onixEDIT

Server Edition

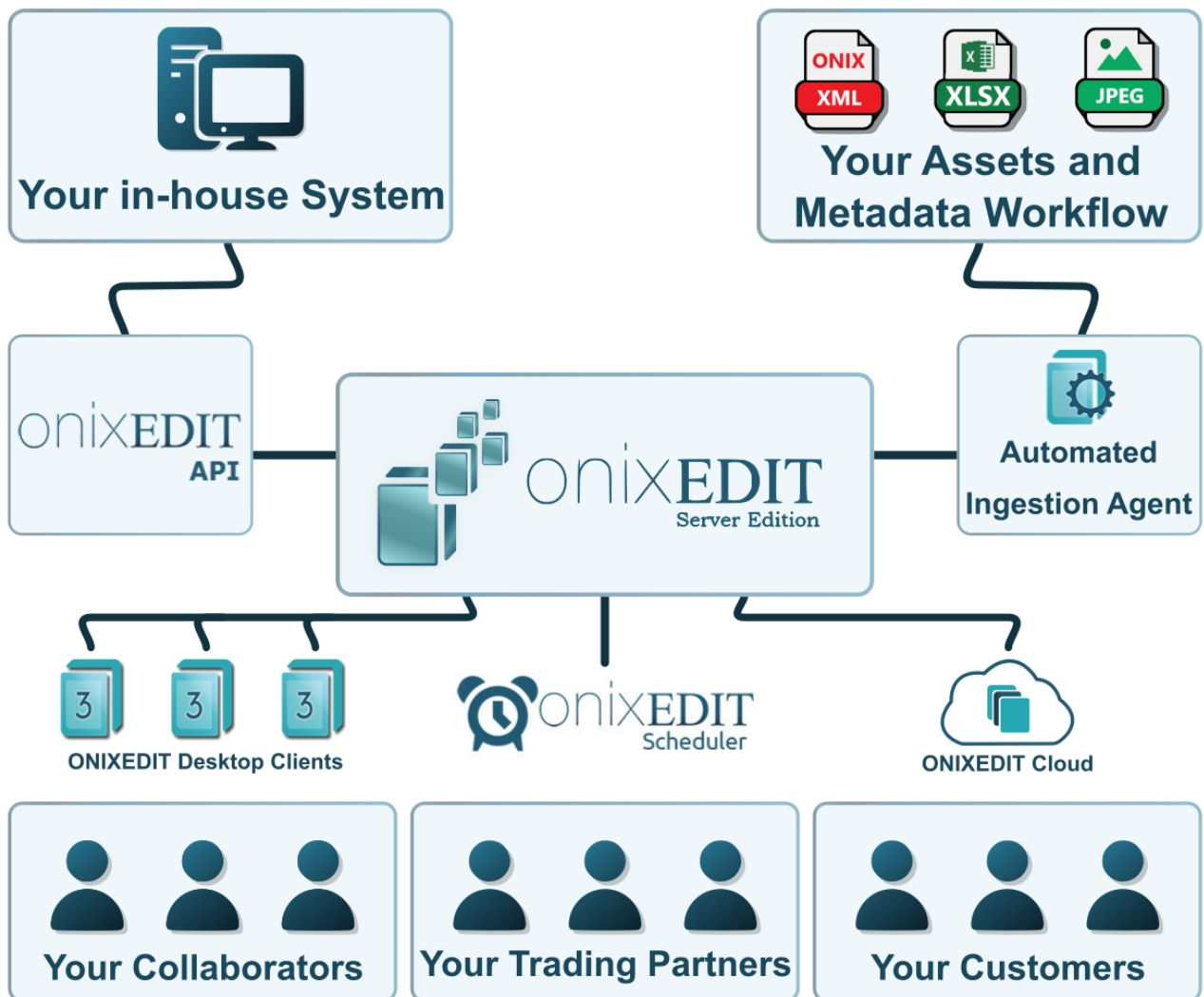## User Manual

Table of contents

Introduction

Welcome to ONIXEDIT Server Edition ©

ONIXEDIT Server Edition is the client-server version of ONIXEDIT that is designed to collect, manage and share your metadata with clients and partners.

ONIXEDIT Server Architecture:

This open and modular system is composed of:

- a powerful SQL database to store your ONIX metadata,
- our Media File Server as your asset manager,
- ONIXEDIT Pro as the client interface to manage your ONIX metadata,
- ONIXEDIT Web Form to allow your users and clients to access their ONIX titles,
- an automated ingestion agent to convert and import metadata from different sources,
- ONIXEDIT Scheduler to automate transmission of metadata to your partners,
- our Web Service API to integrate your legacy system with ONIXEDIT Server.

ONIXEDIT Server is our most advanced ONIX solution. No matter if you are a metadata aggregator who wants to normalize and automate metadata ingestion from publishers or a large publisher who wants to simultaneously maintain thousands of ONIX titles by different users from anywhere, ONIXEDIT Server is for you.

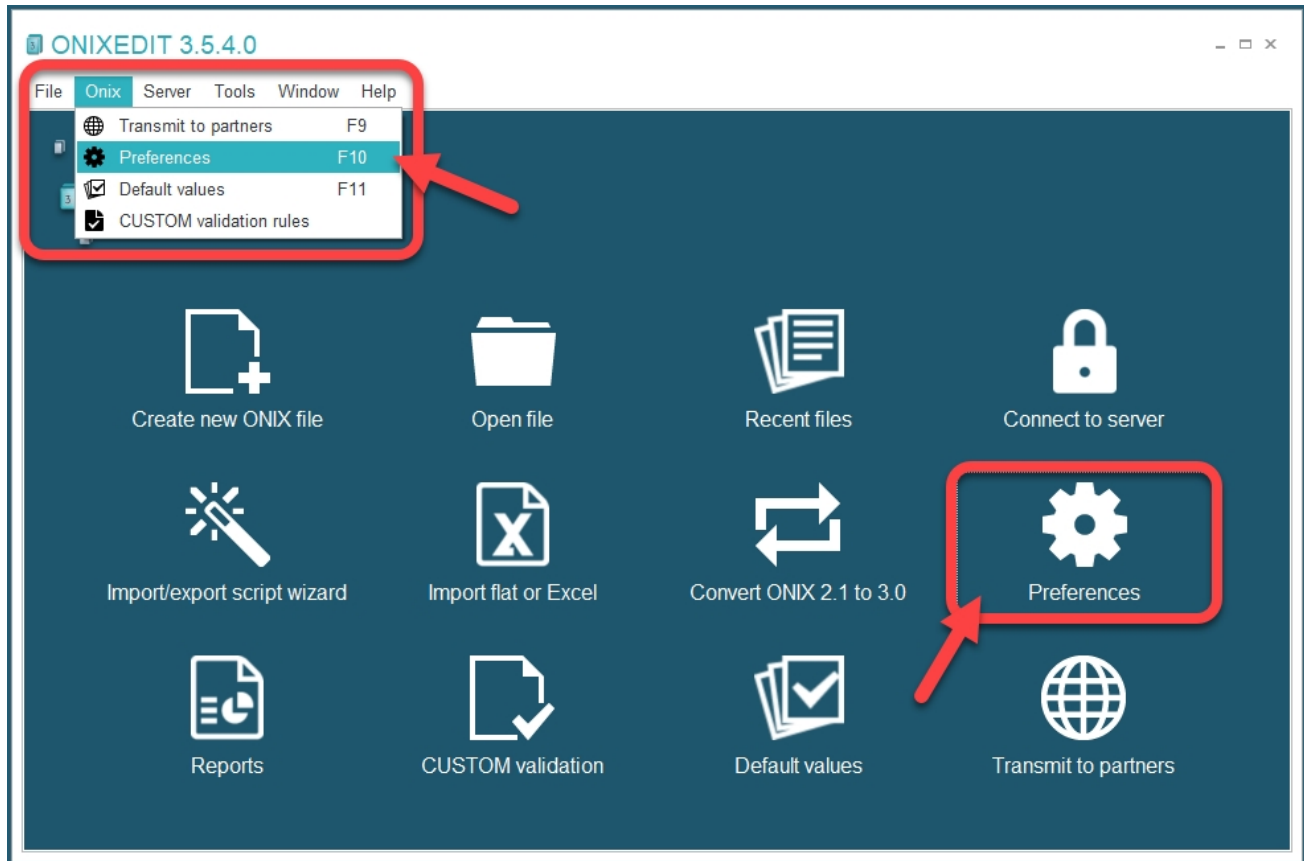## ONIXEDIT Server administration

If you are the owner of an **ONIXEDIT Server** license, this chapter is for you. You will learn how to:

- Manage Catalogues
- Set Catalogue Actions
- Manage Users and their access rights
- Manage Custom fields
- Manage Media Space
- Manage Lock Profiles
- Manage Media File Types for ONIXEDIT Cloud
- Manage ONIXEDIT Cloud columns
- Set Contributors Authority List
- Allow updates on different catalogues

Manage Catalogues

ONIXEDIT Server stores ONIX metadata (2.1 or 3.0) in isolated repositories called **catalogues**. Only the Server administrator is allowed to define catalogues. To do so, they must use the **Preferences** module of ONIXEDIT Pro (the preferences can be accessed via either the main menu *Preferences* button, the menu *Onix / Preferences,* or the *F10* key, as shown in the image below.):

Once in the Preferences module, click on **Server Edition** tab, then **Catalogues**. You should see this screen:

To use ONIXEDIT Server Edition, you must create **at least one catalogue**. There is **no limit** to the **number of catalogues** you can create. The only limitation you may have concerns the number of titles you are authorized to define among all your catalogues (this limitation does not apply to ONIXEDIT Server "on premises").

To define a catalogue, click on the *New* button:

When creating a catalogue, you must determine the **ONIX standard** (2.1 or 3.0) of your new catalogue:

This choice can't be reverted. It determines how the titles you will create in your new catalogue will be validated and, of course, which kind of ONIX files you will be able to read or save with that catalogue.
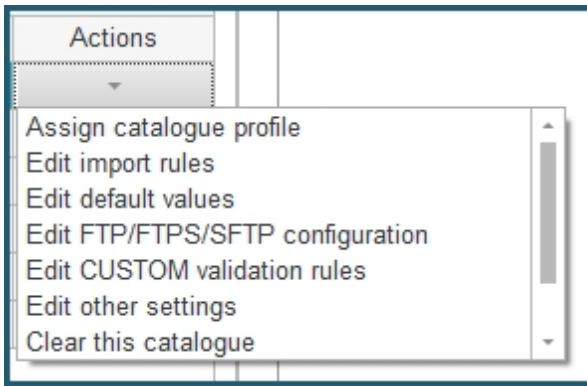
Once your choice is made, a new catalogue record will be added to the catalogue list.

To complete it, you will have to:
1. Give it a name.
2. Give it a contact. (it may be simply a name, or an assigned publisher)
3. Give it a number of allowed titles.

4. Optionally, more settings can also be found under the Actions menu on the far right:

Each time you create or modify a catalogue or its options, you will have to **save** your Preferences module to apply the modifications to ONIXEDIT Server. To do so, click on the *Save* button at the bottom of the Preferences window:

General Catalogue Options

Under the catalogue list, you will find one general catalogue option and a button:

- o *Allow updates of titles from different catalogues when importing a metadata file*: See the section Allow updates on different catalogues.
- o *Set next RecordReference value for Catalogues with Auto-Numbering activated*: This button allows you to set the next sequence ID for catalogues with the auto-numbering option. By default, the next ID is 1, but you can set it to any higher value.

Deleting a catalogue

If you want to delete a catalogue, you have to clear its content first. You won't be authorized to delete a catalogue if it contains any titles. Fortunately, you don't have to delete titles one by one as there is a handy function that will help you clear a catalogue's content quickly. To delete a catalogue, proceed as follows:

1. Select the catalogue(s) you want to delete:

2. Click on the button ***Clear selected catalogues*** and confirm the action. Be careful, this operation is **not reversible**:

**3.** Once the catalogues are cleared, you can click on the *Delete* button and confirm the deletion of the selected catalogues:

Manage Profiles

ONIXEDIT Server allows you to gather catalogues into different groups called "**profiles**". You can define multiple profiles with different settings such as the import rules, the default values and the custom validation, which will then directly be applied to each catalogue under this particular profile. To manage your profiles, you must use the **Preferences** module of ONIXEDIT Pro (the preferences can be accessed via either the main menu *Preferences* button, the menu *Onix / Preferences,* or the *F10* key, as shown in the image below.):
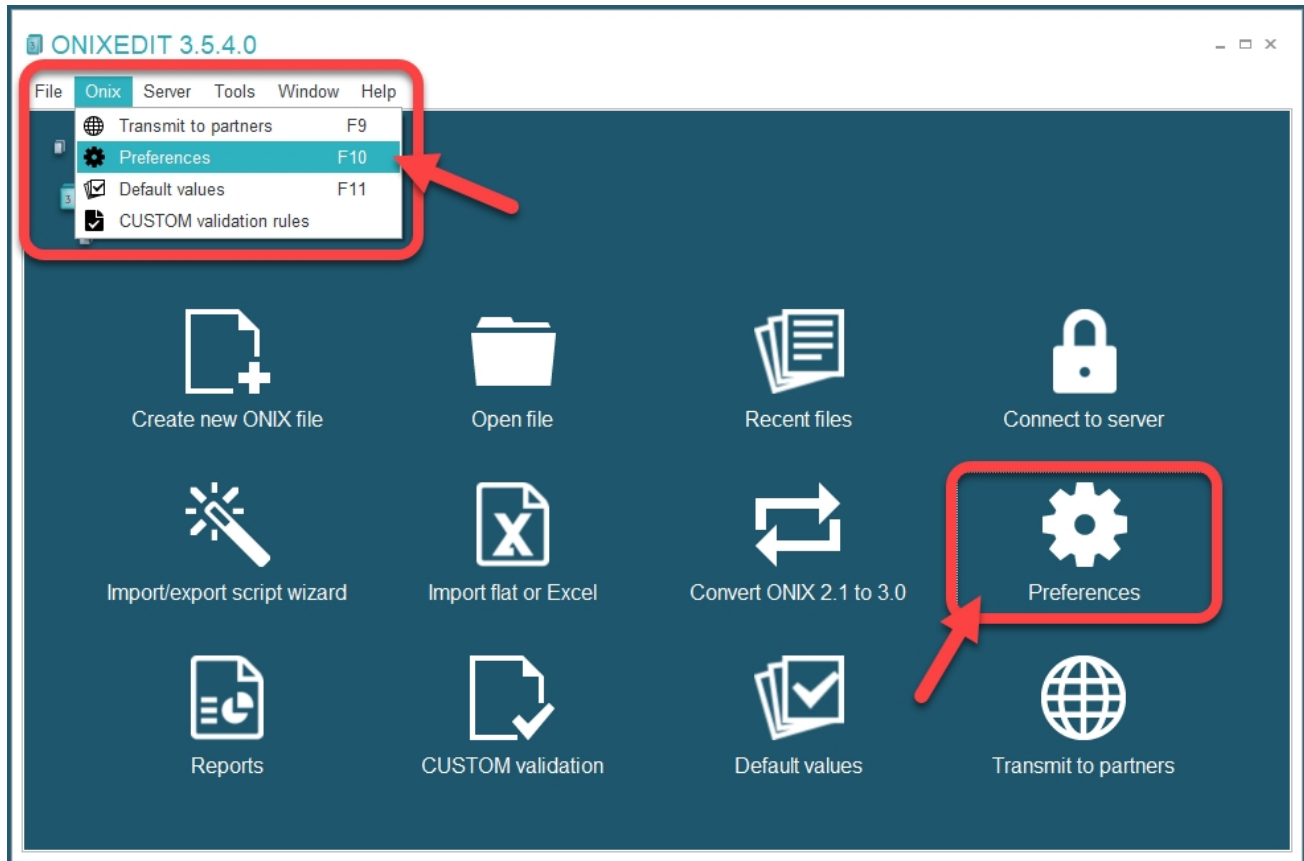
Once in the Preferences module, click on **Server Edition** tab, then **Profiles**. You should see this screen:

In this tab you will see a list of all your profiles. You can create new ones, delete existing ones, and edit their rules. There is **no limit** on the **number of profiles** you can create.

To define a profile, click on the *New* button:

When creating a profile, you must determine the **ONIX standard** (2.1 or 3.0) of your new
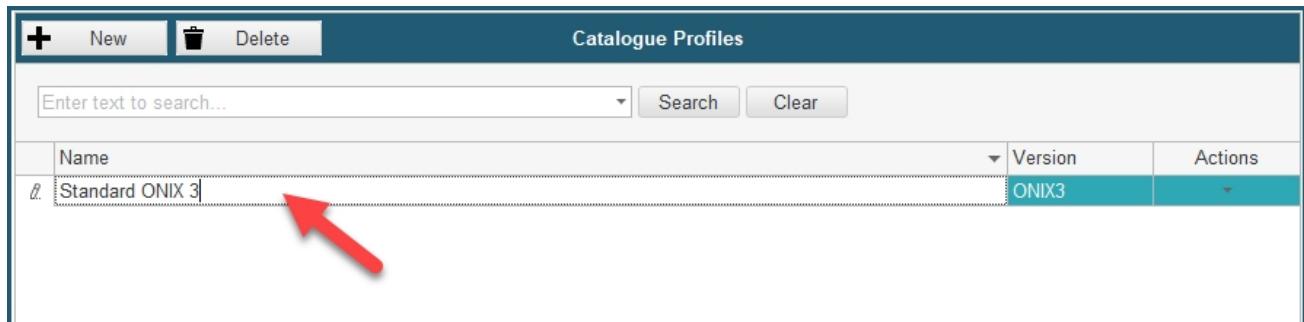
profile:

This choice can't be reverted. It determines which kind of catalogues you will be able to assign to this profile.

Once your choice is made, a new profile record will be added to the profile list.

To complete it, you will have to enter a name for the profile in the *Name* field:

On the far right of the profile record, there is the *Actions* drop down menu. This menu allows you to edit the import rules, the default values, the custom validation rules and some other settings for the profile. Learn more about each of these options in the next section about the Actions menu. The settings of a profile are applied to every catalogue assigned to this profile.

Each time you create or modify a profile or its settings, you will have to **save** your **Preferences** module to apply the modifications to ONIXEDIT Server. To do so, click on the *Save* button at the bottom of the Preferences window:
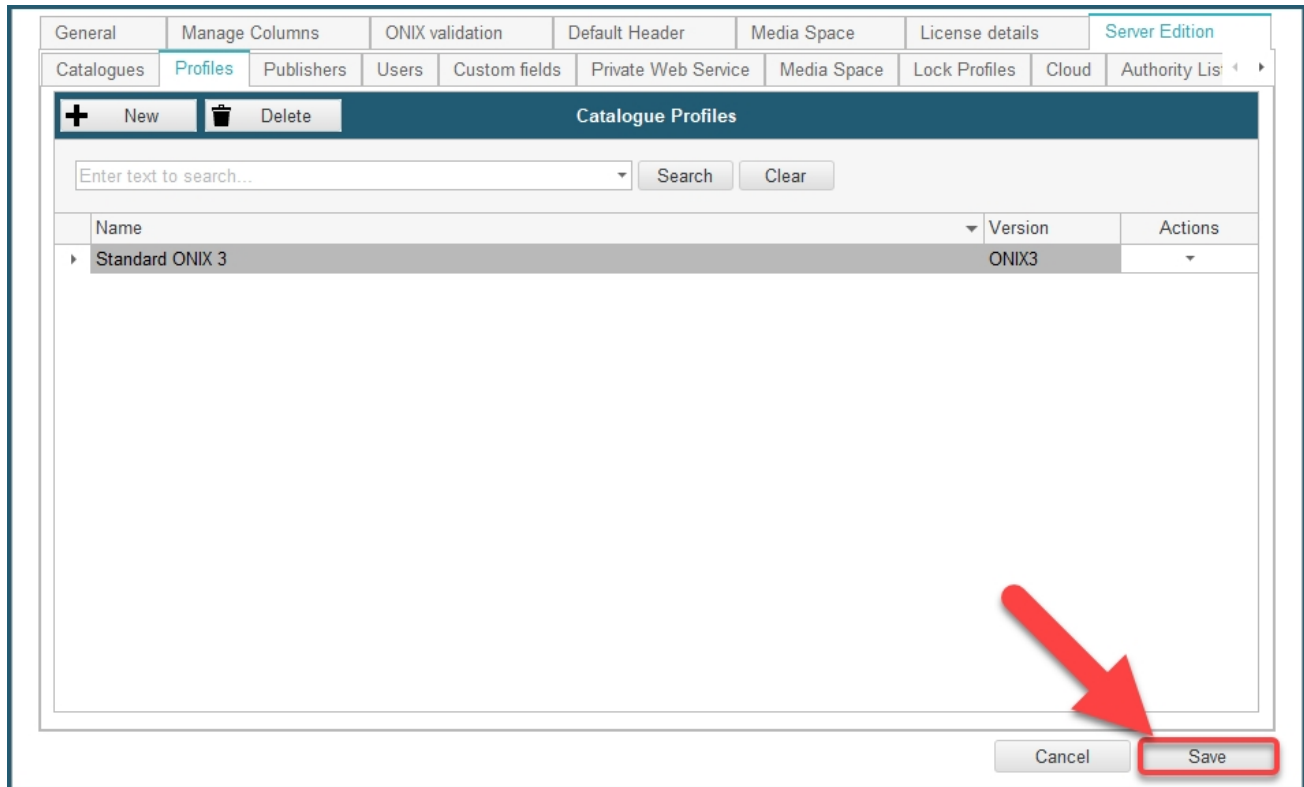
Assigning catalogues to a profile

To assign catalogues to a profile, you first need to navigate to the **Catalogues** tab:
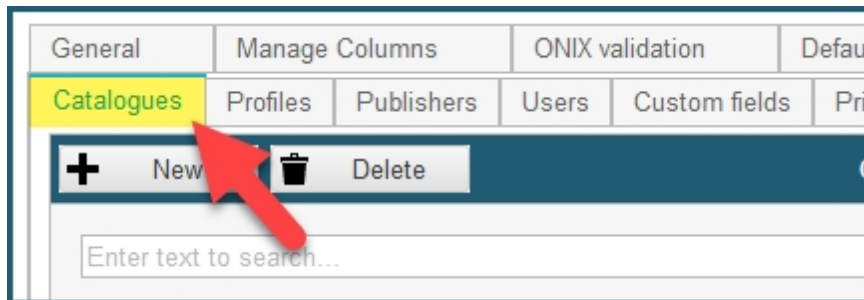
If you already have some created catalogues, you should see a list of those catalogues, similarly to the following image. If you don't and need some help with the catalogues, please refer to the previous section Manage Catalogues.

As you can see highlighted in red in the screen capture above, all of these catalogues fall under the sub-section *Profile: None*. This is because none of these catalogues are assigned to a profile. To assign a catalogue to a profile, click on the *Actions* button of the catalogue you want to assign, and select *Assign catalogue profile*:

A pop-up menu will appear and prompt you to select the profile to which the catalogue should be assigned: (Note that only the profiles with the same ONIX version as the catalogue will appear in the drop-down menu of the profiles to select)
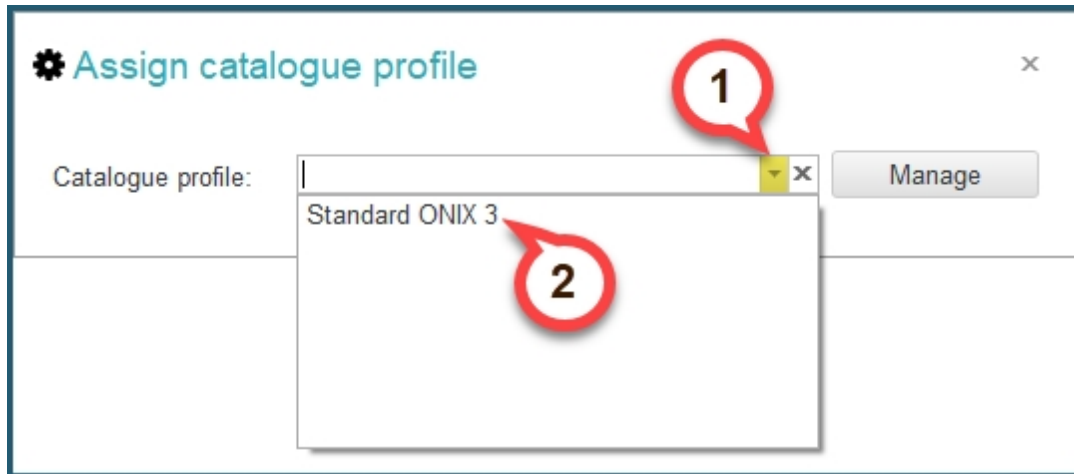
The *Manage* button redirects you to the **Profiles** tab to let you manage your profiles if needed.

Once you have selected the profile to add the catalogue to, you will be asked to confirm the action. Click *Yes* if you want the catalogue to be assigned. Note that you can always dissociate a catalogue from a profile later on if you need to.

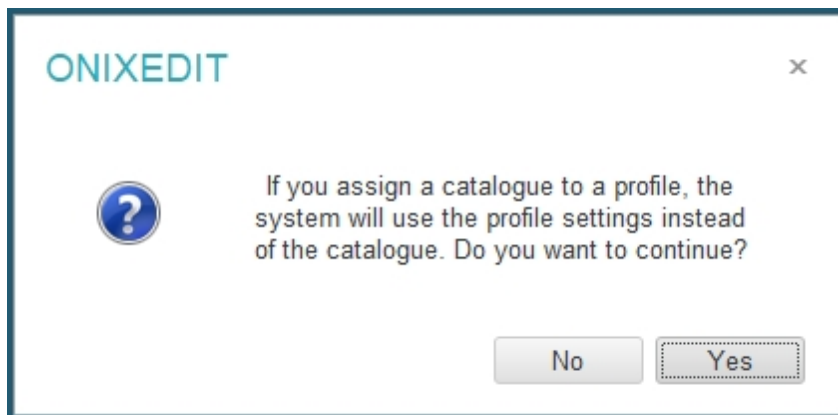As you can see on the picture below, the catalogue was successfully assigned to our profile and now appears under the sub-section of the catalogues list corresponding to this profile:

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
ⓦ Profile: None						
ONIX2	BIG	Maxime	100000	85406	5 %	▾
ONIX2	Hinkler	Hinkler	100	96	92 %	▾
ONIX2	Inner Traditions	Andy	3000	2018	100 %	▾
ONIX3	Les Belles Lettres	Les Belles Lettres	100	99	0 %	▾
ONIX3	MDS 3.0	François	2000	1772	1 %	▾
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▾
ONIX3	ONIXEDIT3	ONIXEDIT	5000	289	0 %	▾
ⓦ Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1098	1 %	▾
			Total: 112500	Total: 90778		

ONIXEDIT will now apply the profile's settings to this catalogue, and any changes to the profile settings will directly apply to the catalogue as well.

Dissociate catalogues from a profile

If you no longer want a catalogue to fall under the settings of a certain profile, you can dissociate the profile in a very similar way to how you assigned it. From the **Catalogues** tab, click on the *Actions* button of the catalogue you want to dissociate, and select *Unassign catalogue profile*: (Note that this option only appears if the catalogue is assigned to a profile)


Deleting a profile

If you want to delete a profile, it is recommended to **dissociate all the catalogues assigned to this profile before deleting it**. Once no catalogues are assigned to the profile, it is safe to delete it. To delete the profile, proceed as follow:
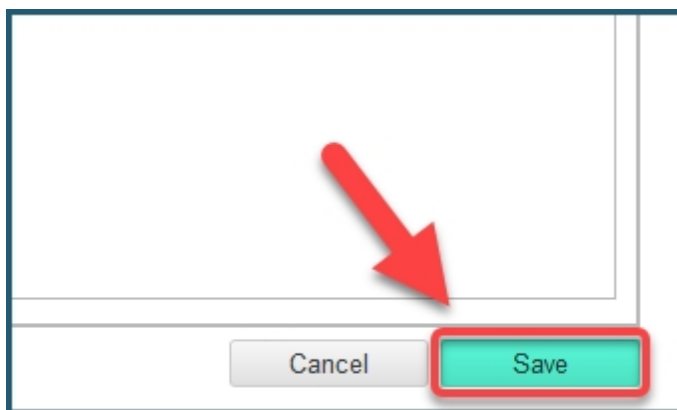
> **1.** From the **Profiles** tab, **select** the profile you want to delete:
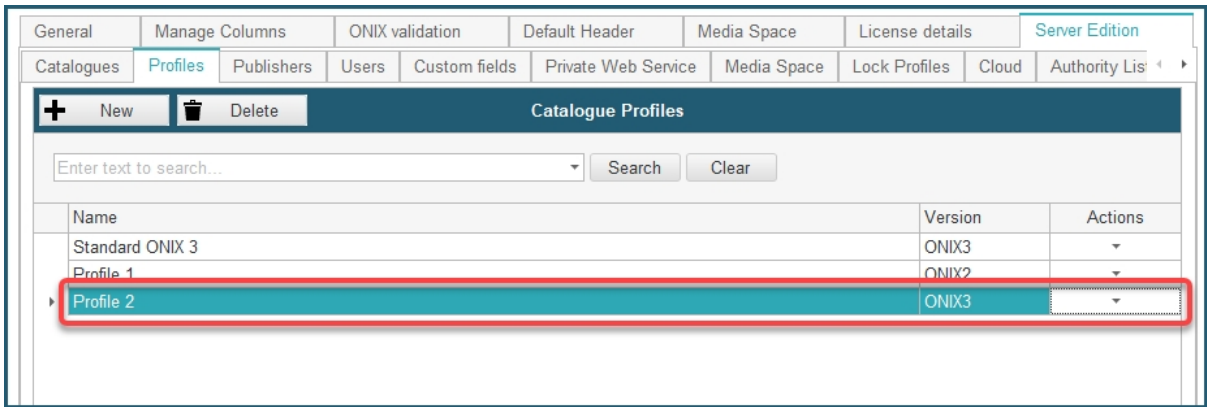
2. Click on the *Delete* button and confirm the action. Be careful, **this operation is not reversible**:
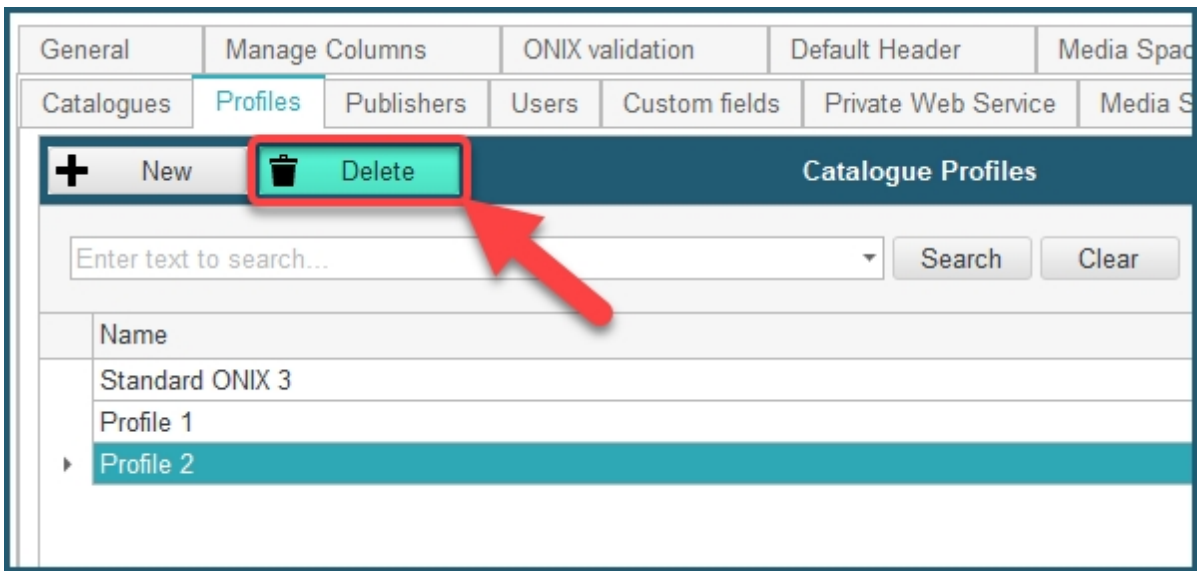
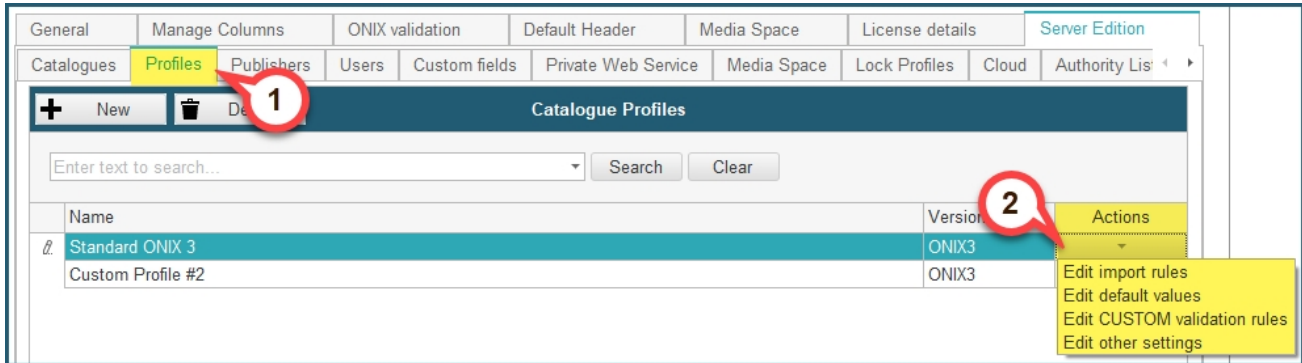**3.** Don't forget to **Save** your changes so that they apply!

Actions menu

The actions menu can be accessed either directly via a catalogue, or via a profile. Here are some different cases:

Case 1: Actions menu of a Profile.
>   This action menu is accessed through the settings in the Profiles tab, and by the Actions button on the far right of the desired profile:

>   Here you can define settings that will apply to every catalogue that is associated with this profile. From this menu, you can:
>>   - Edit import rules
>>   - Edit default values
>>   - Edit CUSTOM validation rules
>>   - Edit other settings
>   You will learn about each one of these in more detail further in this section.

Case 2: Actions menu of a Catalogue assigned to a profile.
>   This action menu is accessed through the settings in the Catalogues tab, and by the Actions button on the far right of the desired catalogue that **is** assigned to a profile:

Here you have the options that only apply to this catalogue. As you can see, options like editing the import rules or the default values don't appear, this is because this catalogue is under a certain profile, which controls these settings for the whole profile. Instead, you find these options:

- Unassign catalogue profile
- Edit other settings
- Clear this catalogue
- Clone this catalogue

Case 3: Actions menu of a Catalogue not assigned to a profile.

This action menu is accessed through the settings in the Catalogues tab, and by the Actions button on the far right of the desired catalogue that is **not** assigned to a profile:

Here, since the catalogue is not assigned to a profile, you have all the options that we saw above, and they only apply to this catalogue. These are all the options:

- Assign catalogue profile

- Edit import rules
- Edit default values
- Edit FTP/FTPS/SFTP configuration
- Edit CUSTOM validation rules
- Edit other settings
- Clear this catalogue
- Clone this catalogue
- Copy default values from another catalogue

In the remaining of this section, you will see in more details the different actions that you can find in the Actions menu:

[Set Import Rules for a catalogue](#)
[Set Default Values for a catalogue](#)
[Define a FTP for ONIXEDIT Cloud](#)
[Define Custom Validation rules](#)
[Edit other settings](#)

Set Import Rules

With ONIXEDIT Server, you can define which ONIX sections will be modifiable when metadata files are imported to your ONIX catalogues. You can import metadata files to a catalogue using ONIXEDIT, ONIXEDIT Cloud and the Automated Ingestion Agent. Both ONIXEDIT Cloud and the Automated Ingestion Agent are options that you can add to your ONIXEDIT Server account.

You can either set import rules for a single catalogue if it is not assigned to a profile, or set import rules for a whole profile.
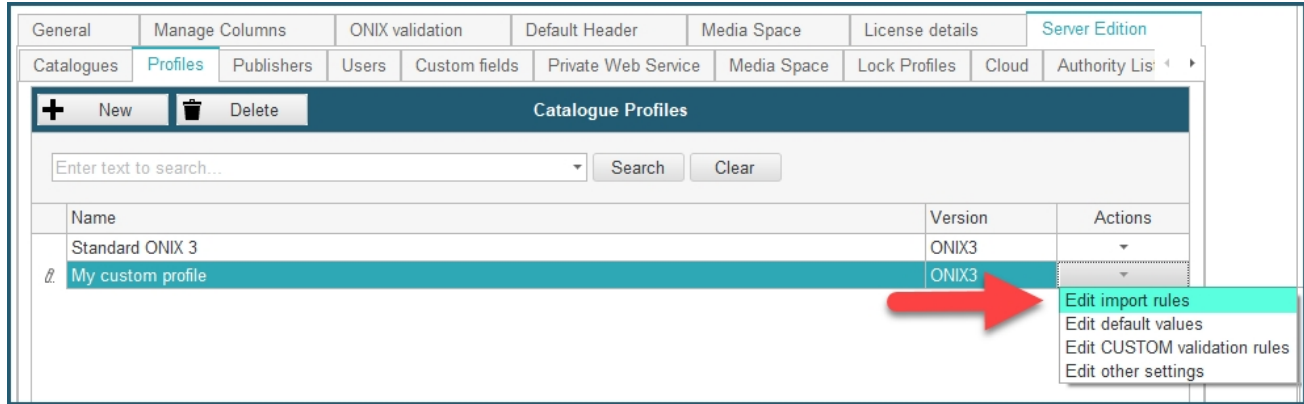
To set Import rules for a catalogue or a profile, follow these steps:

1 a - To set Import rules for an unassigned catalogue: From the *Preferences* module, go to the ***Server Edition / Catalogues*** tab and select *Edit import rules* in the action menu corresponding to the catalogue you want to modify:

1 b - To set Import rules for a whole profile: From the *Preferences* module, go to the *Server Edition / Profiles* tab and select *Edit import rules* in the action menu corresponding to the profile you want to modify:

2 - You should get access to a form similar to the following:

⚙ **Import rules - My New Catalogue**　　　　　　　　　　×

Import rules profile: [[P1]] - Default profile ▾ ⓘ 　 [Manage]

Title primary key: [ISBN13 ▾] *Leave blank to use ONIX_NOSEQ*

☐ Apply import rules when a title is moved from another catalogue

| Insert options | Update options | Exclusions |

☑ Allow creation of new imported titles

☐ Set custom field [▾ ✕] to [   ]

☐ Generate missing THEMA subjects from existing BIC codes

☐ Generate missing THEMA subjects from existing BISAC codes

Generate missing subject Headings from Codes: [Disabled ▾]

☐ Apply merge V2 function with catalogue default values when creating new titles

[Cancel] [Save]

General Options

Import rules profile: [[P1]] - Default profile ▾ ⓘ 　 [Manage]

Title primary key: [ISBN13 ▾] *Leave blank to use ONIX_NOSEQ*

☐ Apply import rules when a title is moved from another catalogue

- Title primary key: The title primary key is the ONIX value that is used by ONIXEDIT Server to decide if an imported title is a new one or an update. As an example, if you set it to ISBN13, ONIXEDIT will get the ISBN13 of any imported title and will try to find a corresponding title in the catalogue. If that same ISBN13 does not exist, ONIXEDIT Server will create a new title in the catalogue. Otherwise, it will modify the existing title providing that the modification is allowed.
- Apply import rules when a title is moved from another catalogue: This option purpose is simply to apply all the import rules defined for the current catalogue when a user will move by drag&drop, one or more titles from another catalogue to the current one. If the option is not set, the rules won't be applied and the titles will be moved without any alteration.

Insert Options

- *Allow creation of new imported titles*: If this option is not checked, ONIXEDIT Server won't allow creation of new titles from the 3 possible import channels. Only modification of existing titles will be allowed (if authorized). If creation of new imported titles is allowed then the following options will also be possible
- *Set custom field*: This option allows you to automatically assign a specific value to a custom field for all new titles imported.
- *Generate missing THEMA subjects from existing BIC codes*: This option will automatically add THEMA subjects to newly imported titles based on the official mapping between BIC and THEMA that you can download from EDItEUR.
- *Generate missing THEMA subjects from existing BISAC codes*: This option will automatically add THEMA subjects to newly imported titles based on the official mapping between BISAC and THEMA that you can purchase from the official BISG site.
- *Generate missing subject Headings from Codes*: This option will produce missing subject Headings to newly imported titles. Subject Headings are not mandatory in the ONIX standard. You can have a valid subject just by setting its Scheme Identifier and Subject Code. But adding headings enriched the title and can be achieved automatically with this option. Subject schemes that are covered by this option are: BIC, BISAC, THEMA and CLIL.

- *Apply merge V2 function with catalogue default values when creating new titles*: You can merge default values defined for the current catalogue with newly imported titles. This will "fill in the blanks" of imported titles with the default values that you usually find when you create a new title using ONIXEDIT or ONIXEDIT Cloud. For more information about the Merge v2 function, consult update option "Apply ONIXEDIT Merge function for already defined sections" below.

Update Options

- *Allow update of existing imported titles*: If this option is not checked, ONIXEDIT Server won't allow updates of existing titles. Only creation of new titles will be allowed (if authorized). If updates are allowed, you will also have access to the following options.
- *Set custom field*: You may set a specific value to a custom field each time a title is modified from an import channel.
- *Generate missing THEMA subjects from existing BIC codes*: This option will automatically add THEMA subjects to imported titles already existing in the catalogue.
- *Generate missing THEMA subjects from existing BISAC codes*: This option will automatically add THEMA subjects to imported titles already existing in the catalogue.
- *Generate missing subject Headings from Codes*: This option will produce missing subject Headings to imported titles already existing in the catalogue.
- *Remove updateable elements from product if not present in imported file*: Be careful with this option if you decide to activate it. Let's illustrate it with an example: Assume that all the ONIX sections are authorized for updates and we currently have the following title in our catalogue:

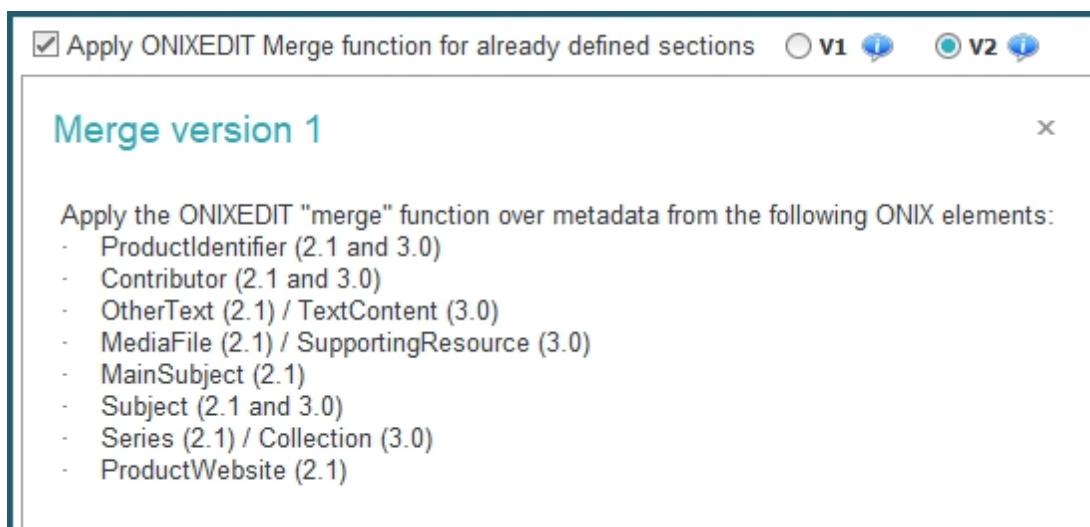**Product before the update:**

```
<Product>
  <RecordReference>REF12345</RecordReference>
  <ProductIdentifier>
    <ProductIDType>01</ProductIDType>
    <IDTypeName>ONIX_NOSEQ</IDTypeName>
    <IDValue>000000000-0000-0000-0000-000000000000</IDValue>
  </ProductIdentifier>
  <ProductIdentifier>
    <ProductIDType>03</ProductIDType>
    <IDValue>9780000000000</IDValue>
  </ProductIdentifier>
  <ProductForm>DG</ProductForm>
  <EpubType>000</EpubType>
  <Imprint>
    <ImprintName>ONIXEDIT</ImprintName>
  </Imprint>
</Product>
```

An ONIX file having the same title based on its EAN (the title primary key in force for our catalogue) is imported, but the EpubType and Imprint are not defined:

Imported file:

ProductIdentifier has been changed, EpubType and Imprint are not provided.

```
<Product>
  <RecordReference>REF12345</RecordReference>
  <ProductIdentifier>
    <ProductIDType>01</ProductIDType>
    <IDTypeName>ONIX_NOSEQ</IDTypeName>
    <IDValue>000000000-0000-0000-0000-000000000000</IDValue>
  </ProductIdentifier>
  <ProductIdentifier>
    <ProductIDType>03</ProductIDType>
    <IDValue>9781111111111</IDValue>
  </ProductIdentifier>
  <ProductForm>DG</ProductForm>
</Product>
```

If the "Remove updateable elements from product if not present in imported file" option is checked, the resulting title will be:

Product after the update if checked:

ProductIdentifier is updated. EpubType and Imprint are deleted.

```
<Product>
  <RecordReference>REF12345</RecordReference>
  <ProductIdentifier>
    <ProductIDType>01</ProductIDType>
    <IDTypeName>ONIX_NOSEQ</IDTypeName>
    <IDValue>000000000-0000-0000-0000-000000000000</IDValue>
  </ProductIdentifier>
  <ProductIdentifier>
    <ProductIDType>03</ProductIDType>
    <IDValue>9781111111111</IDValue>
  </ProductIdentifier>
  <ProductForm>DG</ProductForm>
</Product>
```

As you can see, the missing elements has been removed. But if the option is not set, you will keep the EpubType and Imprint even if missing in the imported title.

- Apply ONIXEDIT Merge function for already defined sections: The ONIXEDIT Merge function is a very powerful tool that you can activate or not when making title updates. When it is not set, ONIXEDIT will modify and completely replace metadata sections provided by the imported source to the existing titles. For instance, if title ABC currently exist and have 3 contributors defined in it and you import that same title with only 2 contributors, the resulting title will only have 2 contributors. But when you activate the Merge function, ONIXEDIT will try to find matches between imported metadata and existing ones. For every existing element, an update will be made. Missing ones will be added. There are 2 versions of that function that you can activate. Version "**V1**" have limited effects on a subset of the ONIX sections supported by ONIXEDIT as you can see from the V1 tooltip:

☑ Apply ONIXEDIT Merge function for already defined sections ○ V1 🛈   ◉ V2 🛈

Merge version 1   ✕

Apply the ONIXEDIT "merge" function over metadata from the following ONIX elements:
- ProductIdentifier (2.1 and 3.0)
- Contributor (2.1 and 3.0)
- OtherText (2.1) / TextContent (3.0)
- MediaFile (2.1) / SupportingResource (3.0)
- MainSubject (2.1)
- Subject (2.1 and 3.0)
- Series (2.1) / Collection (3.0)
- ProductWebsite (2.1)

Version "**V2**" provides the same functionality as our Copy/Merge function from ONIXEDIT. You can get more details from our ONIXEDIT User Manual here. Take particular attention to the **Key Fields table** that you will find in the User Manual because it describes what are the fields that are considered by ONIXEDIT to establish if there is a match or not for each particular ONIX section. For instance, to change a price from an ONIX 2.1 title, you must at least provide a metadata file with the Primary Key set in Import Rules (RecordReference, ISBN or EAN) and a combination of SupplierRole, SupplierName, PriceTypeCode, CurrencyCode and PriceQualifier. For example, if you import an Excel file having only those key fields with a "Price" column, ONIXEDIT will be able to identify exactly the right price to update for each title.
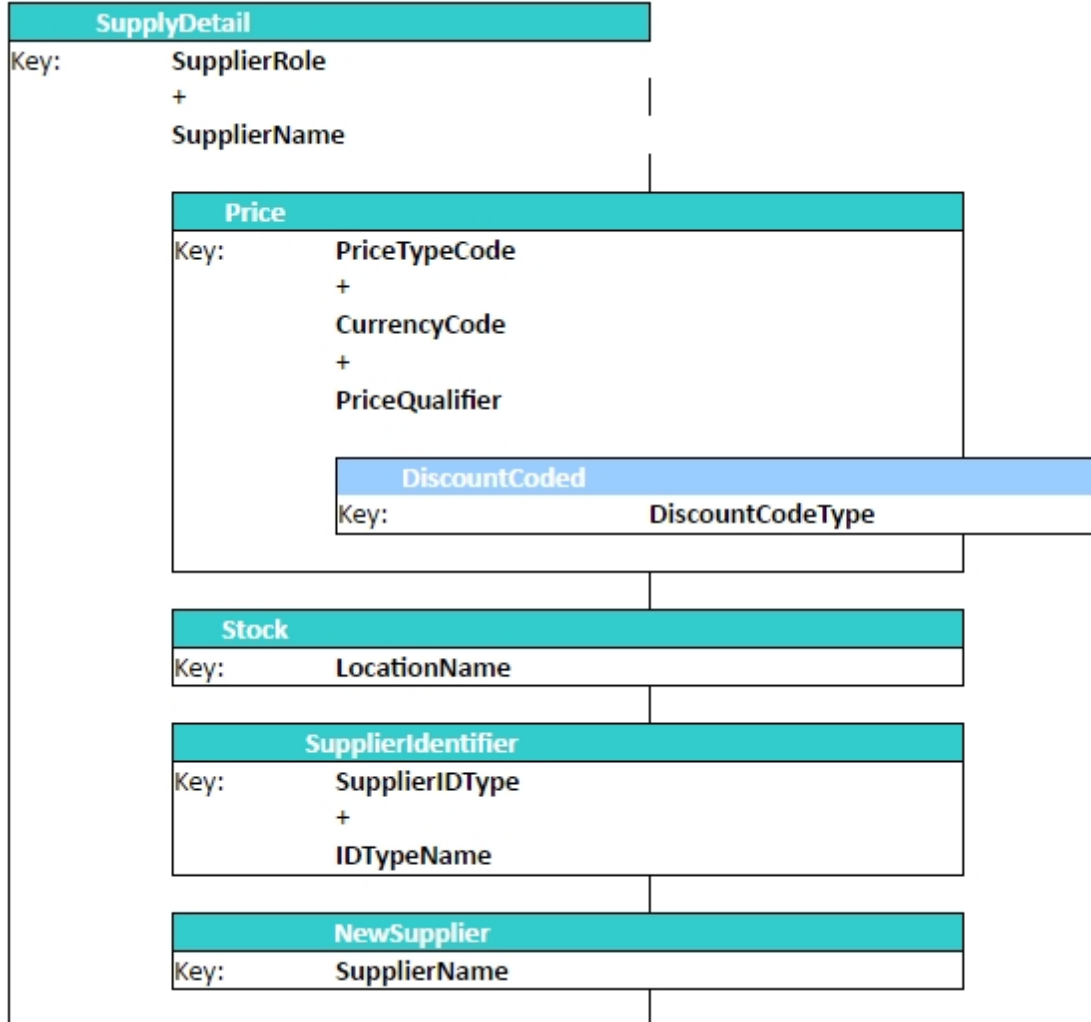
- Modifiable ONIX sections: You can designate which ONIX fields and sections may be updated from an import channel. As an example, the following screen capture disallows modification of RecordReference tag and ProductIdentifier composite because it is unchecked:
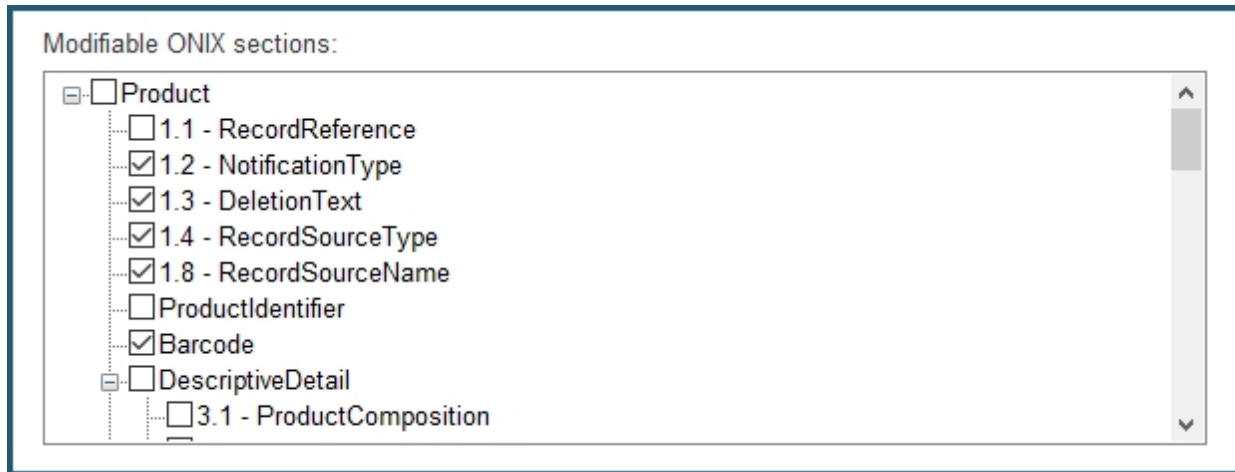
Exclusion Options

- Reject titles with the following criteria: This section allows you to exclude titles corresponding to specific criteria from the import process. As an example, the following criteria will exclude any titles that are not in English or that are not eBooks:
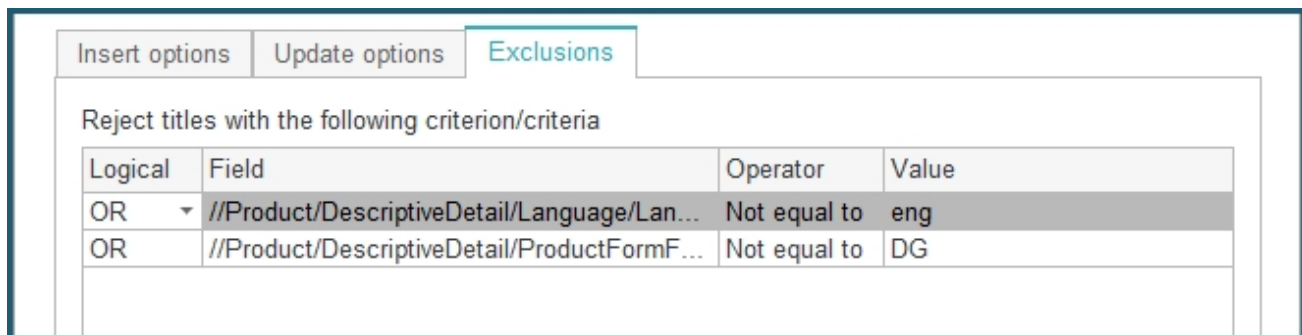
Once your Import rules are defined, click on the **Save** button of the Import rules dialog, then click on the **Save** button of your Preferences.

Import Rules Profiles

Since version 3.4.12, a significant improvement has been made to Import Rules: You can now define many different import rules for each of your ONIXEDIT Server catalogues. We call it Import Rules Profiles. By default, each catalogue only has one import rule. As long as you don't create additional profiles, Default profile (P1) will be disabled in the Profile dropdown list and automatically applied to all imported files:

Import rules profiles are used to apply different import behaviors if necessary. The default profile [[P1]] is used for all imports without any particular action. You can define secondary profiles with the **Manage** button:

Each new profile will allow you to define a completely new set of import rules for the same catalogue. A specific Import Rules profile will be applied automatically when its corresponding profile code (ex: [[P1]], [[P2]], [[P3]]) will be included in the name of the file that is imported to the catalogue. No matter if you are using ONIXEDIT Pro or if the file is automatically imported by the Automated Ingestion Agent.

Let's consider 3 different scenarios where Import Rules Profiles could be used:

- o Profile [[P2]] - Product Supply Update. With this profile, we want to avoid making modifications to our ONIX titles except for their ProductSupply bloc. First, we select profile P2 using the drop-down list:

When you activate a new profile, you will notice that nothing is selected from the Insert options tab as well as from the Update options tab. We don't want to create new titles using that profile, so we'll leave the *Allow creation of new imported titles* unchecked. But, we will set the one for Update options:

At the bottom of the Update options tab, we'll check Merge function V2 and we'll uncheck all modifiable ONIX sections except the ones under ProductSupply and we'll save the Import rules dialogue as well as our ONIXEDIT Preferences.

To activate automatically the P2 profile, all we need to do is to include the label "[[P2]]" somewhere in the metadata file name. For instance, the file "OnixMetadata[[P2]].xml" will automatically trigger our P2 import rules profile. Consequently, only the ProductSupply bloc from the file imported will be considered by ONIXEDIT. No other ONIX section will be altered.

o   Profile [[P3]] - Delete All Subjects: It may happen that you want to delete a complete ONIX section after an erroneous update for instance. You can use a profile for that

like P3 and configure it that way:

To clear the Subject section of a series of titles, all you have to do is to export their primary keys (ISBN13 for instance) to a flat file using our generic import/export tool. For instance, you can create an Excel file having only one ISBN13 column for each of the titles you want to clean-up the Subject section. Name that file "DeleteAllSubjects[[P3]].xlsx" and import it back with the same ONIXEDIT Import/Export script that you used for its creation. As a result, all the titles having their ISBN13 in that Excel file will have their Subject section cleared.

BE CAREFUL: When you activate option "Remove modifiable elements from product if not present in imported file", be sure to have a recent backup of your ONIX catalogue in hand prior to apply that option in case of a mistake.

o Profile [[P4]] - Replace Contributors: It may happen that you need to completely replace one or more ONIX section with metadata coming from an external source. For instance, maybe the contributors section has been altered erroneously and you would like to clean it up. You don't want to do a merge neither a removal of the section. Just replacing it. Profile P4 will then only have section Contributors checked. Nothing else.

You can then import an ONIX file having [[P4]] in his name and as a result, you'll get a complete replacement of the Contributor section.

Set Default Values

You can set default values for any ONIX field that will apply when a new title will be added to a catalogue using ONIXEDIT Pro or ONIXEDIT Cloud.

You can either set default values for a single catalogue if it is not assigned to a profile, or set default values for a whole profile.

To define default values for a catalogue or a profile, proceed as follows:

1 a - To set default values for an unassigned catalogue: From the *Preferences* module, go to the **Server Edition / Catalogues** tab and select *Edit default values* in the action menu corresponding to the catalogue you want to modify:
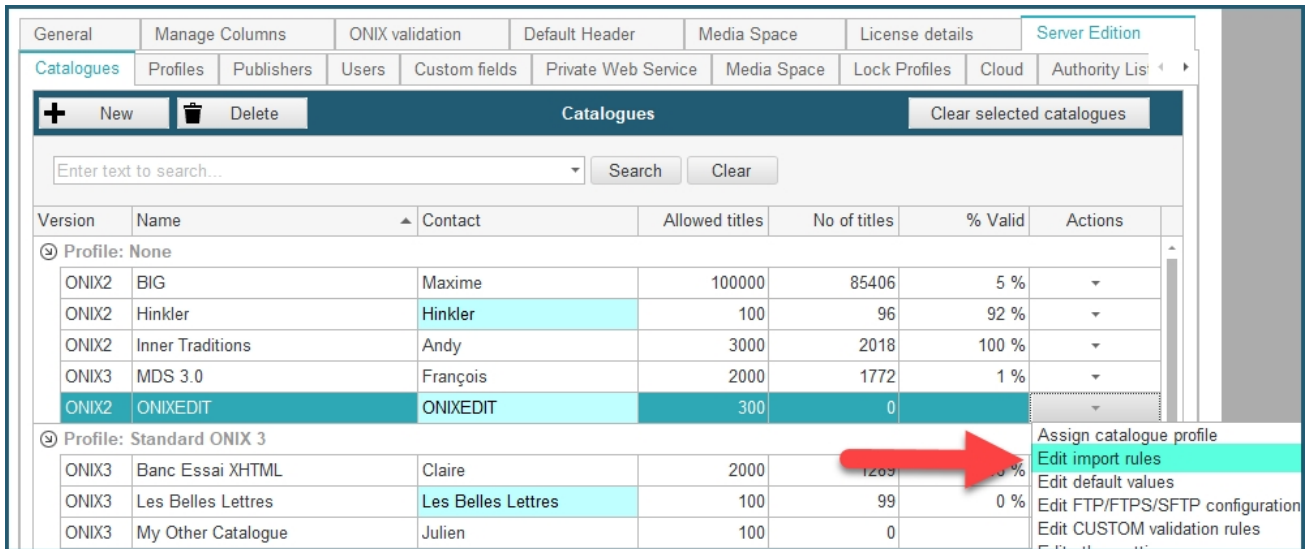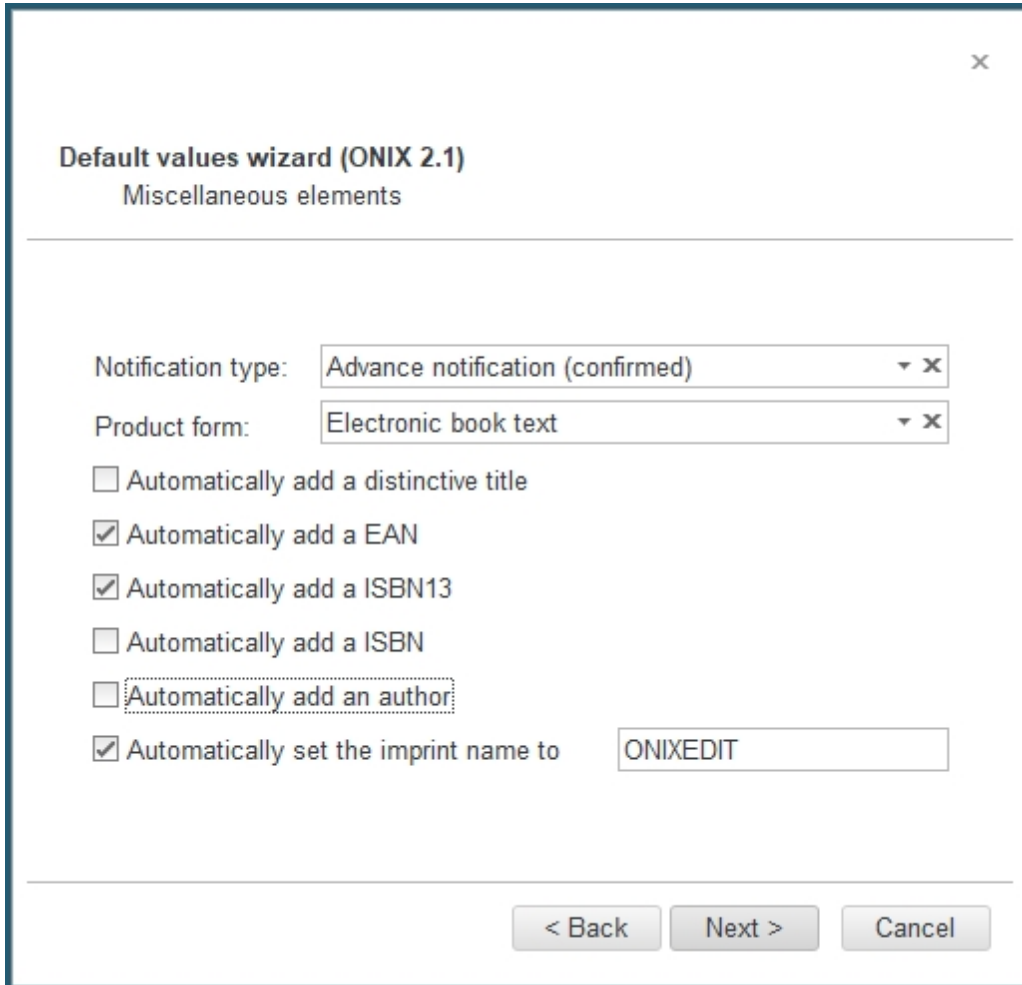
1 b - To set default values for a whole profile: From the *Preferences* module, go to the *Server Edition / Profiles* tab and select *Edit default values* in the action menu corresponding to the profile you want to modify:
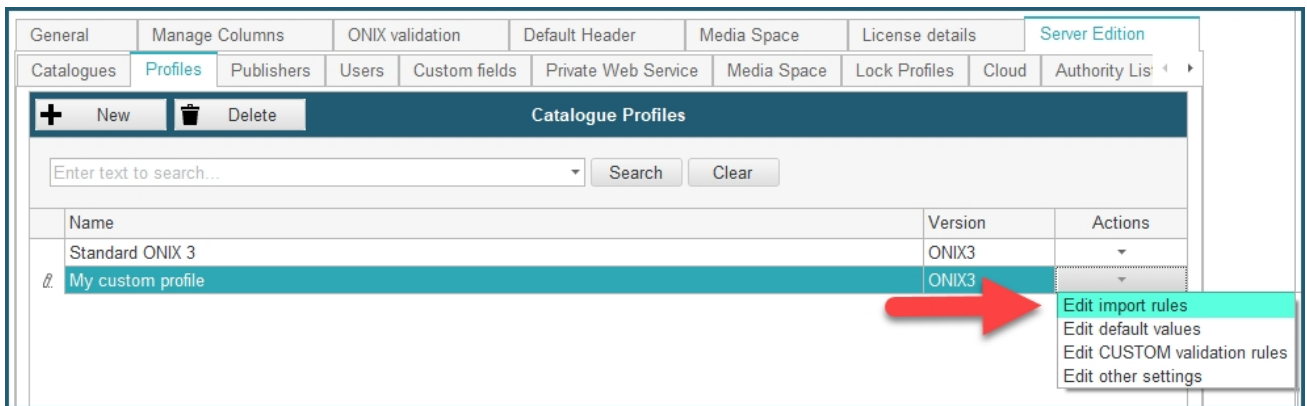
2 - You will then have three choices:
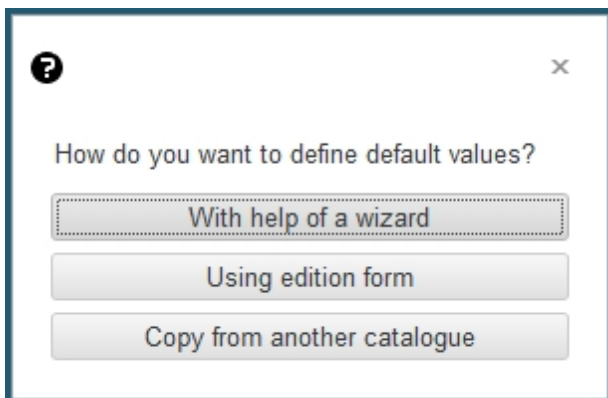
2 a - With help of a wizard: By clicking on the first choice, you will get a decision wizard that will guide you through the most common default values you can define for your ONIX metadata catalogue. There is a distinct wizard for each ONIX standard depending on which one is set for your catalogue.

2 b - Using edition form: You can also set default values using ONIXEDIT edition form (Advanced or Simplified). If you want to define default values that will apply as well to ONIXEDIT Pro and ONIXEDIT Cloud, we suggest you to use the Simplified form to define your default values:

Once your default values are defined, simply save them using the menu *File / Save default values*:
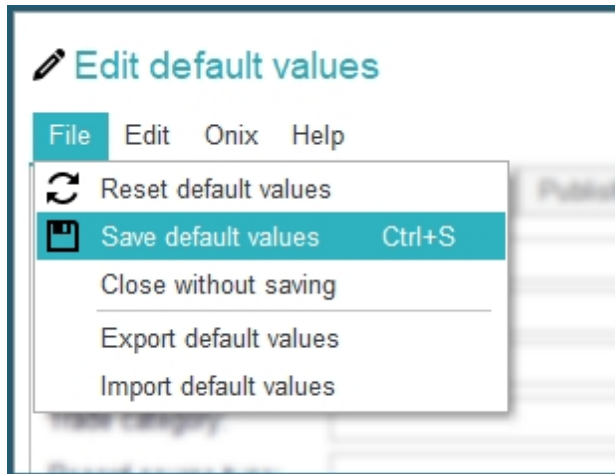
Then, close the default values form and **save your preferences**.

2 c - Copy from another catalogue: The last and fastest possibility that you have to define default values is to use the *Copy from another catalogue* button. You will then have to select the catalogue from which the default values will be copied from as show below and you're done!
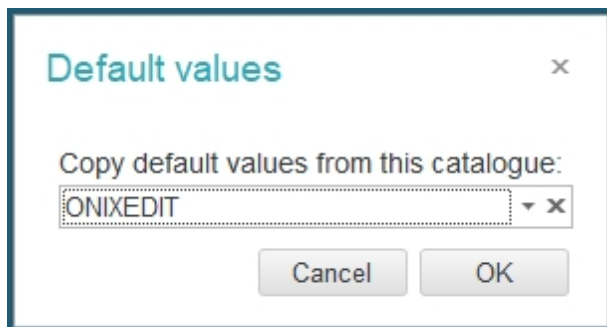
Define a FTP for ONIXEDIT Cloud

Users working with ONIXEDIT Cloud to manage ONIX titles may need to transmit ONIX files. Of course, they can download ONIX titles to a local ONIX file on their computer and then, send it to some recipients using an email, an FTP software or other electronic means. However, to ease this task, ONIXEDIT Server allows definition of one or many dedicated FTP accounts that you can define for a specific catalogue.

To define a recipient FTP account designated to receive ONIX files and corresponding cover images from users of an ONIXEDIT Server catalogue, follow these steps:

1 a - To define a FTP for an unassigned catalogue: From the *Preferences* module, go to the **Server Edition / Catalogues** tab and select *Edit FTP/FTPS/SFTP configuration* in the action menu corresponding to the catalogue you want to modify:

1 b - To define a FTP for a whole profile: From the *Preferences* module, go to the *Server Edition / Profiles* tab and select *Edit other settings* in the action menu corresponding to the profile you want to modify:

2 - The Edit other settings window will open. If you used the action menu of a catalogue, the right tab will directly be selected. Otherwise, select the *ONIXEDIT Cloud* tab (1), and then the *Actions* tab (2). You should see a screen like shown below. Now you can click on the *Add a new FTP/FTPS/SFTP action* button:

3 - Define the settings required to establish a connection to the FTP/FTPS or SFTP site where you want your ONIXEDIT Cloud users to send ONIX files and optionally, cover images:

Optionally, you can also set a [Custom Field](#) value to all exported titles using the **Set custom field** checkbox:

4 - A new item in the *Actions* menu of ONIXEDIT Cloud will then show the new FTP transmission action:
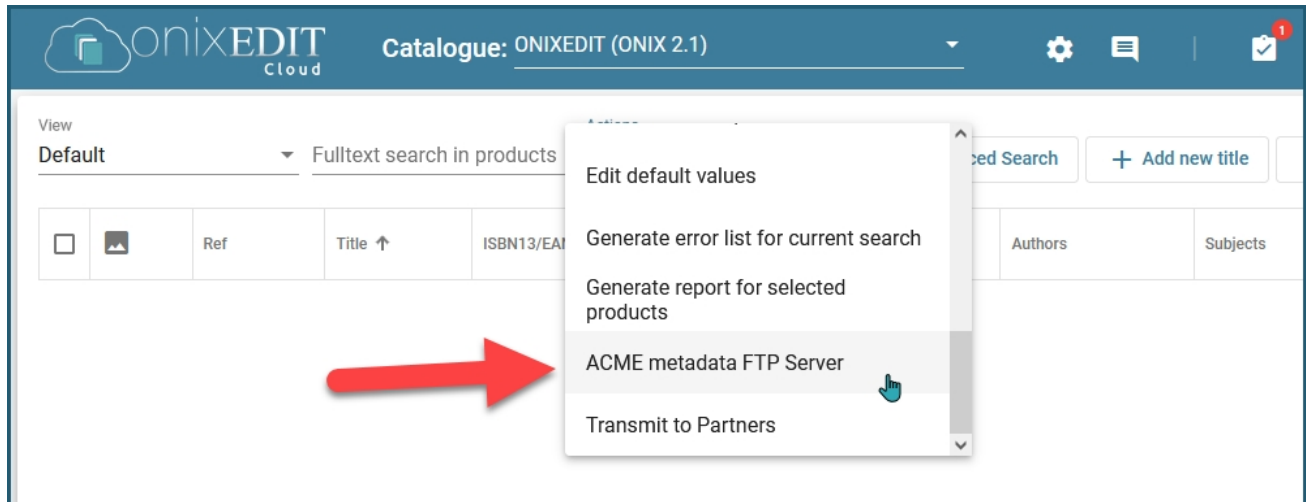
Define Custom Validation rules

ONIXEDIT PRO (and optionally with ONIXEDIT Regular) allows you to set Custom Validation rules to define mandatory fields specific to your organization. With ONIXEDIT Server, you can define Custom Validation rules for each of your catalogues and your profiles.

To set Custom Validation rules, proceed as follows:

1 a - To define custom values for an unassigned catalogue: From the *Preferences* module, go to the ***Server Edition / Catalogues*** tab and select ***Edit CUSTOM Validation rules*** in the action menu corresponding to the catalogue you want to modify:
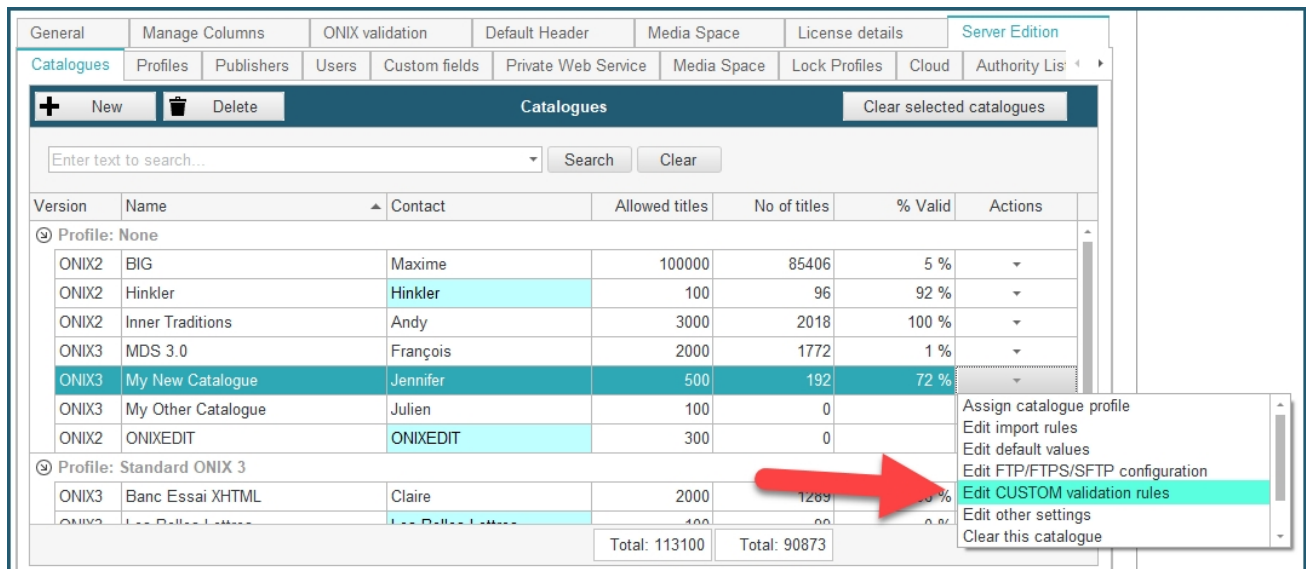
1 b - To define custom values for a whole profile: From the *Preferences* module, go to the ***Server Edition / Profiles*** tab and select ***Edit CUSTOM Validation rules*** in the action menu corresponding to the profile you want to modify:
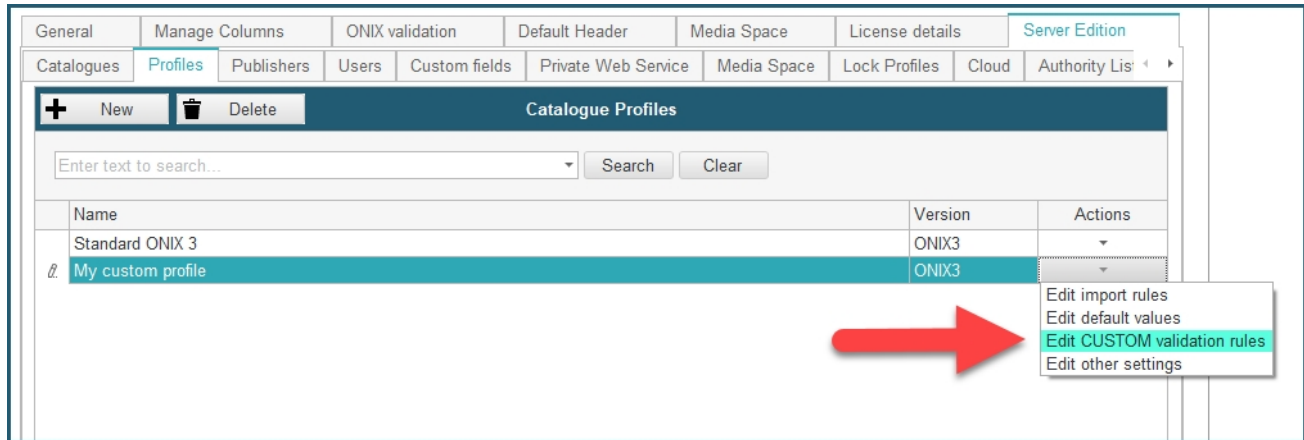
2 - Follow the same instructions as for defining Custom Validation rules for local ONIX files as defined from the ONIXEDIT User Manual.

3 - Then, close the Custom Validation form and save your preferences.

Once Custom Validation rules are defined for a catalogue, it won't be applied automatically. As for any other regular validation format, you first need to activate it with the "Edit other settings" tool and next, apply that validation to user access rights.

XPATH Validation Rules

You can now also define custom validation rules using XPATH expressions, which allows you to customize your validation to the maximum and gives you countless possibilities.

We will go through a simple example to show how you can define XPATH validation rules.

In this example, we will set an XPATH validation rule that checks that the *Main Content Page Count* is between 0 and 10000.

First, in the Custom validation rules edition form, locate the field to which you want to apply a validation, in our case, the Extent. Then select the field (1), and use the menu ***CUSTOM validation / Set XPath validation for current element***, or press the ***F5*** key (2):

You will see the following dialog. Click on the **Add new rule** button to define the validation rule:
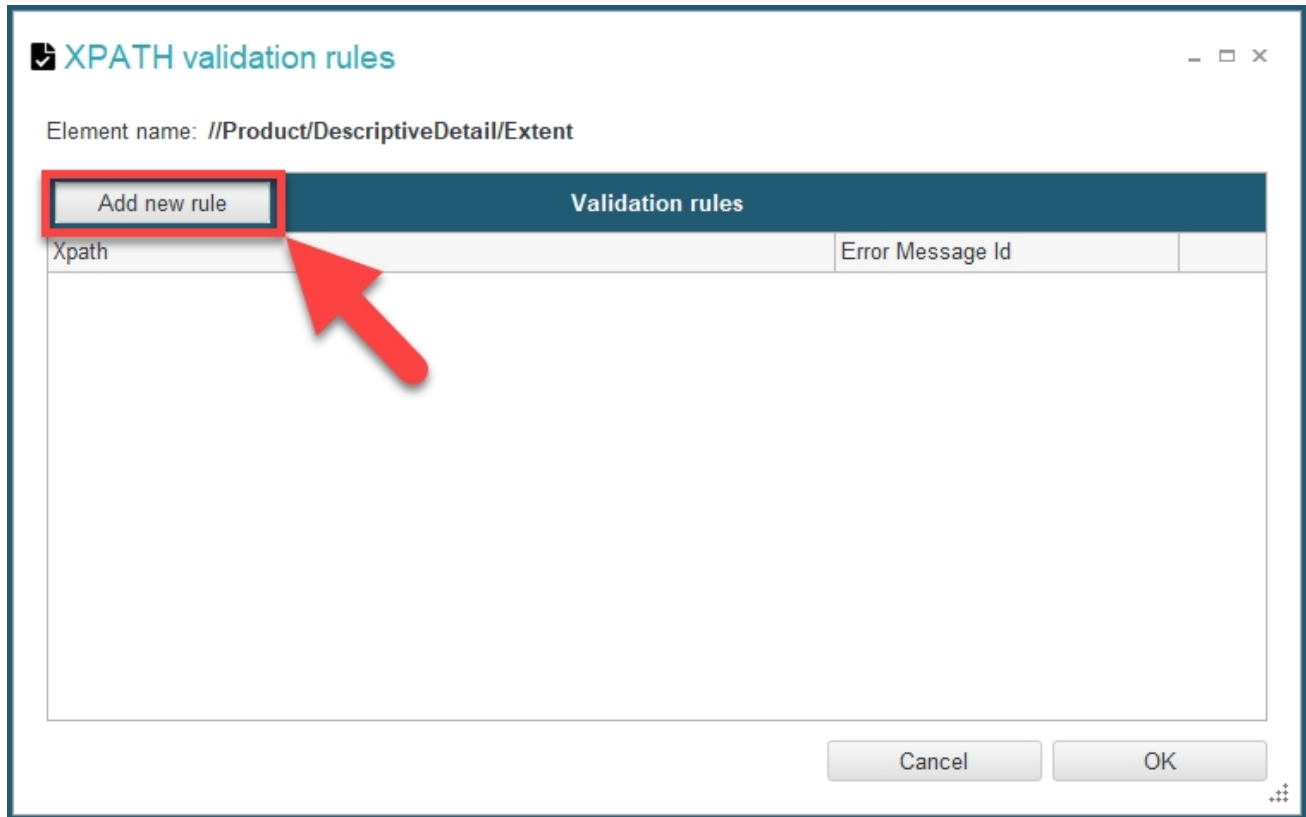
The XPath validation rule edition screen will appear, here are the different components you can find on the screen:

XPath expression: This is where you will write the boolean XPath expression that defines the rule to create.

XPATH Validation Rules examples: This shows two different examples of XPath expressions you could use to define a rule.

Insert ONIX tag: Allows you to select any ONIX tag and insert its corresponding XPath expression.

2 **Insert Publisher attribute**: Allows you to select any of your created publisher

attributes and insert its corresponding XPath expression.

3 **Validate XPath expressions**: Allows you to check if your XPath expression is

valid or not.

4 **Error message**: This is where you will select the error message that will appear

whenever this custom validation rule is not respected by a title.

5 **Validation type**: Here you can define whether every item in the field should

respect the rule, or whether only one item needs to respect the rule.

To continue our example where we want to validate that the *Main Content Page Count* is between 0 and 10000, our **XPath expression** should look like this:

	Insert ONIX tag	Insert Publisher attribute	Validate XPath expression
XPath expression:	number(//Product/DescriptiveDetail/Extent[ExtentType="00"]/ExtentValue)>0 and number (//Product/DescriptiveDetail/Extent[ExtentType="00"]/ExtentValue)< 10000		
	You must define a valid XPATH expression returning a boolean value (True or False)		

If you want more details on how to define XPath expressions, refer to the [ONIXEDIT User Manual](#).

Next, we have to select the **Error message**. Click on the ⋯ button on the far right of the Error message field:

[SubjectSchemeIdentifier="10"]/SubjectCode,"YA")) then boolean
(//Product/DescriptiveDetail/Audience[AudienceCodeType="01"]/AudienceCodeValue="03")

Error message: [   ] ...

Validation type: [Validate that at least one item of the group respects the condition   ▼]

Cancel   Save

The **Manage error messages** screen will appear. This screen allows you to create error messages that will then be available to be reuse. To create a new error message, click the *Add new* button:

✏ Manage error messages   _ □ ✕

Category: [▼]

Add new	Error messages		
ID	Category	Message EN	

Cancel   OK

You will see the following *Edit message* dialog. Start by entering an ID to identify your new error message (1). Then you can add a category to classify your error messages in categories (2). Then select a language in the drop-down menu (3), and fill the *Message* field with the actual message for your error in the selected language (4). Finally, click on *Add this translation* (5):

Once you have done that, the version of your new error message in the language you selected is added to the table below:

Optionally, you can now change the language in the drop-down menu, and manually add different translations for you error message, by repeating the steps above. Alternatively, if you have the English version of your message added, you can simply click on **Auto translate**, and all translations available will be automatically added:

Once you are done, click the *Save* button in the bottom right corner. You will then see your custom error message added to the list:

You can now select it and click **OK**. The error message is now selected and will be displayed when the rule is not applied.

Last step, we need to select our **Validation type** using the drop-down menu:

Once it is done, click **Save** to confirm. The rule we just created now appears in the list of XPATH validation rules for this element:
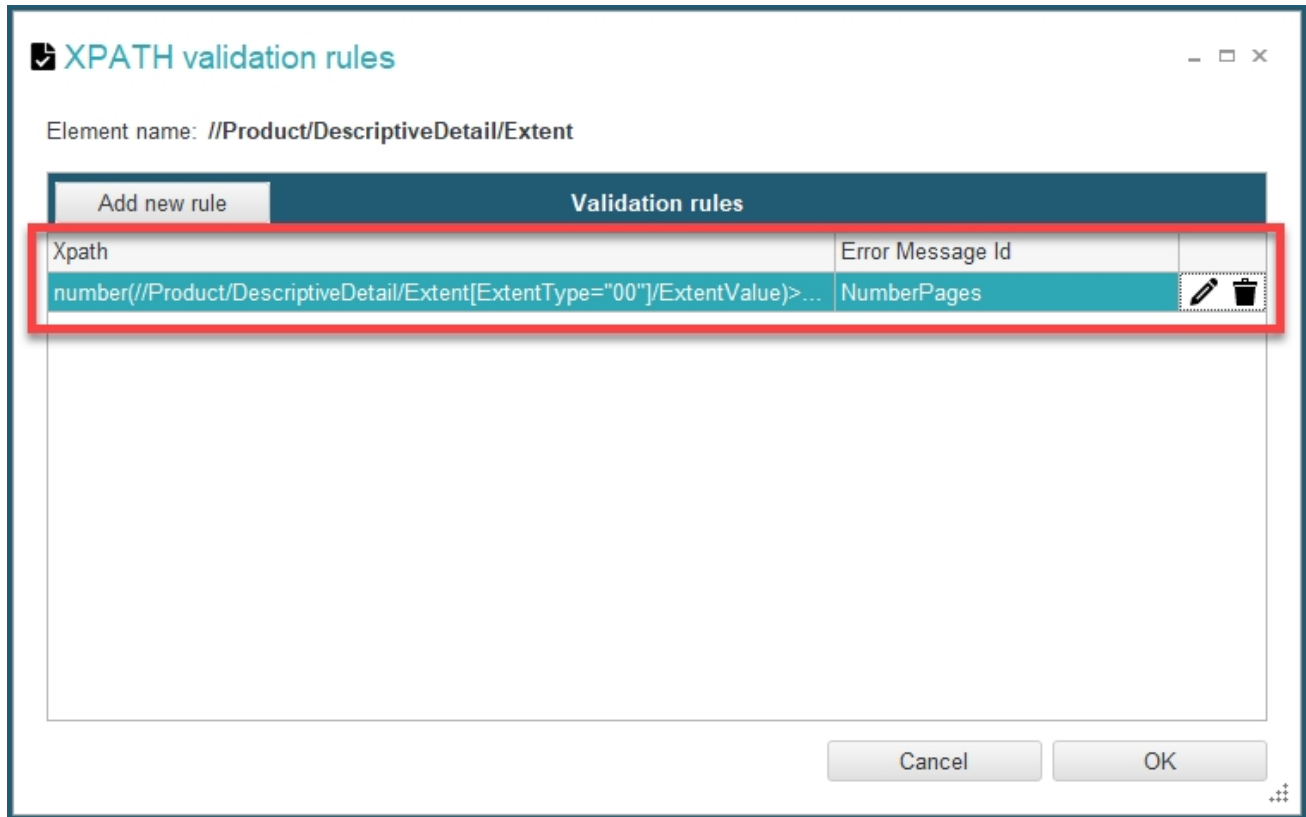
Now as you can see in the following screen capture, our new XPath validation rule works as intended:
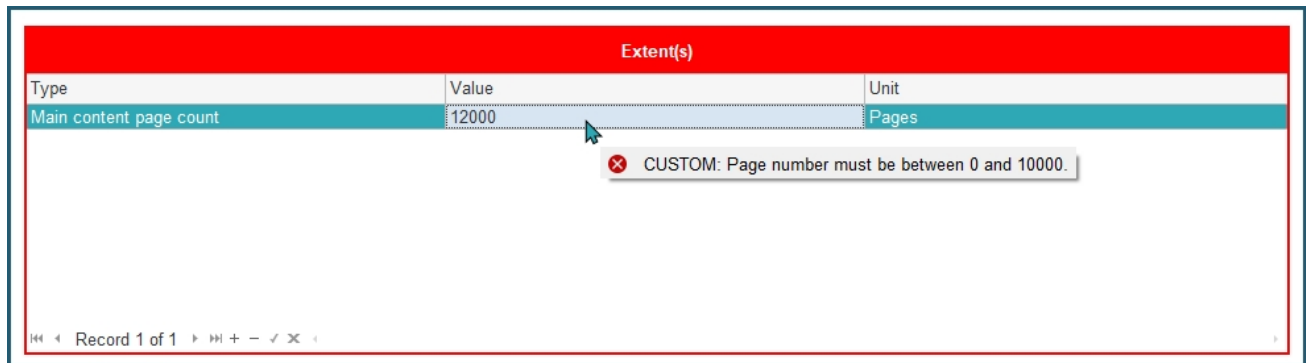
Edit other settings

You can edit many other settings which you can find in the **Edit Other Settings** part of the action menu.

You can again either edit these settings for a single catalogue, or for a whole profile.

You can access these settings like the following:

a - To edit other settings for a catalogue: From the *Preferences* module, go to the ***Server Edition / Catalogues*** tab and select ***Edit other settings*** in the action menu corresponding to the catalogue you want to modify:

b - To edit other settings for a profile: From the *Preferences* module, go to the ***Server Edition / Profiles*** tab and select ***Edit other settings*** in the action menu corresponding to the profile you want to modify:

Note that for catalogues that are assigned to a profile, if you go to *Edit other settings* from the catalogues actions menu, some options will be disabled. To modify these options, use the action menu of the profile.

When you click on the *Edit other settings* button, the following dialog is shown:

⚙ **Edit settings - My New Catalogue**   ✕

Catalogue profile: [▼ ✕]   [Manage]

Name: [My New Catalogue   ]

Contact: [Jennifer   ]

Allowed titles: [500 ⏶⏷]

No of titles: 192

Record Reference auto-numbering: ☐

A valid ISBN13 or EAN must be supplied: ☑

Send daily validation results to publishers: ☐   Results type: [XML   ▼]

| Validation | ONIXEDIT Cloud |

Choose the formats against which the catalogue will be validated:

ONIX 2.1
- ☐ AMAZON
- ☐ APA
- ☐ BIC
- ☐ BISG
- ☐ BOOKNET
- ☐ BTLF
- ☐ CUSTOM
- ☐ Validate ONIX 3.0 mandatory elements
    - ☐ Strict validation for numeric data elements 💬

ONIX 3.0
- ☐ CUSTOM
- ☐ Validate against ONIX 3.0 Best Practices Guide
- ☐ Strict validation for numeric and HTML data elements 💬

                                              [Cancel]   [Save]

Using this dialog, you can define the following:

  o *Catalogue profile*: Profile to which the catalogue is assigned to.

o *Name*: Name of the catalogue (same as in the catalogue list).
o *Contact*: Same as in the catalogue list.
o *Allowed titles*: a maximum number of allowed titles. If you leave this cell empty, there won't be any limit except the total number of titles allowed for your ONIXEDIT Server account.
o The *Record reference auto-numbering* option will produce a sequence of automatic numbers that will be assigned to every new title in that catalogue. Indeed, when a new title is created, you will see [AUTO NUMBER] in the Record reference field and it won't be modifiable:

When the new title is saved, it will receive the next sequence ID available from the server.The sequence starts at 1 unless you change it to something else using the button **Set next RecordReference value for Catalogues with Auto-Numbering activated** that you will find under the catalogues list:

Under these settings, you will find 2 tabbed sections:

Validation section

Use this section to select the possible validation formats that you want to authorize for your ONIXEDIT and ONIXEDIT Cloud users. Only the checked options will be available in the User Access Rights form. Each validation format will add validation rules corresponding to best practices established by organizations such as Booknet Canada, BISG or EDItEUR. By default, only the basic validation rules established by the ONIX standard are applied.

ONIXEDIT Cloud section

The ONIXEDIT Cloud tab present options pertinent for those using ONIXEDIT Cloud with ONIXEDIT Server for ONIX metadata entry:
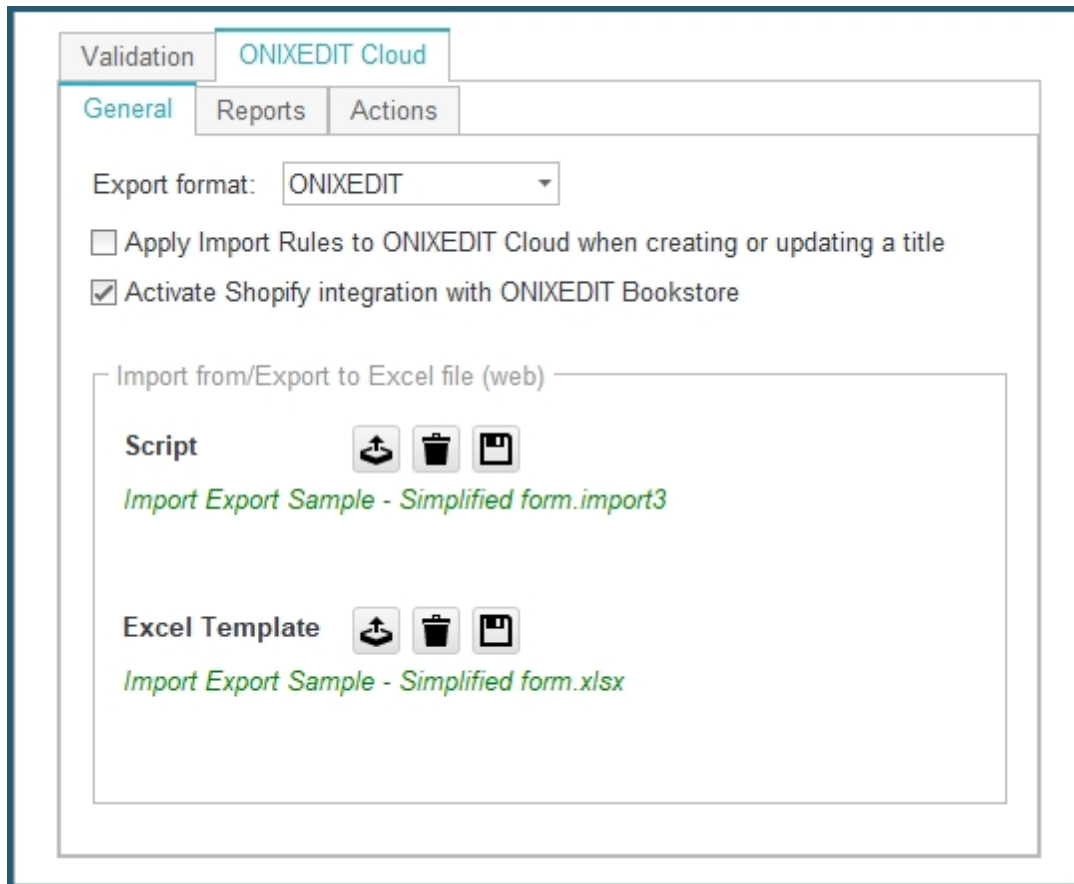
Under ONIXEDIT Cloud tab, you will find 3 sub tabs:

General

The following options can be set:

o Export format: By default, this is set to ONIXEDIT, which is the standard long reference ONIX format used internally by ONIXEDIT. You can change it to ONIXEDIT Short or any specialized format supported by ONIXEDIT (for ONIX 2.1 catalogues). The export format is used by the Web interface to produce the ONIX files that a user can get from the Action menu "Export selected titles to ONIX".

o Apply Import Rules to ONIXEDIT Cloud when creating or updating a title: Set this option if you want to configure the same rules for titles added or modified using ONIXEDIT Cloud as those defined for external metadata import. See Import Rules section for more details.

o Activate Shopify integration with ONIXEDIT Bookstore: If you activate this option, ONIXEDIT Cloud will show the ONIXEDIT Bookstore button at the top right corner over the main list. With this button, an ONIXEDIT Cloud user can bind an ONIXEDIT Server catalogue to a Shopify bookstore and make direct Shopify product updates from the ONIX metadata. Visit our ONIXEDIT Bookstore page for more details.

o The "*Import from/Export to Excel file (web)*" panel is used to set the ONIXEDIT import/export script and Excel template that can be used from ONIXEDIT Cloud as an alternative to create or export ONIX metadata to and from Excel files. The import/export script and corresponding Excel template that you will set for a catalogue will define some of the Actions menu items available to web users:

To define an Import/Export script and its corresponding Excel template, proceed as follows:
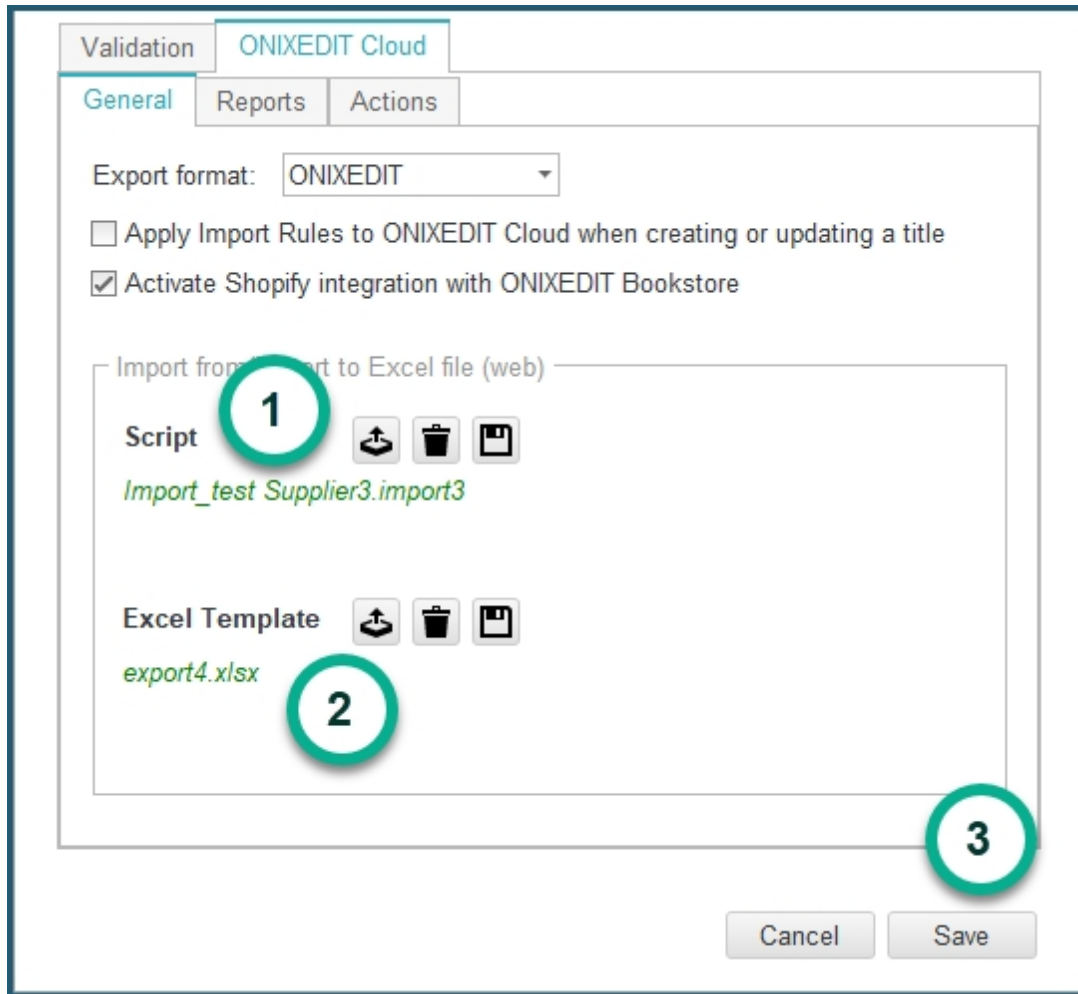
1. Select on your PC a valid Import/Export script that was previously created with the generic flat file import/export module of ONIXEDIT. Refer to the ONIXEDIT User Manual for more details about how to create import/export scripts.
2. Select the corresponding Excel file that matches the Import/Export script.
3. Save the catalogue settings.

Reports

Under the Reports tab, you can define reports created using ONIXEDIT Report Builder tool and make it available for your ONIXEDIT Cloud users. You can define as many reports as you want and make it available for a specific catalogue using the **Publish a Report for current catalogue** button. You can also use the **Publish a Report for all catalogues** button and make the report available for all the catalogues defined in your ONIXEDIT Server account:

Once defined, the new reports will be available from the Generate Report action page of ONIXEDIT Cloud:

Actions

Under the Actions tab, you will find the FTP list actions as explained here.

You will also be able to define new POST actions to allow your ONIXEDIT Cloud users to transmit HTTP POST requests for selected ONIX titles to any web site for endless integration possibilities. To create a new POST action, click on the **_Add a new POST action_** button. A new form window will show up:

Complete the form above as follow:

1. Caption EN: This is the caption you will see in the English interface of the Action menu at ONIXEDIT Cloud.
2. Caption FR: This is the caption you will see in the French interface of the Action menu at ONIXEDIT Cloud.
3. HTTP POST: This is the URL where the HTTP POST request will be sent.
4. Title Selection:
   - Selected titles only: this will authorize an ONIXEDIT Cloud user to select titles from the main list and send a POST request for it. If no titles are selected, the POST action won't be sent.
   - All or Selected titles: same as the previous option except that when no title is selected from the main list, the POST request will be sent for all the titles in the catalogue.
   - No title required: this option will allow transmission of the POST request without having to select any title.
5. Optionally, a POST action can transmit a specific ONIX field for each selected titles from the ONIXEDIT Cloud list:
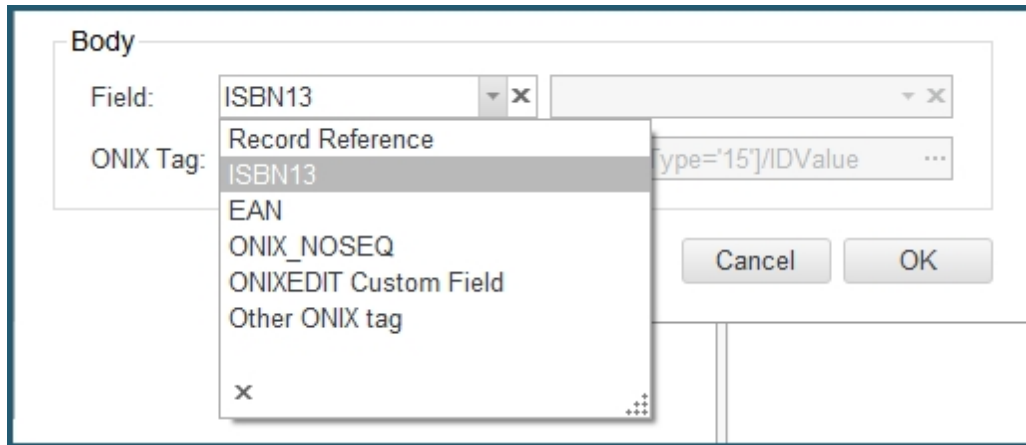
Once a new POST action is defined, ONIXEDIT Cloud users will be able to use it from the Actions menu:
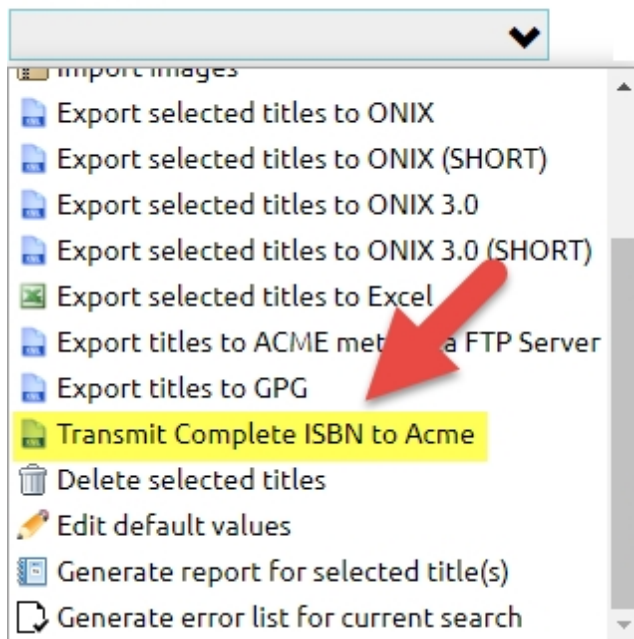
Manage Publishers

In this section, you will see how ONIXEDIT Server allows you to <u>create Publishers</u> and <u>assign them to your catalogues</u>. You can <u>define attributes</u> for your Publishers, and then use these attributes when <u>setting default values</u> or <u>exporting your titles</u>. To manage your publishers, you must use the **Preferences** module of ONIXEDIT Pro (the preferences can be accessed via either the main menu *Preferences* button, the menu *Onix / Preferences,* or the F10 key, as shown in the image below).
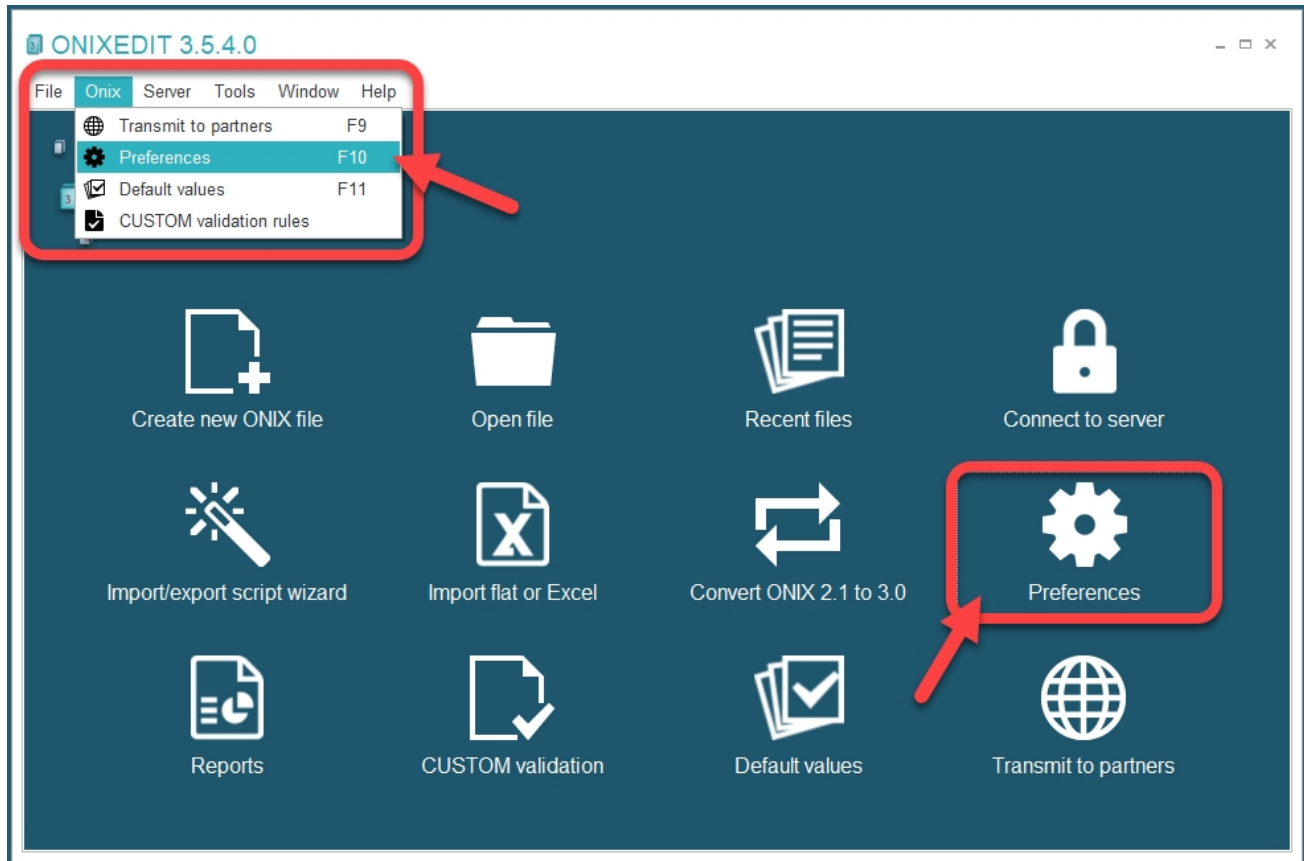
Once in the Preferences module, click on **Server Edition** tab, then **Publishers**. You should see this screen:

In this tab you will see a list of all your defined publishers. You can create new ones, delete existing ones, and edit their attributes. There is **no limit** on the **number of publishers** you can create.

1. Create Publishers

To define a new publisher, click on the **+** button at the bottom left corner of the list:

You will then see this pop-up dialog, as shown below. You should start by entering the *Publisher name* (1) and *Contact name* (2), they are **required**. Then you can keep filling the other fields (3) if you would like (Email, Phone, Fax, SAN, SAP), these are **optional**. We will come back to the *Attributes* tab that you can see at the top later. Once you are done, click *OK* to confirm (4):

Once you have created some publishers, your Publishers tab will look like this:
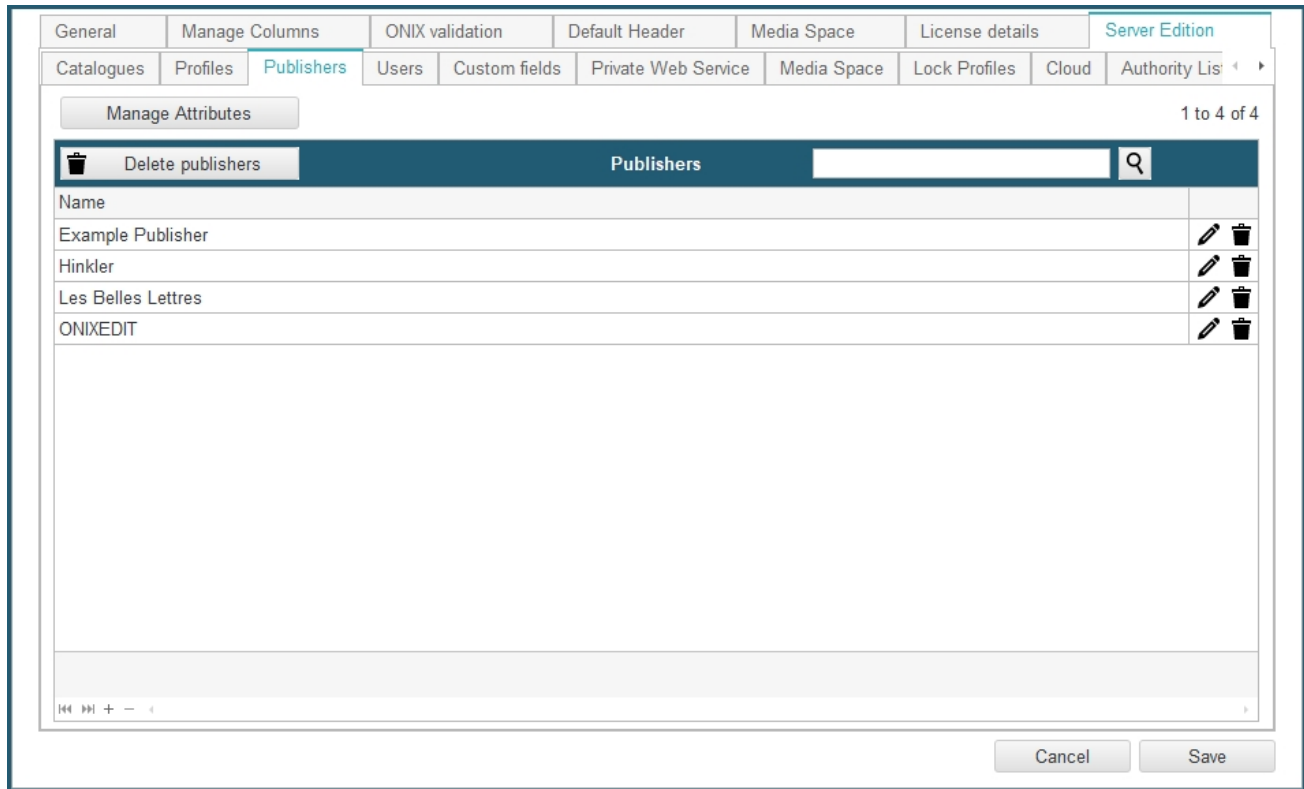
You can use the controls on the far right to **edit** ✏ and **delete** 🗑 publishers.

2. Assign Publisher to a Catalogue

If you navigate to your catalogues tab (*Preferences* / *Server Edition* / *Catalogues*), you will see a list of all your catalogues. Below is an example of a catalogues list:

Note the *Contact* column that is highlighted in red in the screenshot above. As you can see, some of the contacts are on a white background, and some are colored with a light blue. A contact is **highlighted** in **blue** when a **Publisher** is **assigned** to this catalogue. When you don't assign a Publisher to a catalogue, you simply write down the name of the contact (white background). But when you assign a created Publisher to a catalogue, the name of the publisher will appear (blue background).

To assign a publisher to a catalogue, click on the contact of this catalogue and then the "•••" button on the right, as shown below:

You will then see this dialog shown below pop up to let you choose the publisher to assign. Select the publisher among all your created publishers (1), and click *OK* to confirm (2). Note that you can use the search bar at the top right to quickly find the publisher you want.

Now as you can see on the image below, the publisher was **assigned** to the **catalogue** and now shows in the *Contact* column in blue:

You can dissociate this publisher from the catalogue by doing the following. First, click on the "•••" button on the right of the contact like you did to assign the publisher. Then, in the *Choose a Publisher* dialog, click on the ***Define another contact name*** button:
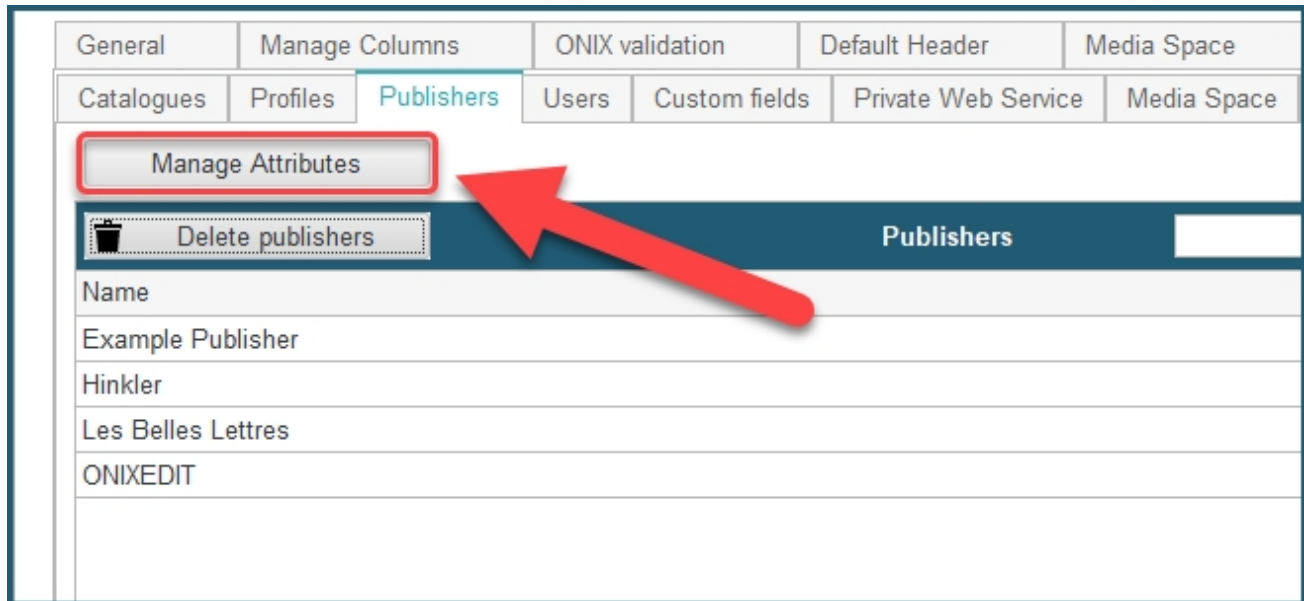
You will then just have to write the name of the contact, just like the other contacts with a white background.

3. Manage Attributes

In addition to the default fields you filled when creating a publisher (Contact name, Email, Phone, etc.), you can define custom attributes. These extra attributes that you define will be available for all your publishers, and each of them can have their own value for this attribute.

To manage your publisher attributes, click on the *Manage Attributes* button right above the publishers list:

This pop-up dialog will appear:

To **create** a new **attribute**, click on the *New* button in the upper left corner:
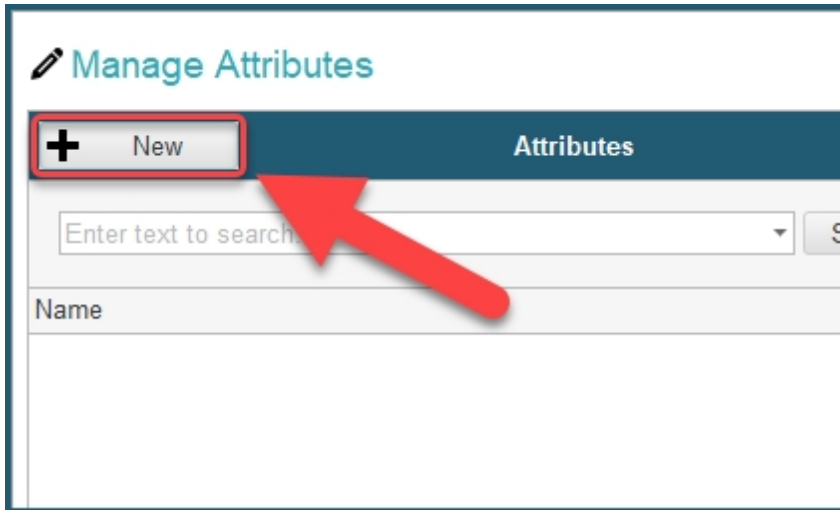
You will then be prompted to enter the **name** of the attribute you want to create. You can always edit the name later if you need. Enter the name and click *Save* to create the attribute:
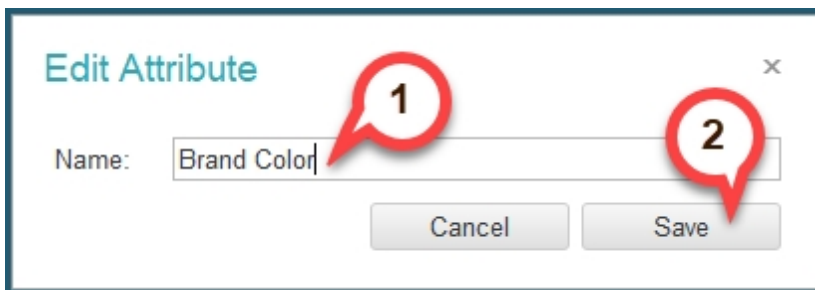
Once you have created some attributes, your Attributes list could look something like this:
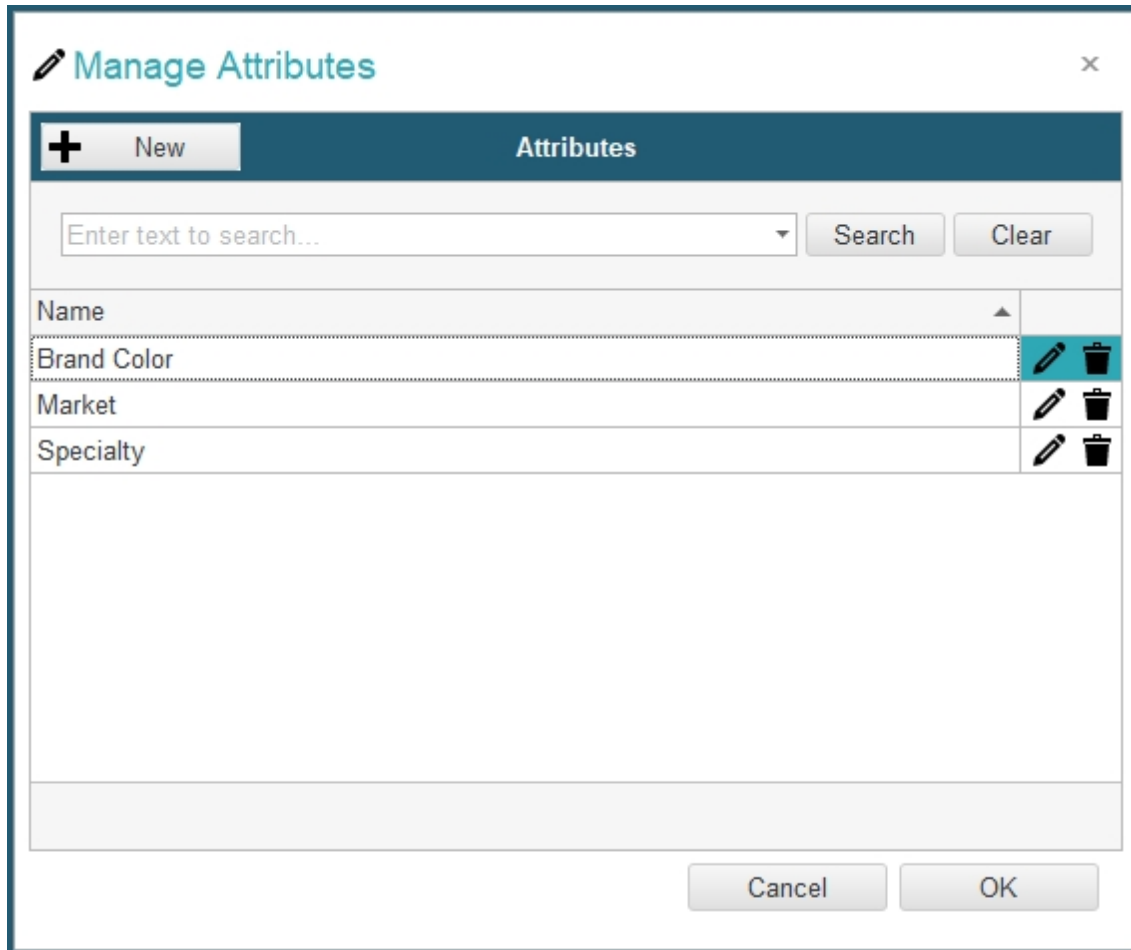
You can use the controls on the far right to **edit** ✏ and **delete** 🗑 attributes.

4. Edit a Publisher's Custom Attributes

Now that you have created some attributes, you can edit the values to these attributes for your publishers. To do this, click on the **edit** ✏ button of the publisher you want to modify:

A dialog will pop up, navigate to the **Attributes** tab (1). Here you can find all the custom attributes that you have created. In the *Value* section on the right end of each attribute, you can enter the value that you want for this publisher (2). Once you are done, you can click **OK** to confirm (3):

5. Use Publisher Attribute in Export Script

If you need more details about how import/export scripts work, please refer to the [ONIXEDIT User Manual](#).

If you are creating an export script, you can add some publisher attribute in the script so that the value of this attribute gets exported based on the publisher of the catalogue. For example, in the demonstrations above, we defined the value of *Green* to the attribute *Brand Color* for the publisher *Example Publisher*. Then in our export script, we can add the publisher attribute *Brand Color*, and the value exported in this column will depend on the publisher of the catalogue from which we export. If the catalogue is assigned to publisher *Example Publisher*, then the value *Green* will be exported.

To use publisher attributes in export scripts, proceed as follows:

First, in the generic import/export tool, click on the **Xpath column** button:

The XPath column dialog will pop up as shown below. Then click on the **Insert ONIX node** button:

You will then be see this dialog. Click on the **Special functions** button, and then **Get Publisher Attribute Value**:
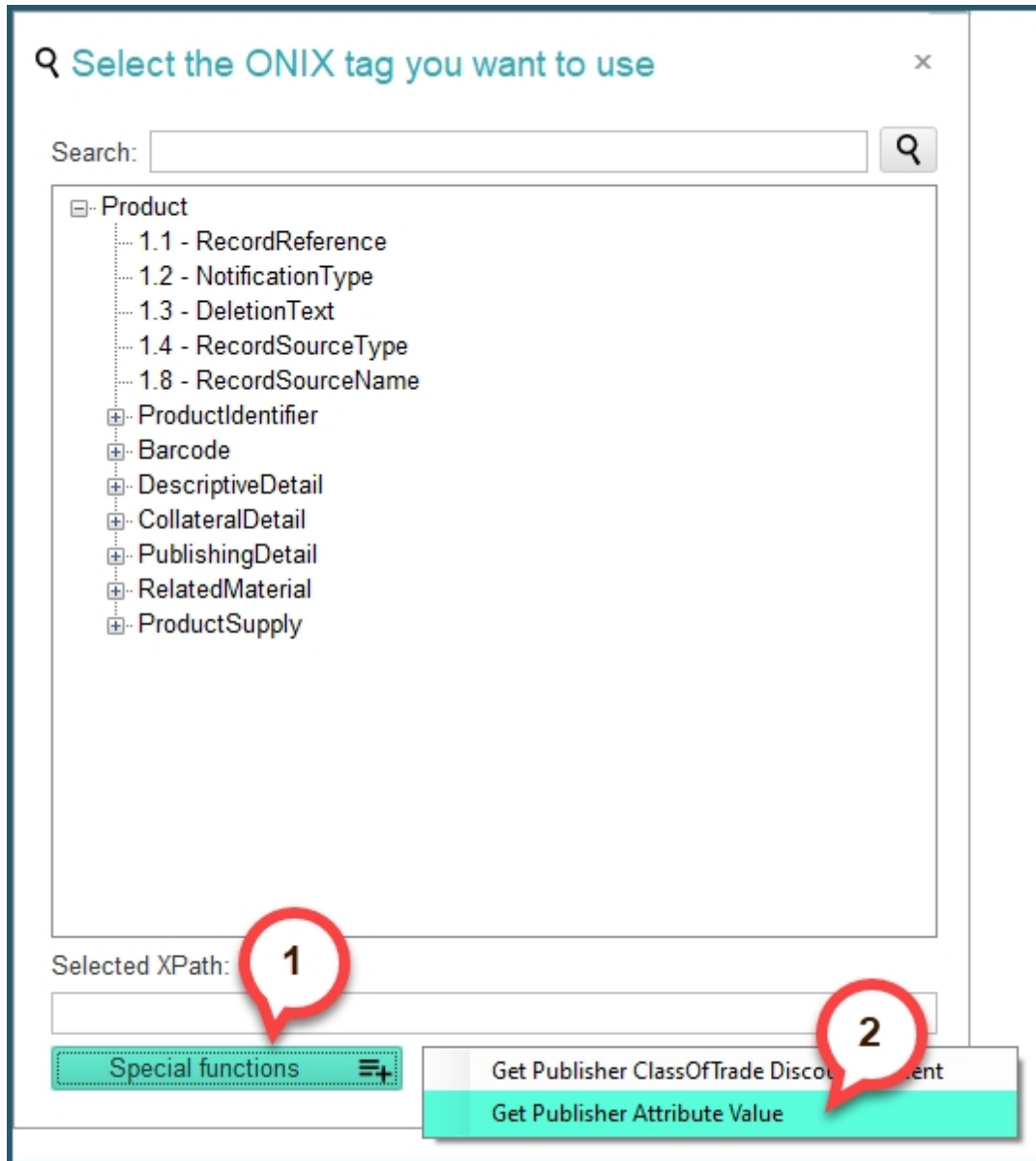
You will be prompted to select the publisher attribute that you want from your created attributes, like shown below. You can use the search bar to help find the one you want. Select an attribute, and click **OK** to confirm. Alternatively you can simply double click the selected attribute.

You will then see the selected XPath like indicated in yellow on the following screenshot. Next click on the *OK* button. This will copy the XPath to your clipboard.
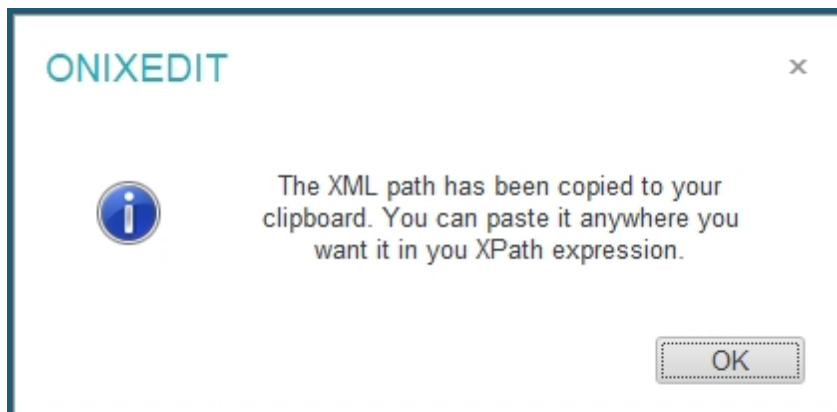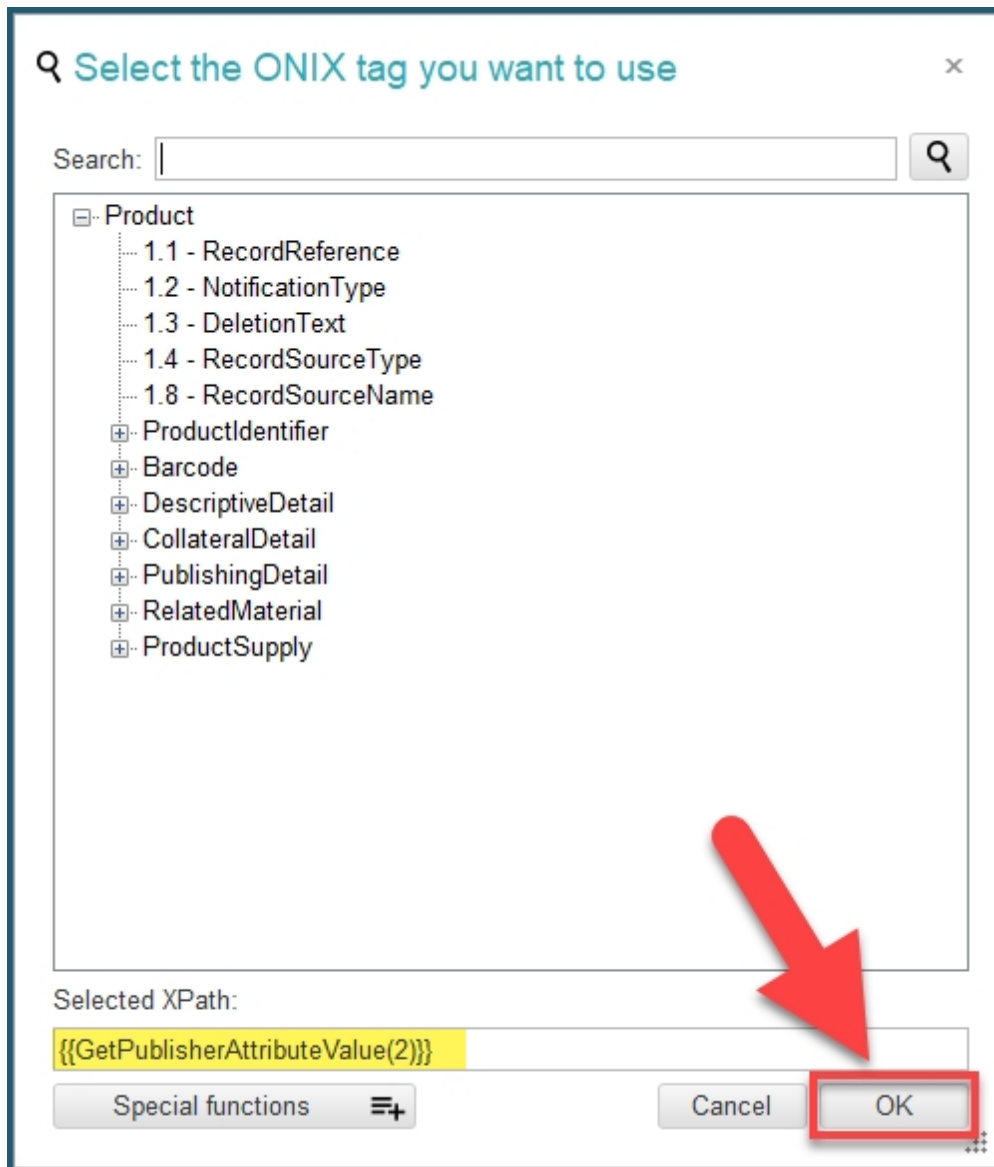
Next, paste the XPath in the *XPath expression* field as shown below (using **CTRL+V** or **right click / paste**):

XPath column

Use this dialog to add a column that will export a value based on an xpath expression.

IMPORTANT: This column is used for export only.

XPath expression (2.0, 3.0 or 3.1):   [Insert ONIX node]   [Validate XPath expression]

{{GetPublisherAttributeValue(2)}}

XPath examples

Once you have pasted the XPath, you can click the **Save** button at the bottom right to confirm. You will then see the added column in the columns list:

Finally, indicate what attribute this is by entering it in the *Caption* field of the column:

Done! You now have the Brand Color of the publisher associated to the catalogue that will be exported when using this script. As you can see in the **Preview** like on the image below

(Accessed using the *Display Conversion ...* button), the value **Green** will be exported based on the current catalogue, since it is associated with our **Example Publisher** defined earlier, which uses green:
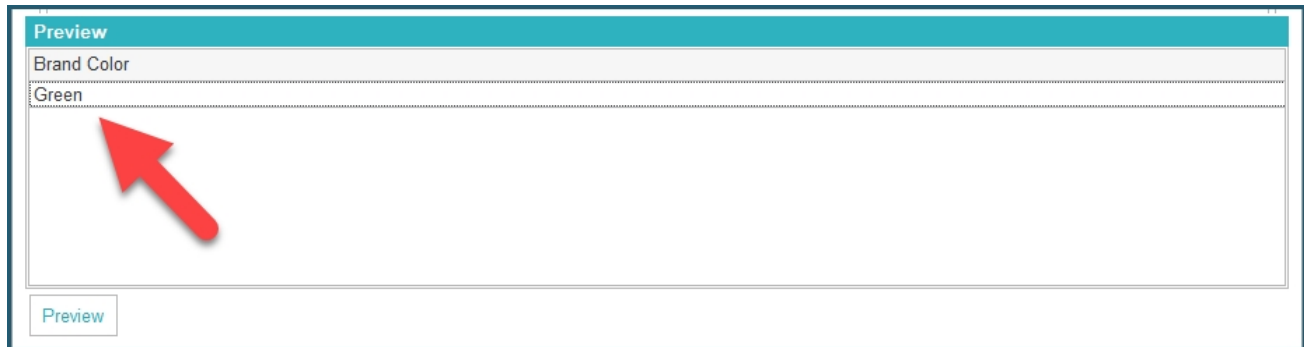
6. Use Publisher Attribute in Default Values

When editing the default values of a catalogue or a profile using the edition form, you can set a default value to be the value of a certain publisher attribute. Here is how to proceed to do so:

First, select the field on which you want to set a default value (1). Then, go to *Edit / Get publisher attribute value* (2):
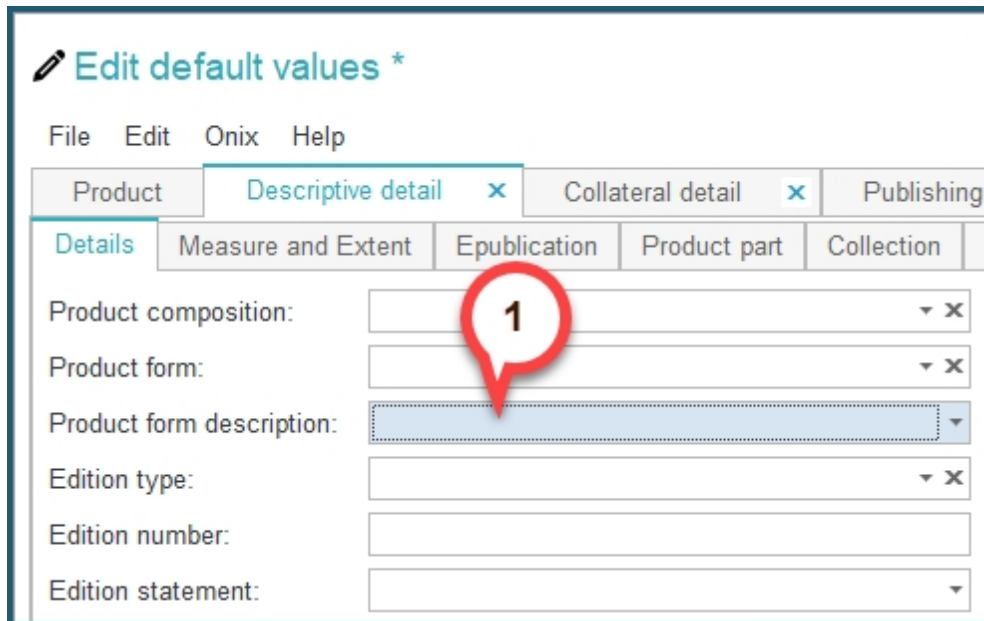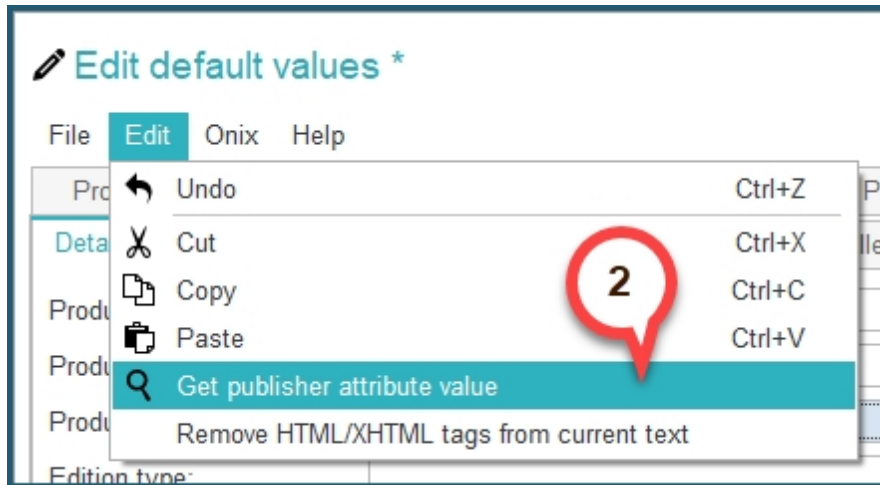
You will be prompted to select the publisher attribute that you want from your created attributes, like shown below. You can use the search bar to help find the one you want. Select an attribute, and click **OK** to confirm. Alternatively you can simply double click the selected attribute.
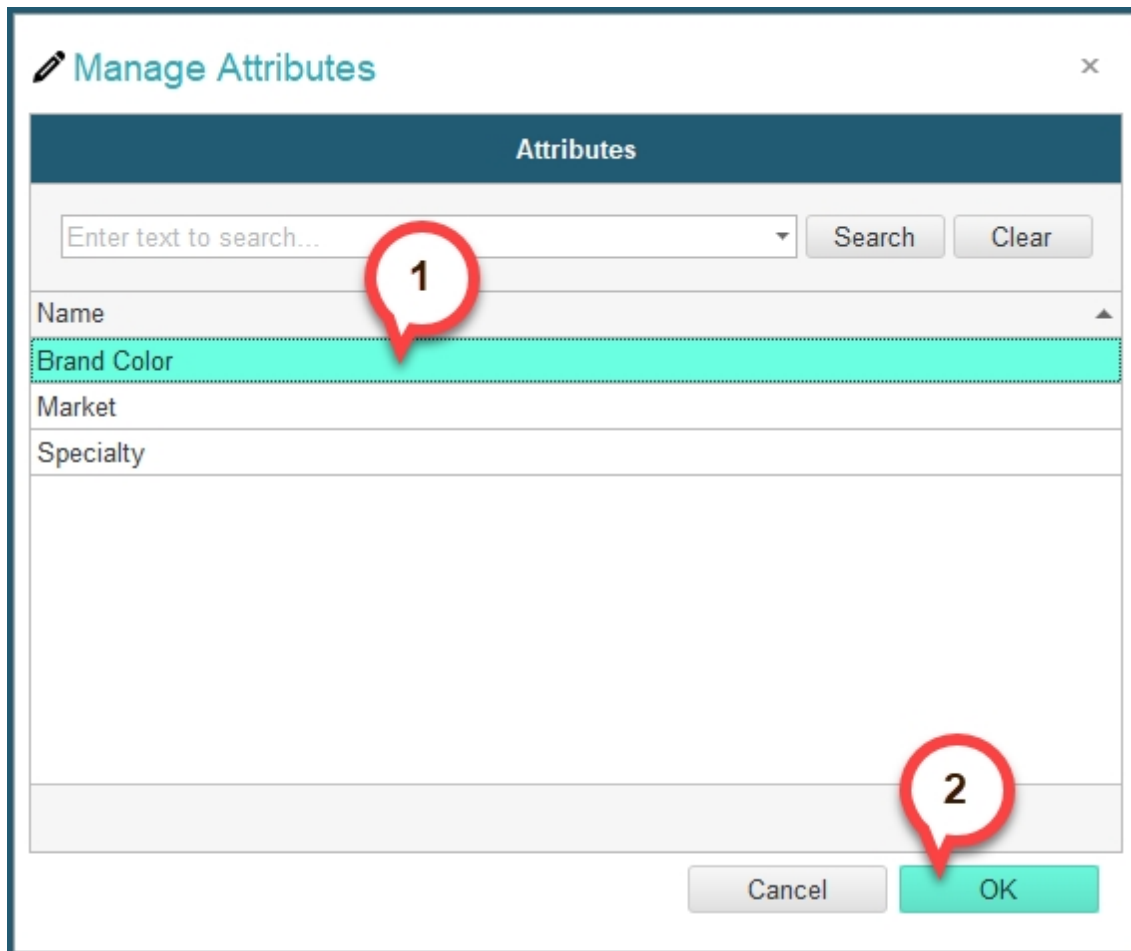
You will then see the corresponding XPath expression appear in the selected field:

You are all set! Simply **save your changes** and the preferences and now when you create new titles within catalogues that apply these default values, you will see the Brand Color of the Publisher in this field:

Manage Users and their access rights

With ONIXEDIT Server, you can define **two types of users**:

- **ONIXEDIT Pro users**: You can invite any ONIXEDIT Pro user to collaborate to one or many of your ONIXEDIT Server catalogues. They will use ONIXEDIT as the client interface to get access to the authorized catalogues.
- **Web users**: If your ONIXEDIT Server account has the Web option, you can define as many web users as you want. Web users will be limited only to the maximum number of concurrent access allowed.

To define an ONIXEDIT Pro user, follow these steps:

1. Make sure to know the ONIXEDIT Pro serial number of the user you want to authorize.

2. From the *Preferences* module, go to the ***Server Edition / Users*** tab:
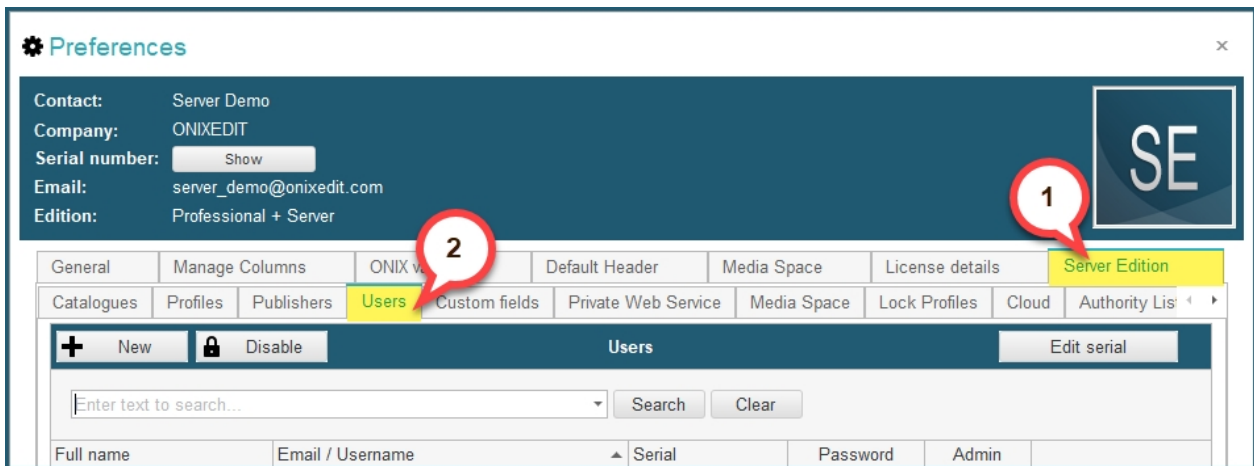
3. Click on the ***New*** button above the list of current users:
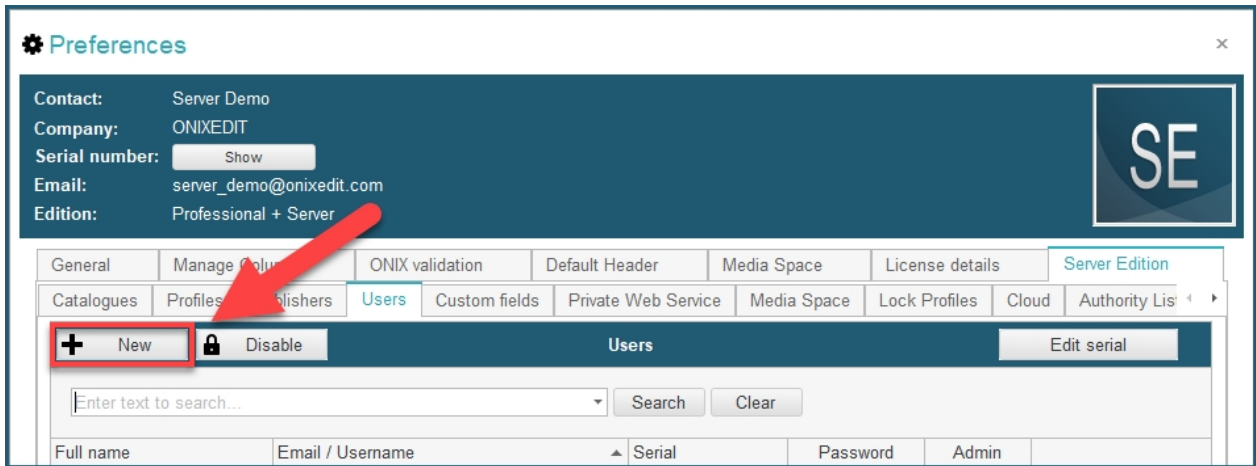
4. You will be prompted to enter the **email** of the user associated with the ONIXEDIT Pro license:
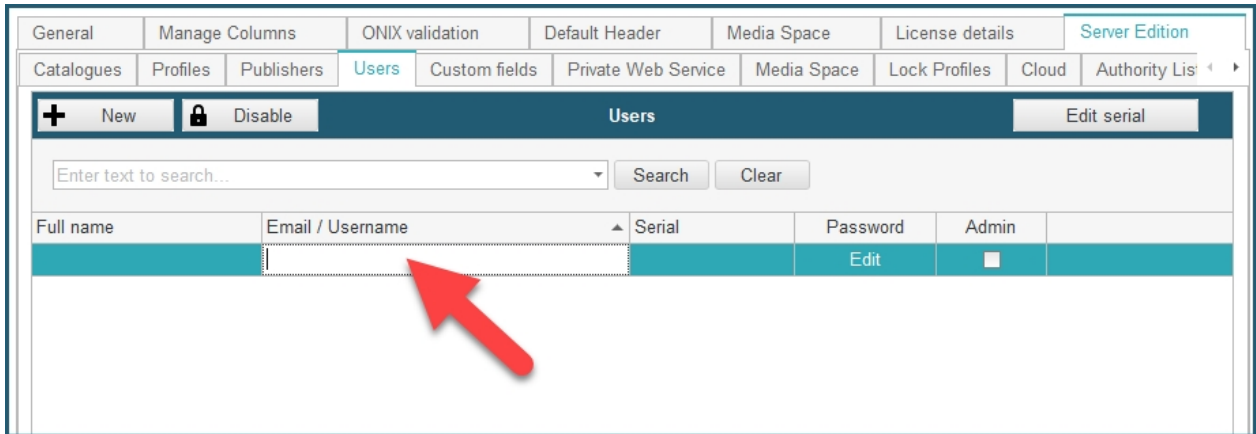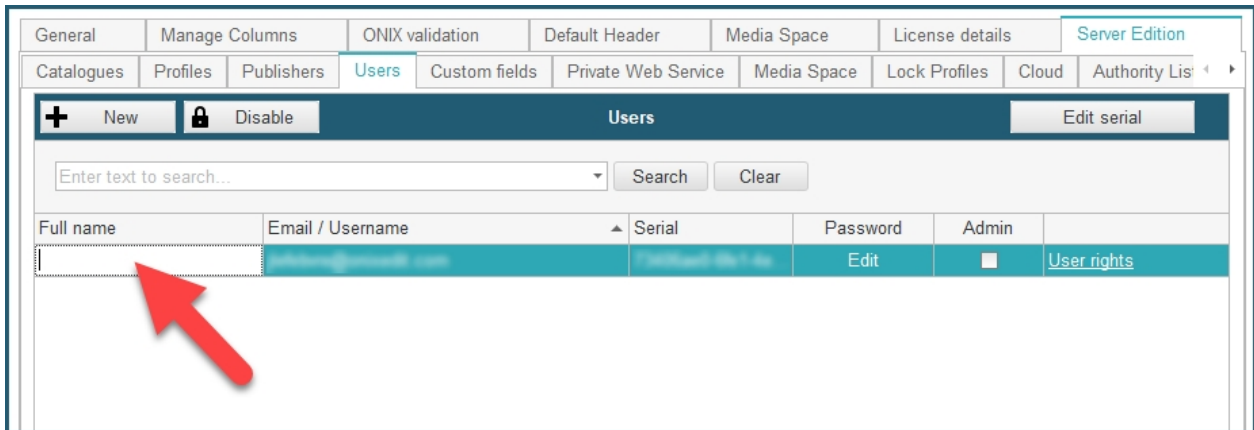
5. This must be the email address of a **valid ONIXEDIT user**. After entering the email, press *TAB*. If the email is valid and associated to an ONIXEDIT Pro serial number, the next step will be to enter that serial number:

6. Then, you will have to enter the **full name** of that new user:

7. Next, you will define a **password** for that user:

8. Then, you will have to define the access rights for that user:
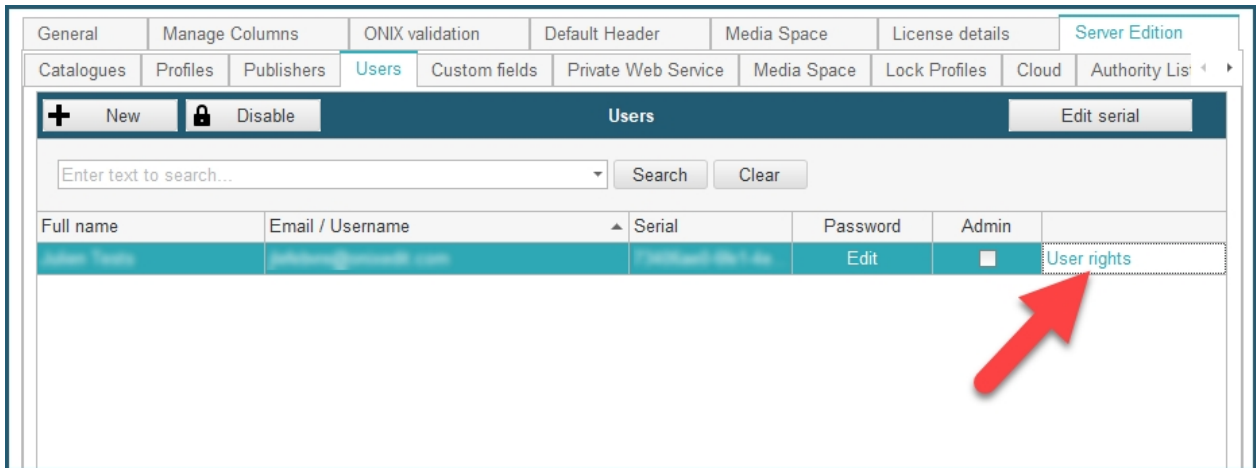
By clicking the ***User rights*** link on the right, you will get access to a dialog that will show all your current catalogues. You must then locate the ones you want to grant the user access to by clicking on the dropdown menu (1), selecting the catalogue you want to add (2) and clicking on ***Add*** button (3). (You can also use the search bar at the top to help find the catalogue you want to add):
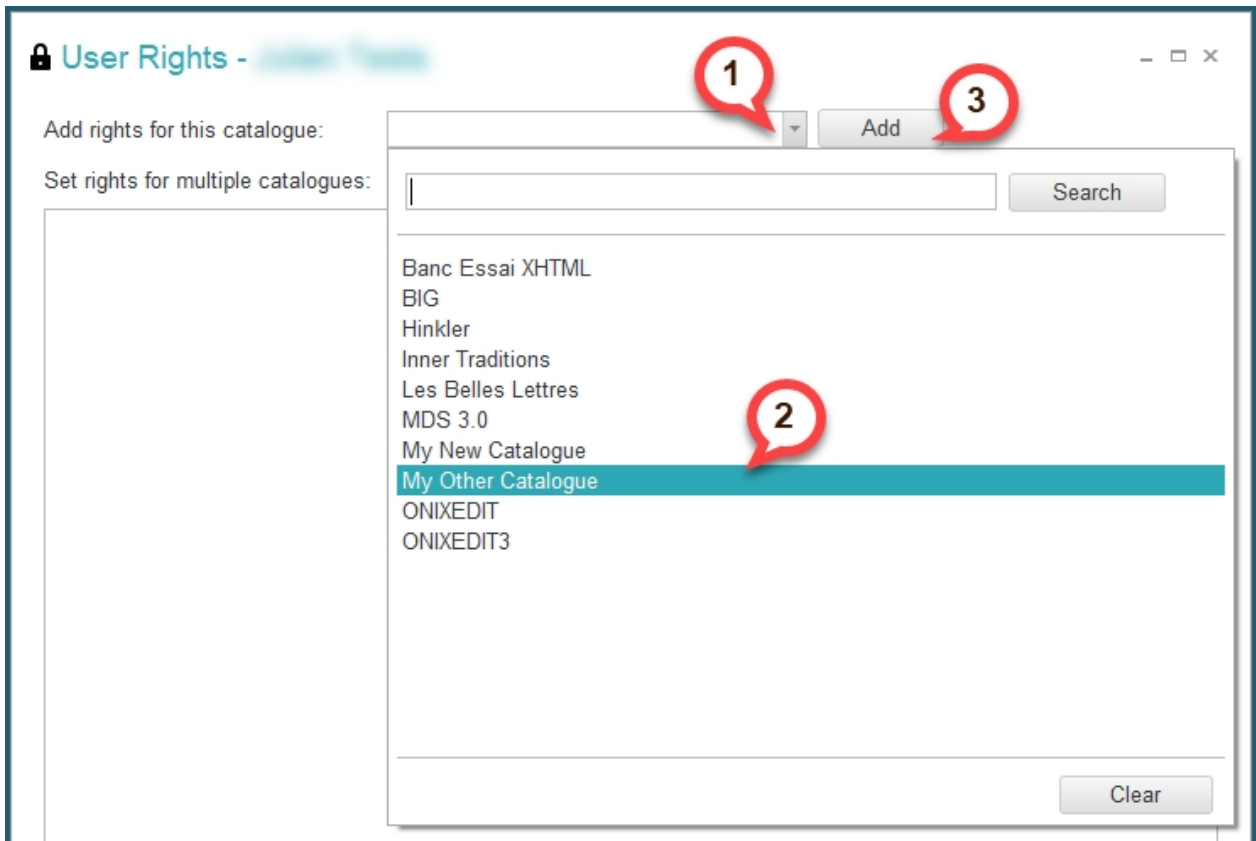
Then you will have to check the **privileges** you want to allow for that user for that catalogue:

Optionally, you can use the **Set rights for multiple catalogues** tool to apply the same access rights to many ONIXEDIT Server catalogue in a single operation:

Moreover, you can use the **ONIXEDIT SE modules permissions** tool to define to which module will the user be granted permission:
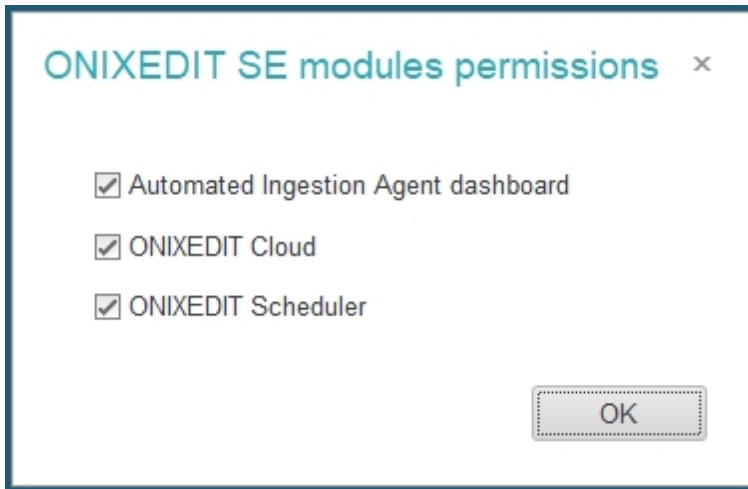
9. Finally, **Save** your ONIXEDIT Server preferences, and you are done!

To define a Web user, follow these steps:

1. From the *Preferences* module, go to the **Server Edition / Users** tab:
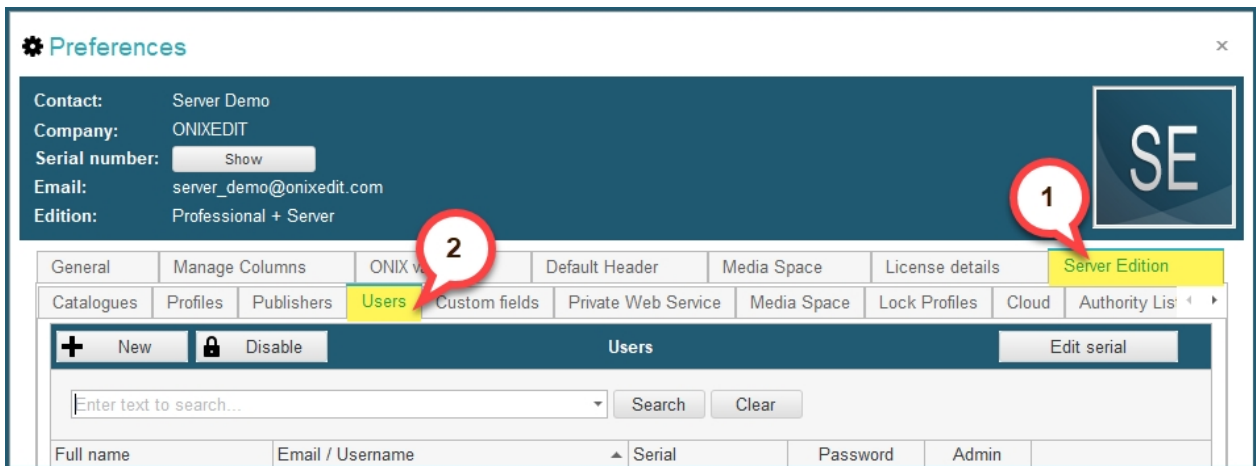
2. Click on the **New** button above the list of current users:
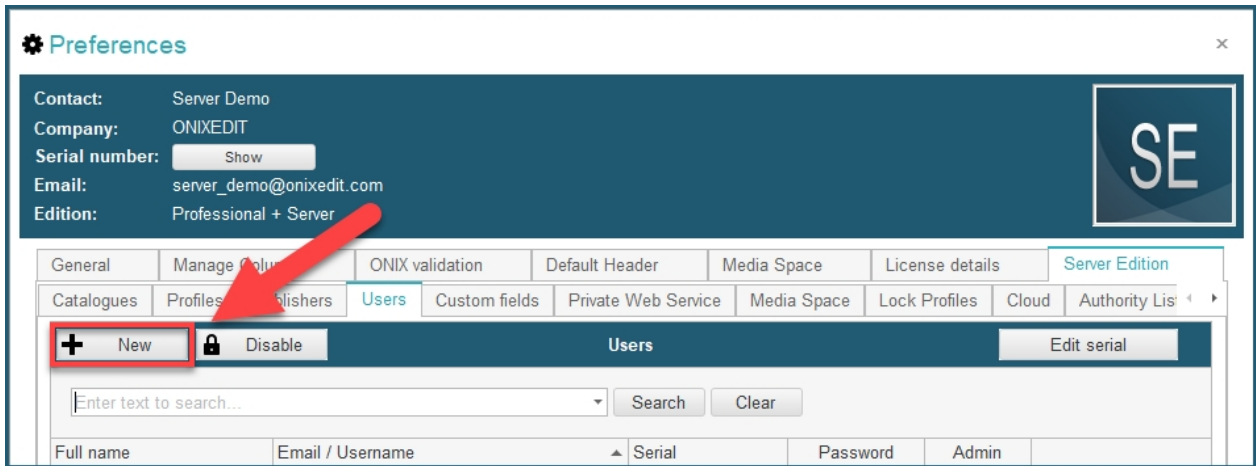
3. You will be invited to enter the **username** of the new web user. It could be any alphanumeric value:
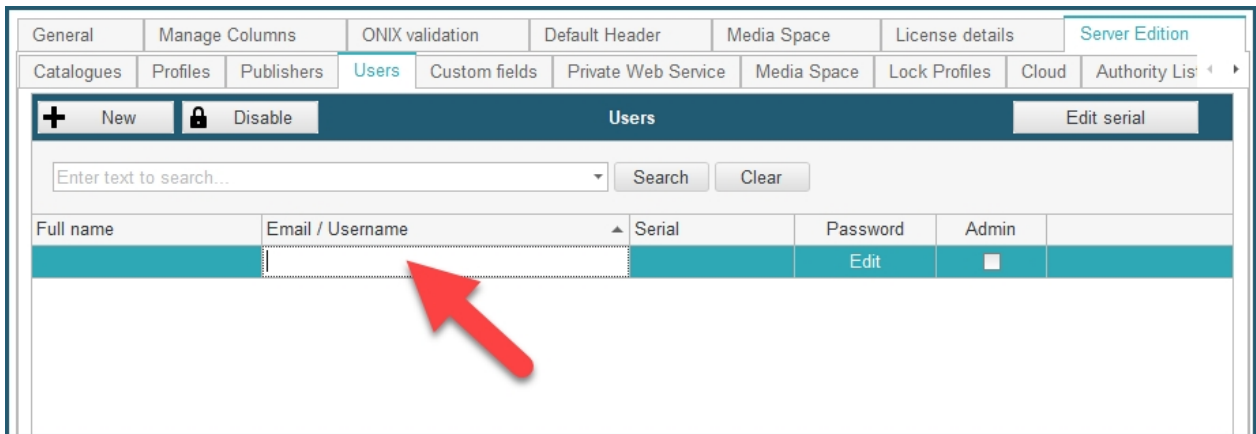
4. After entering the username, press *TAB*. You will see the following confirmation dialog. Click on *YES*:

5. Then, you will have to enter the **full name** of that new user:

6. Next, you will define a **password** for that user:

7. And finally, you will have to define the **user rights** (same steps as for ONIXEDIT Pro users as shown above).

Manage Custom fields

In your ONIXEDIT *Preferences*, under **Server Edition / Custom fields** tab, you will find a list where you can define custom fields:

Custom fields are **non-ONIX data** that you can add to any of your ONIX records when using ONIXEDIT Server. Because these are non-ONIX information, they **will not be included in the ONIX files** you will produce from ONIXEDIT server. But custom fields will appear in a special section of the Advanced form of ONIXEDIT:

You can also use custom fields in the special search tool available with ONIXEDIT Server.

As well, you can **import/export** them to and from flat files or Excel using our generic import/export tool.

Custom fields can now also be viewed and edited using **ONIXEDIT Cloud** or the **simplified form** of ONIXEDIT.

You can create as many custom fields as you want. All the custom fields that you will define will be available to all your ONIXEDIT Server catalogues.

To create a custom field, click on the *New* button, give a name to your field, an optional description, select its type and save it:

You can also define its **category** with the left most column (more on this [right after](#)).

You can define a list of **possible values** for Alphanumeric fields. To do so, just click on the **Allowed values** icon Ⓐ and type the values you want to authorize:

Moreover, you can determine whether the field is repeatable within a title using the **Repeatable** checkbox, and define a default value for each custom field by using either the **Default value** or **XPath** columns.

Custom Fields Categories

Since version 3.4.8 of ONIXEDIT, you can classify your custom fields by Category. To do so, use the ***Manage custom fields categories*** button:
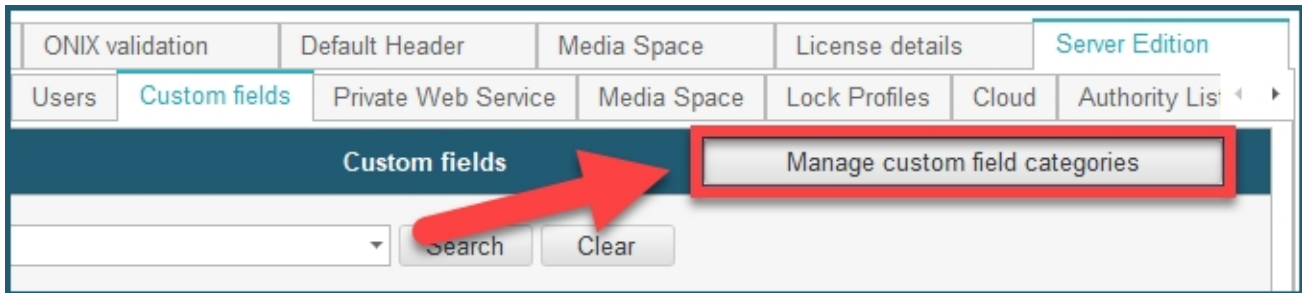
The following form will show up, allowing you to add/delete as many categories as you like:

Once defined, you can assign them to your custom fields:

Assigning categories to your custom fields will allow you to:

- o Group and present your custom fields by category:

o   Authorize your end users (ONIXEDIT Pro and Cloud) to view and modify specific categories of custom fields:

🔒 User Rights - RGU External

Add rights for this catalogue:　[　　　　　　　　　▼]　[Add]

Set rights for multiple catalogues:　[Set...]　　　　ONIXEDIT SE modules permissions:　[Set...]

Catalogue 3 / 3

ONIXEDIT3

User rights:

Read Titles:	☑
Add Titles:	☑
Modify Titles:	☑
Delete Titles:	☑
Save Invalid Titles:	☑
Edit Custom Fields:	Edit **(1)**
Lock/Unlock Titles:	☑
Edit default values (Web only):	☑
Locked titles profile:	All locked

Choose which formats are visible to this user (ONIXEDIT and Web):

AMAZON (ONIX 2.1) (N/A for this catalogue)	☐
APA (ONIX 2.1) (N/A for this catalogue)	☐
BIC (ONIX 2.1) (N/A for this catalogue)	☐
BISG (ONIX 2.1) (N/A for this catalogue)	☐
BOOKNET (ONIX 2.1) (N/A for this catalogue)	☐
BTLF (ONIX 2.1) (N/A for this catalogue)	☐
ONIXBest (ONIX 3.0) (N/A for this catalogue)	☐
CUSTOM (ONIX 2.1 and ONIX 3.0):	☑

(4)

Note: You can search a catalogue using CTRL + F　　　　[OK]

Private Web Service

The **Private Web Service** tab is used by ONIXEDIT to configure ONIXEDIT Server "On Premises" installations. It is **strongly recommended to not modify these settings** prior to have consulted the ONIXEDIT team.

Manage Media Space

The **Media Space** tab of your ONIXEDIT Server Edition preferences is dedicated to define where to store your different media files that you associate with each of your titles using ONIXEDIT Pro or ONIXEDIT Cloud. Media files can also be processed automatically by ONIXEDIT Automated Ingestion Agent. Every ONIXEDIT Server installation provides 2 different Media Space Zone:

- o **PUBLIC Zone** is where the files that you want to share with your trading partners, and public in general, will be located. For instance, this is where your cover images will go. Each file in your Public Zone will be published over the Internet and free to access by everyone knowing their corresponding URL.

- o **PRIVATE Zone** is where you will save your precious asset files that you do not want to share with everyone. Your eBooks, for example, should be in this category. Files in your Private Zone are not published over the Internet. However, it is possible for you to automate their transmission to specific partners using ONIXEDIT Scheduler.

At any moment, you can decide to set which type of asset files will be public and which will be private. **By default, every asset type is public**, but if you intend to use ONIXEDIT Server to manage your eBooks, **it is strongly recommended to set the following types as Private**:
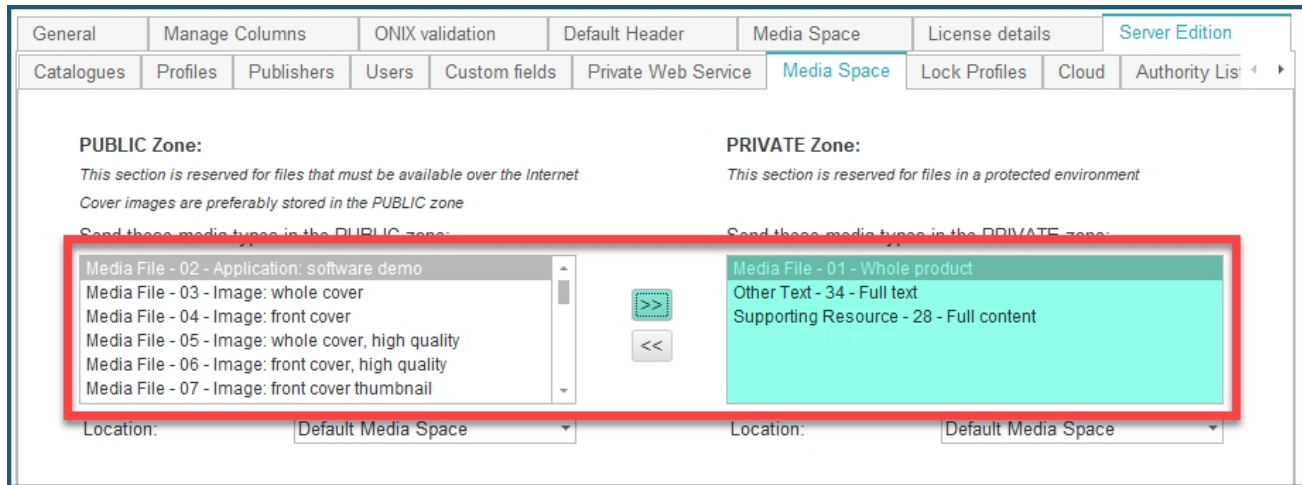
If ever you make changes after having assign media files to some of your titles, it is important to know that the **files already in your ONIXEDIT Media Space will stay in their original zone**.

If your ONIXEDIT Server is hosted at ONIXEDIT, you will probably notice that the *Location* drop-down menu will show "Default Media Space":
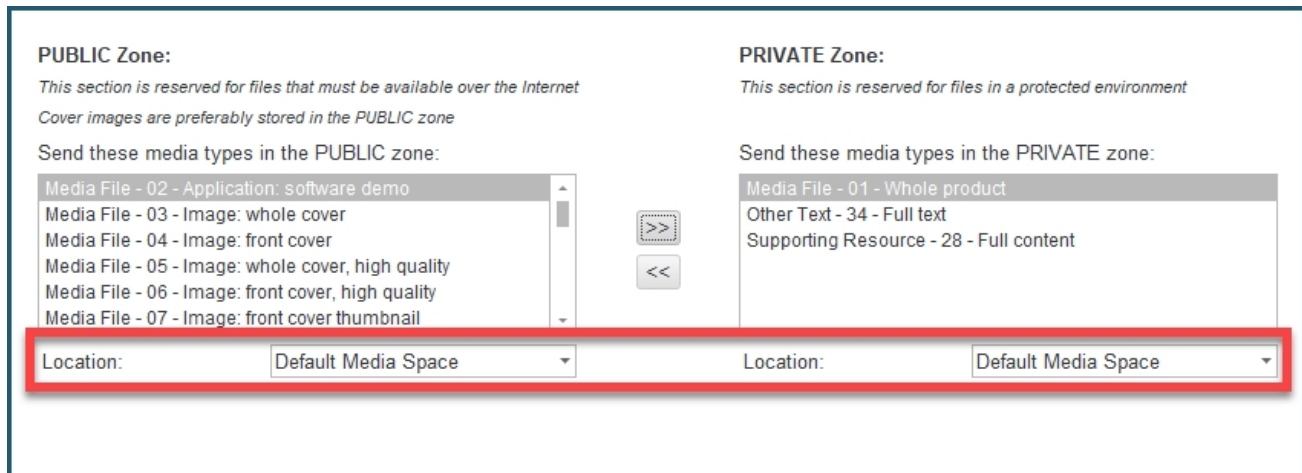
"Default Media Space" corresponds to the Media Space server located at ONIXEDIT.

However, if you purchased ONIXEDIT Server "On Premises" then, your location will be set to a different location.

It can be a FTP server:

Or an Amazon S3 bucket:

When we install ONIXEDIT Server on your own premises, we configure Public and Private locations for you. So you don't have to configure these by yourself.

At the bottom left of the **Media Space** tab, you will find a button named *Cover images validation and processing*. If you click on it, you will see a small dialog like the following:

Using this dialog, you can set:

- o Minimum image requirements.
- o Automatic image reduction for high-resolution images.
- o Automatic thumbnail creation when adding or updating a cover image (When checked, each time a new cover image is defined for a title, ONIXEDIT will automatically produce a thumbnail from it.)

At the bottom right of the **Media Space** tab, you will find a button named ***Limit the maximum size of media files***. If you click on it, you will see a dialog like the following:

Maximum file size (in Mb) for ONIX assets (leave empty for unlimited size)	
Asset type	Max file size (in Mb)
Media File - 01 - Whole product	
Media File - 02 - Application: software demo	
Media File - 03 - Image: whole cover	
Media File - 04 - Image: front cover	
Media File - 05 - Image: whole cover, high quality	
Media File - 06 - Image: front cover, high quality	
Media File - 07 - Image: front cover thumbnail	
Media File - 08 - Image: contributor(s)	
Media File - 10 - Image: for series	
Media File - 11 - Image: series logo	
Media File - 12 - Image: product logo	
Media File - 16 - Image: Master brand logo	
Media File - 17 - Image: publisher logo	
Media File - 18 - Image: imprint logo	
Media File - 22 - Image: table of contents	

Using this dialog, you can set a maximum size for the files of every different type of asset.

Manage Lock Profiles

By default, when a title is locked, it can't be modified. You can lock specific titles of a catalogue using ONIXEDIT. Consult Locking titles section for more details about how to lock/unlock titles.

However, since ONIXEDIT 3.4, you can now **define different lock profiles**. For instance, suppose that you want to authorize some users to revise description, table of contents and other text metadata. But you don't want them to accidentally modify other information when titles are locked. The solution is to define a new "Text revision" profile that will authorize modification only to *OtherText* (ONIX 2.1) and *TextContent* (ONIX 3.0) elements.

To do so, go in your ONIXEDIT *Preferences*, under *Server Edition / Lock Profiles* tab. Then simply click on the *New* button (1), give a **name** to your new lock profile (2) and an optional **description** (3):
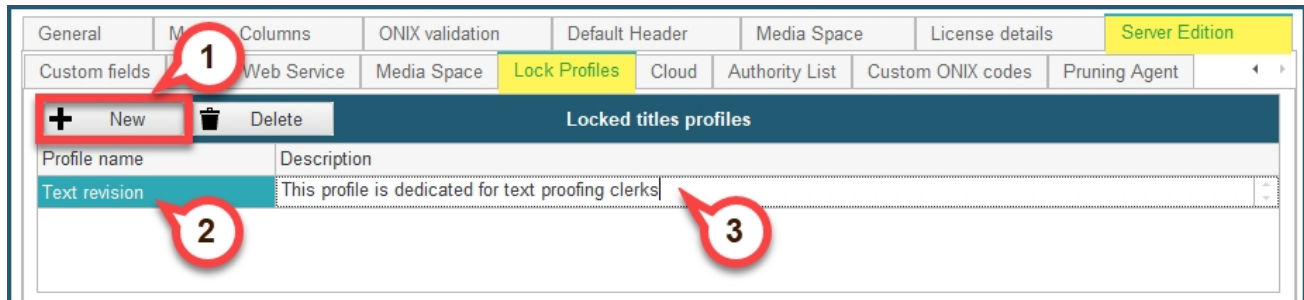
Next, you will **select each ONIX elements that will be modifiable** by users having the "Text revision" profile for Locked titles:
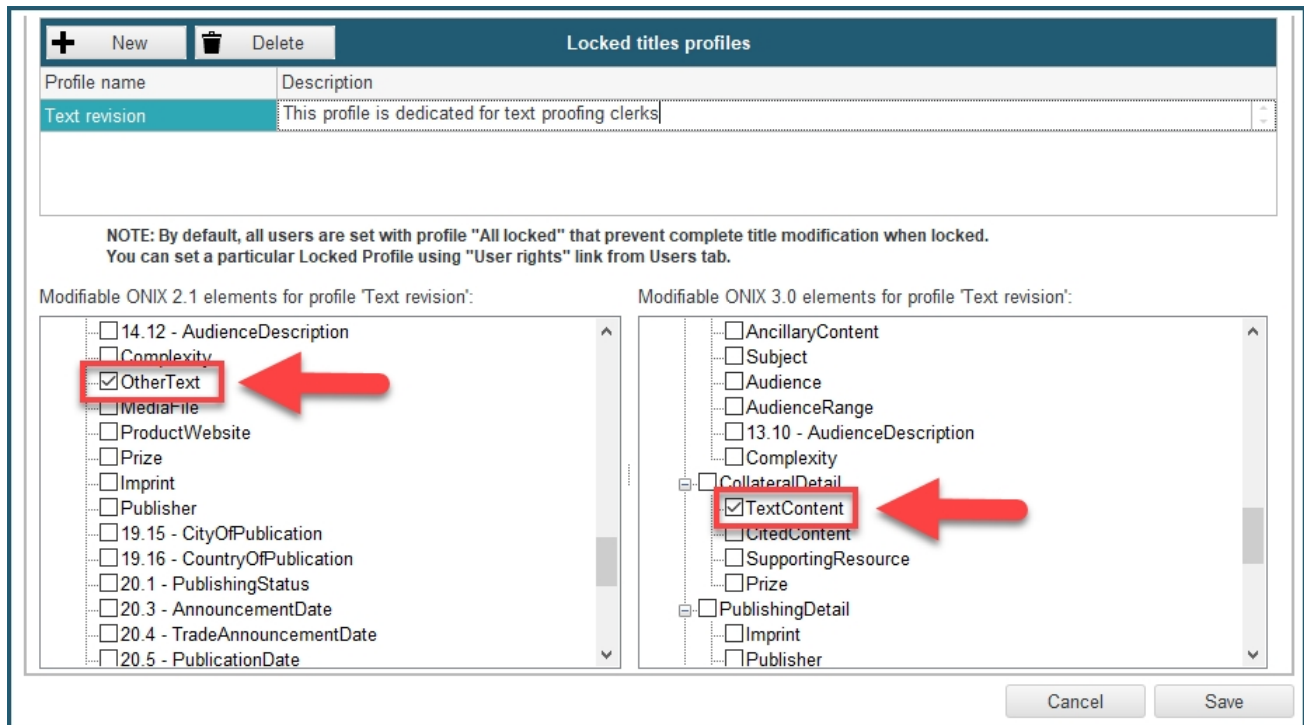
Don't forget to **save** your preferences once you are done!

Once a new lock profile is set, you can **assign it to any of your ONIXEDIT Server users** from their [access rights dialog](#):

As a result, the users having Text Revision profile set for one or more catalogues, **won't be**

able to modify any metadata of locked titles from those catalogues **except elements authorized by the lock profile**, for example:
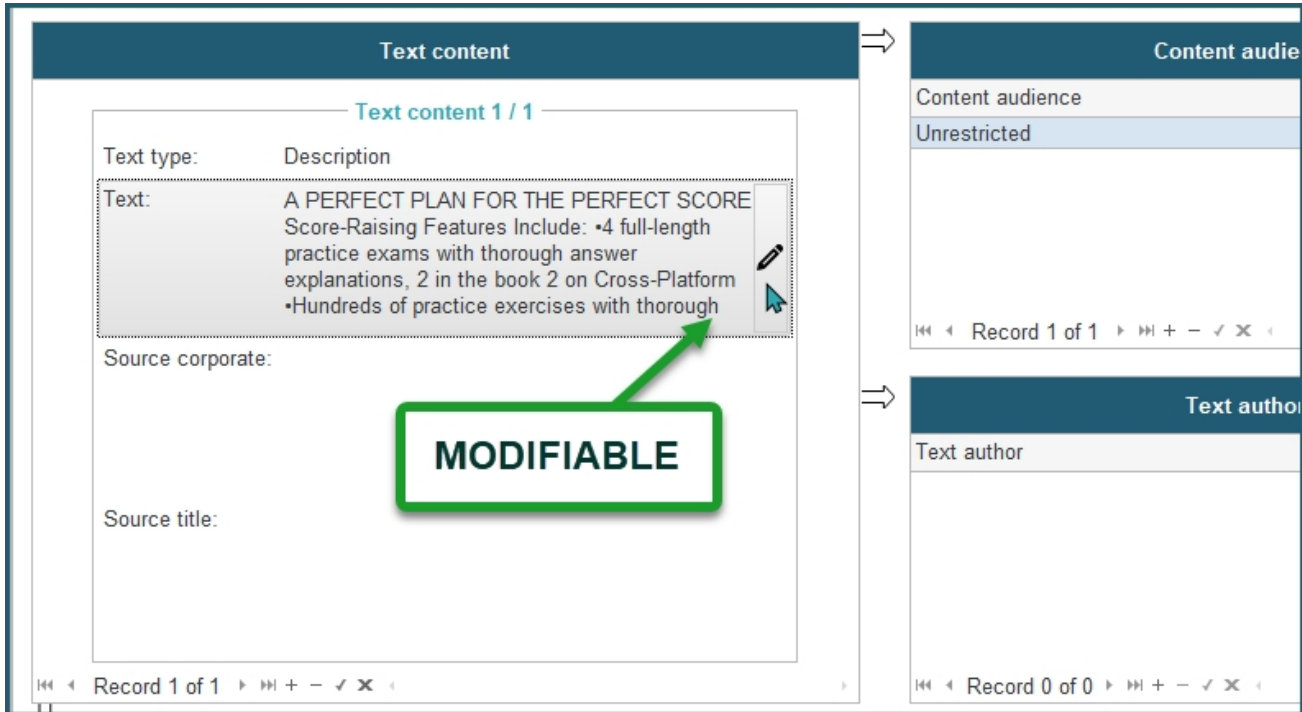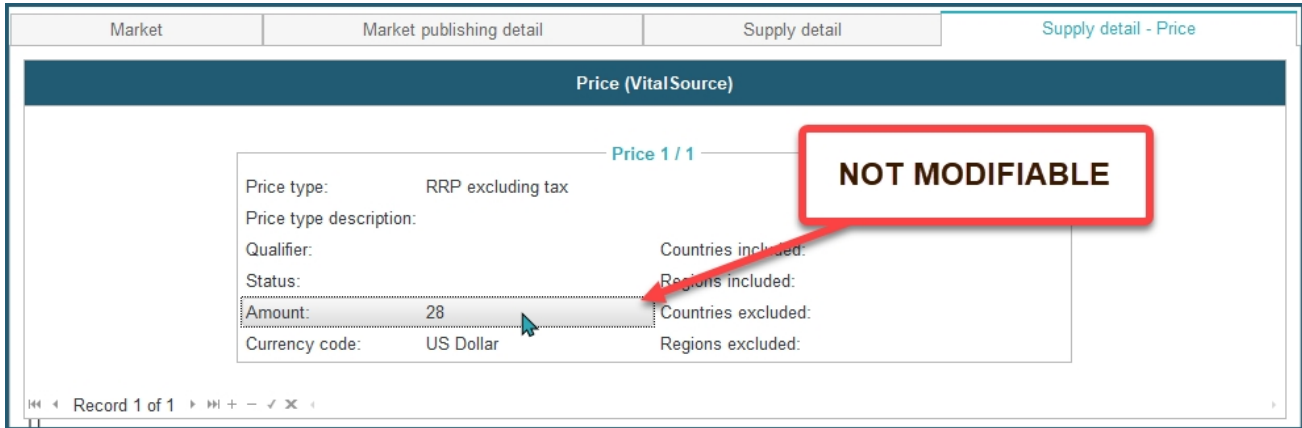
Manage Media File Types for Cloud

From your ONIXEDIT *Preferences*, you can use the **Server Edition / Cloud / Media files** tab to define which media file types you want to authorize for viewing/editing from ONIXEDIT Cloud.

Just toggle the check-boxes under the ***Authorized*** column to allow/disallow each media file type:

You can also click on the **More settings** button on the right to get access to a form similar to the following:
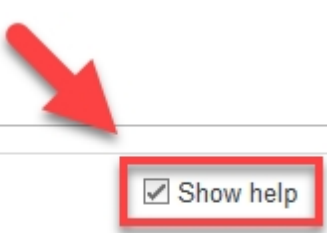
Tip: activate the *Show help* check box at the bottom to get contextual help on each field:

The Media Files configuration that you will set **will apply to all your ONIXEDIT Server catalogues accessible from ONIXEDIT Cloud**.

To explain the usage of the *More settings* dialog, we will go through two different common cases.

1. Configuring a cover image settings for ONIXEDIT Cloud

We want to allow ONIXEDIT Cloud users to define one cover image per title and rename uploaded cover image files using the ISBN of the title. To do so, first click on the *More settings* button corresponding to **Media File - 04 - Image: front cover** (ONIX 2.1):

Next, click on the *Authorized* check box (1) and make sure that *Multiple items* is not selected (2). Define also the captions that you want to show under the cover images for your English and/or French users (3).

The *File name mask* field allows you to rename the media file that will be uploaded by the user in order to apply a standard naming convention for those files. If you leave that field blank, ONIXEDIT Cloud will keep the original filename or will use the **Unique Id** if defined. You can

use any of the following tokens: [ISBN], [ISBN13] or [RecordReference] along with static prefix/suffix strings.

For instance, if you set it to be "COVER_[ISBN13]", the resulting filename of a cover image named "abc.jpg" uploaded for title 9780006391555 will be "COVER_9780006391555.jpg".

Set *File name mask* field to "[ISBN13]" (4).

Finally, make sure that the *Unique Id* drop-down menu is set to "None" (5). Your dialog should look like the following:

Repeat the steps above for **Supporting Resource - 01 - Front cover** (ONIX 3.0):

Media file types authorized for ONIXEDIT Cloud				
Media File Type ▲	Authorized	Multiple items	Unique Id	More settings
Media File - 24 - Image: back cover	☑	☐	None	···
Media File - 25 - Image: back cover, high quality	☐	☐	None	···
Media File - 26 - Image: back cover thumbnail	☐	☐	None	···
Media File - 27 - Image: other cover material	☐	☐	None	···
Media File - 28 - Image: promotional material	☐	☐	None	···
Supporting Resource - 01 - Front cover	☑	☐	None	···
Supporting Resource - 02 - Back cover	☑	☐	None	···
Supporting Resource - 03 - Cover / pack	☐	☐	None	···
Supporting Resource - 04 - Contributor picture	☑	☑	String	···
Supporting Resource - 05 - Series image / artwork	☐	☐	None	···
Supporting Resource - 06 - Series logo	☐	☐	None	···
Supporting Resource - 07 - Product image / artwork	☐	☐	None	···

After having **saved** your ONIXEDIT Preferences, you will be able to see the result immediately within ONIXEDIT Cloud's title edition form. A media file area will allow users to add the authorized files either by clicking on it and selecting the file, or simply by dragging and dropping the file in the area:

Once the user selected the file or dropped it in the area, they will see the following dialog. They will then select the appropriate type of media file from their authorized set in the drop-down menu (1) and then click **OK** (2):
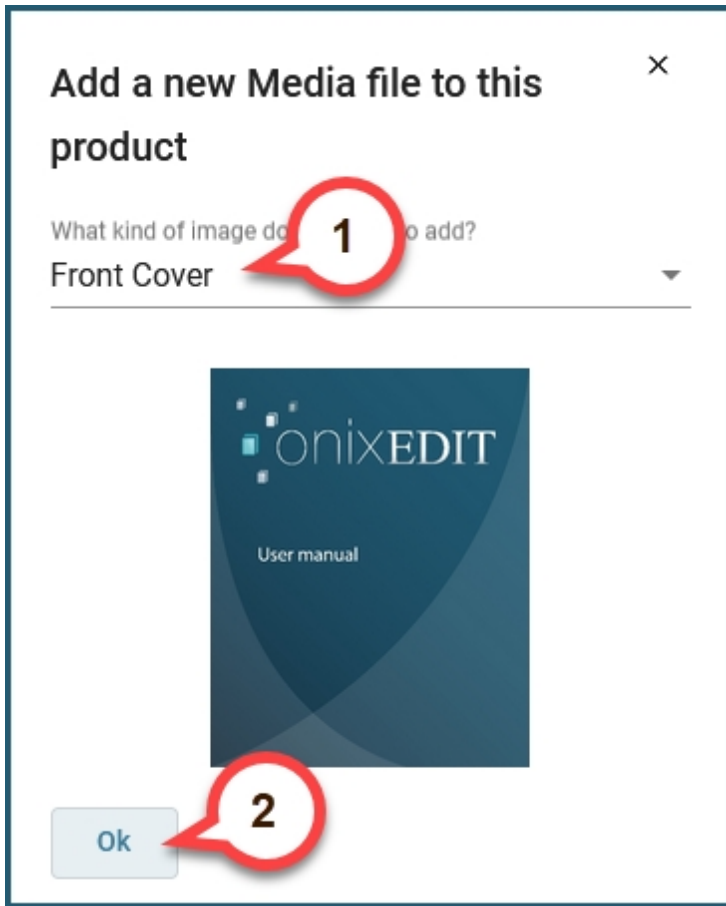
The image will then be associated to the current title:

2. Configuring contributor pictures for ONIXEDIT Cloud

We want to allow ONIXEDIT Cloud users to define one picture for each contributor of a title. We also want to define a drop-down list with each contributor names to facilitate pictures identification. To do so, first click on the *More settings* button corresponding to **Media File - 08 - Image: contributor(s)** (ONIX 2.1):

What we need to do should look like the following screen capture:

This time, we activate the **Multiple items** check-box to allow end users to define more than just one contributor.

We also leave the **File name mask** blank and we select "String" for the **Unique Id**:
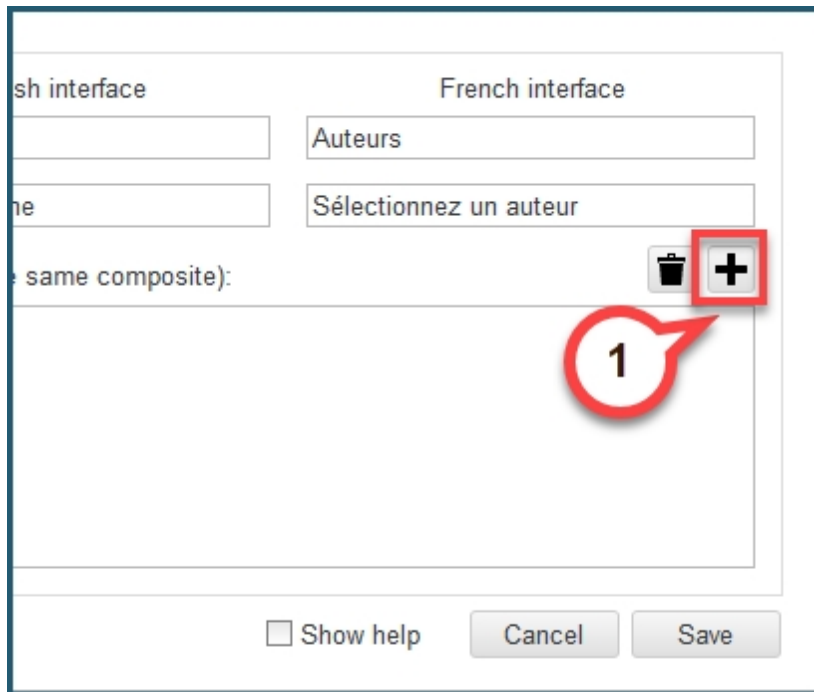
Then we define some contributor fields to feed a drop-down list that will appear in the Cloud image form. This will be used to create a Unique Id for each contributor picture that we will add.
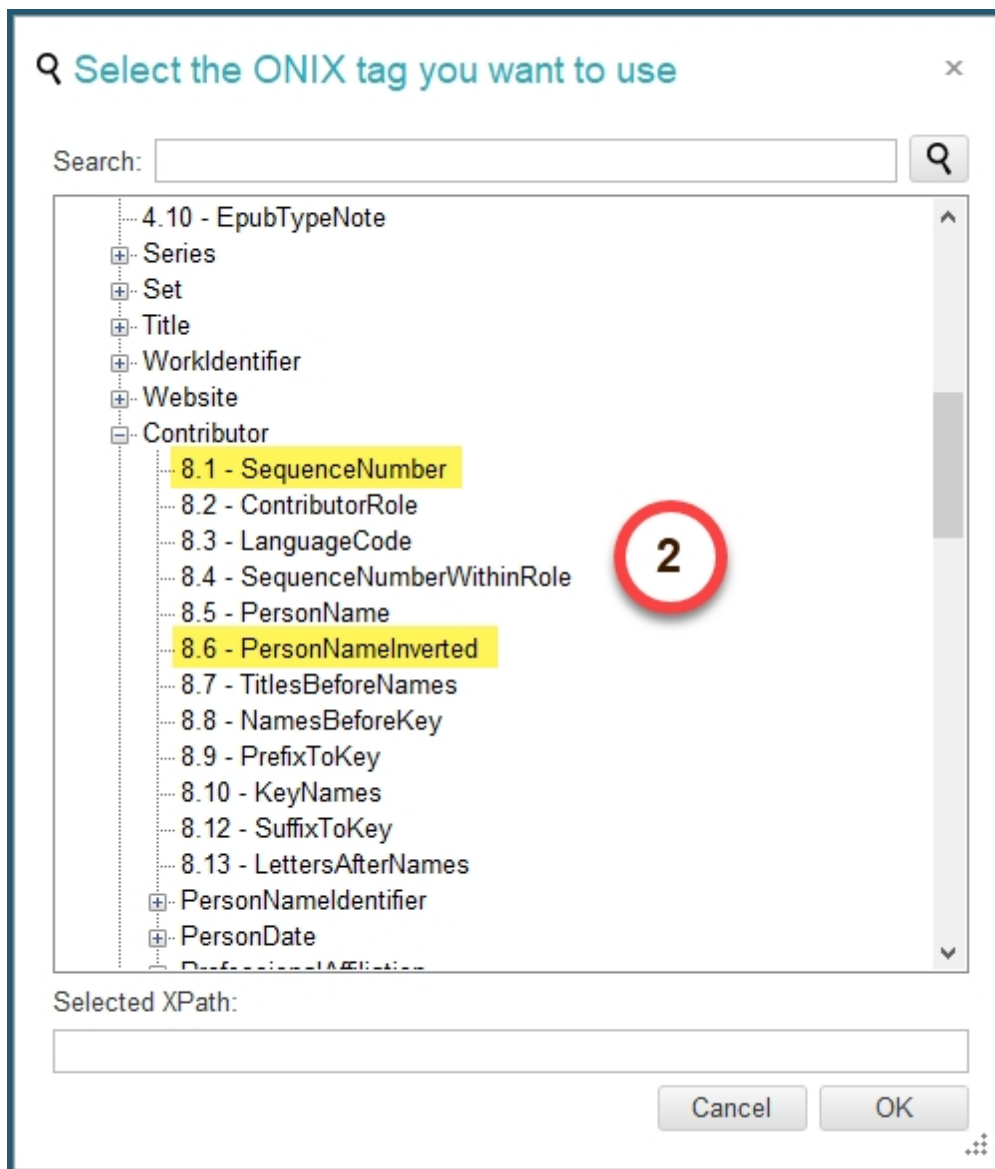
We **save** the media file settings dialog and did the same steps for ***Supporting Resource 04
- Contributor picture*** (ONIX 3.0):

Media file types authorized for ONIXEDIT Cloud				
Media File Type ▲	Authorized	Multiple items	Unique Id	More settings
Media File - 24 - Image: back cover	☑	☐	None	···
Media File - 25 - Image: back cover, high quality	☐	☐	None	···
Media File - 26 - Image: back cover thumbnail	☐	☐	None	···
Media File - 27 - Image: other cover material	☐	☐	None	···
Media File - 28 - Image: promotional material	☐	☐	None	···
Supporting Resource - 01 - Front cover	☑	☐	None	···
Supporting Resource - 02 - Back cover	☑	☐	None	···
Supporting Resource - 03 - Cover / pack	☐	☐	None	···
Supporting Resource - 04 - Contributor picture	☑	☑	String	···
Supporting Resource - 05 - Series image / artwork	☐	☐	None	···
Supporting Resource - 06 - Series logo	☐	☐	None	···
Supporting Resource - 07 - Product image / artwork	☐	☐	None	···
Supporting Resource - 08 - Product logo	☐	☐	None	···
Supporting Resource - 09 - Publisher logo	☐	☐	None	···
Supporting Resource - 10 - Imprint logo	☐	☐	None	···

When you are done, don't forget to **save** your preferences!

Now, when we go to ONIXEDIT Cloud, we can set contributor pictures and use a drop-down list to associate each image with its corresponding contributor:
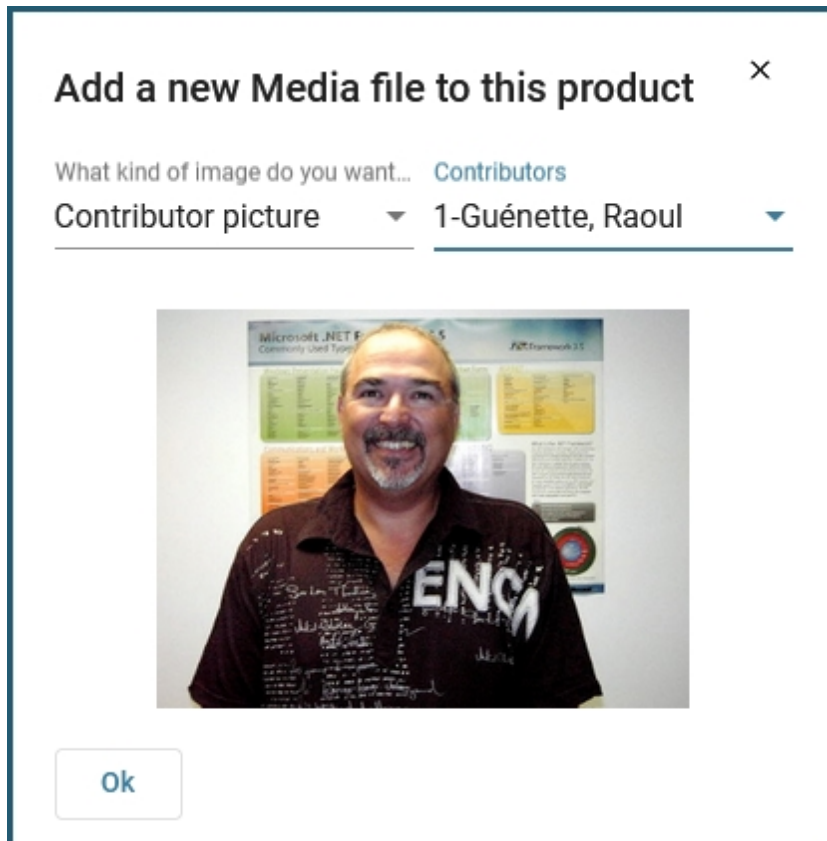
As a result in ONIXEDIT, we can see the media file link with a distinctive filename (in this case, "1-Gu%C3%A9nette,_Raoul.png"):
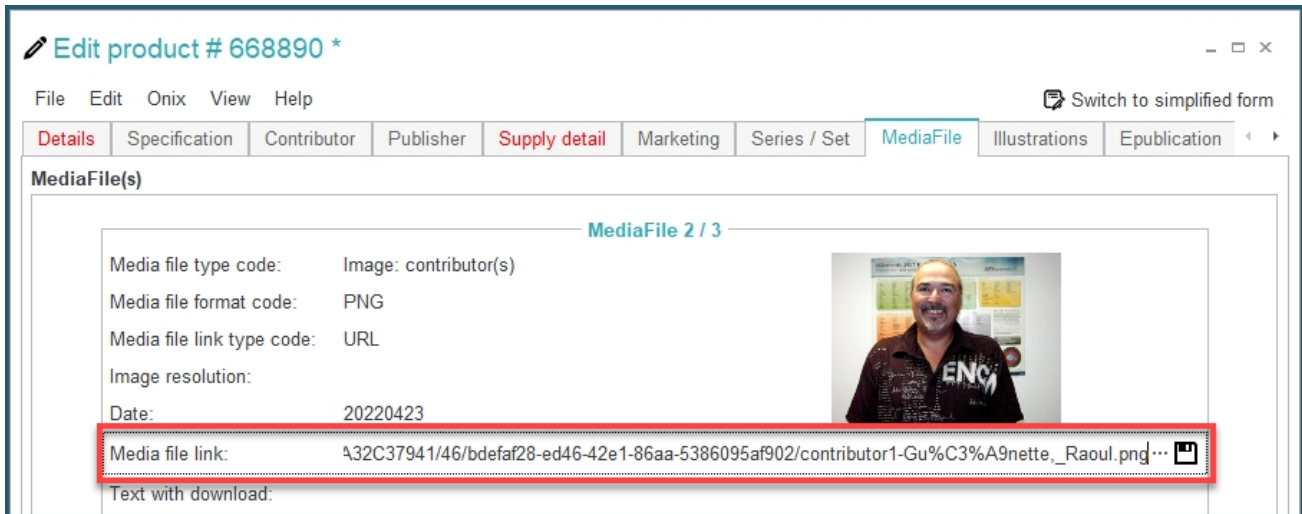
Manage ONIXEDIT Cloud columns

Since version 3.4.8, from the **Server Edition / Cloud** tab you can now also define the columns of the main list for your ONIXEDIT Cloud users, both for ONIX 2.1 and ONIX 3.0. Like for ONIXEDIT main list, you can set any ONIX field to be part of the list. You can even define very specific XPATH columns:
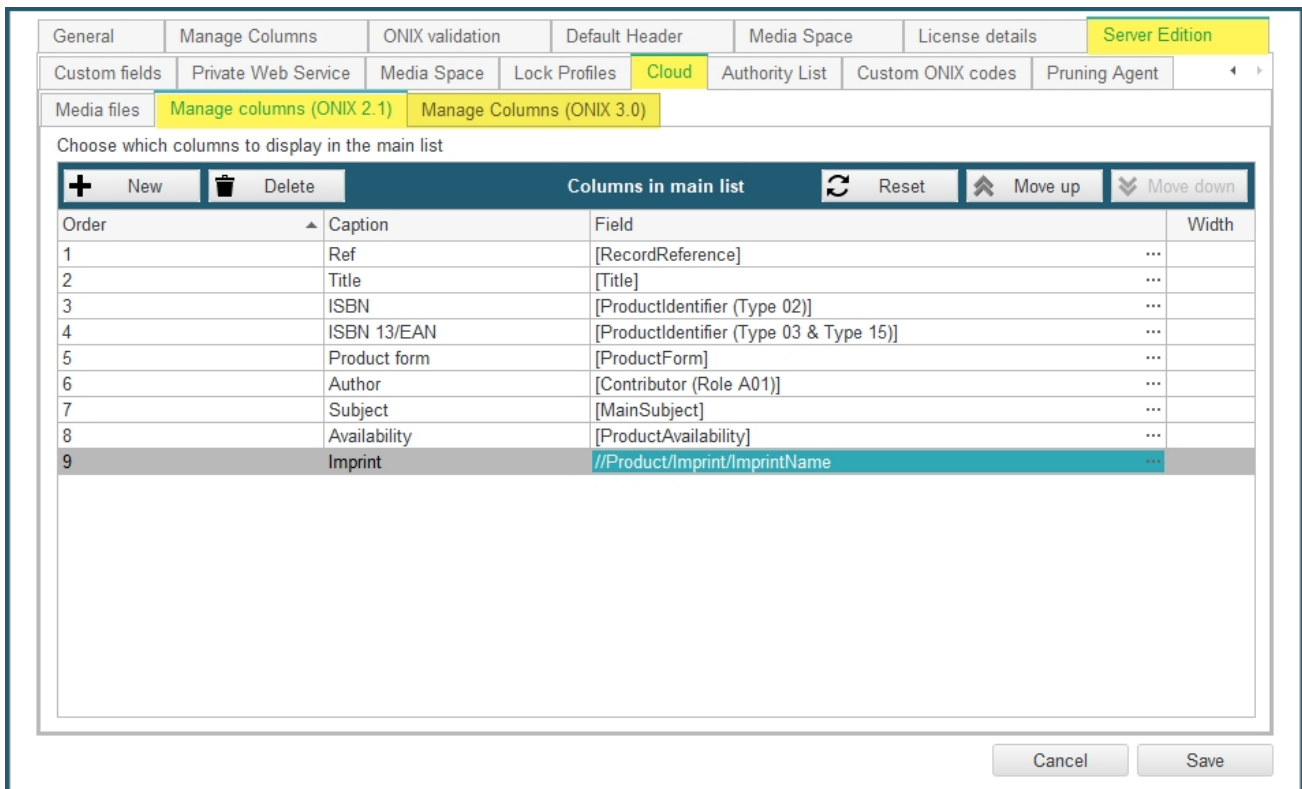
For more details, visit the following page of the ONIXEDIT user manual: [Changing main list columns](#).

Set Contributors Authority List

Since version 3.4.8, you can now define an **Authority List** to standardize the metadata of the different contributors defined for your ONIX titles. To do so, you will find the **Server Edition / Authority List** tab in your ONIXEDIT preferences:

To start using the Authority List, you first need to decide if you will let ONIXEDIT **automatically assign IDs** to each of your contributors or if you want to define it by yourself. You can set this at the bottom of the list, like shown below:

No matter which option you choose, ONIXEDIT will automatically assign a sequential ID to each of your contributor for you. But if you select *Define my own IDs*, ONIXEDIT IDs will be hidden to let you type (or import) the one that you want for each contributor.

If you decide to use your own IDs, each of your ONIX products will present 2 proprietary PersonNameIdentifier (ONIX 2.1) or NameIdentifier (ONIX 3.0). The one named "ONIXEDIT" is the automatically assigned ID and the one named "CUSTOM" is your own ID. For instance:

```
<Contributor>
 <SequenceNumber>1</SequenceNumber>
 <ContributorRole>A01</ContributorRole>
 <PersonName>René Alleau</PersonName>
 <PersonNameInverted>Alleau, René</PersonNameInverted>
 <NamesBeforeKey>René</NamesBeforeKey>
 <KeyNames>Alleau</KeyNames>
 <PersonNameIdentifier>
  <PersonNameIDType>01</PersonNameIDType>
  <IDTypeName>ONIXEDIT</IDTypeName>
  <IDValue>6016</IDValue>
 </PersonNameIdentifier>
 <PersonNameIdentifier>
  <PersonNameIDType>01</PersonNameIDType>
  <IDTypeName>CUSTOM</IDTypeName>
  <IDValue>abc123</IDValue>
 </PersonNameIdentifier>
 <BiographicalNote>René Alleau is a philosopher and historian who has written extensively on alchemy, the occult sciences, and secret societies. The author of &lt;em&gt;History of Occult Sciences&lt;/em&gt; and &lt;em&gt;Aspects de l alchimie traditionelle&lt;/em&gt;, he lives in France.</BiographicalNote>
</Contributor>
```

Next, you need to establish the **scope of the Authority List**. This setting define how restrictive the Authority List will be for your end users. You have **3 possibilities**:
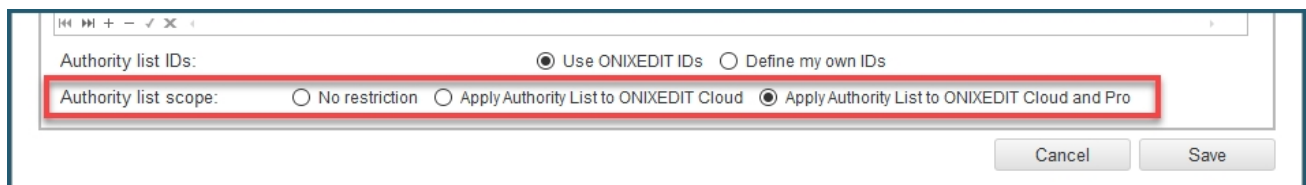
- o **No restriction**: Setting this option will simply show the list of contributors to the end users when they add a new contributor to an ONIX title from ONIXEDIT Pro or ONIXEDIT Cloud. They will be authorized to pick one or many contributors from the authority list or create a new one that don't belong to that list.
- o **Apply Authority List to ONIXEDIT Cloud**: With this option, ONIXEDIT Pro users won't have any restriction when they add contributors to an ONIX title (same behaviour as the previous option). However, ONIXEDIT Cloud users won't be authorized to create new contributors. They will be restricted to pick one or many contributors from the authority list.
- o **Apply Authority List to ONIXEDIT Cloud and Pro**: This option will restrict all ONIXEDIT Server users (ONIXEDIT Cloud or Pro) to select the contributors from the authority list when they assign it to an ONIX title.

Note: No matter which of the above option is selected, metadata ingested from an external source **won't be restricted to the authority list**. For instance, there won't be any restriction when you import an existing ONIX file to an ONIXEDIT Server catalogue under the control of your authority list.

The Authority List is composed of the following items:

o **Import/Export** button: This button presents the Authority List Import/Export tool. Using this tool, you can add/update your authority list from an Excel, CSV or Tabulated file:

You can also export your complete Authority List to an Excel, CSV or Tabulated file using the **Export to file** button.

o **Import pictures** button: Using this button, you can associate contributor images to each contributor defined in the Authority List. Just name your contributor images using the Authority List ID that is in force, put all those images in an archive (.zip or .gz) or a folder on your PC and import it:
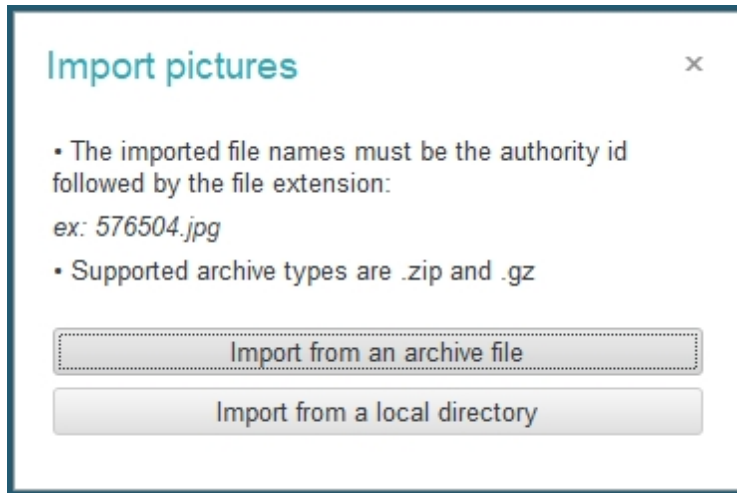
You can also edit a contributor and use the following button to add one image at a time:
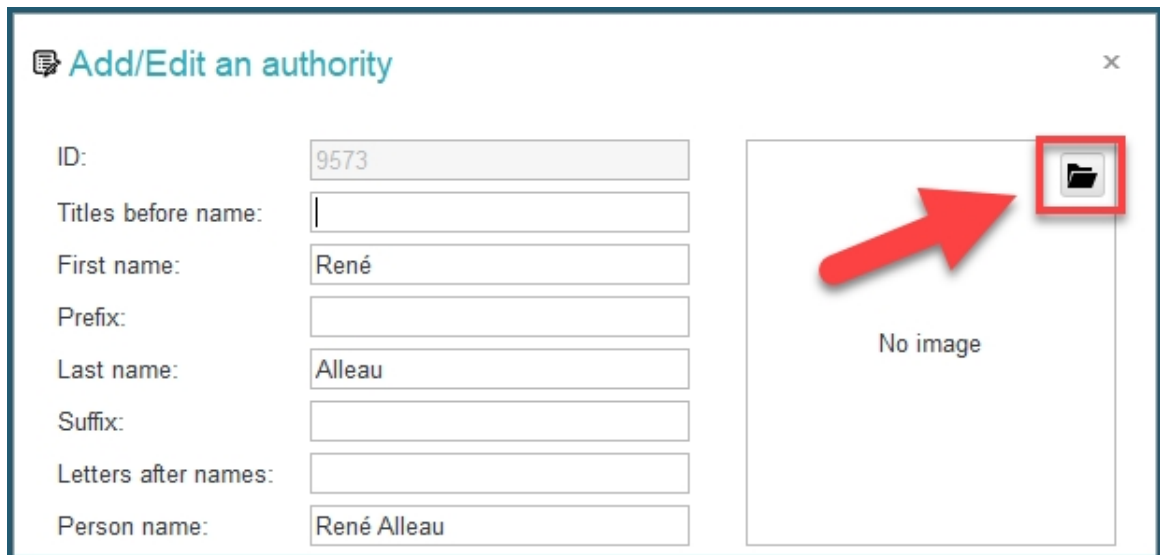
Once associated to a contributor, the corresponding image is automatically uploaded to your ONIXEDIT public Media Space. Each time a contributor from the Authority List is associated to an ONIX title, the corresponding URL is automatically added to that title.

o **Select catalogues**: With this button, you will select the catalogues on which the authority list should apply.

Optionally, you can also browse your selected catalogues to extract all contributors already defined and add/update them in the Authority List using this button:
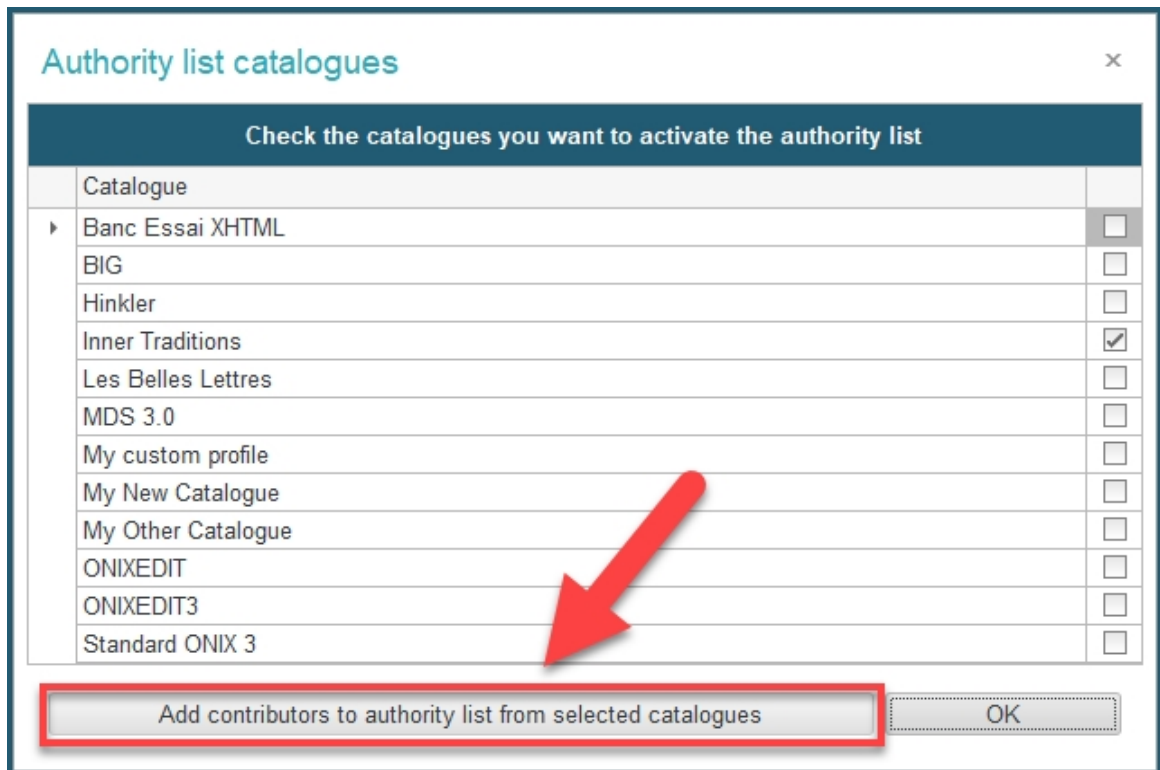
This can be useful if you decide to start using the ONIXEDIT Server Authority List from catalogues already having titles defined in it. As a result, you'll get your Authority List set with all the contributors you already have. Moreover, the system will try to do matches based on the contributor names collecting and merging data to a single entry in your Authority List. This button can also be used to update your Authority List from new titles created from an external source. For instance, after an ONIX file is imported to a catalogue under the control of the Authority List.

o **Apply Authority List to Catalogues**: Use this button each time after making modification to your Authority List to populate those modifications to titles of your ONIXEDIT Server catalogues that are controlled by the Authority List. You can use that button as often as you like.
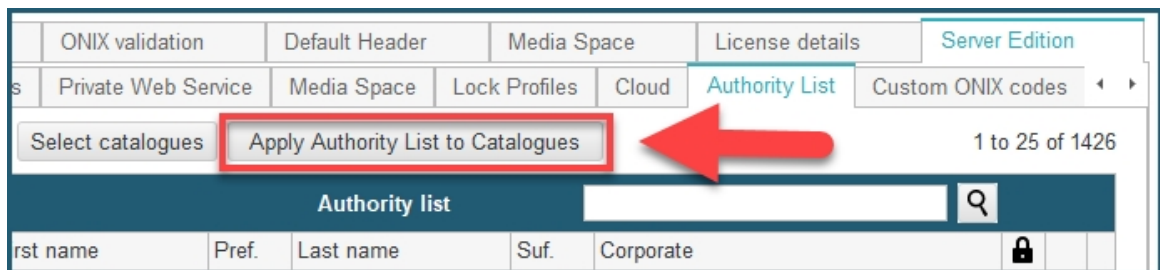
o **The Search tool**: You can use the search tool to quickly find the contributors you want to edit:

o To **edit a contributor**, you can simply double-click on it, or click on the *Edit* button:

Additional information:

o The ***Role*** field is the default role of a contributor. You can still change it when you assign a contributor from the Authority List to a specific ONIX title.

o You can lock up a selection of contributors using the contextual menu (right click):

Once locked, contributors appear with an orange background color and show a lock icon at right:

Locked contributors can't be changed. To unlock it, use the contextual menu again.

Custom ONIX codes

From your ONIXEDIT *Preferences*, you can use the **Server Edition / Custom ONIX codes** tab to hide or show some ONIX codes from the lists in ONIXEDIT Pro and ONIXEDIT Cloud, and also create your own custom ONIX codes for internal use.

WARNING: If you define your own custom ONIX codes, your ONIX files could be declared invalid and rejected by your trading partners. Your custom codes will not be valid in the ONIX standard.

Note: You can still **hide** existing ONIX codes without any risks for the validity of your ONIX files.

1. Hiding / Showing existing ONIX codes

To hide an ONIX code from a list, proceed as follows:

From the **Server Edition / Custom ONIX codes** tab in the Preferences, use the **ONIX version** drop-down menu to select the ONIX version in which you want to make the changes:

Use the **ONIX list** drop-down menu on the left to select the list in which you want to hide one or more ONIX codes:

This drop-down menu contains all ONIX codelists, as you can find [here](#).

Once you have selected a list, you will see a table containing all the codes available in this list:

To hide a code from this list, simply click on **Hide**, situated on the far right of the code you want to hide, as shown below:

Hidden codes are shown highlighted in a light red, as you can see on the screen capture below. To make the ONIX code show in the list again, you can simply click on **Show**.

Don't forget to **save your preferences** once you are done with your modifications.

2. Defining custom ONIX codes

To define your own custom ONIX code, proceed as follow:

Use the **ONIX version** drop-down menu to select the ONIX version in which you want to add a code:

Use the *ONIX list* drop-down menu on the left to select the list in which you want to add a new
ONIX code:

Click on the *New* button:

You will see the following *Custom ONIX code* dialog. Start by entering a code number for
your new ONIX code (1). Then select a language in the drop-down menu (2), and fill the
Heading field with a name for your code in the selected language (3). Finally, click on **Add
this translation** (4):

Once you have done that, the version of your new code in the language you selected is added to the table below:

Optionally, you can now change the language in the drop-down menu, and manually add different translations for you custom code, by repeating the steps above. Alternatively, if you have the English version of your code added, you can simply click on **Auto translate**, and all translations available will be automatically added:

Once you are done, click the *Save* button in the bottom right corner. You will then see your custom code added to the ONIX list:

You can click on *Edit* to modify the code's parameters, or delete it.

WARNING: If you define your own custom ONIX codes, your ONIX files could be declared invalid and rejected by your trading partners. Your custom codes will not be valid in the ONIX standard.

Pruning Agent

ONIXEDIT Server's **Pruning Agent** allows you to automatically and periodically archive titles that match a certain criterion. For example, you could decide to make ONIXEDIT automatically archive titles that have not been modified for over a year. Archived titles will be cleared from your catalogues, and then permanently removed from the archives after a certain amount of time that you can adjust. Here is how to proceed to enable and configure the pruning agent:

From your ONIXEDIT *Preferences*, navigate to the **Server Edition / Pruning Agent** tab. Use this check box at the top to enable or disable the pruning agent:

Once you enabled the pruning agent, you can configure its parameters below. Use these two buttons to set the search criteria that should be met by a title to get archived, the first one for ONIX 2.1 catalogues (1) and the second one for ONIX 3.0 catalogues (2):

The advanced search dialog will appear. You can use it as you would to search in a catalogue, but this time the search setting will be used by the pruning agent when archiving titles. Once your search criteria are defined, click the **Search** button to confirm. The example shown below would search for every title that was last modified over a year ago:

The following settings let you decide at what moment should the pruning agent execute, and at what frequency. The example below would make the pruning agent execute once a week, every Sunday at 2 AM:

Finally, the last setting, "**Remove products from archive after X days**" let you decide after how many days should the archived titles be permanently removed from the archive:

Allow updates on different catalogues

At the bottom left of the *Server Edition / Catalogues* tab, you will find an option named *Allow updates of titles from different catalogues when importing a metadata file*:

The catalogues that you defined for your ONIXEDIT Server account are **independent and isolated ONIX metadata repositories**. This means that the same title can be defined in two different catalogues. If you want to **avoid creating duplicated records** when using an automated input mechanism like the automated ingestion agent or using the ONIXEDIT menu *Server / Import to a catalogue* function, you need a way to tell ONIXEDIT to check if the title exists in the current catalogue as well as in others prior to creating a new record. This is exactly the purpose of this option.

When you activate it, the following modifications to your ONIXEDIT Server system will occur:

o   When a metadata file is imported to a catalogue using ONIXEDIT Pro, ONIXEDIT Cloud or the Automated Ingestion Agent, verification is made on each title. ONIXEDIT checks if the title already exists not only in the catalogue to which the file is imported, but also on all other catalogues of the same ONIX version (2.1 or 3.0). The check is made on the primary key defined in the import rules of the catalogue where the file is imported.

o   The import rules that are applied are always those of the catalogue where the metadata file is imported, **not** those of the catalogue where the titles are updated.

o   If you try to create a new title using ONIXEDIT Cloud and you set a primary key that already exists in another catalogue, ONIXEDIT Cloud will refuse that entry and you will be informed:

Can't use this ISBN because it is already used by a title in catalogue 'C1'

ISBN 13:

Add image

- o However, you can still use ONIXEDIT Pro to bypass the previous rule and thus, you can create a new title having the same primary key of another title from another catalogue. That bypass does not apply to metadata files imported.

Using ONIXEDIT Pro as the client

- Connect to ONIXEDIT Server
- Searching titles
- Locking titles
- Importing ONIX files to a catalogue
- Using flat files Import/Export module
- Batch and Automated Ingestion Agent log

Connect to ONIXEDIT Server

Using ONIXEDIT Pro, you can connect to an ONIXEDIT Server providing that you have been invited by the ONIXEDIT Server administrator. To be invited, you must provide your ONIXEDIT Serial number and a password of your choice to the Server administrator who will define you as a user of ONIXEDIT Server, granting you access to one or more ONIXEDIT Server catalogues.

Once it is done, you will be able to connect to that ONIXEDIT Server from ONIXEDIT Pro. You must have access to the Internet to do so.

To connect to an ONIXEDIT Server, follow these steps:

1 - Launch your ONIXEDIT software.

2 - Click on the ***Connect to server*** button from the ONIXEDIT main menu, or the same option from the ***Server*** menu at the top:
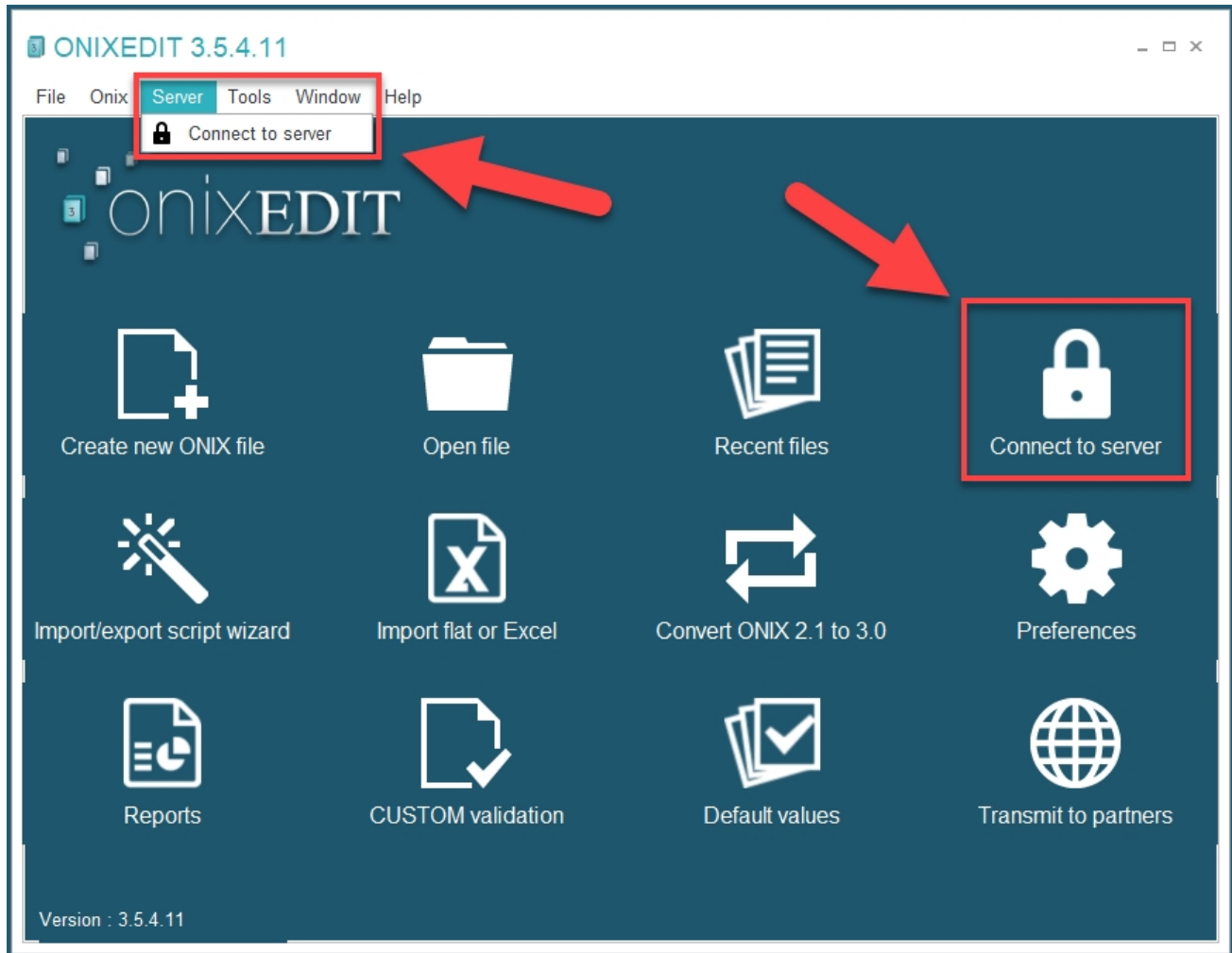
3 - Type your password and click Connect:

4 - You will then see the ONIXEDIT Server catalogues that you have access to. The first column indicates if the catalogue is 2.1 or 3.0. The second column shows the name of the owner of the ONIXEDIT Server account. If you have been invited by more than one

organization, you will be able to see it from that column. You can then select the catalogue you want to work with and click on **Choose** button:

A main list window will open, showing you the first 50 titles:

You can then make a search to find the titles you want to consult/modify, or you can browse to the next page:

Searching titles

Searching titles is easy with ONIXEDIT Server. Just connect to ONIXEDIT Server and open the catalogue of your choice. Then, type **CTRL+F** or use **Edit / Search** menu.
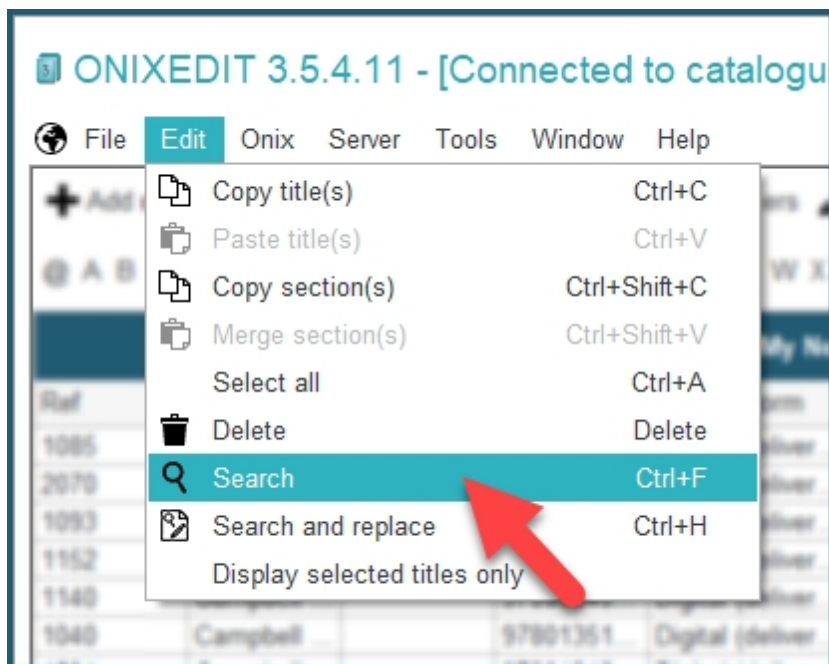
You will get access to the ONIXEDIT Server Search tool where you can define one or more search criteria:

To define a search criterion, proceed as follows:

1 - If there is no empty line in the Search list, click on the **+** at the top left of the list.

2 - Select a predefined field or ONIX tag by clicking the drop down menu under **In field** column to show the options:

The first few options in the drop down menu are system information such as creation or last modification date. Right underneath, you have three categories: Usual tags, Product and CustomFields. You can expand these categories to show their content using the arrows on the left (As shown in the screen capture above, highlighted in yellow).

Usual tags will contain the most common ONIX fields.
Product will contain a hierarchical list of all the ONIX tags supported by ONIXEDIT.
CustomFields will contain a list of all your custom fields.

Once you have selected the field that you want, just click on it to confirm.

3 - You must then select a search operator with the help of another drop down menu:
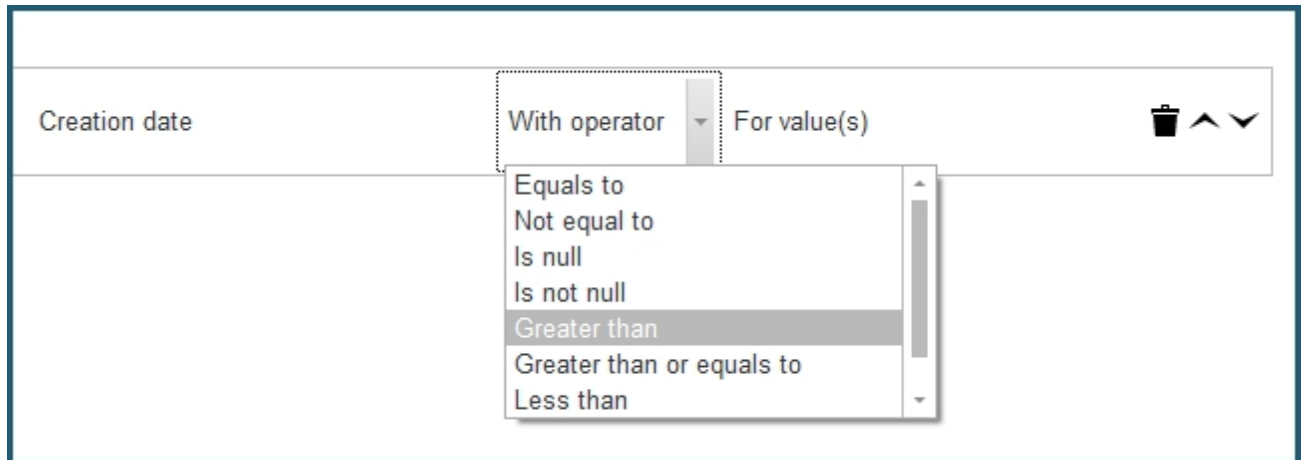
The content of this drop down menu depends on the field chosen.

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:

Creation date   Equals to   2022-03-08

Friday, April 29, 2022

March 2022

SU	MO	TU	WE	TH	FR	SA
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Clear

0 catalogues

3.2 - ProductForm   Equals to   Book

BA	Book
EA	Digital (delivered electr...
00	Undefined
AA	Audio
AB	Audio cassette
AC	CD-Audio
AD	DAT

RecordReference   Equals to   123

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:

1		3.2 - ProductForm		Equals to		Book		🗑 ∧ ∨
2	AND	Authors		Contains		Reeves		🗑 ∧ ∨

Saving usual searches

Once your search is defined, you can save it for later usage. You will have to give your search a name (1), and click on the **Save search** button (2):
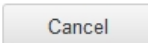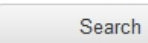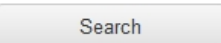
Once a search is saved, you can use the **Load search** button to load it back and use it:

Similarly, in ONIXEDIT Cloud, you can load the same search using the *Load* button in the **Advanced Search**:

Searching titles from all catalogues

If you want to make a search of titles from all the catalogues you have access to, use the *Search in all catalogues* function in the *Server* menu, or use *CTRL+Shift+F*:
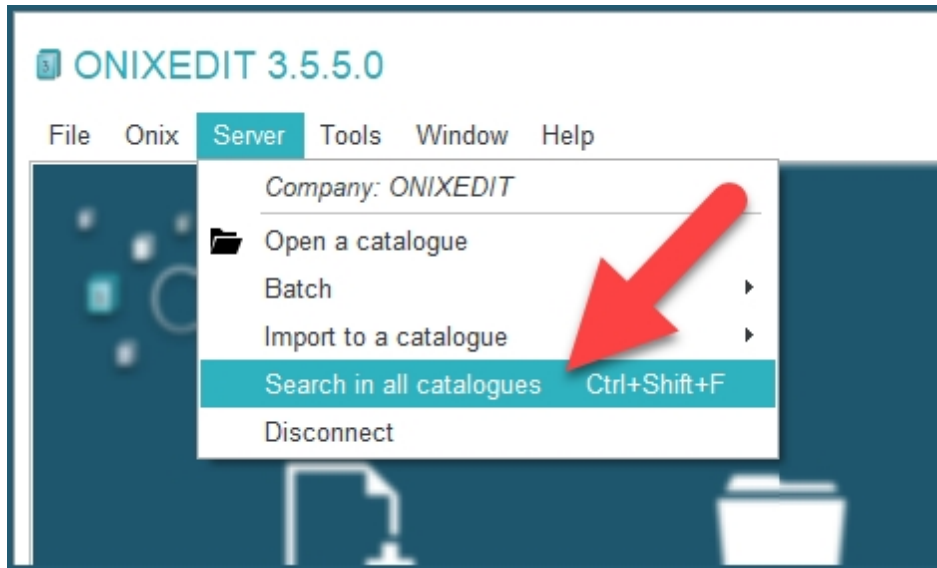
Locking titles

If you want to prohibit any kind of modification to one or several titles, you can "lock" them. To do so, proceed as follows:

1 - Open the catalogue containing the titles you want to lock.

2 - Select the titles you want to lock.

3 - Right-click on one of the selected titles in your main list and select *Lock selected title(s)*:

As a result, the selected titles will appear highlighted in orange and a small lock icon will be shown under **Locked** column:

If someone that has access to those titles with ONIXEDIT Pro or ONIXEDIT Cloud tries to

modify or delete the titles, a message will show indicating that this action is prohibited:
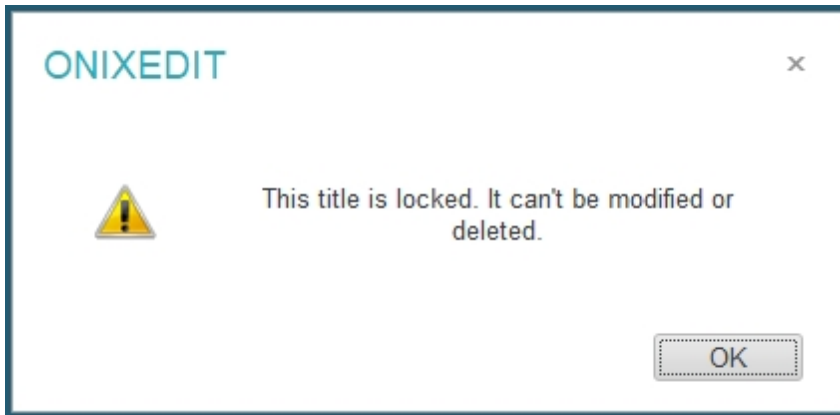
To unlock a locked title, just right click on it from the main list and select **Unlock selected title(s)**:
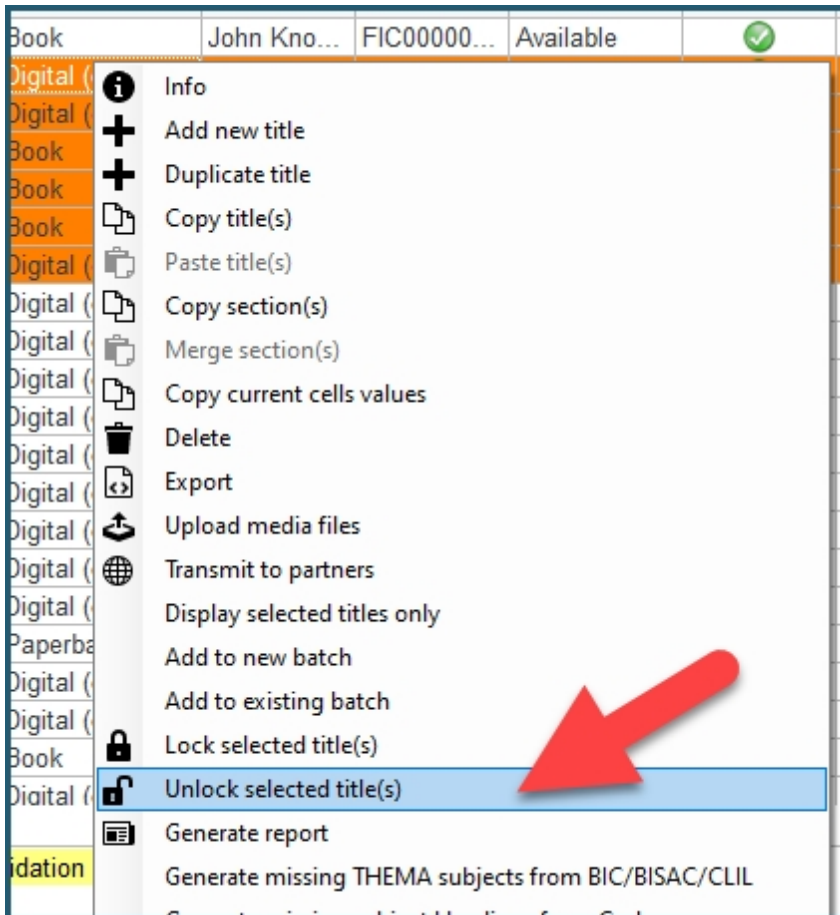
Alternatively, locked titles can be partially modified if you defined **Lock Profiles**. Consult Manage Lock Profiles section for more details.

Importing ONIX files to a catalogue

Using ONIXEDIT connected to ONIXEDIT Server, you can import huge ONIX 2.1 or 3.0 files to an ONIXEDIT Server catalogue.

To import an ONIX file to an ONIXEDIT Server catalogue, use the **Server / Import to a catalogue / Import ONIX file** function:
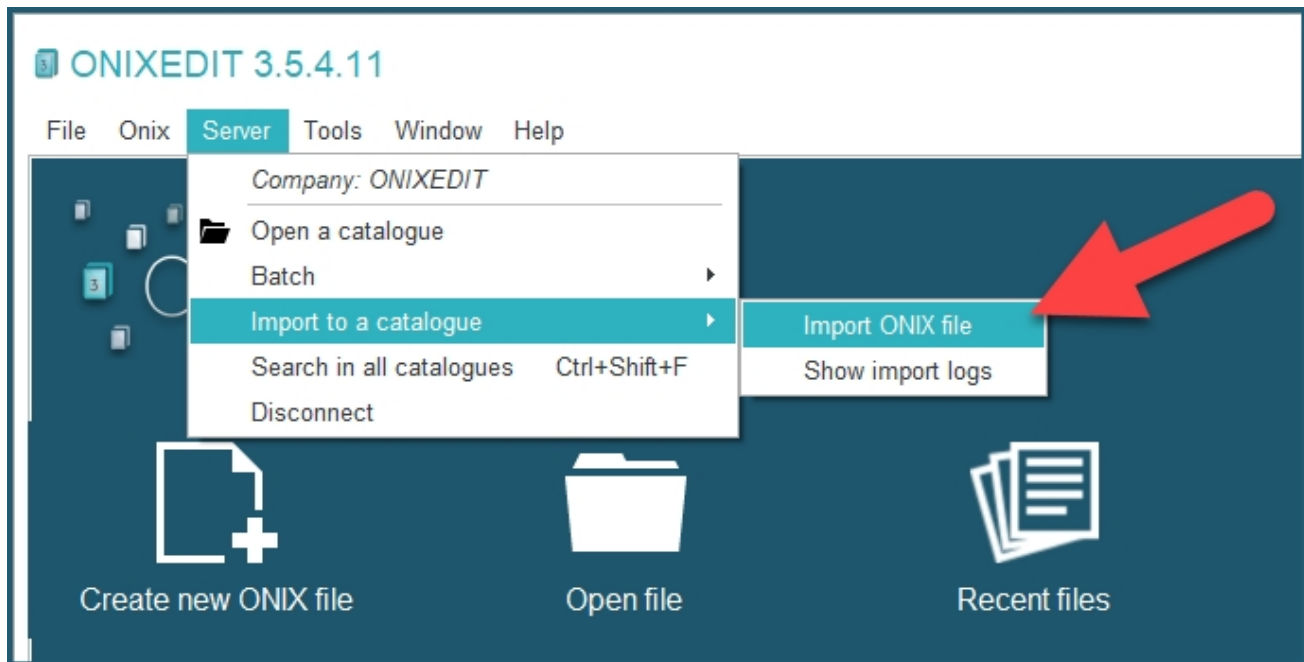
A specialized dialog will then appear. Follow these steps:

1 - Click on the **Browse ...** button and choose the ONIX 2.1 or 3.0 file on your PC that you want to import.

2 - Click on the **Choose ...** button and choose the ONIXEDIT Server catalogue to which you want to import the ONIX file.

3 - Click on **Start**.
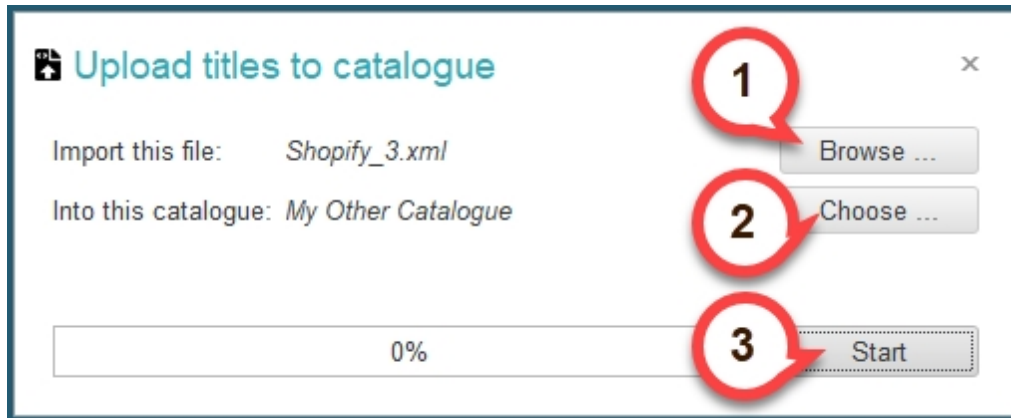
The import will begin and at the end of the process, you will see an "Upload completed" message. When importing an ONIX file to a catalogue, ONIXEDIT will apply the Import rules set for that catalogue. Thus, existing titles will be updated and new ones will be created according to the rules established.

You can import an ONIX 2.1 file to an ONIX 2.1 or ONIX 3.0 catalogue. You can only import an ONIX 3.0 file to an ONIX 3.0 catalogue.

If you want to import smaller ONIX files, you can open them first using ONIXEDIT.
Next, open your ONIXEDIT Server catalogue. You should have both windows opened.
Then, select the titles you want to upload from your local file window and **drag and drop them to your ONIXEDIT Server Catalogue window**:

ONIXEDIT will automatically copy the selected titles to your ONXIEDIT Server catalogue.

Using flat files Import/Export module

ONIXEDIT Pro (optional with ONIXEDIT regular) provides a useful tool to import/export flat files and Excel files to and from ONIX.

You can use that tool to import metadata from a flat file to an ONIXEDIT Server catalogue. To do so, open the Flat file generic import tool and check the ***Import directly into an ONIXEDIT Server Catalogue*** checkbox:

You will then be invited to select the ONIXEDIT Server catalogue that will receive the flat file metadata.

Then, you just have to click on the **_Convert and Import Flat or Excel File to ONIX_** button as you would do normally:

Instead of creating a new local ONIX file, ONIXEDIT will import the flat file directly to your ONIXEDIT Server catalogue and will apply the Import Rules defined for that catalogue.

Consult ONIXEDIT User manual for more details on importing from flat files or Excel.

Batches and Automated Ingestion Agent log

Using ONIXEDIT connected to ONIXEDIT Server, you can define "batches". A batch identifies a group of titles that belong to one or more ONIXEDIT Server Catalogues. You can then use batches to easily find that group of titles and send them to your trading partners.

To create a new batch, first connect to your ONIXEDIT Server and then use the **Server / Batch / Manage transmission batches** function:
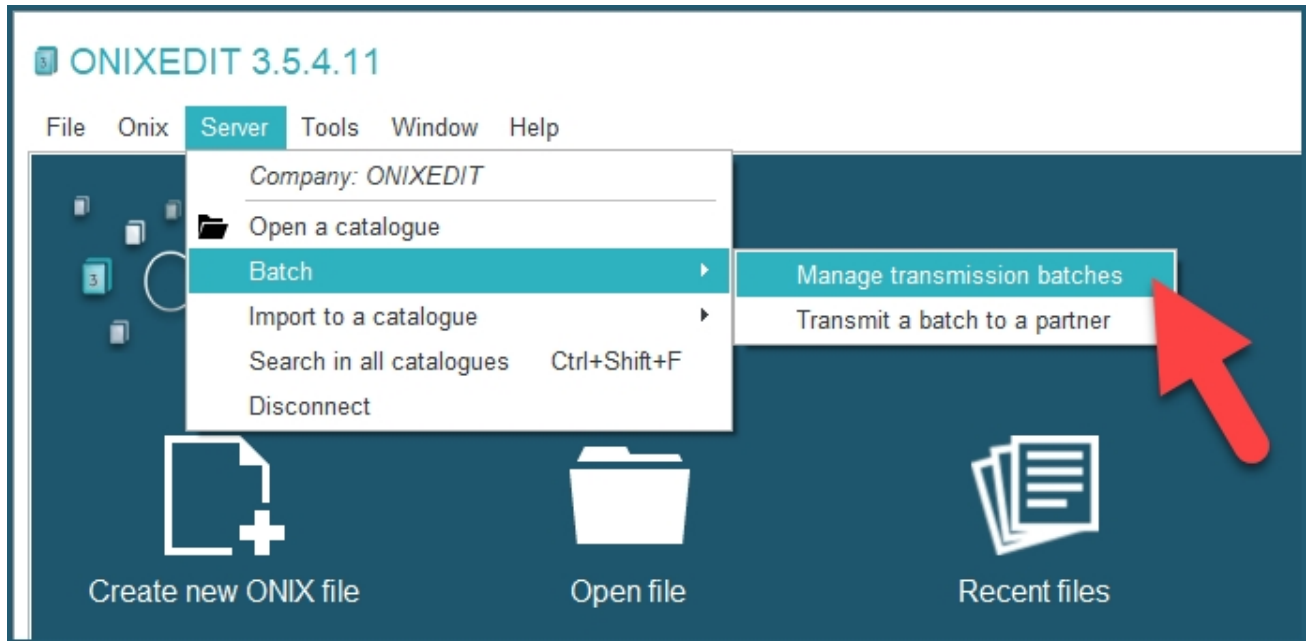
Then, proceed as follows:

1 - Give your new batch a name.
2 - Enter an optional status.
3 - Select the ONIX version for that new batch (ONIX2 for ONIX 2.1 and ONIX3 for ONIX 3.0).
4 - Click on the *Create new batch* button.
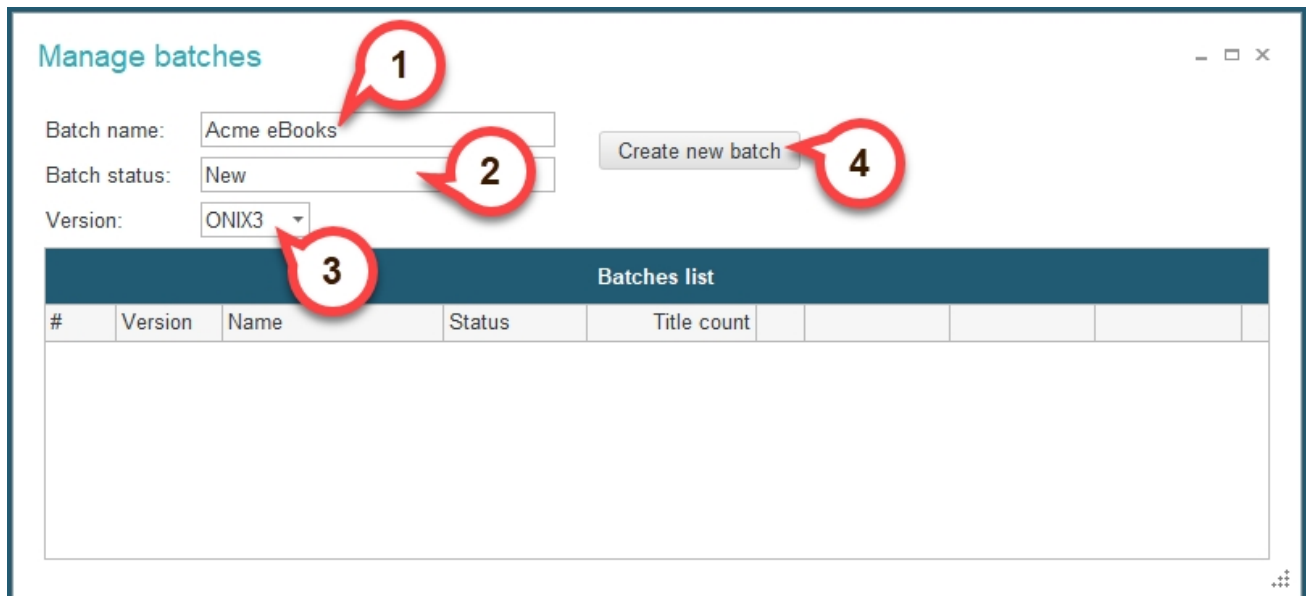
You should then see it appear in the **Batches list** right underneath:

Once a batch is created, you can later **edit** its name or status by double-clicking it:

To add titles to a batch, open an ONIXEDIT Server catalogue and select the titles that you want to add. Then, right click on one of the selected titles to show the contextual menu. Select *Add to existing batch*:

You will then have to select the batch to which you want to add the selected titles. You can also create a new batch from selected titles directly using the contextual menu **Add to new batch**.

Once a batch has been loaded with some titles, you can use it to transmit batch titles to your business partners:
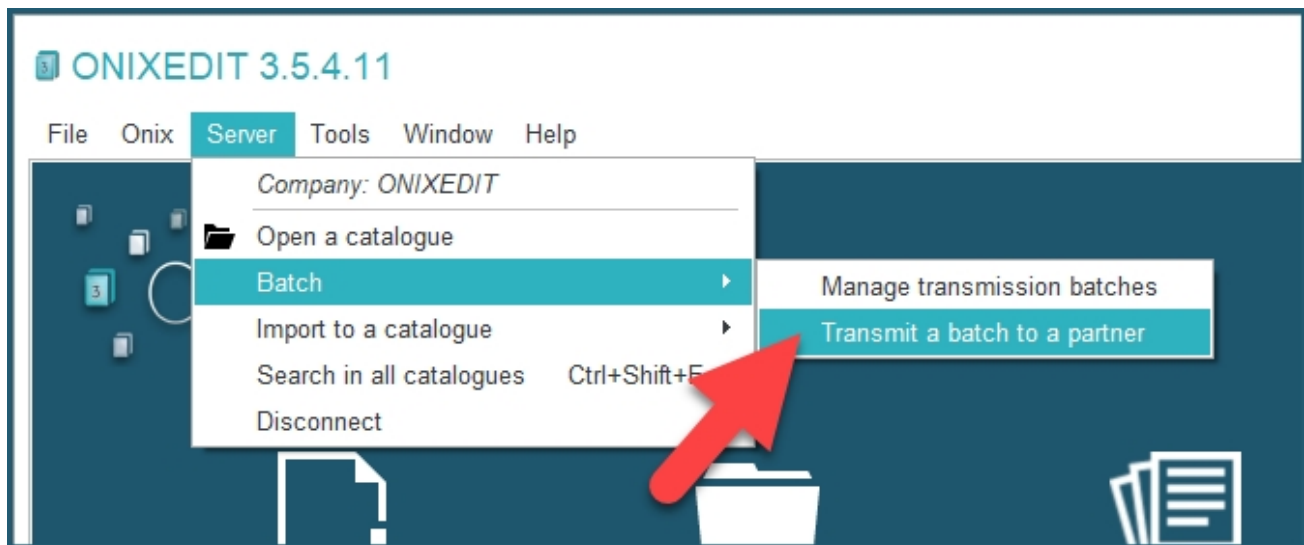
To remove titles from a batch, go to **Server / Batch / Manage transmission batches** menu and click on **Show titles**:

Then, select the titles you want to remove (1) and click on **Remove selected titles from batch** (2):

Titles **will not** be deleted from your ONIXEDIT Server catalogue. They will only be removed from your batch.

Using ONIXEDIT Cloud as the client

With ONIXEDIT Server having the Web Interface option, you can offer your partners a direct access to one or more of your ONIXEDIT Server catalogues without asking them to purchase ONIXEDIT. You just have to [define a web user](#) and provide the link to your ONIXEDIT Cloud web site (cloud.onixedit.com for ONIXEDIT Server hosted model).

Your web users will be able to add, modify or delete titles (according to their access rights), upload/download ONIX files or Excel files and set the cover images of their titles.

Refer to [ONIXEDIT Cloud user manual](#) for more details.

Automated Ingestion Agent

ONIXEDIT Server provides an optional tool allowing more automated metadata files and asset files ingestion. We call that tool the **Automated Ingestion Agent**.

The Automated Ingestion Agent provides a Windows service that can be configured to check for "hot folders" (usually FTP folders) where metadata and asset files are uploaded. Each hot folder is associated with a specific ONIXEDIT Server catalogue. Consequently, each time a metadata file is available in a hot folder, it is imported to the corresponding catalogue while respecting the import rules defined for that catalogue. As well, the Automated Ingestion Agent will search for cover image files (jpg, tiff, png, gif, bmp) and ebook files (pdf or ePub) and, based on their name (ISBN or EAN in the file name), those files will be automatically associated with the corresponding title and uploaded to your Media Space or simply archived. The Agent is able to process ONIX files as well as flat files (Excel, or CSV) with automatic conversion to ONIX, providing that an ONIXEDIT import script is defined in the corresponding import script folder (one import script folder per catalogue). After each ingestion of a file, a processing report is sent to you by email and is also saved in the server to keep track of every file ingested.

Consult the Automated Ingestion Agent manual for more details about that service.

ONIXEDIT Scheduler

If you want to automate transmission of metadata and media files to your partners from your ONIXEDIT Server catalogues, the best way is to use **ONIXEDIT Scheduler**. Refer to the ONIXEDIT Scheduler manual for more details.

EULA

IMPORTANT, PLEASE READ CAREFULLY. THIS IS A LICENSE AGREEMENT.

ONIXEDIT, ONIXEDIT Pro, ONIXEDIT Converter, ONIXEDIT Cloud, ONIXEDIT Bookstore, ONIXEDIT Scheduler and ONIXEDIT Server Edition are protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. Those SOFTWARE PRODUCTS are licensed, not sold.

End User License Agreement

This End User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) and ONIXEDIT with regard to the copyrighted Software (herein referred to as "SOFTWARE PRODUCT" or "SOFTWARE") provided with this EULA. The SOFTWARE PRODUCT includes computer software, the associated media, any printed materials, and any "online" or electronic documentation. Use of any software and related documentation ("Software") provided to you by ONIXEDIT in whatever form or media, will constitute your acceptance of these terms. If you do not agree with the terms of this EULA, do not install, copy or use the Software. By installing, copying or otherwise using the SOFTWARE PRODUCT, you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA, ONIXEDIT is unwilling to license the SOFTWARE PRODUCT to you.

1. Eligible Licensees. This Software is available for license solely to SOFTWARE owners, with no right of duplication or further distribution, licensing, or sub-licensing. IF YOU DO NOT OWN THE SOFTWARE, THEN DO NOT DOWNLOAD, INSTALL, COPY OR USE THE SOFTWARE.

2. License Grant. ONIXEDIT grants to you a personal, non-transferable and non-exclusive right to use the copy of the Software provided with this EULA. You agree you will not copy the Software except as necessary to use it on a single computer. You agree that you may not copy the written materials accompanying the Software. Modifying, translating, renting, copying, transferring or assigning all or part of the Software, or any rights granted hereunder, to any other persons and removing any proprietary notices, labels or marks from the Software is strictly prohibited. Furthermore, you hereby agree not to create derivative works based on the Software. You may not transfer this Software.

3. Copyright. The Software is licensed, not sold. You acknowledge that no title to the intellectual property in the Software is transferred to you. You further acknowledge that title and full ownership rights to the Software will remain the exclusive property of ONIXEDIT and/or its suppliers, and you will not acquire any rights to the Software, except as expressly set forth above. All copies of the Software will contain the same proprietary notices as contained in or on the Software. All title and copyrights in and to the SOFTWARE PRODUCT (including but not limited to any images, photographs, animations, video, audio, music, text and "applets," incorporated into the SOFTWARE PRODUCT), the accompanying printed materials, and any copies of the SOFTWARE PRODUCT, are owned by ONIXEDIT or its suppliers. The SOFTWARE PRODUCT is protected by copyright laws and international treaty provisions. You may not copy the printed materials accompanying the SOFTWARE PRODUCT.

4. Reverse Engineering. You agree that you will not attempt, and if you are a corporation, you will use your best efforts to prevent your employees and contractors from attempting to reverse compile, modify, translate or disassemble the Software in whole or in part. Any failure to

comply with the above or any other terms and conditions contained herein will result in the automatic termination of this license and the reversion of the rights granted hereunder to ONIXEDIT.

5. Disclaimer of Warranty. The Software is provided "AS IS" without warranty of any kind. ONIXEDIT and its suppliers disclaim and make no express or implied warranties and specifically disclaim the warranties of merchantability, fitness for a particular purpose and non-infringement of third-party rights. The entire risk as to the quality and performance of the Software is with you. Neither ONIXEDIT nor its suppliers warrant that the functions contained in the Software will meet your requirements or that the operation of the Software will be uninterrupted or error-free. ONIXEDIT IS NOT OBLIGATED TO PROVIDE ANY UPDATES TO THE SOFTWARE.

6. Limitation of Liability. ONIXEDIT's entire liability and your exclusive remedy under this EULA shall not exceed the price paid for the Software, if any. In no event shall ONIXEDIT or its suppliers be liable to you for any consequential, special, incidental or indirect damages of any kind arising out of the use or inability to use the software, even if ONIXEDIT or its supplier has been advised of the possibility of such damages, or any claim by a third party.

7. Rental. You may not loan, rent, or lease the SOFTWARE.

8. Upgrades. If the SOFTWARE is an upgrade from an earlier release or previously released version, you now may use that upgraded product only in accordance with this EULA. If the SOFTWARE PRODUCT is an upgrade of a software program which you licensed as a single product, the SOFTWARE PRODUCT may be used only as part of that single product package and may not be separated for use on more than one computer.

9. No Liability for Consequential Damages. In no event shall ONIXEDIT or its suppliers be liable for any damages whatsoever (including, without limitation, incidental, direct, indirect special and consequential damages, damages for loss of business profits, business interruption, loss of business information, or other pecuniary loss) arising out of the use or inability to use this ONIXEDIT product, even if ONIXEDIT has been advised of the possibility of such damages.

10. Indemnification By You. If you distribute the Software in violation of this Agreement, you agree to indemnify, hold harmless and defend ONIXEDIT and its suppliers from and against any claims or lawsuits, including attorney's fees that arise or result from the use or distribution of the Software in violation of this Agreement.

11. ONIXEDIT includes 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/

12. ONIXEDIT uses the "ONIX for Books" standard and the ONIX code lists established by the EDItEUR group in accordance with the license of use which you can consult directly on the website of the group: https://www.editeur.org/83/Overview/.

13. ONIXEDIT also uses the French translation of the ONIX code lists produced by the Cercle de la Librairie whose website is here: https://cercledelalibrairie.org/documents/

14. ONIXEDIT also uses the Spanish translation of the ONIX code lists produced by DILVE whose website is here: https://dilve.es/dilve/dilveweb/index_dilve.jsp

ONIXEDIT
C.P. 6
Salaberry-de-Valleyfield, QC, Canada
J6S 4V5

sales@onixedit.com
www.onixedit.com