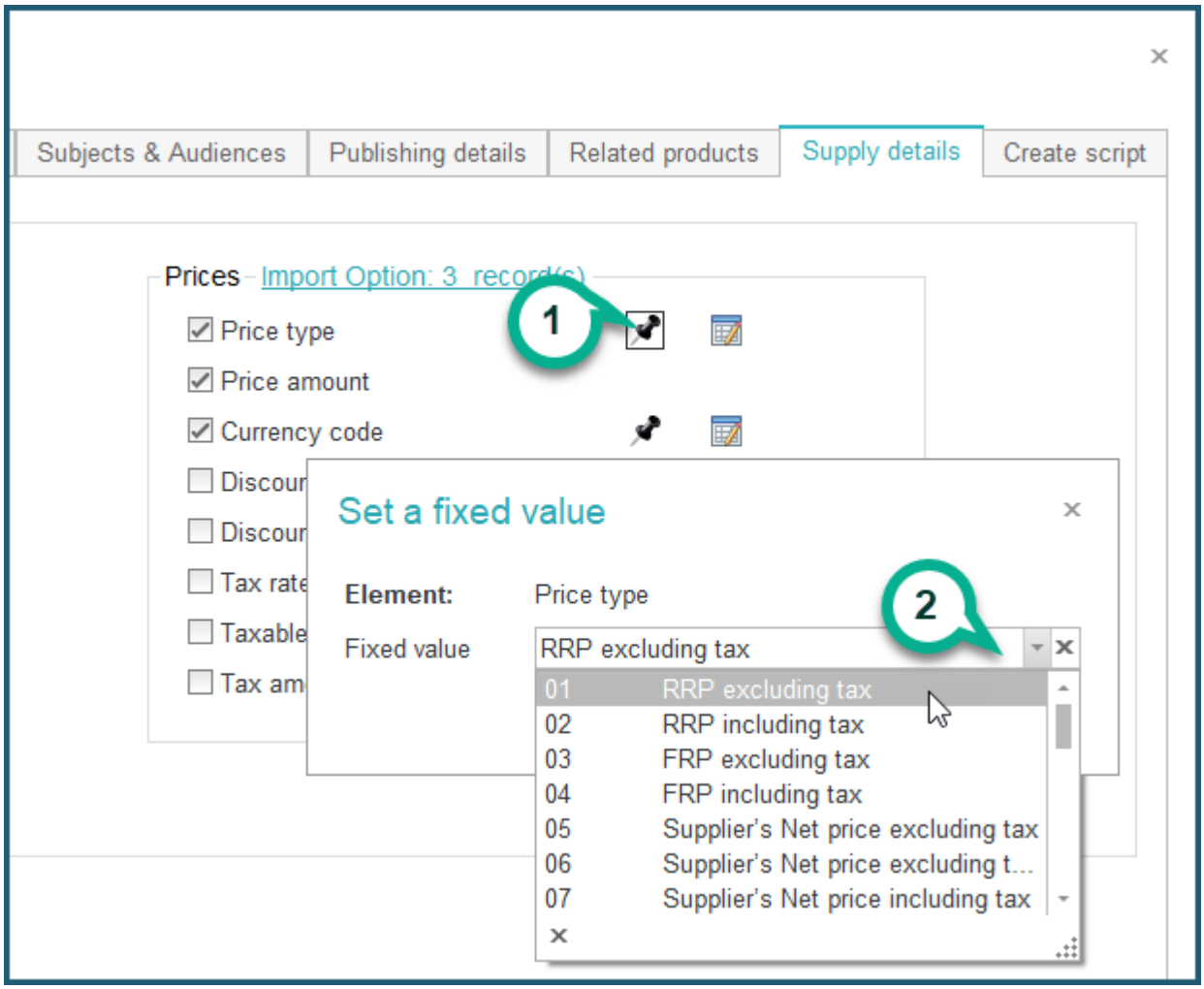



Set the number of records for repeating groups like Contributors and Prices:

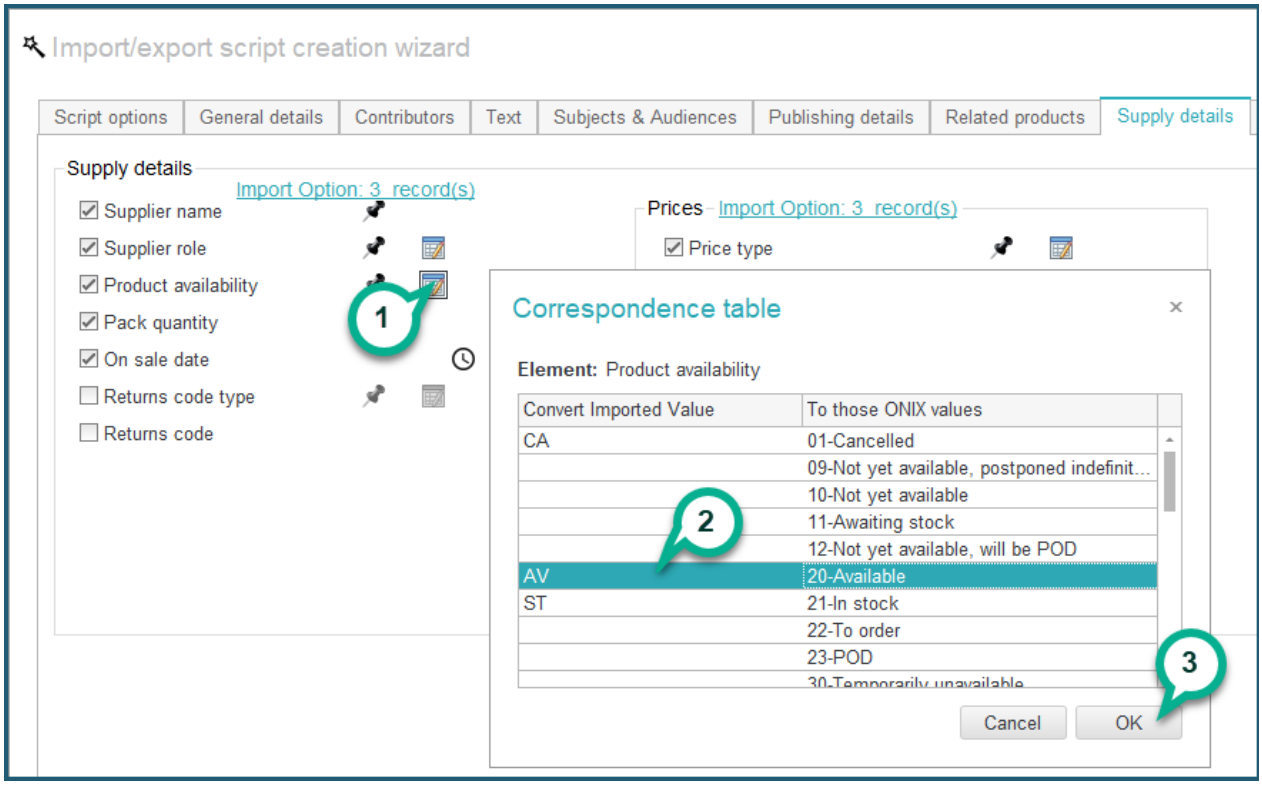



And you're done!

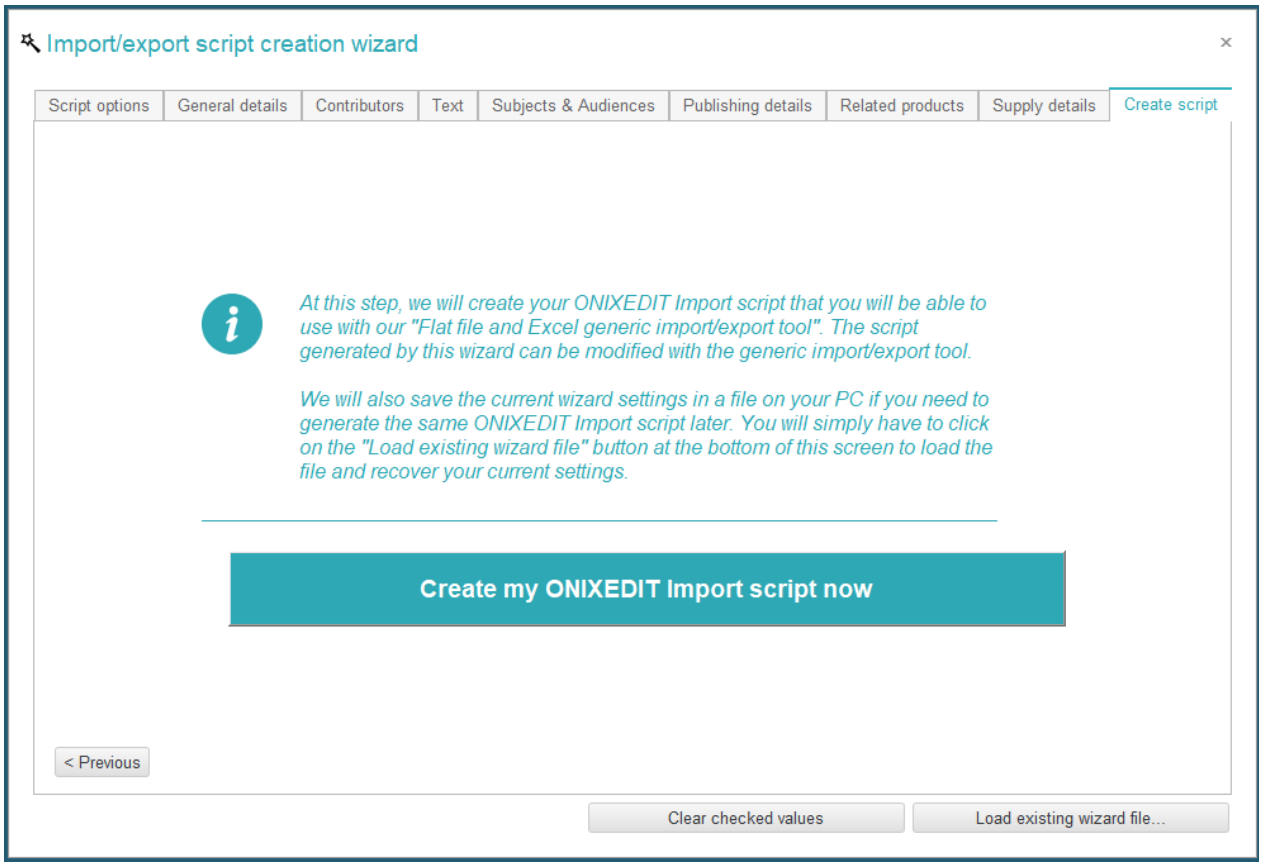
You can even set fixed values for specific fields:

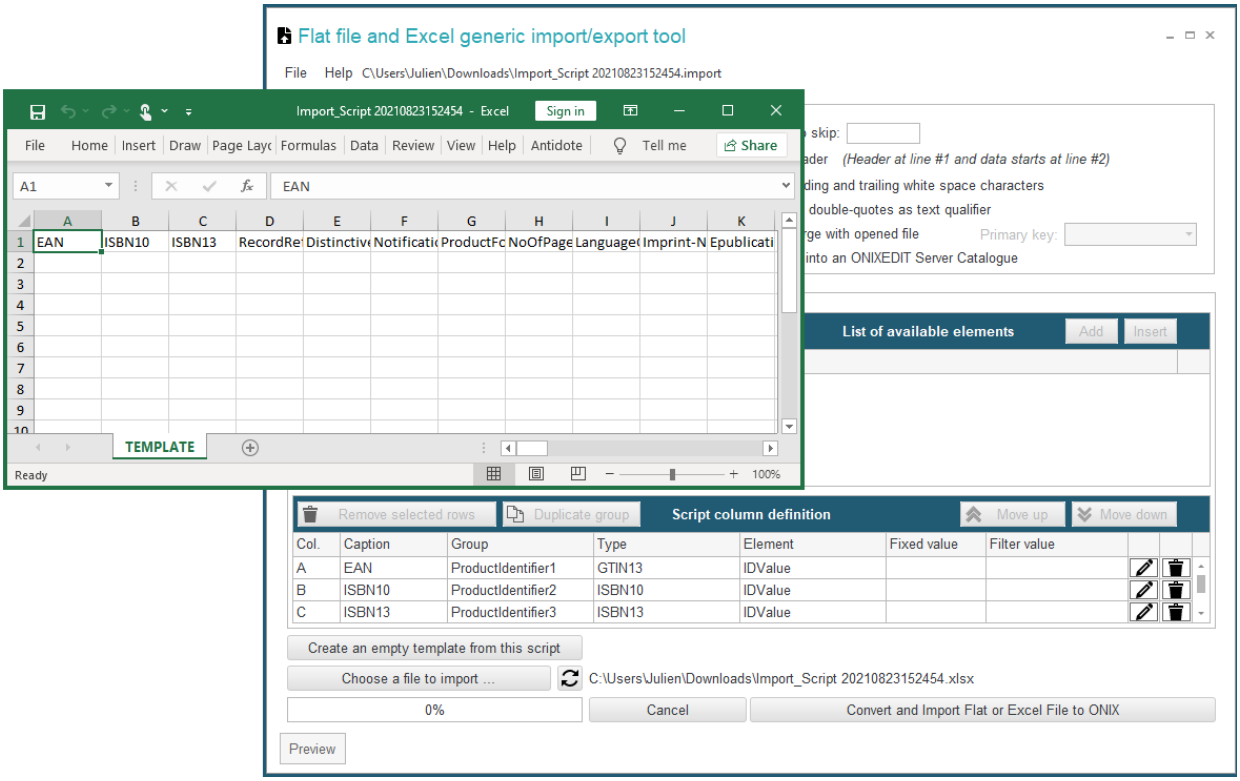



And even correspondence tables to translate imported values:

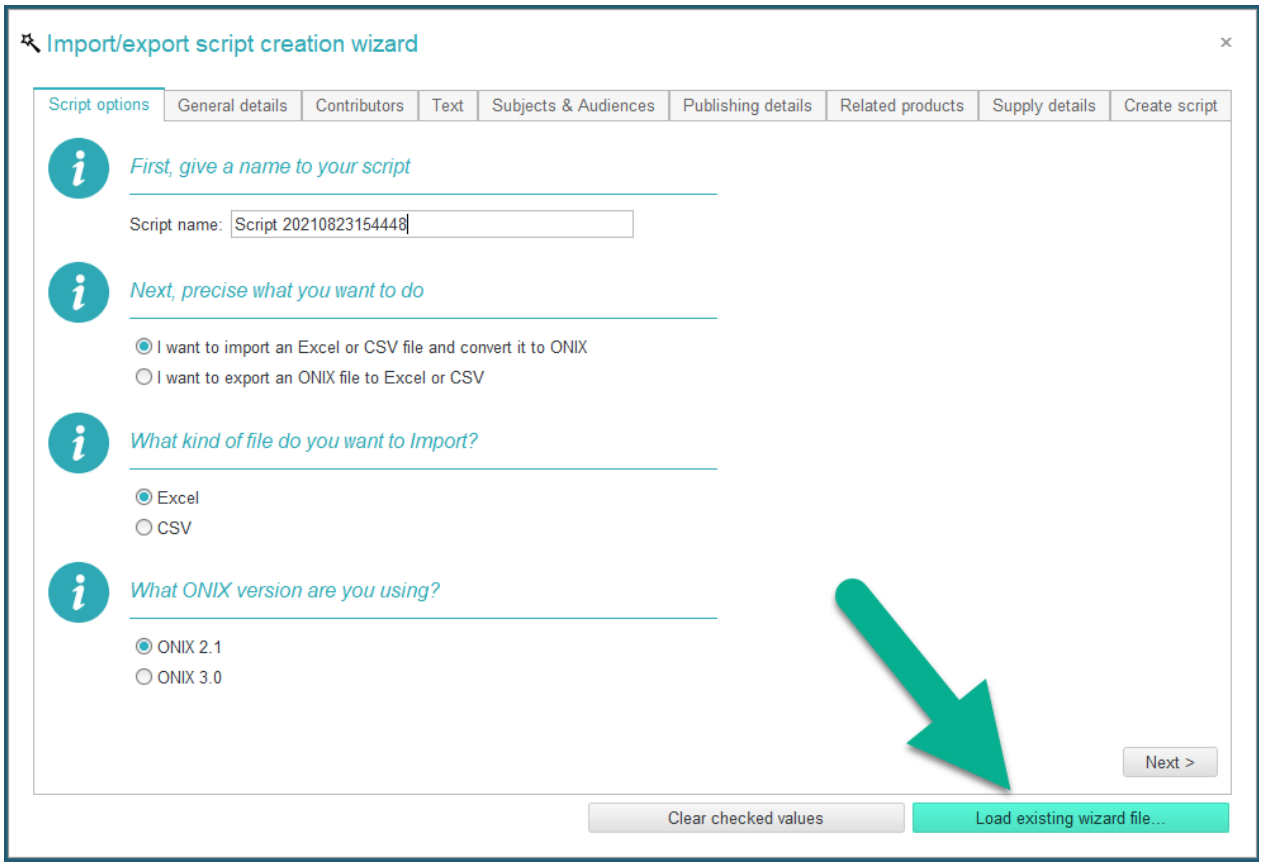


At the last step, the import/export wizard will create your **ONIXEDIT** import/export script and an Excel template with all the required columns to start from (for Import):



It will also save a wizard definition file if you want to use it later as a starting point for your next wizard usage:




## Define XPATH expressions

XPath stands for XML Path Language. XPath uses "path like" syntax to identify and navigate nodes in an XML document.

**ONIXEDIT** includes 2 different XPATH engines:

- The native XPATH engine from .NET which offers XPATH 1.0 compliance. This engine is used everywhere in ONIXEDIT.
- Saxon HE 9.8 that is Open Source under Mozilla Public License 2.0. Source code of Saxon HE 9.8 can be found here: https://sourceforge.net/projects/saxon/files/. Saxon XPATH engine offers XPATH 3.1 compliance and is used by our generic Export to Flat File or Excel tool as well as ONIXEDIT Scheduler.

For instance, you can set XPATH instructions when you manage columns of your ONIXEDIT Main list (XPATH 1.0) or when you export to a flat file (XPATH 3.1)

**ONIXEDIT** uses XPATH to select a particular value in an ONIX product that corresponds to very specific criteria. For instance, if you have multiple prices defined for a title and you want to show the USD price of a specific supplier in your main list, you must use XPath to do so. Otherwise, **ONIXEDIT** will present you the first price found in the SupplyDetail composite if you simply select the default PriceAmount tag. In the following case, it will be the CAD price:

**<SupplyDetail>**

```
    <SupplierName>ONIXEDIT</SupplierName>
    <ProductAvailability>21</ProductAvailability>
    <Price>
      <PriceTypeCode>01</PriceTypeCode>
      <PriceAmount>6.99</PriceAmount>
      <CurrencyCode>CAD</CurrencyCode>
    </Price>
    <Price>
      <PriceTypeCode>01</PriceTypeCode>
      <PriceAmount>4.99</PriceAmount>
      <CurrencyCode>USD</CurrencyCode>
    </Price>
  </SupplyDetail>
```

But with a complete XPATH instruction, you can exactly identify the USD price that you need to show. For instance, the following XPATH 1.0 instructions indicate to consider the SupplyDetail composite having the SupplierName tag equals to "ONIXEDIT". Starting from that point, then drill down to the Price having the CurrencyCode tag equals to "USD" and get the corresponding PriceAmount value:

```
//Product/SupplyDetail[SupplierName='ONIXEDIT']/Price[CurrencyCode='USD']
/PriceAmount
```

The following provides other XPATH 1.0 examples:

- **//Product/MainSubject[MainSubjectSchemeIdentifier='93']/SubjectHeadingText**: Shows the Thema Main Subject.
- **//Product/Subject[SubjectSchemeIdentifier='20']/SubjectHeadingText**: Shows keywords
- **//Product/SupplyDetail/Price[PriceAmount>=100 and PriceTypeCode = '02' and CurrencyCode ='USD']/PriceAmount**: Shows the USD PriceAmount tag value of the first RRP including taxes Price that is greater than or equals to 100.

You can also use specialized functions in your XPATH instructions. For instance:

- **string-length(//Product/Contributor[CountryCode="CA"])>0**: Shows "True" for each title having at least one Canadian contributor.
- **concat(//Product/Title[TitleType='01']/TitlePrefix, ' ', //Product/Title[TitleType='01']/TitleWithoutPrefix)**: Shows the complete distinctive title obtained from the concatenation of TitlePrefix and TitleWithoutPrefix.
- **concat(//Product/Title[TitleType='01']/TitlePrefix, ' ', //Product/Title[TitleType='01']/TitleWithoutPrefix)**: Shows "True" for titles having their Main BISAC subject beginning by "FIC" (i.e. "Fiction" titles).

**XPATH 3.1:**

Since version 3.4.8, **ONIXEDIT** includes Saxon HE 9.8. We added it mostly to provide advanced capabilities to our end users needing to produce very specific flat files or Excel

export scripts.Thus, our generic export tool is now XPATH 3.1 compliant. This means that you can add XPATH columns in your export scripts with advanced XPATH syntax. For instance, you can set IF THEN ELSE expressions like this:

```
if(//Product/ProductForm='DG')
        then 'NO HANDLING'
        else 'HANDLING REQUIRED'
```

```
if(//Product/ProductForm='DG')
        then 'NO HANDLING'
        else 'HANDLING REQUIRED'
```

Nested IF THEN ELSE expressions are also supported. For instance, supposed that we want to export a column to a flat file with value "SCIENCE" when the BISAC main subject code begin by "SCI" and "RELIGION" when it begins by "REL". And for all other cases, we want to show "OTHERS: " followed by the subject headings. Here is the corresponding XPATH 3.1 expression:

```
if(contains(//Product/MainSubject[MainSubjectSchemeIdentifier="10"]/SubjectCode, "SCI"))
then "SCIENCE"
else if
(contains(//Product/MainSubject[MainSubjectSchemeIdentifier="10"]/SubjectCode, "REL"))
then "RELIGION"
else concat("OTHERS:
", //Product/MainSubject[MainSubjectSchemeIdentifier="10"]/SubjectHeadingText)
```

Consider the following ONIX Contributor composites:

```
<Contributor>
  <SequenceNumber>1</SequenceNumber>
  <ContributorRole>A01</ContributorRole>
  <NamesBeforeKey>Raoul</NamesBeforeKey>
  <KeyNames>Guénette</KeyNames>
</Contributor>
<Contributor>
  <SequenceNumber>2</SequenceNumber>
  <ContributorRole>A01</ContributorRole>
  <NamesBeforeKey>Maxime</NamesBeforeKey>
  <KeyNames>Ménard</KeyNames>
</Contributor>
<Contributor>
  <SequenceNumber>3</SequenceNumber>
  <ContributorRole>A01</ContributorRole>
  <NamesBeforeKey>Danny</NamesBeforeKey>
  <KeyNames>Côté</KeyNames>
</Contributor>
```

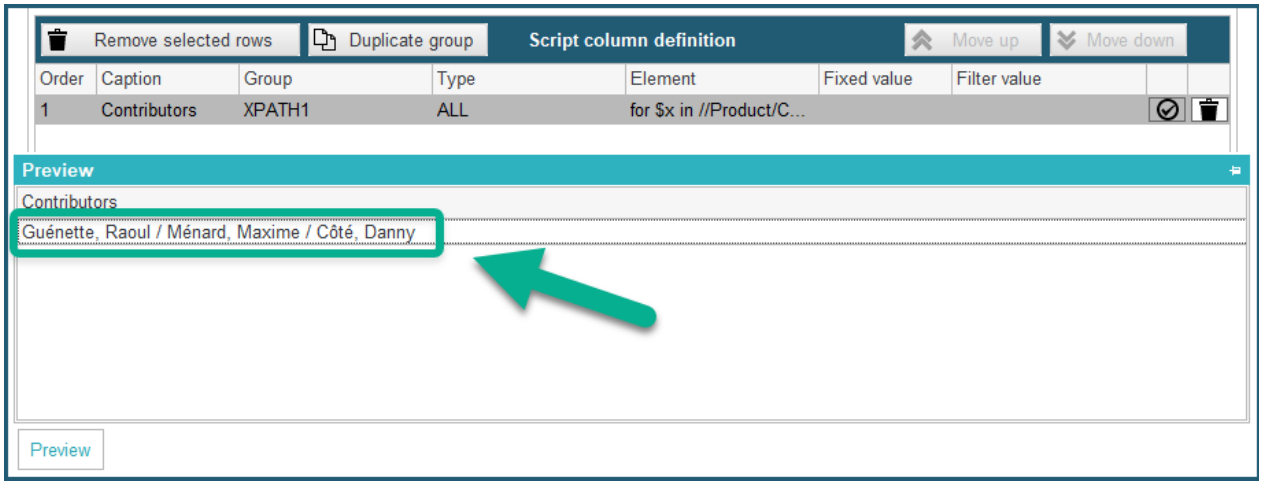
Suppose that we want to export all the contributor names to a single column of a flat file and we want to present the Last Name first, followed by a comma and the First Name. To reach

that goal, we will use a FOR instruction that will apply a "concat" function to each instance of "//Product/Contributor" composite. The corresponding XPATH expression will look like this:

```
for $x in //Product/Contributor
return concat($x/KeyNames, ', ', $x/NamesBeforeKey)
```

Notice that to make it work within an XPATH column of an ONIXEDIT export script, you must select the option "Process all values" at the bottom of the XPATH column dialogue:

For the above ONIX snippet, the result will then be:

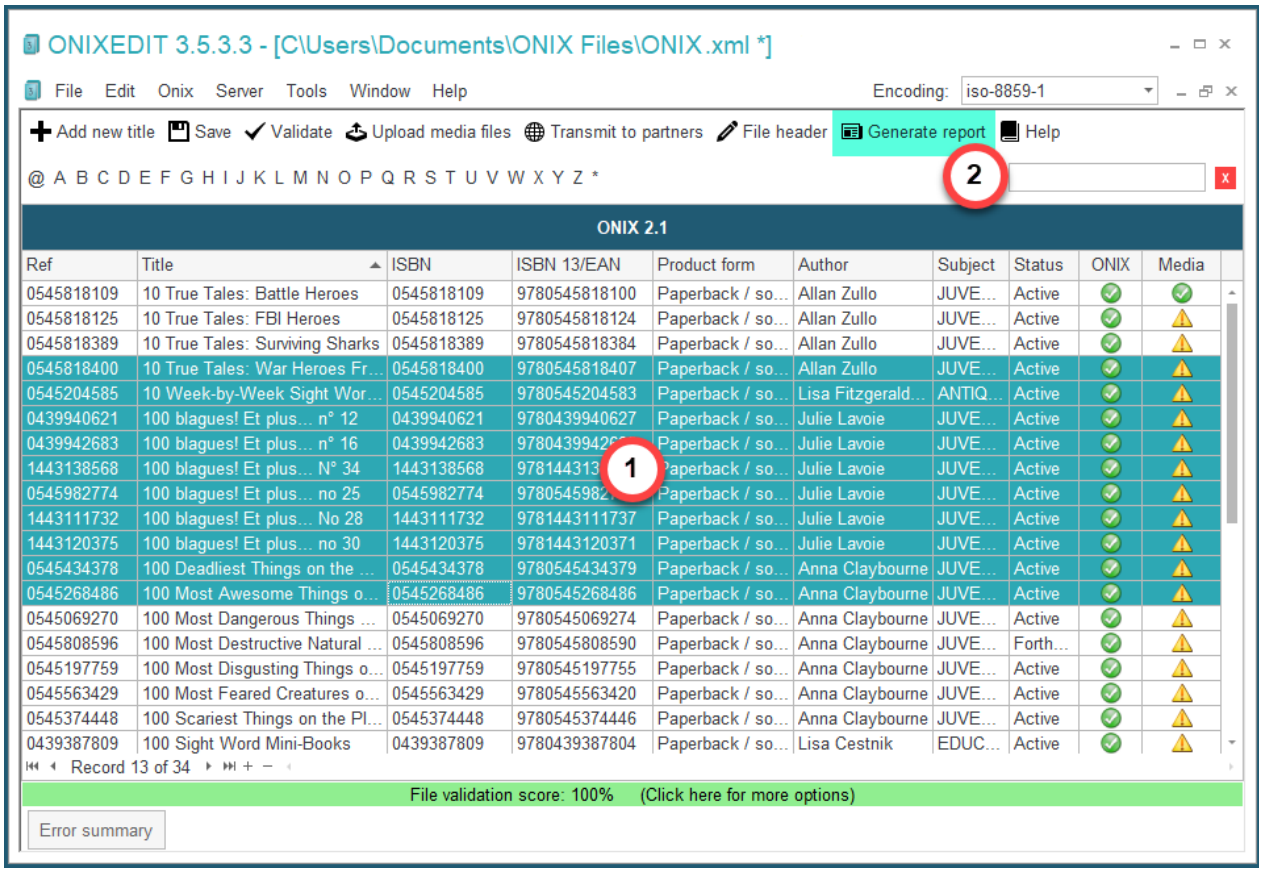



**XPath references:**

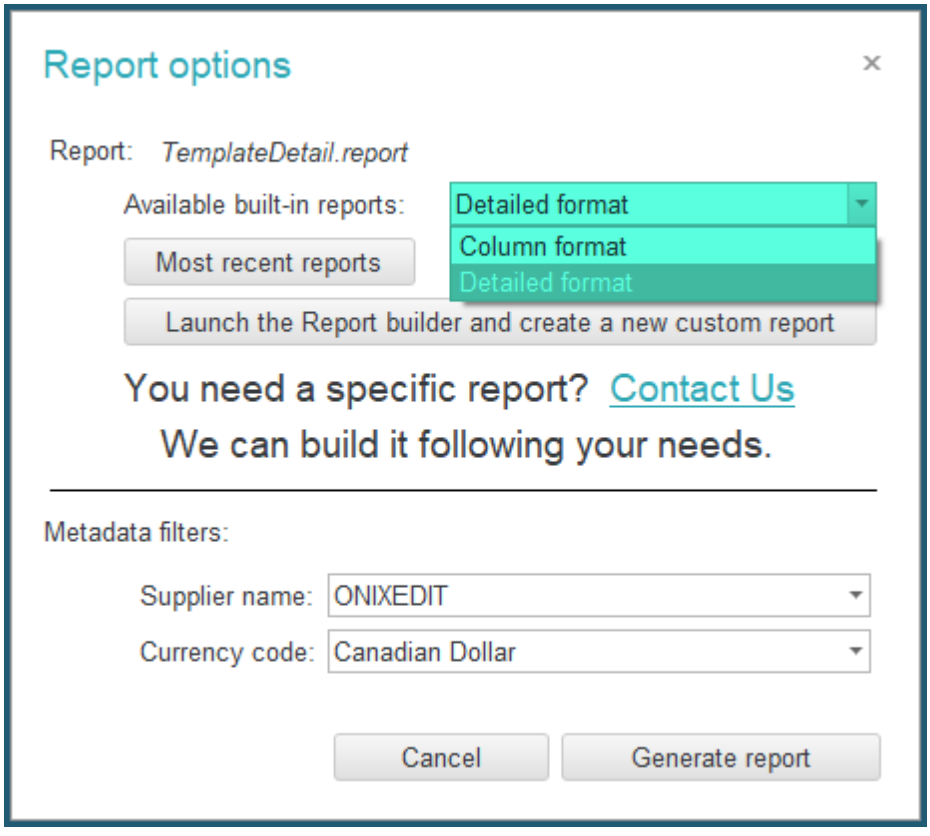
- Basic syntax: https://www.w3schools.com/xml/xpath_syntax.asp
- Functions: https://www.w3schools.com/xml/xsl_functions.asp
- Advanced XPATH 3.1 syntax documentation from Saxon: https://www.saxonica.com/html/documentation/expressions

## Create a report

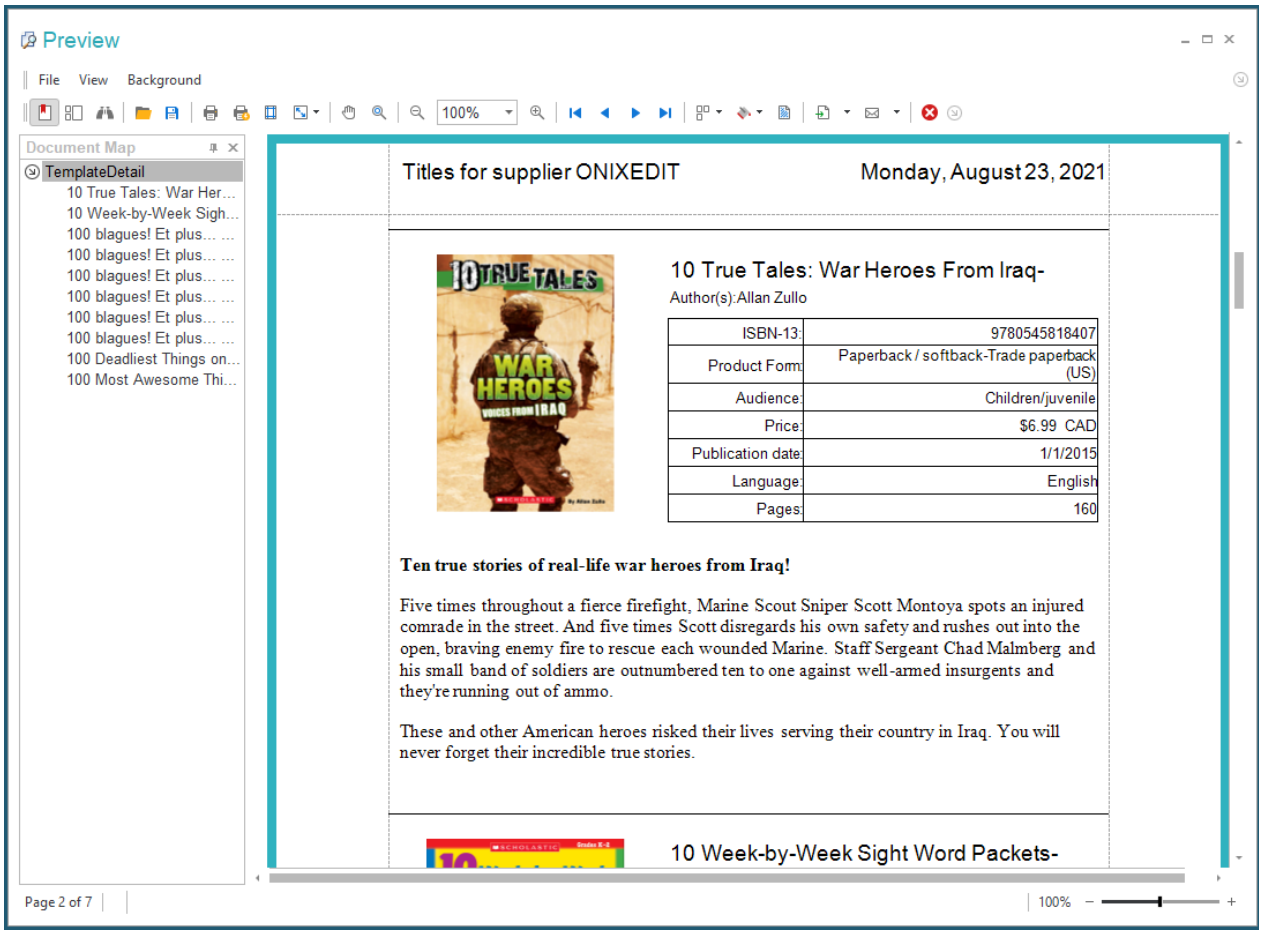
With **ONIXEDIT**, you can create awesome reports for your marketing purposes based on your ONIX metadata. You just have to select the titles for which you want a report and click on the "**Generate report**" button from the tool bar:



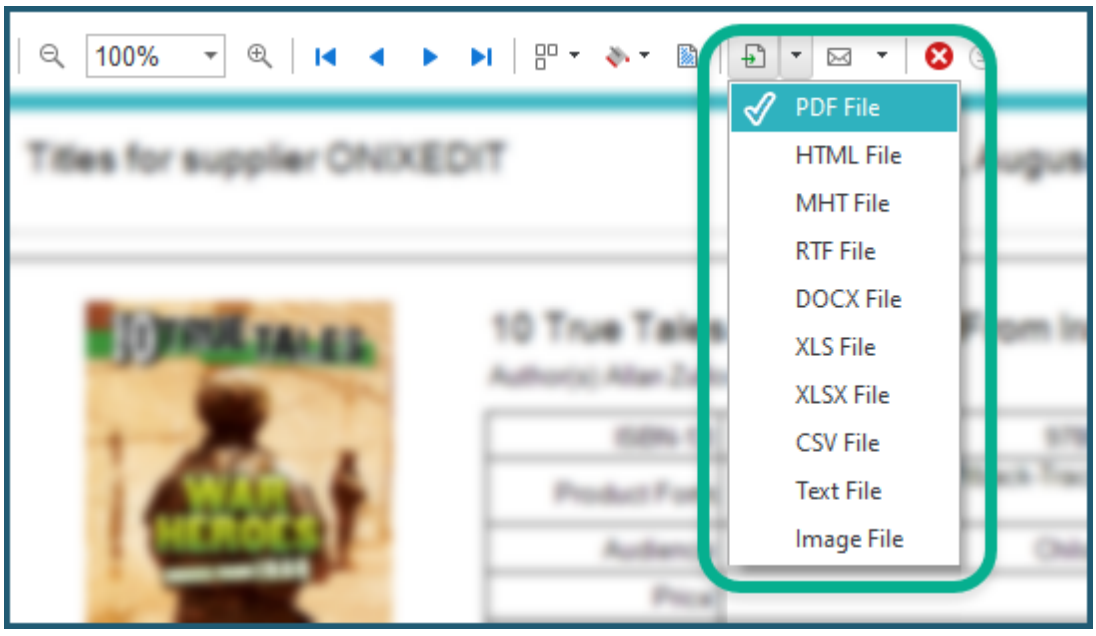

You will find 2 built-in reports that are ready to use:



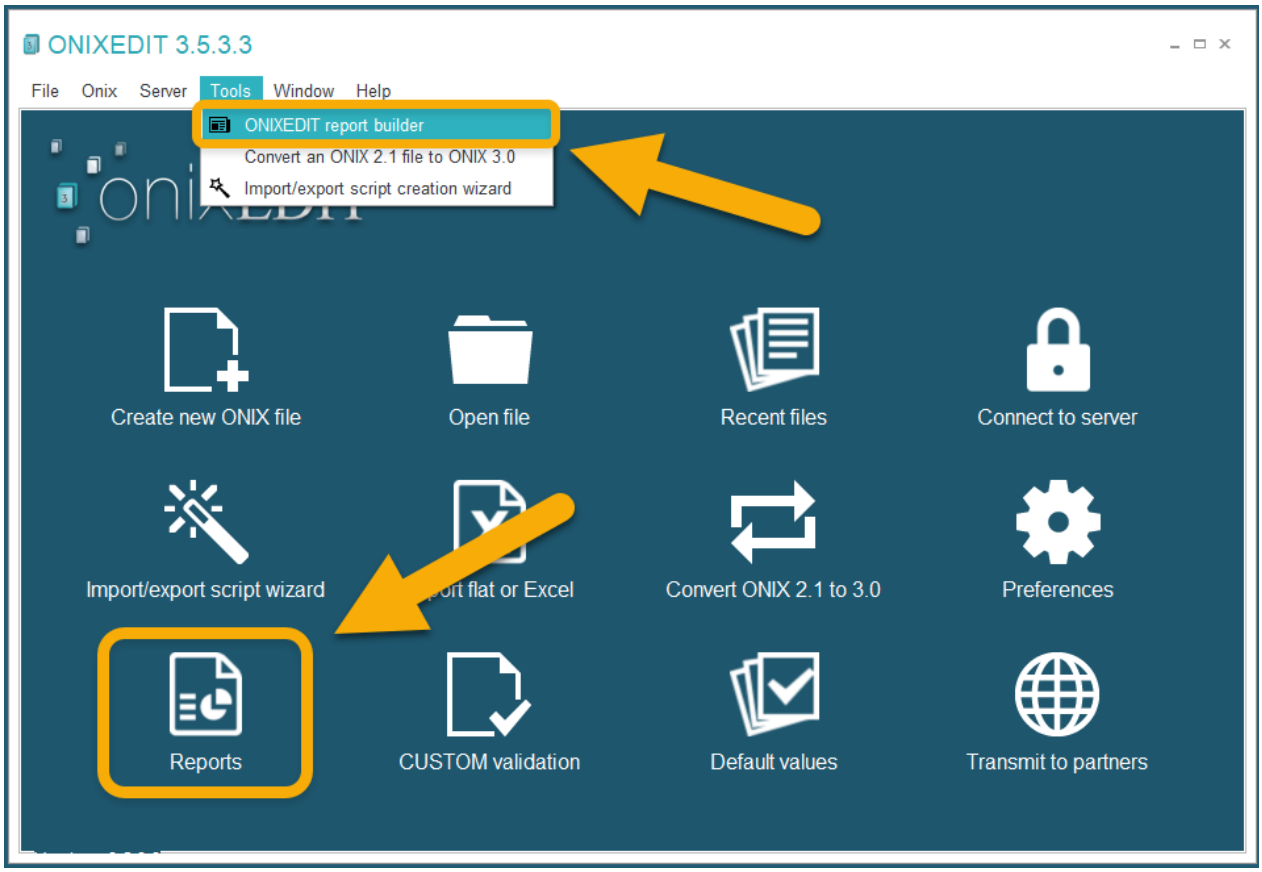

For instance, this is the Detailed format report:



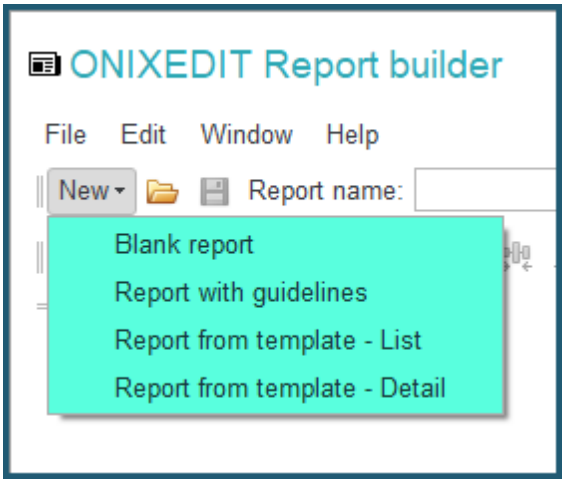

Of course, you can print your reports, but you can also save it in different file formats:

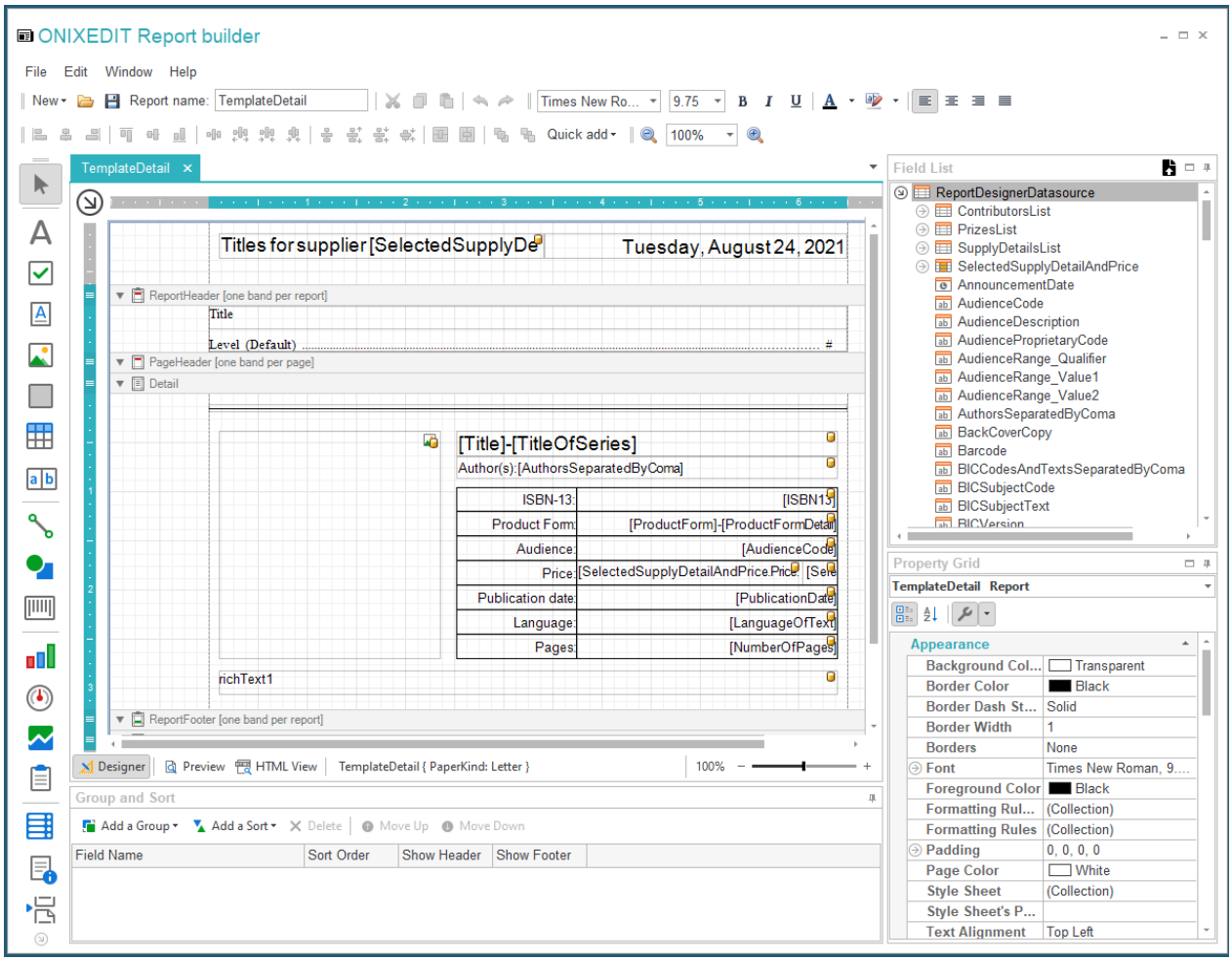



You can also create your own reports and share it with your colleagues using our Report Builder:

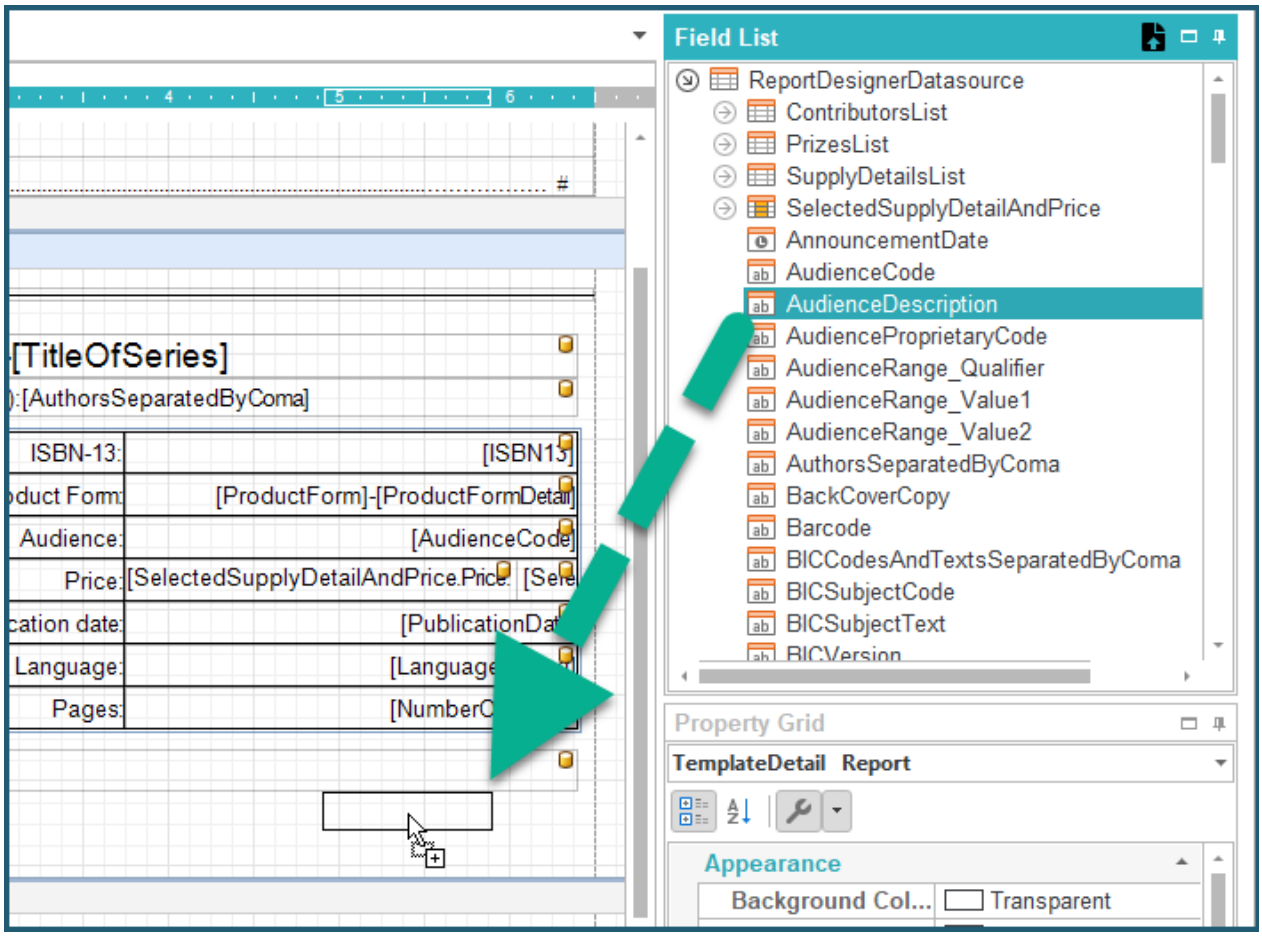



Using the Report Builder, you can create a new report from scratch or use one of our built-in reports as a template:

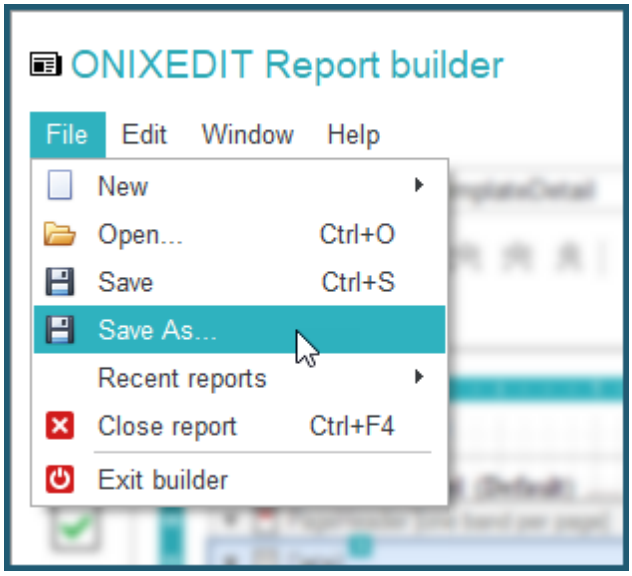




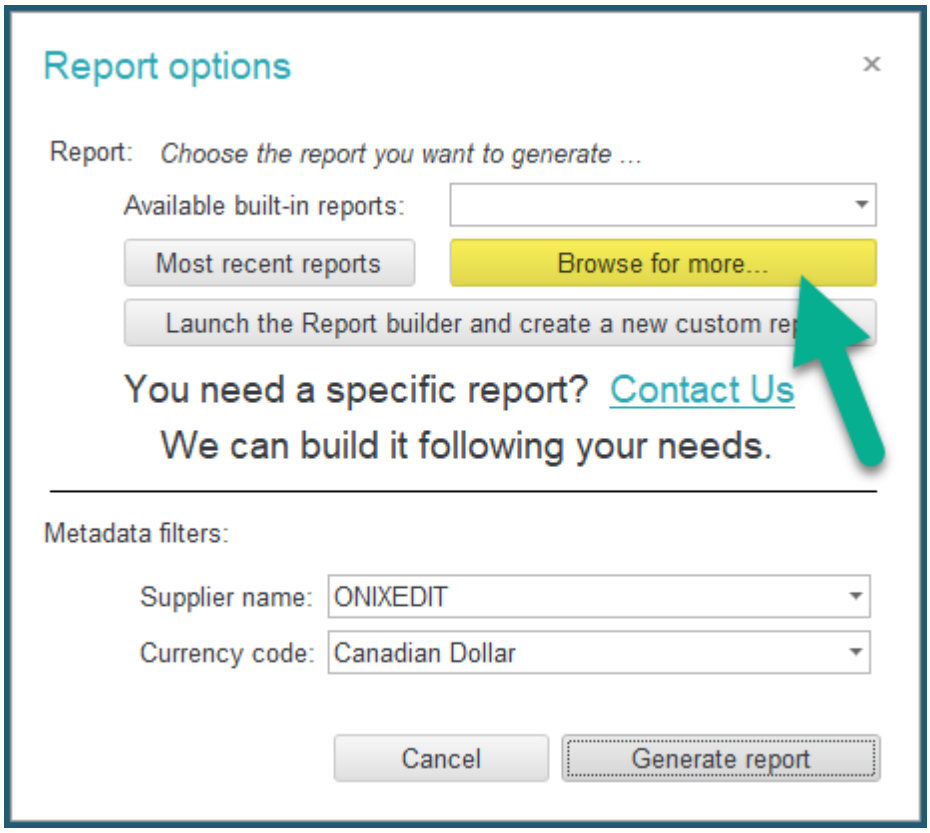

You will find pre-defined ONIX fields in the "**Field list**" panel that you can place on the working surface of the report by drag & drop:



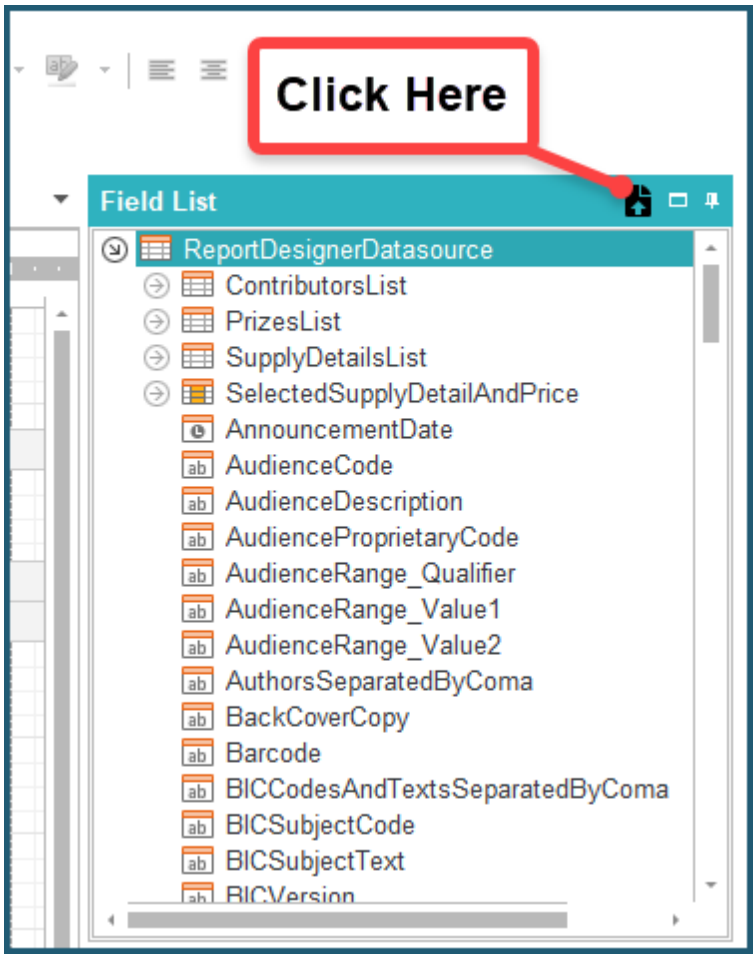

Once your report is completed, you can save it to your PC:



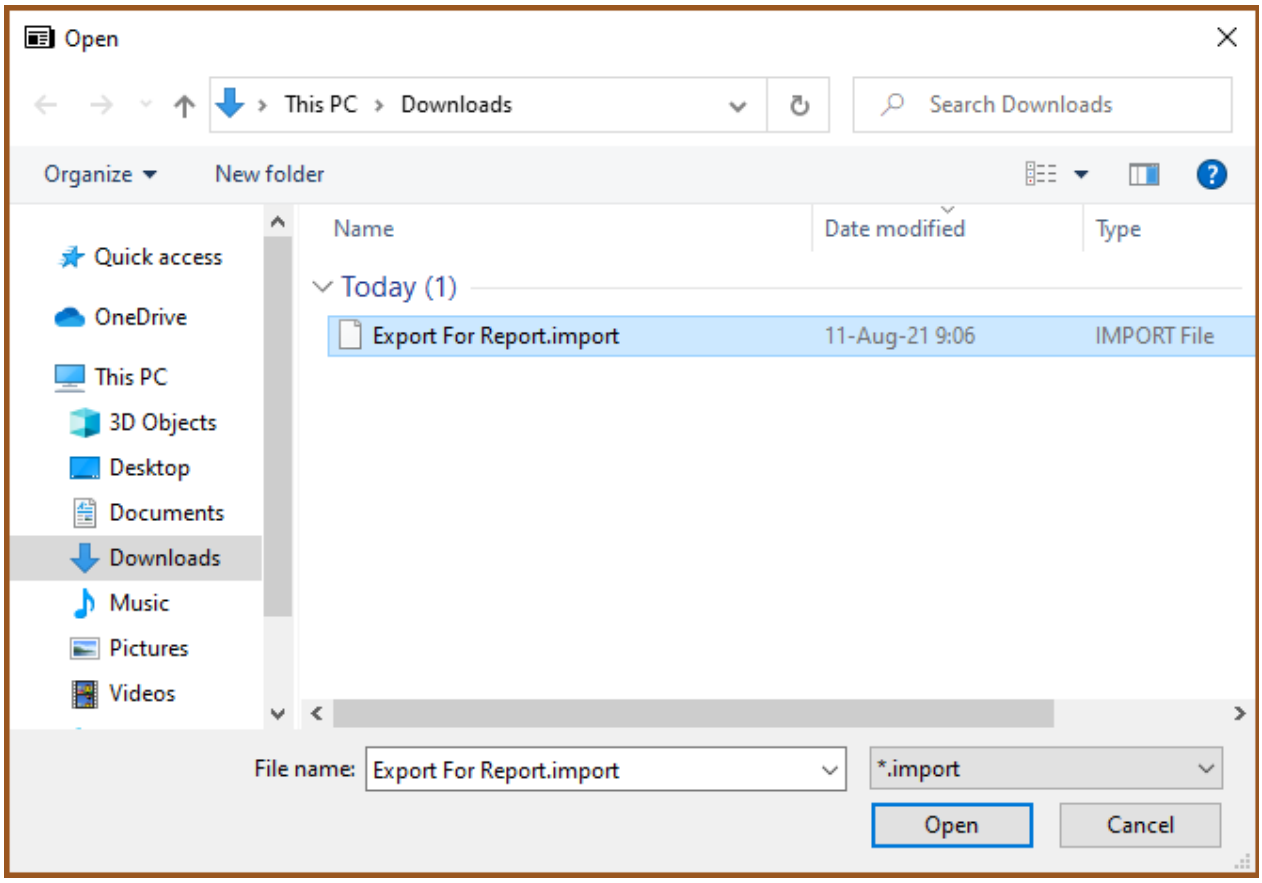

And use it with the "**Browse for more**" button from the "Generate Report" tool:



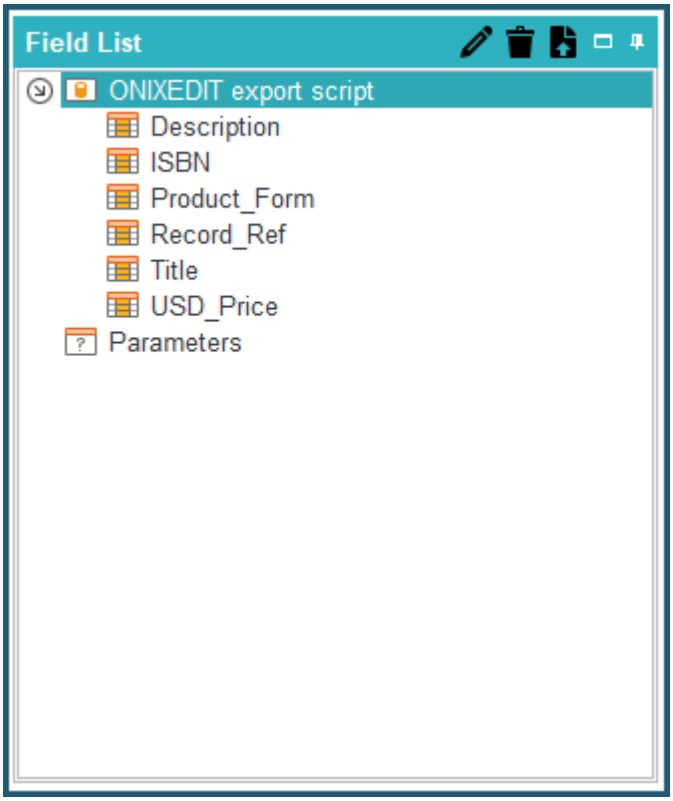

Since version 3.4.9, you can now modify the default Field List to suit your exact needs simply by binding an ONIXEDIT Export Script to your report. As you surely already noticed, the default Field List provides only the most common ONIX fields that you may need. However, if you created an export script with very specific ONIX elements or even XPATH columns, you can now associate your export script to your **ONIXEDIT** report. To do so, just click on the following button that is shown in the Field List header:




A standard Open File window will appear. Locate your **ONIXEDIT** Export Script and open it:




As a result, you will find each of your export script columns in the Field List:




**ONIXEDIT** reports are based on the commercial component Report Designer from DevExpress. You will find complete documentation about it here.

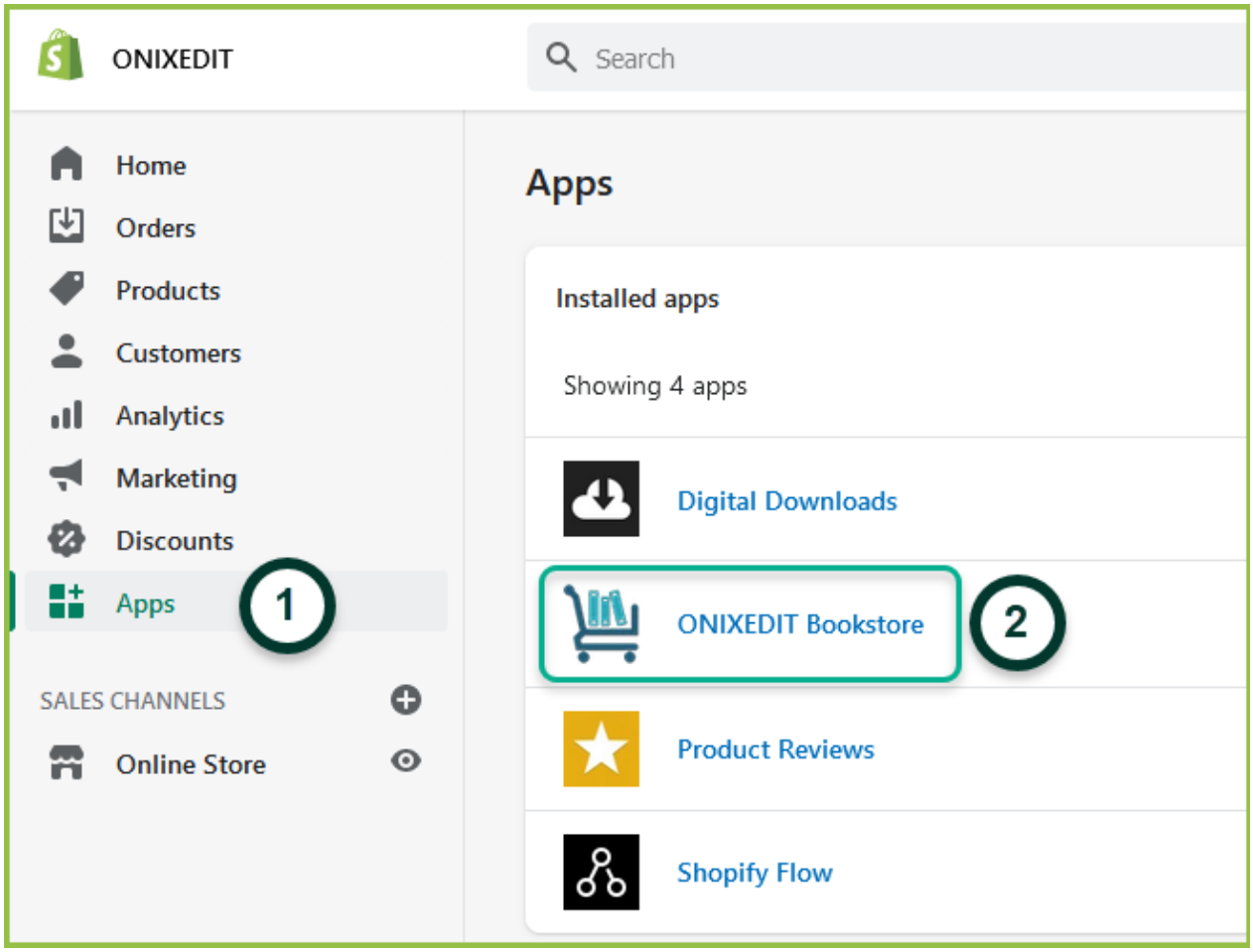
## Configure ONIXEDIT Bookstore for Shopify

ONIXEDIT Bookstore is a free Shopify App designed to help anyone having **ONIXEDIT** Regular, Pro or Cloud to automate creation/update of a complete Shopify store directly from an ONIX metadata source. All you need is any edition of **ONIXEDIT** (starting from version 3.4.3), a Shopify store and our Shopify app (install it from here) and you'll be ready to sell your books online in a snap.

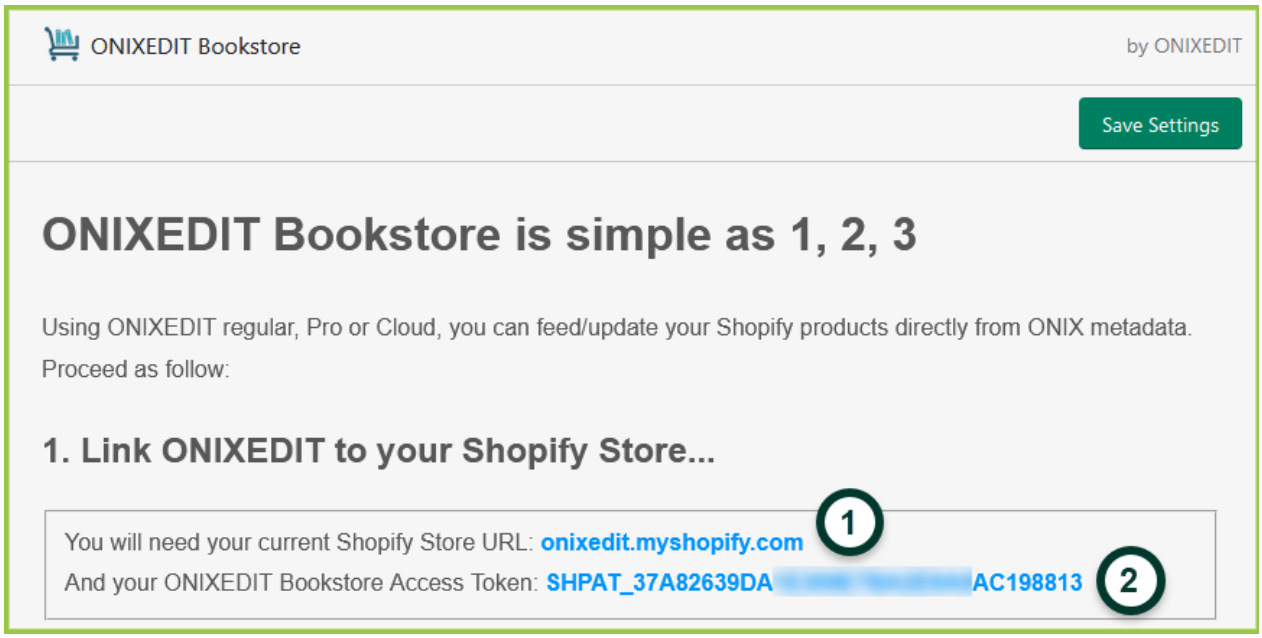
To configure ONIXEDIT Bookstore with your Shopify store and **ONIXEDIT**, follow these steps:

1- Install ONIXEDIT Bookstore at your Shopify store from this installation page.

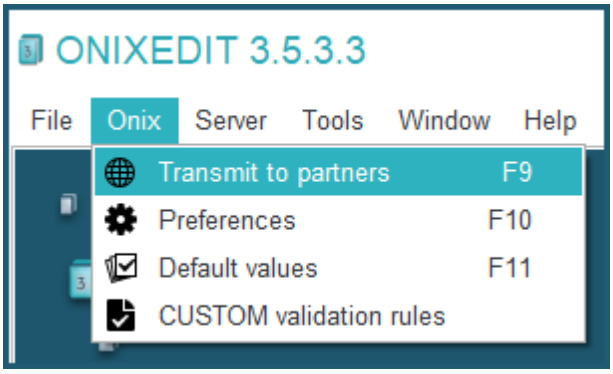
2- Once installed at your Shopify Store, click on your Shopify Apps menu, then on ONIXEDIT Bookstore:



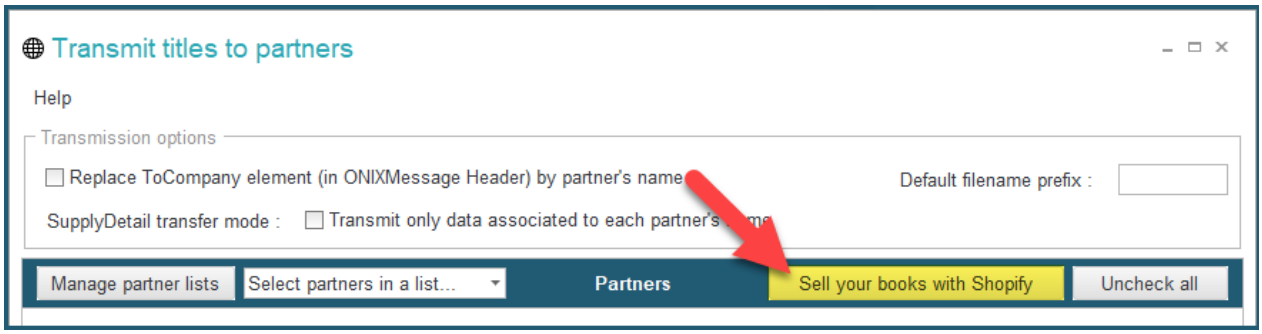

3- On top of the ONIXEDIT Bookstore configuration page, you will see your Shopify Store URL (1) and your ONIXEDIT Bookstore Access Token (2). You will have to copy each item to paste it in your **ONIXEDIT** software:



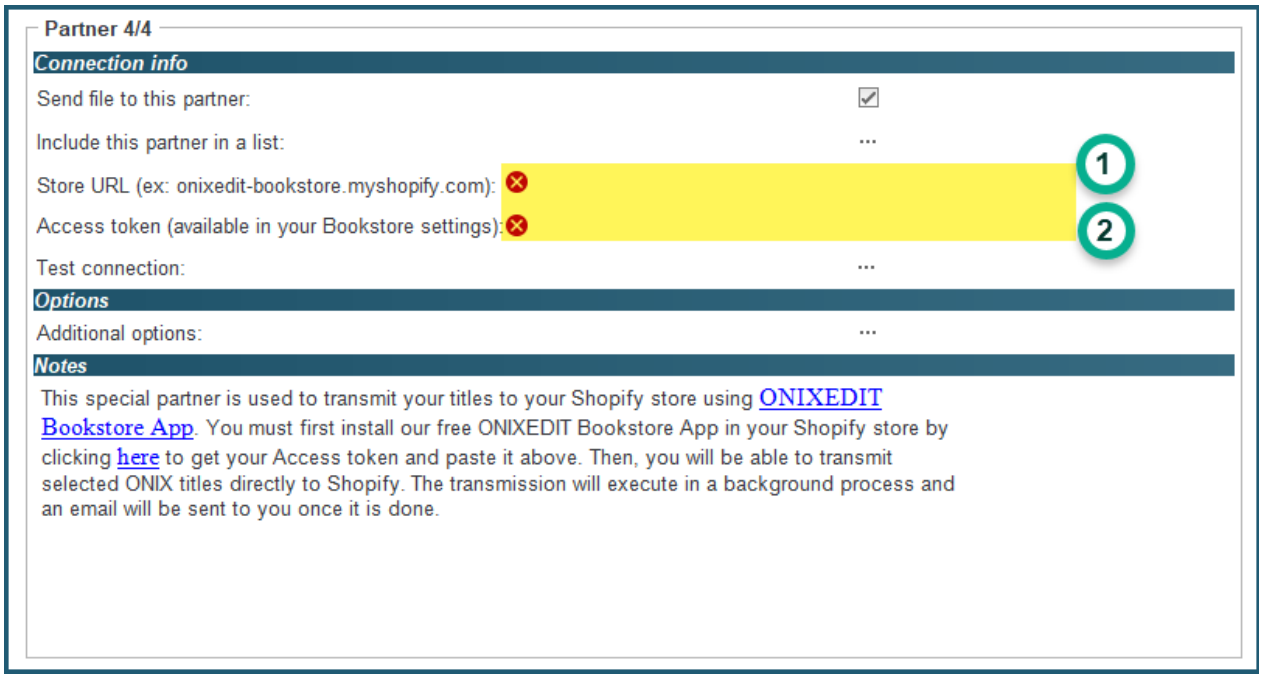

4- Launch **ONIXEDIT** and select menu **Onix / Transmit to partners** (or press **F9** key):



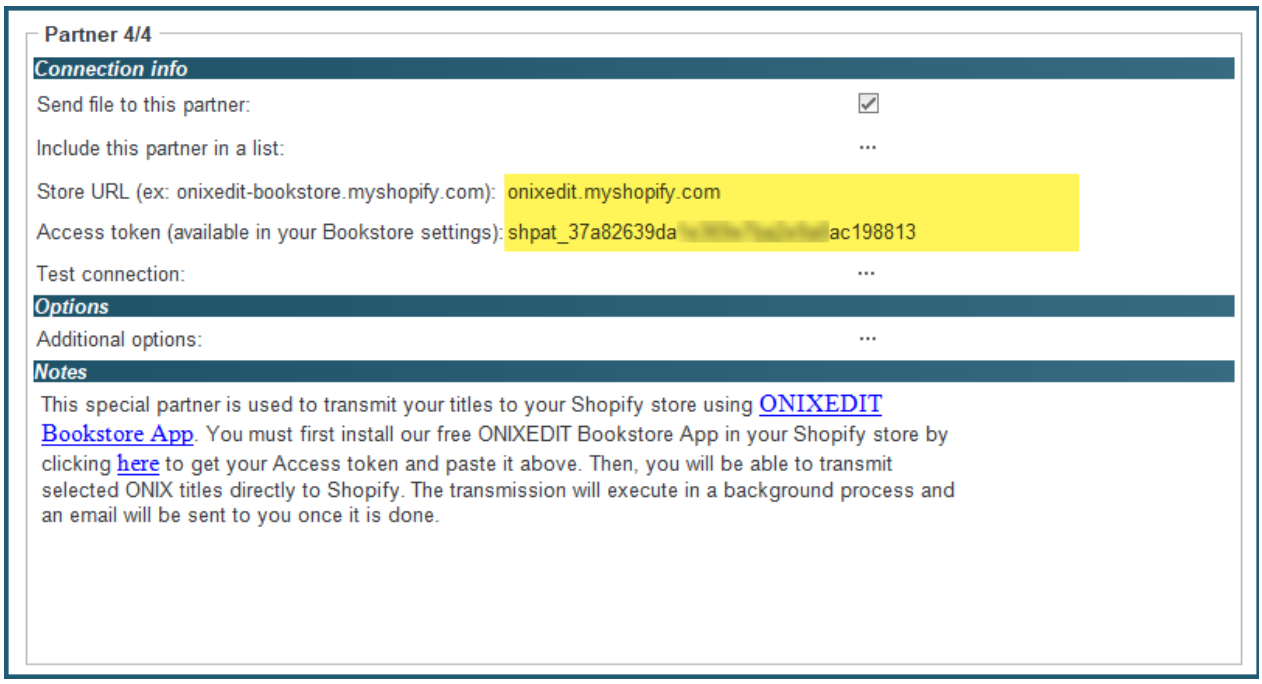

5-Click on the button "**Sell your books with Shopify**":



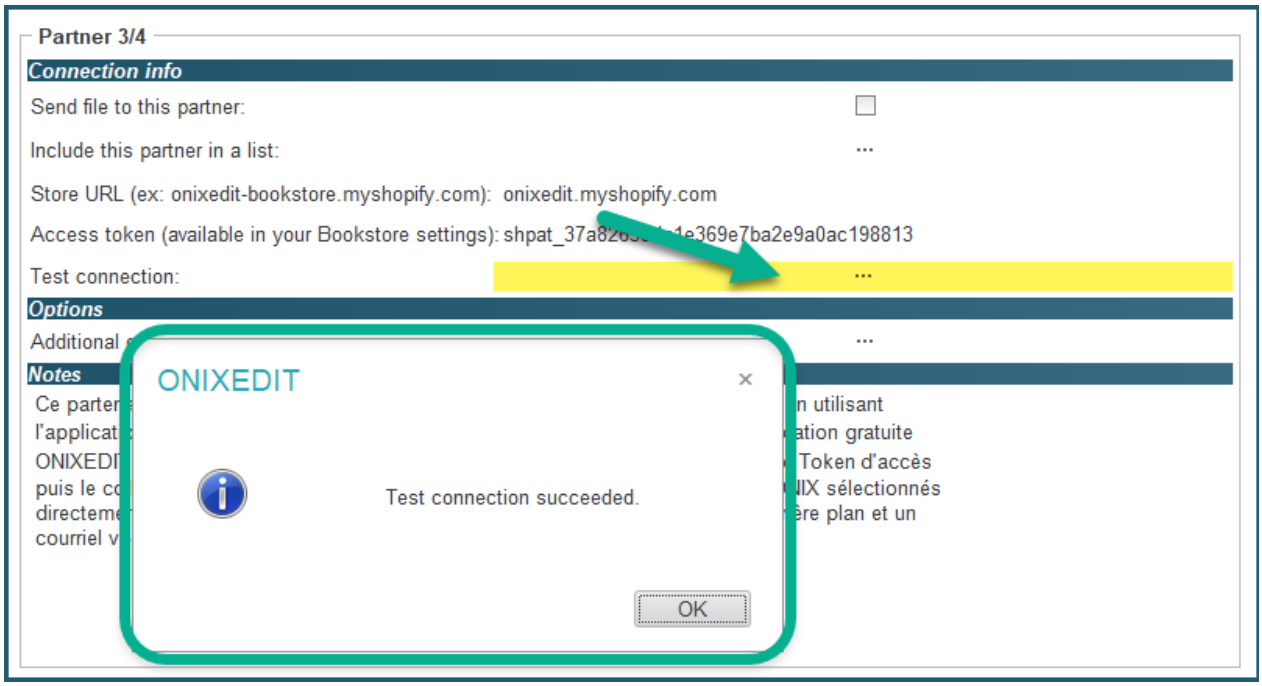

6- Copy/Paste the Shopify Store URL (1) and your ONIXEDIT Bookstore Access Token (2) that you get at step #3 to the corresponding fields of your **ONIXEDIT** partner record:




You should get something like this:




7- Finally, test the connection with Shopify by hitting the **Test Connection** button:




You are now ready to send your ONIX titles directly to Shopify as you would do with any regular partner. See Transmit to partners tool.

# Appendix

## List of ONIX 2.1 elements in ONIXEDIT

The following table represents the complete list of ONIX 2.1 information elements supported by **ONIXEDIT** with, for each one, the reference issue from the ONIX documentation:

## List of ONIX 3.0 elements in ONIXEDIT

The following table represents the complete list of ONIX 3.0 information elements supported by **ONIXEDIT** with, for each one, the reference issue from the ONIX documentation:

If you cannot see these tables, please refer to the web version on the ONIXEDIT website.