



# onixEDIT

Server Edition

## User Manual

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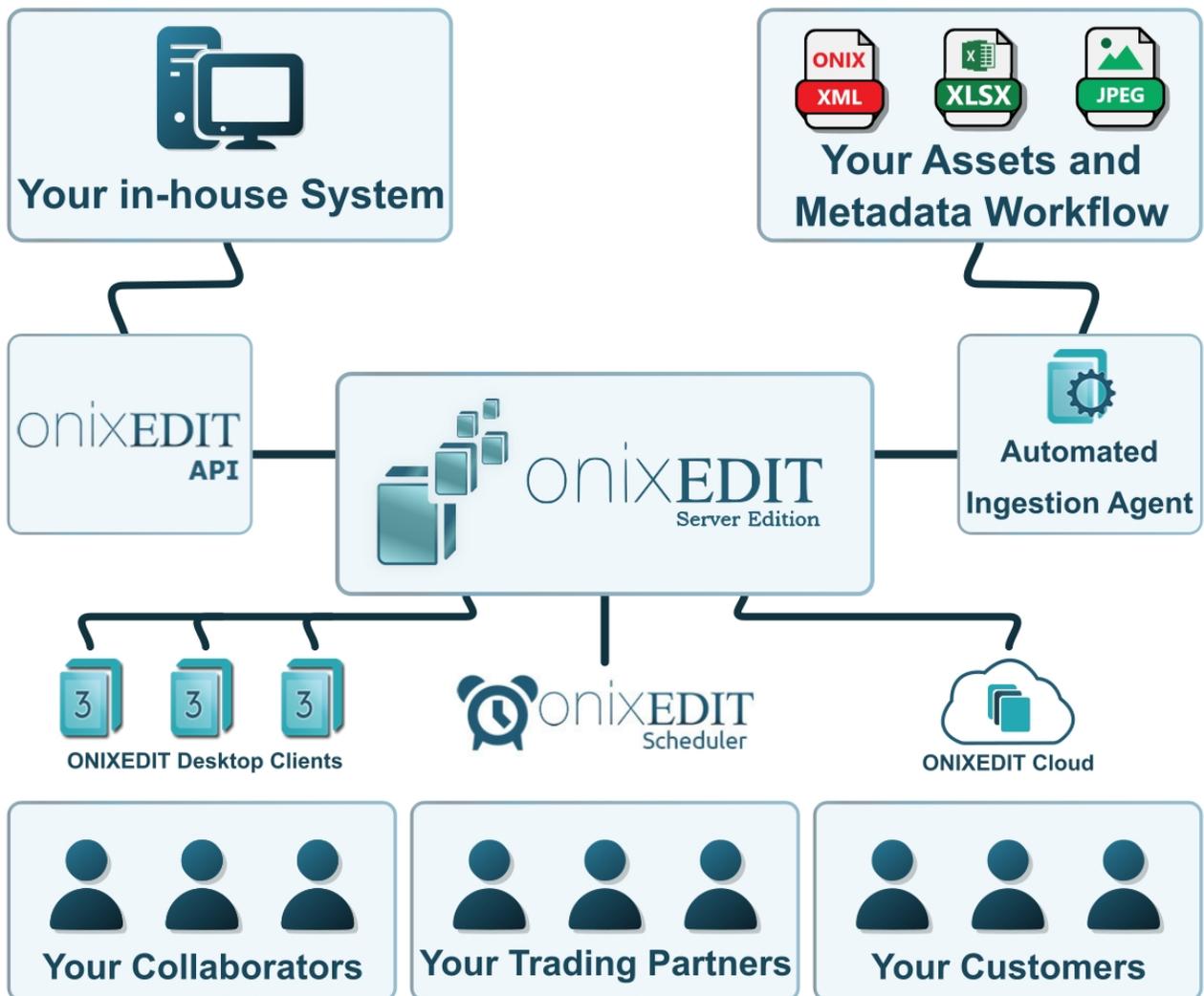
## Introduction



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

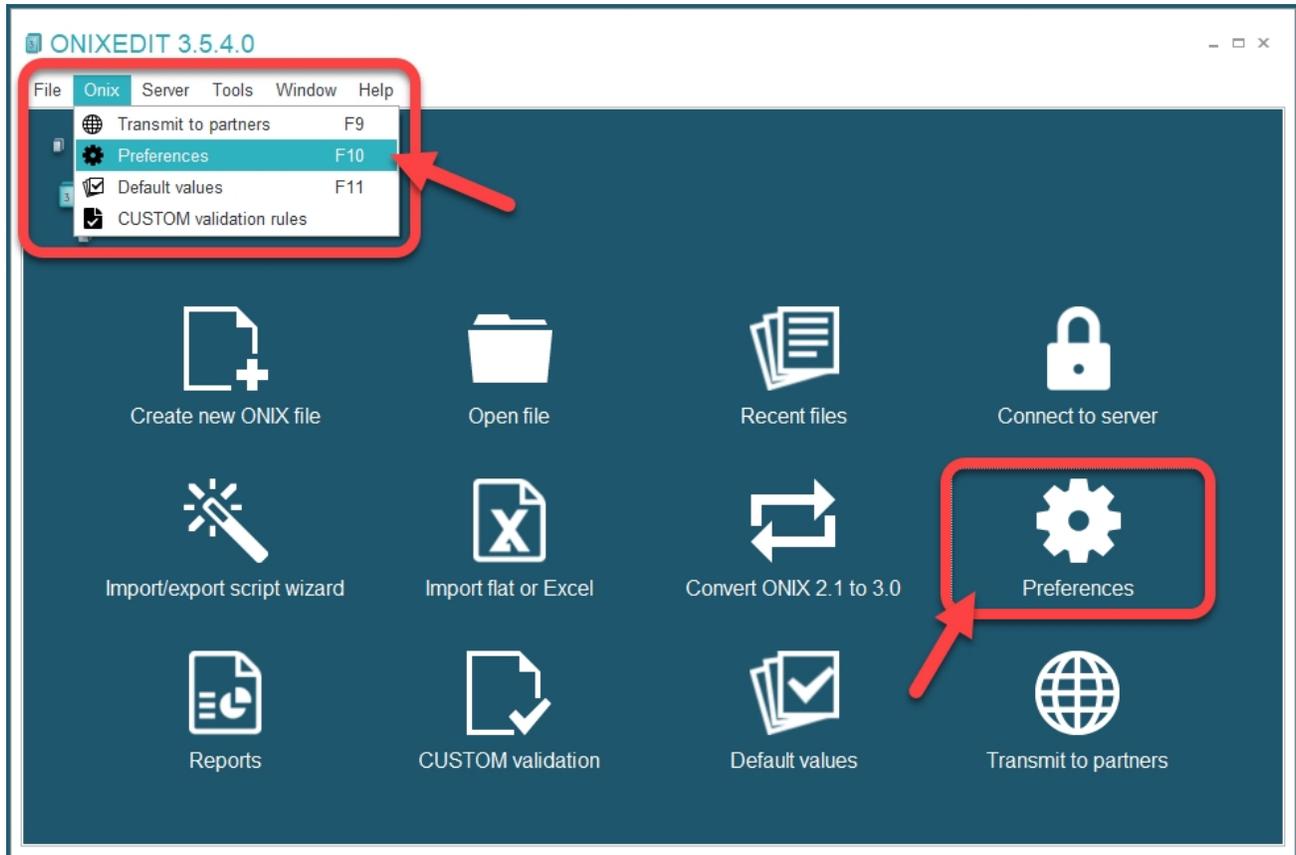
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If you are the owner of an **ONIXEDIT Server** license, this chapter is for you. You will learn how to:

- [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.

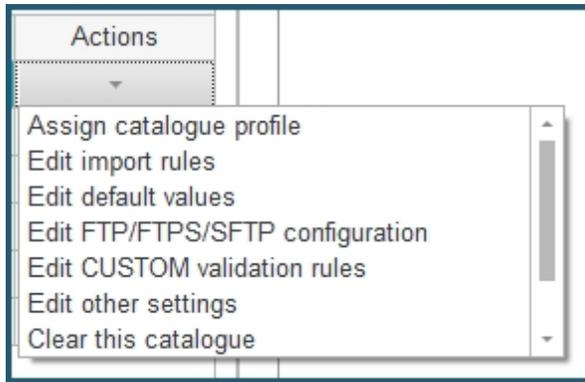
To complete it, you will have to:

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.

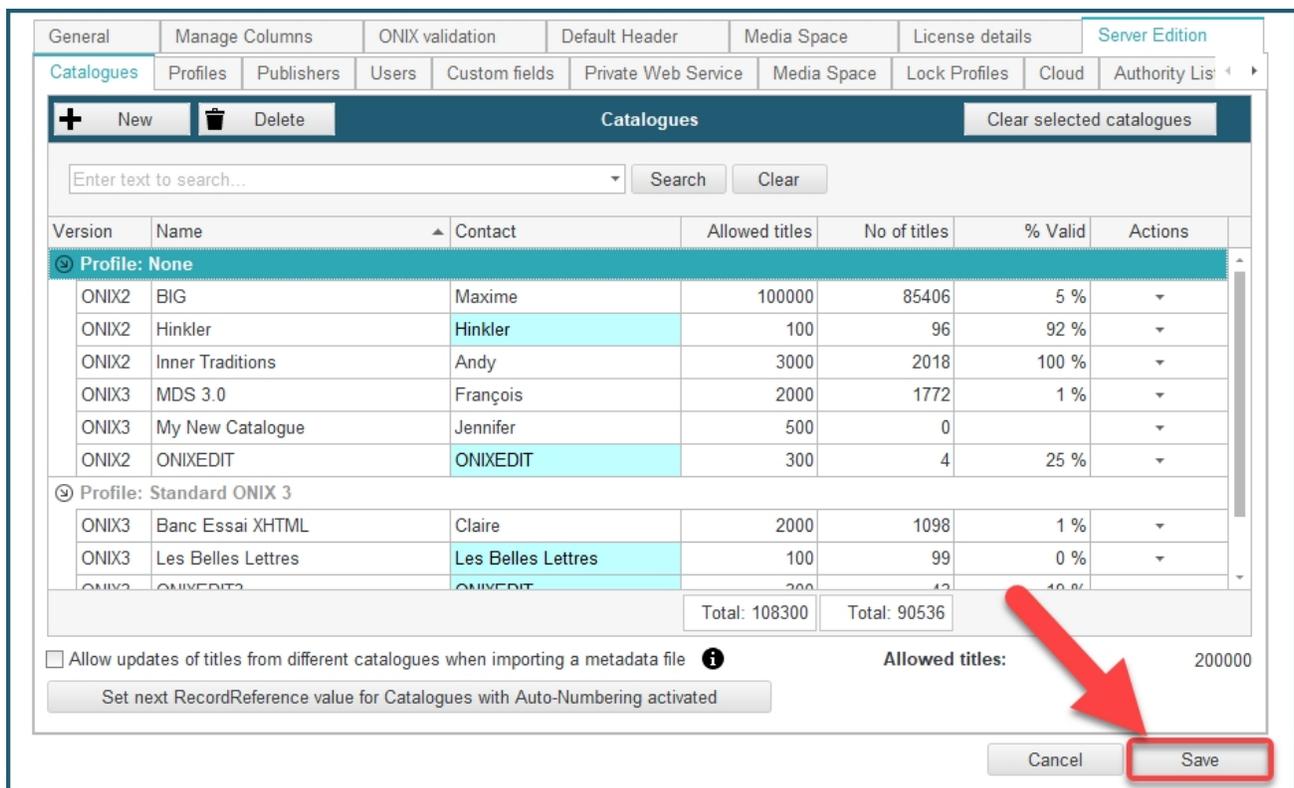
Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
Profile: None						
ONIX3	My New Catalogue	Jennifer	500	0		

The table above shows a single catalogue entry. Red circles with numbers 1, 2, 3, and 4 are placed over the 'Name', 'Contact', 'Allowed titles', and 'Actions' columns respectively, corresponding to the steps in the previous list.

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

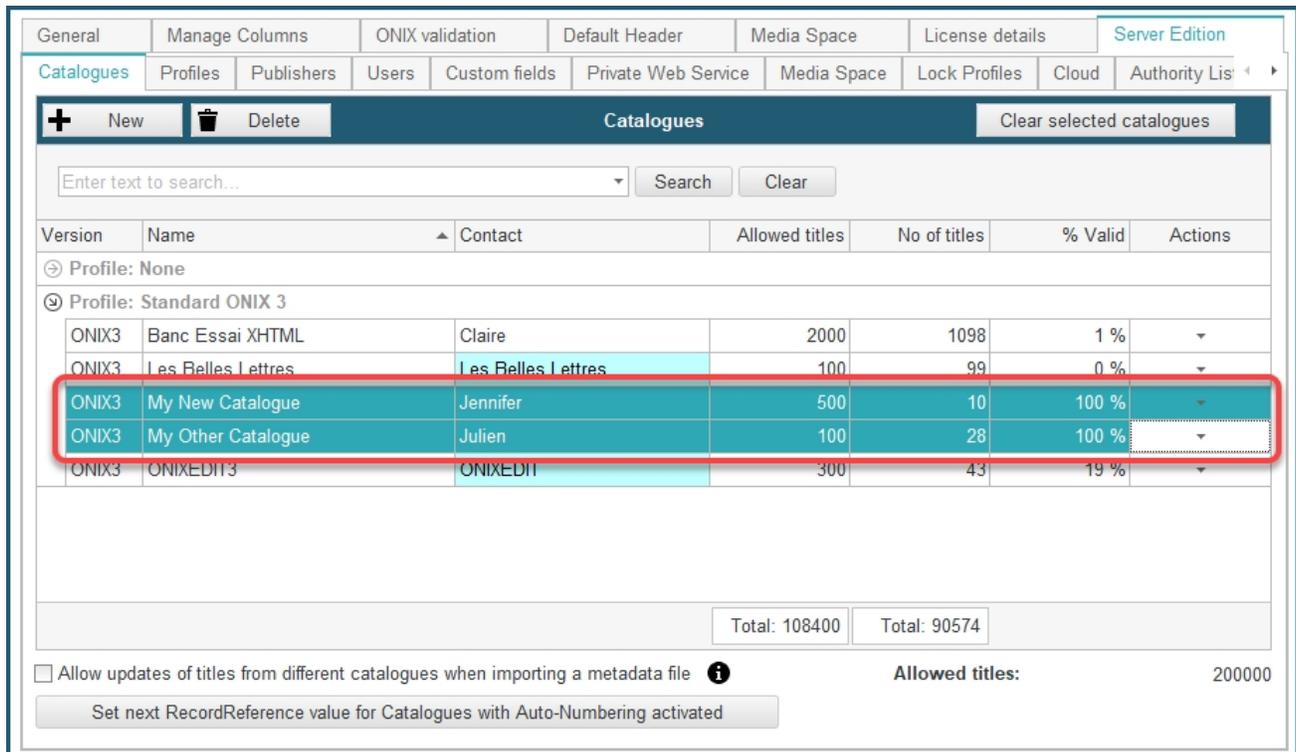
Under the catalogue list, you will find one general catalogue option and a button:

- *Allow updates of titles from different catalogues when importing a metadata file:* See the section [Allow updates on different catalogues](#).
- *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:



The screenshot shows the 'Catalogues' management interface. At the top, there are tabs for 'General', 'Manage Columns', 'ONIX validation', 'Default Header', 'Media Space', 'License details', and 'Server Edition'. Below these are sub-tabs for 'Catalogues', 'Profiles', 'Publishers', 'Users', 'Custom fields', 'Private Web Service', 'Media Space', 'Lock Profiles', 'Cloud', and 'Authority Lis'. The main area has a search bar and a table of catalogues. The table has columns for 'Version', 'Name', 'Contact', 'Allowed titles', 'No of titles', '% Valid', and 'Actions'. The row for 'My New Catalogue' is highlighted in blue and circled in red. Below the table, there are two 'Total' buttons showing 'Total: 108400' and 'Total: 90574'. At the bottom, there is a checkbox for 'Allow updates of titles from different catalogues when importing a metadata file' and a button for 'Set next RecordReference value for Catalogues with Auto-Numbering activated'.

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
Profile: None						
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1098	1 %	▼
ONIX3	Les Belles Lettres	Les Belles Lettres	100	99	0 %	▼
ONIX3	My New Catalogue	Jennifer	500	10	100 %	▼
ONIX3	My Other Catalogue	Julien	100	28	100 %	▼
ONIX3	ONIXEDIT3	ONIXEDIT	300	43	19 %	▼

Total: 108400    Total: 90574

Allow updates of titles from different catalogues when importing a metadata file **i**    Allowed titles: 200000

Set next RecordReference value for Catalogues with Auto-Numbering activated

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

The screenshot shows the ONIXEDIT Server interface. At the top, there are tabs for 'General', 'Manage Columns', 'ONIX validation', 'Default Header', 'Media Space', 'License details', and 'Server Edition'. Below these are more specific tabs: 'Catalogues', 'Profiles', 'Publishers', 'Users', 'Custom fields', 'Private Web Service', 'Media Space', 'Lock Profiles', 'Cloud', and 'Authority Lis'. The main area has a 'Catalogues' header with '+ New' and 'Delete' buttons. A 'Clear selected catalogues' button is highlighted with a red box and a circled '1'. A modal dialog is open, asking 'Do you really want to delete the 38 titles from the 2 selected catalogue(s)?'. The dialog has 'No' and 'Yes' buttons, with the 'Yes' button highlighted by a red box and a circled '2'. The dialog also shows a table of titles to be deleted.

No of titles	% Valid	Actions
1098	1 %	▼
99	0 %	▼
10	100 %	▼
28	100 %	▼
43	19 %	▼

At the bottom of the dialog, there are two 'Total' fields: 'Total: 108400' and 'Total: 90574'. Below the dialog, there is a checkbox for 'Allow updates of titles from different catalogues when importing a metadata file' and an 'Allowed titles: 200000' field. A button 'Set next RecordReference value for Catalogues with Auto-Numbering activated' is also visible.

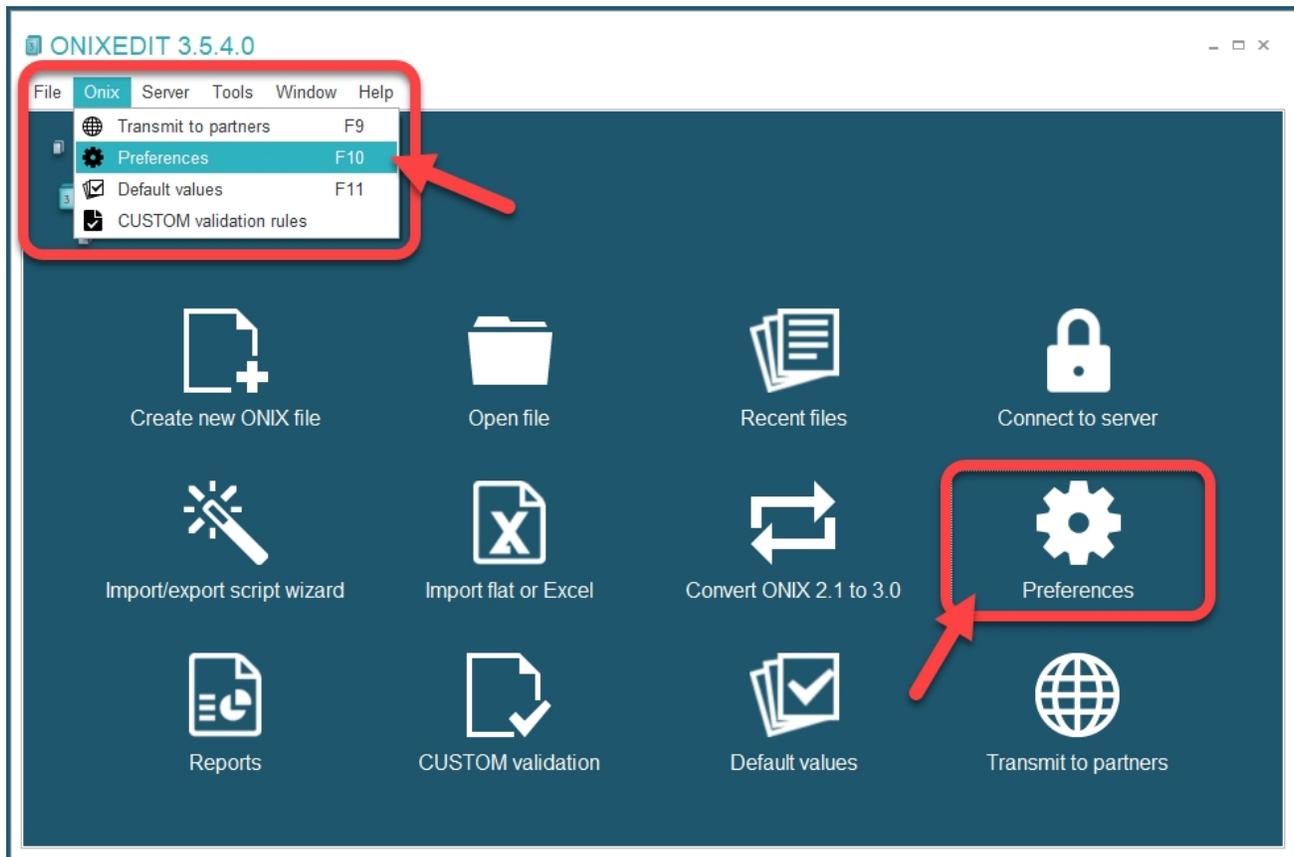
3. Once the catalogues are cleared, you can click on the **Delete** button and confirm the deletion of the selected catalogues:

The screenshot shows the ONIXEDIT Server interface with the 'Delete' button highlighted by a red box and a red arrow. The interface includes tabs for 'General', 'Manage Columns', 'ONIX validation', and 'Default Header'. Below these are tabs for 'Catalogues', 'Profiles', 'Publishers', 'Users', 'Custom fields', and 'Private Web Ser'. The main area has a 'Catalogues' header with '+ New' and 'Delete' buttons. A search bar is present with the text 'Enter text to search...' and a 'Search' button. Below the search bar, there is a table with columns 'Version', 'Name', and 'Contact'. The table is filtered by 'Profile: Standard ONIX 3' and shows the following data:

Version	Name	Contact
ONIX3	Banc Essai XHTML	Claire
ONIX3	Les Belles Lettres	Les Belles Lettres
ONIX3	My New Catalogue	Jennifer
ONIX3	My Other Catalogue	Julien
ONIX3	ONIXEDIT3	ONIXEDIT

## 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:

**Preferences**

Contact: Server Demo  
 Company: ONIXEDIT  
 Serial number:   
 Email: server\_demo@onixedit.com  
 Edition: Professional + Server

SE

General | Manage Columns | ONIX validation | Default Header | Media Space | License details | **Server Edition**

Catalogues | **Profiles** | Publishers | Users | Custom fields | Private Web Service | Media Space | Lock Profiles | Cloud | Authority Lists

**+** New  Catalogue Profiles

Enter text to search...

Name	Version	Actions
------	---------	---------

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:

General | Manage Columns | ONIX validation | Default Header

Catalogues | **Profiles** | Publishers | Users | Custom fields | Private Web Service

**+** New  Catalogue Profiles

Enter text to search...

Name

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

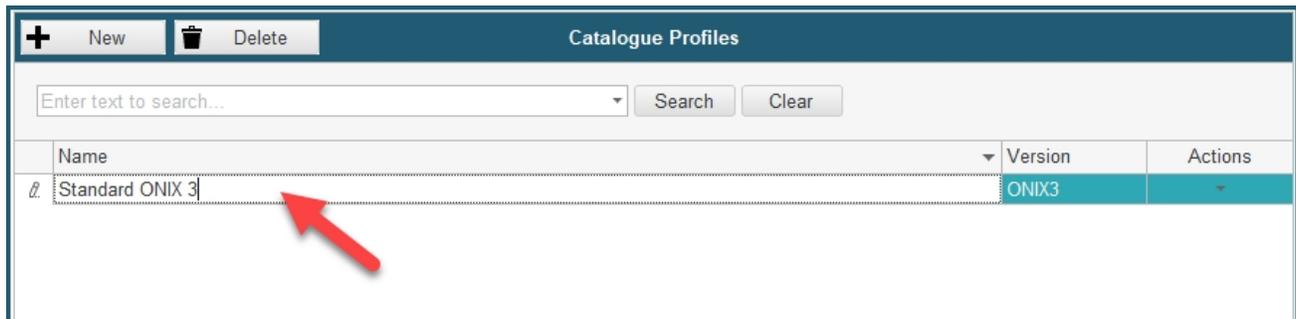
profile:



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

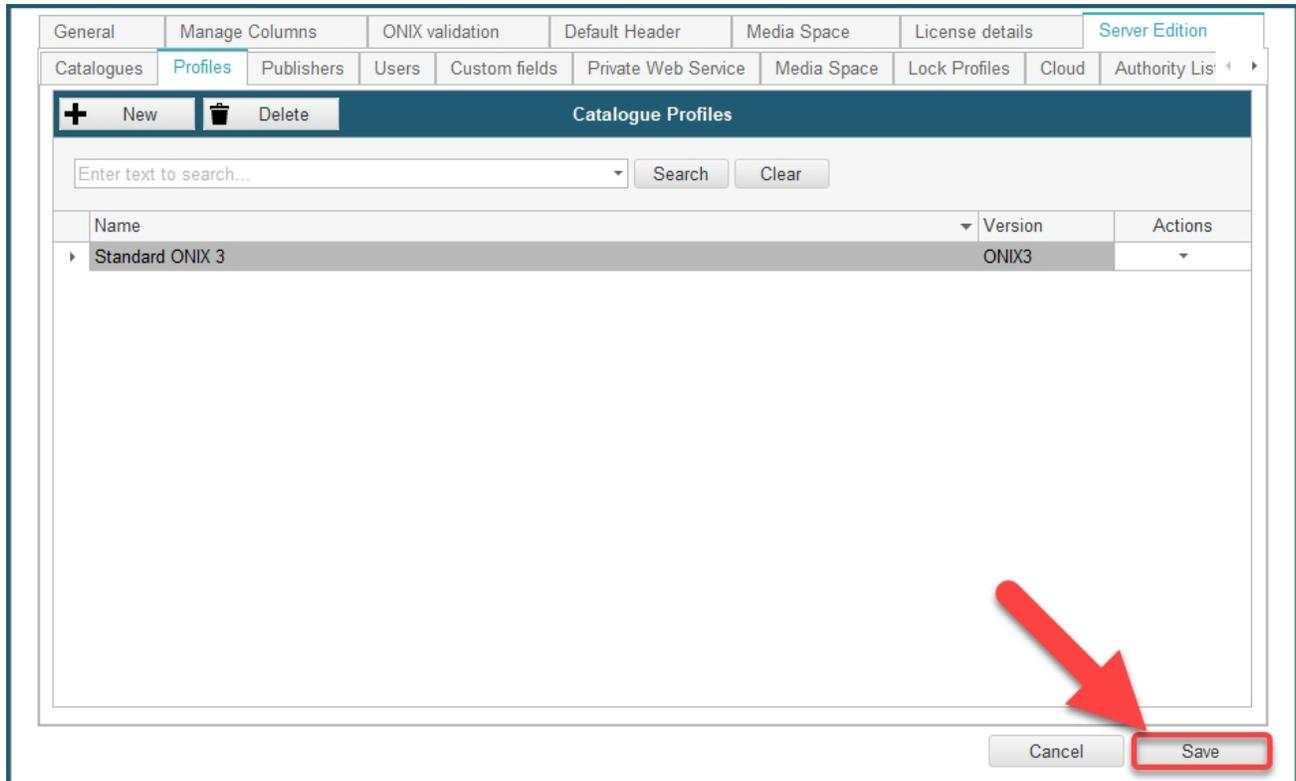
Once your choice is made, a new profile record will be added to the profile list.

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



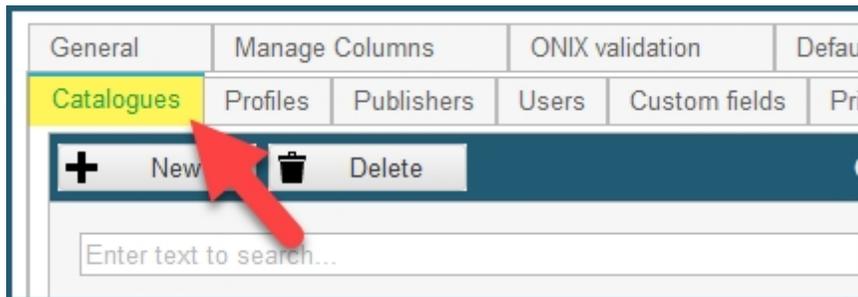
On the far right of the profile record, there is the **Actions** drop down menu. This menu allows you to edit the import rules, the default values, the custom validation rules and some other settings for the profile. Learn more about each of these options in the next section about the [Actions menu](#). 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](#).

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
⊙ Profile: None						
ONIX3	Banc Essai XHTML	Claire	2000	1098	1 %	▼
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 %	▼

Total: 112500    Total: 90778

Allow updates of titles from different catalogues when importing a metadata file ⓘ    Allowed titles: 200000

Set next RecordReference value for Catalogues with Auto-Numbering activated

Cancel    Save

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**:

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
⊙ Profile: None						
ONIX3	Banc Essai XHTML	Claire	2000	1098	1 %	▼
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 %	▼

Assign catalogue profile

Edit import rules

Edit default values

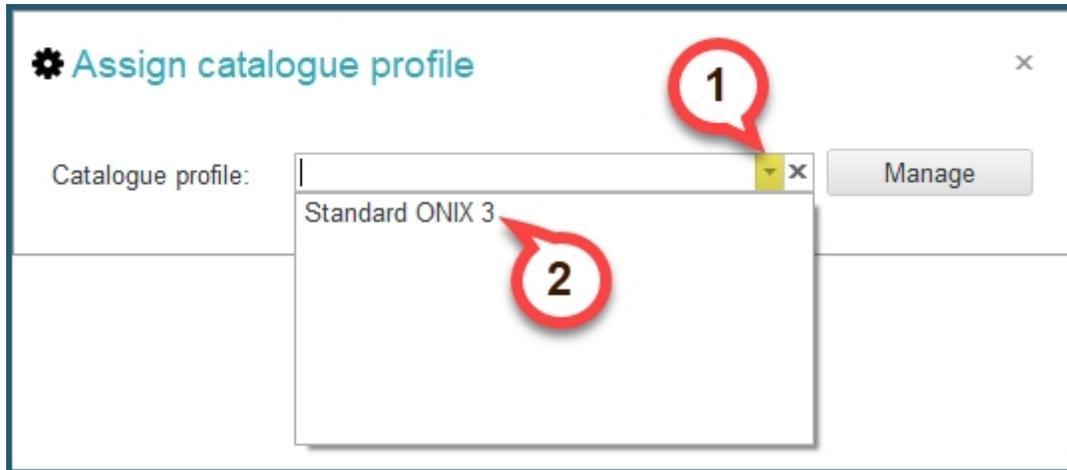
Edit FTP/FTPS/SFTP configuration

Edit CUSTOM validation rules

Edit other settings

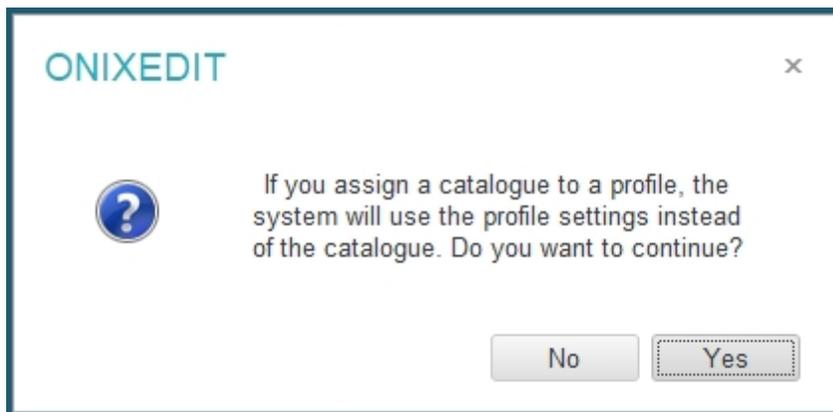
Clear this catalogue

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)

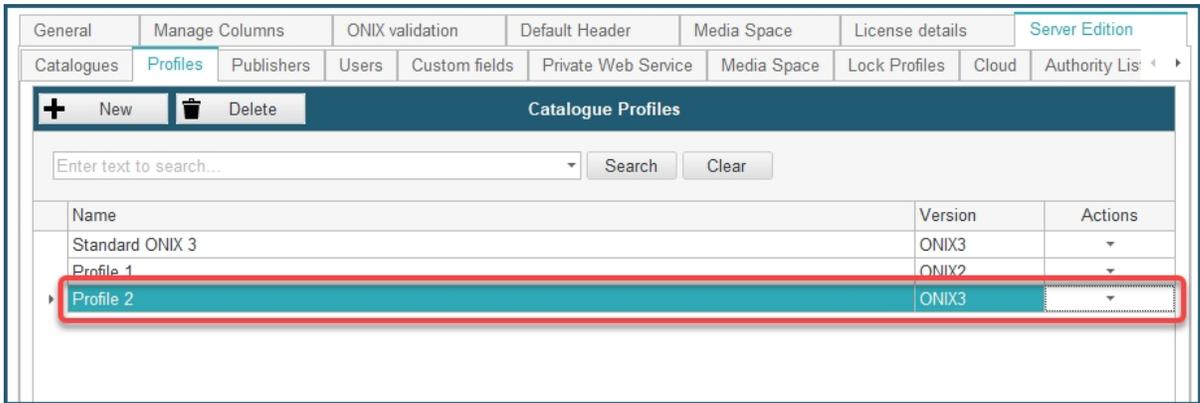
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▼
ONIX3	ONIXEDIT3	ONIXEDIT	5000	289		▼
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1098	1 %	▼
			Total: 112500	Total: 90778		
<input type="checkbox"/> Allow updates of titles from different catalogues when importing a metadata file ⓘ						
Set next RecordReference value for Catalogues with Auto-Numbering activated						

1  
 2  
 Unassign catalogue profile  
 Edit other settings  
 Clear this catalogue  
 Clone this catalogue

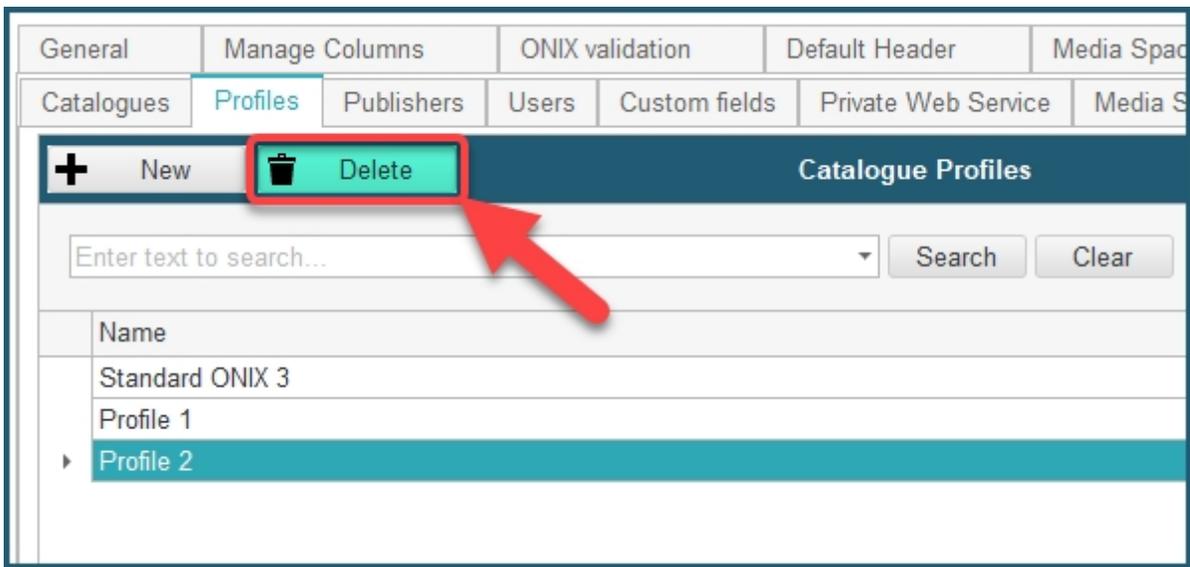
## Deleting a profile

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:

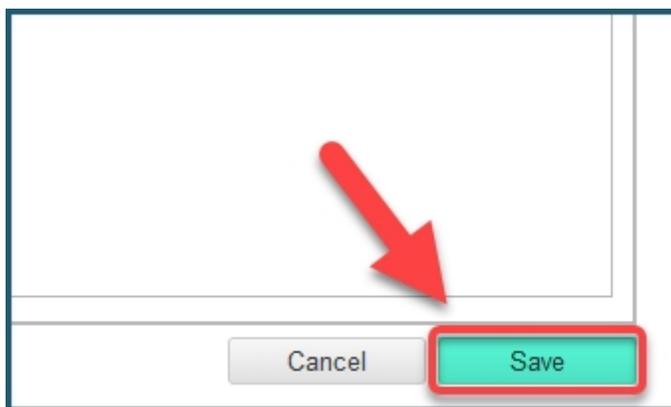
1. From the **Profiles** tab, **select** the profile you want to delete:



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!

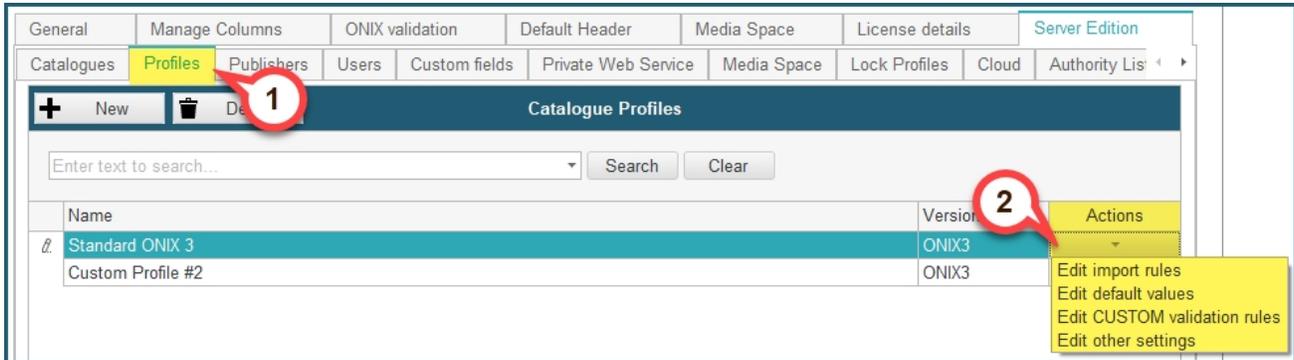


## Actions menu

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:

The screenshot shows the 'Catalogues' tab in the ONIXEDIT Server interface. The 'New' button is circled in red with the number '1'. The 'Actions' dropdown menu for the 'My Other Catalogue' row is circled in red with the number '2'. The dropdown menu is open, showing the following options: 'Unassign catalogue profile', 'Edit other settings', 'Clear this catalogue', and 'Clone this catalogue'.

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
ONIX2	Inner Traditions	Andy	3000	2018	100 %	
ONIX3	MDS 3.0	François	2000	1772	1 %	
ONIX2	ONIXEDIT	ONIXEDIT	300	0		
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1289	96 %	
ONIX3	Les Belles Lettres	Les Belles Lettres	100	99	0 %	
ONIX3	My Other Catalogue	Julien	100	0		
ONIX3	ONIXEDIT3	ONIXEDIT	5000	1	100 %	
Profile: Custom Profile #2						
ONIX3	My New Catalogue	Jennifer	500	192	72 %	

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:

The screenshot shows the 'Catalogues' tab in the ONIXEDIT Server interface. The 'New' button is circled in red with the number '1'. The 'Actions' dropdown menu for the 'BIG' row is circled in red with the number '2'. The dropdown menu is open, showing the following 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', and 'Copy default values from another catalogue'.

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
Profile: None						
ONIX2	BIG	Maxime	100000	85406		
ONIX2	Hinkler	Hinkler	100	96	92 %	
ONIX2	Inner Traditions	Andy	3000	2018	100 %	
ONIX3	MDS 3.0	François	2000	1772	1 %	
ONIX2	ONIXEDIT	ONIXEDIT	300	0		
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1289	96 %	
ONIX3	Les Belles Lettres	Les Belles Lettres	100	99	0 %	

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.

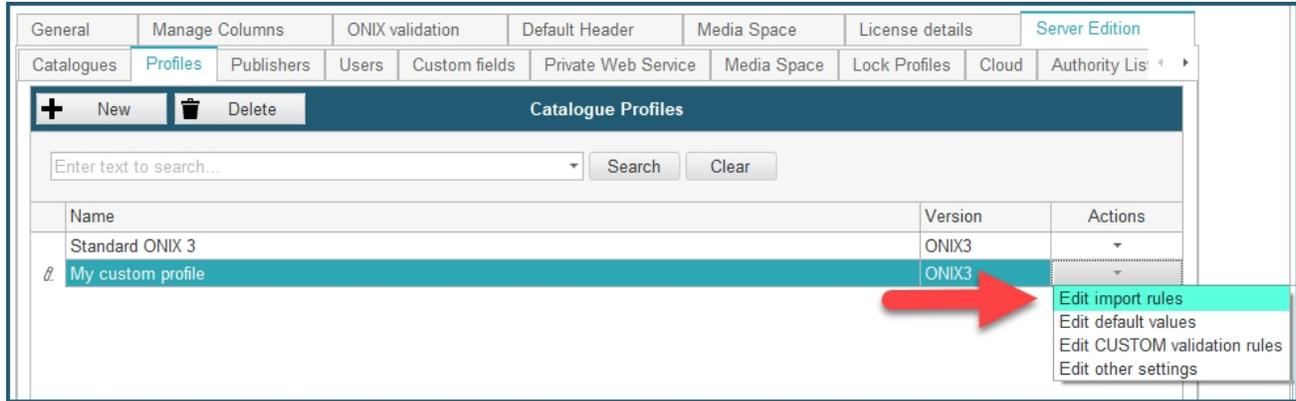
To set Import rules for a catalogue or a profile, follow these steps:

**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:

The screenshot shows the 'Catalogues' section of the ONIXEDIT Server interface. The table lists various catalogues with columns for Version, Name, Contact, Allowed titles, No of titles, and % Valid. The 'ONIXEDIT' catalogue is highlighted in blue. A red arrow points to the 'Edit import rules' option in the Actions menu for this catalogue.

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	MDS 3.0	François	2000	1772	1 %	▼
ONIX2	ONIXEDIT	ONIXEDIT	300	0	0 %	▼
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1265	63 %	▼
ONIX3	Les Belles Lettres	Les Belles Lettres	100	99	0 %	▼
ONIX3	My Other Catalogue	Julien	100	0	0 %	▼

**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:



The screenshot displays the 'Catalogue Profiles' section of the ONIXEDIT Server interface. The 'Profiles' tab is active, and the 'My custom profile' row is selected. A red arrow points to the 'Actions' column for this profile, which has a dropdown menu open showing the following options:

- Edit import rules
- Edit default values
- Edit CUSTOM validation rules
- Edit other settings

**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

The screenshot shows the 'Insert options' tab with the following settings:

- Allow creation of new imported titles
- Set custom field [dropdown] to [text field]
- 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

- **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.

Subject 1 / 1

Main subject:

Scheme identifier: BISAC Subject Heading

Scheme name:

Scheme version:

Code: LAN008000

Heading text: 

- *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

Insert options   **Update options**   Exclusions

Allow update of existing imported titles

Set custom field Revision\_Status to To do

Generate missing THEMA subjects from existing BIC codes

Generate missing THEMA subjects from existing BISAC codes

Generate missing subject Headings from Codes: Disabled

Remove modifiable elements from product if not present in imported file

Apply ONIXEDIT Merge function for already defined sections    V1    V2

Modifiable ONIX sections:

- Product
  - 1.1 - RecordReference
  - 1.2 - NotificationType
  - 1.3 - DeletionText
  - 1.4 - RecordSourceType
  - 1.8 - RecordSourceName
  - ProductIdentifier
  - Barcode
  - DescriptiveDetail
    - 3.1 - ProductComposition

Cancel   Save

- *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:

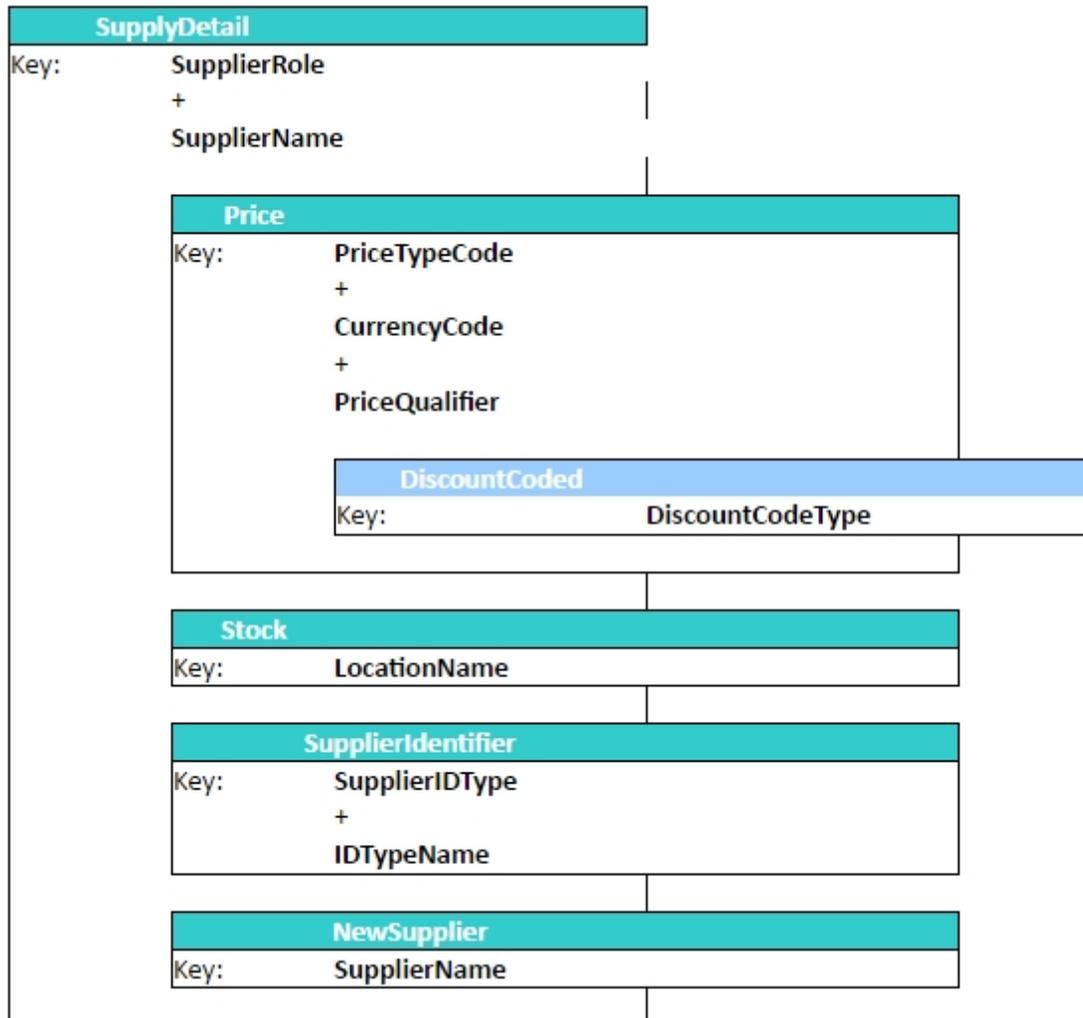
Apply ONIXEDIT Merge function for already defined sections     V1      V2 

**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:

Modifiable ONIX sections:

- Product
  - 1.1 - RecordReference
  - 1.2 - NotificationType
  - 1.3 - DeletionText
  - 1.4 - RecordSourceType
  - 1.8 - RecordSourceName
  - ProductIdentifier
  - Barcode
  - DescriptiveDetail
    - 3.1 - ProductComposition

## 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:

Insert options   Update options   **Exclusions**

Reject titles with the following criterion/criteria

Logical	Field	Operator	Value
OR	//Product/DescriptiveDetail/Language/Lan...	Not equal to	eng
OR	//Product/DescriptiveDetail/ProductFormF...	Not equal to	DG

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 - My New Catalogue ×

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

Title primary key: ISBN13 Leave blank to use ONIX\_NOSEQ

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:

### ⚙ Import rules - My New Catalogue ×

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

Title primary key: ISBN13 Leave blank to use ONIX\_NOSEQ

### ✎ Manage profiles ×

+ Add a new profile

Code	Name	Description	
[P1]	Default profile	This profile is used for all imports by default	🗑
[P2]	Product Supply Update	Allow modifications on ProductSupply block only	🗑
[P3]	Delete All Subjects	Use this profile to clear all subjects	🗑
[P4]	Replace Contributors	This profile completely replace Contributors section	🗑

OK

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:

- 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:

**Import rules - ONIXEDIT3**

Profile: [P2] - Product Supply Update

Title primary key: ISBN13 Leave blank to use ONIX\_NOSEQ

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:

Update options

Allow creation of new imported titles

Update options

Allow update of existing imported titles

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.

Apply ONIXEDIT Merge function for already defined sections  V1  V2

Modifiable ONIX sections:

- AudienceRange
- 13.10 - AudienceDescription
- Complexity
- CollateralDetail
- PublishingDetail
- RelatedMaterial
- ProductSupply
  - Market
  - MarketPublishingDetail
  - SupplyDetail

Cancel Save

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.

- 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:

The screenshot shows the 'Update options' tab in the ONIXEDIT Server interface. The following options are visible:

- Allow update of existing 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
- Remove modifiable elements from product if not present in imported file
- Apply ONIXEDIT Merge function for already defined sections (V1 selected, V2 unselected)

Modifiable ONIX sections:

- Extent
- 11.6 - NumberOfIllustrations
- 11.7 - IllustrationsNote
- AncillaryContent
- Subject
- Audience
- AudienceRange
- 13.10 - AudienceDescription
- Complexity
- CollateralDetail

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.

- 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.

The screenshot shows the 'Update options' tab in the ONIXEDIT Server interface. It contains the following elements:

- Three tabs: 'Insert options', 'Update options' (active), and 'Exclusions'.
- Checkboxes for:
  - Allow update of existing imported titles
  - Set custom field [dropdown] to [input]
  - Generate missing THEMA subjects from existing BIC codes
  - Generate missing THEMA subjects from existing BISAC codes
- A dropdown menu: 'Generate missing subject Headings from Codes: Disabled'.
- Checkboxes for:
  - Remove modifiable elements from product if not present in imported file
  - Apply ONIXEDIT Merge function for already defined sections (radio buttons for V1 and V2)
- A section titled 'Modifiable ONIX sections:' containing a list of sections with checkboxes:
  - EpubUsageConstraint
  - 3.21 - MapScale
  - ProductClassification
  - ProductPart
  - Collection
  - TitleDetail
  - Contributor (highlighted in yellow)
  - 7.51 - ContributorStatement
  - Event
  - 9.1 - EditionType

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.

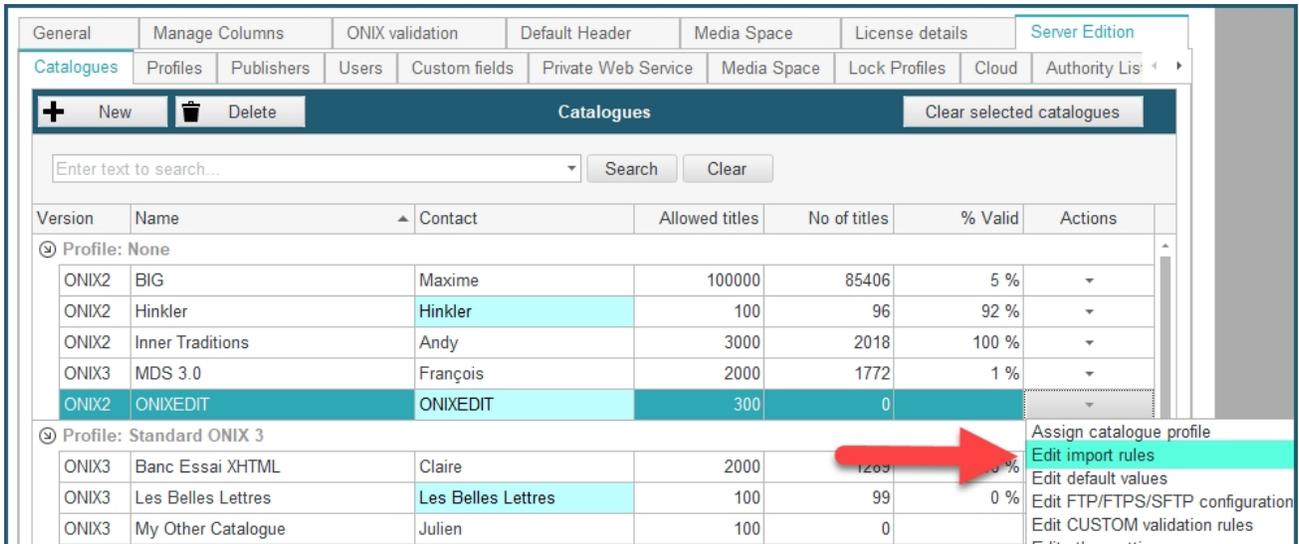
## Set Default Values

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.

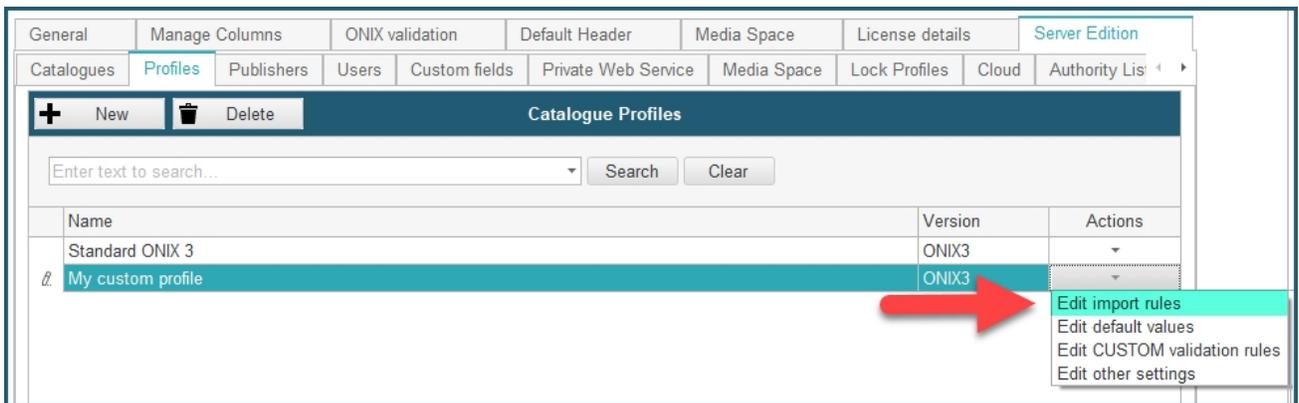
You can either set default values for a single catalogue if it is not assigned to a profile, or set default values for a whole profile.

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

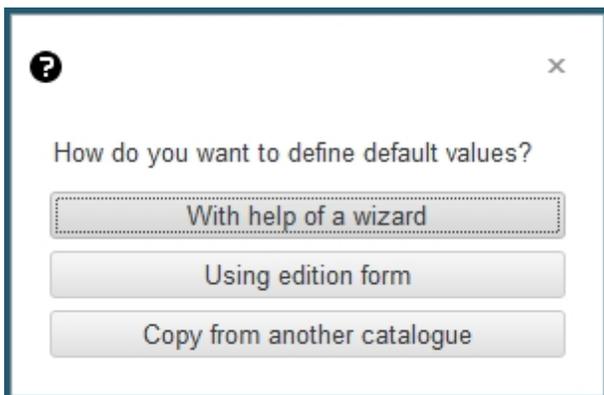
**1 a - To set default values for an unassigned catalogue:** From the *Preferences* module, go to the **Server Edition / Catalogues** tab and select *Edit default values* in the action menu corresponding to the catalogue you want to modify:



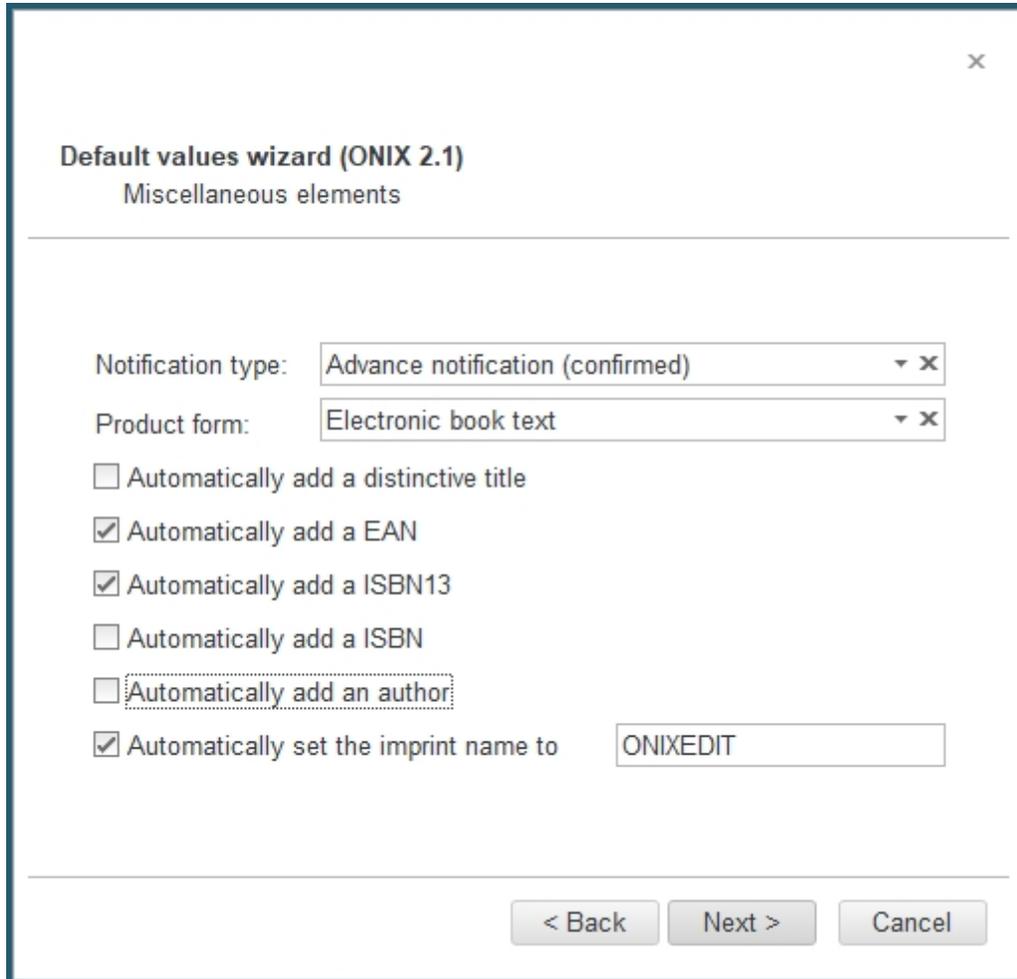
**1 b - To set default values for a whole profile:** From the *Preferences* module, go to the **Server Edition / Profiles** tab and select *Edit default values* in the action menu corresponding to the profile you want to modify:



**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.



The screenshot shows a dialog box titled "Default values wizard (ONIX 2.1)" with a subtitle "Miscellaneous elements". It contains several configuration options:

- Notification type: Advance notification (confirmed) (dropdown menu)
- Product form: Electronic book text (dropdown menu)
- Automatically add a distinctive title
- Automatically add a EAN
- Automatically add a ISBN13
- Automatically add a ISBN
- Automatically add an autho
- Automatically set the imprint name to ONIXEDIT (text input field)

At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

**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:

 Edit default values \_ □ ×

File Edit Onix Help  Switch to simplified form

Details Specification Contributor Publisher Supply detail Marketing Series / Set MediaFile Illustrations Epublication

Record reference:  Title(s)

Notification type:  ▾ ×

Product form:  ▾ ×

Trade category:  ▾ ×

Record source type:  ▾ ×

Record source name:

Product packaging:

Out of print date:

No of pages:

**Product form detail(s)**

Product form detail

Record 0 of 0

**Product form feature(s)**

Type	Value	Description

Record 0 of 0

Number:

Type code:  ▾ ×

Statement:

**Product identifier(s)**

ID type	ID type name	ID value

Record 0 of 0

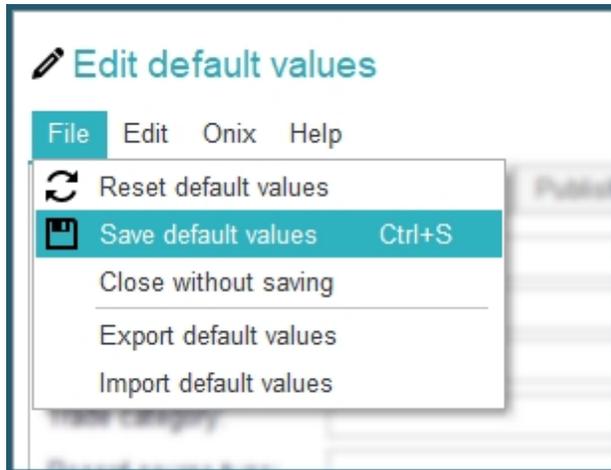
Table of contents XML

**ONIXEDIT** ×

 Use this form to define your default values for all your new titles.

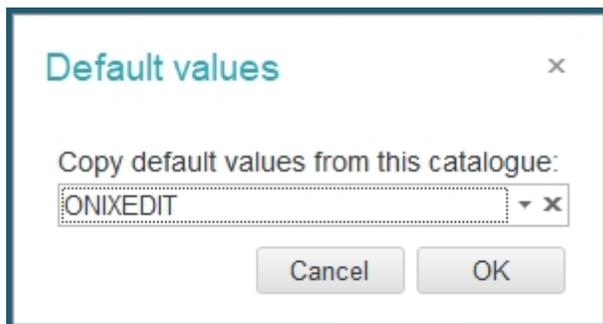
OK

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:

The screenshot shows the 'Catalogues' tab in the ONIXEDIT Server interface. The interface includes a search bar and a table with columns: Version, Name, Contact, Allowed titles, No of titles, % Valid, and Actions. The table is divided into two profile sections: 'Profile: None' and 'Profile: Standard ONIX 3'. A red arrow points to the 'Edit FTP/FTPS/SFTP configuration' option in the action menu for the 'My Other Catalogue' row.

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	MDS 3.0	François	2000	1772	1 %	▼
ONIX3	My Other Catalogue	Julien	100	0		▼
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▼
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	196	96 %	▼
ONIX3	Les Belles Lettres	Les Belles Lettres	100	99	0 %	▼
ONIX3	ONIXEDIT	ONIXEDIT	5000	4	100 %	▼
			Total: 113100	Total: 90873		

**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:

The screenshot shows the 'Profiles' tab in the ONIXEDIT Server interface. The interface includes a search bar and a table with columns: Name, Version, and Actions. The table lists two profiles: 'Standard ONIX 3' and 'My custom profile'. A red arrow points to the 'Edit other settings' option in the action menu for the 'My custom profile' row.

Name	Version	Actions
Standard ONIX 3	ONIX3	▼
My custom profile	ONIX3	▼

**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:

### ⚙️ Edit settings - My custom profile ✕

Catalogue profile:  Manage

Name:

Contact:

Allowed titles:

No of titles: 0

Record Reference auto-numbering:

A valid ISBN13 ISBN must be supplied:

Validation ONIXEDIT Cloud

General Reports Actions

Define custom functions in ONIXEDIT Cloud Actions menu:

Add a new FTP/FTPS/SFTP action

FTP actions		
Name	URI	

Add a new POST action

POST actions		
URI	Caption EN	Caption FR

Cancel
Save

**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:

### FTP Configuration - My custom profile ✕

Use this form to set up an account to which web users can directly transmit their ONIX metadata. This feature will be available from the Action menu.

Recipient name:

Connection type:

Address:

Username:

Password:

ONIX Path:

[Copy authorized images](#)

Image Path:

Cover Images Name:

You can automatically set a Custom field to a specific value when titles are transmitted to this FTP from ONIXEDIT Cloud:

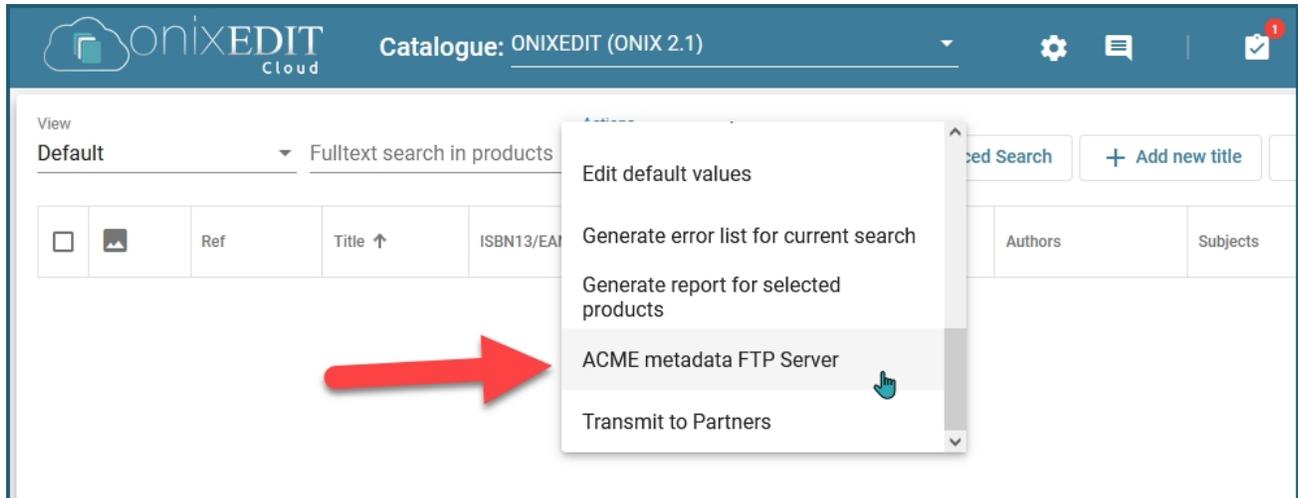
Set custom field  to

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

You can automatically set a Custom field to a specific value when titles are transmitted to this FTP from ONIXEDIT Cloud:

Set custom field  to

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

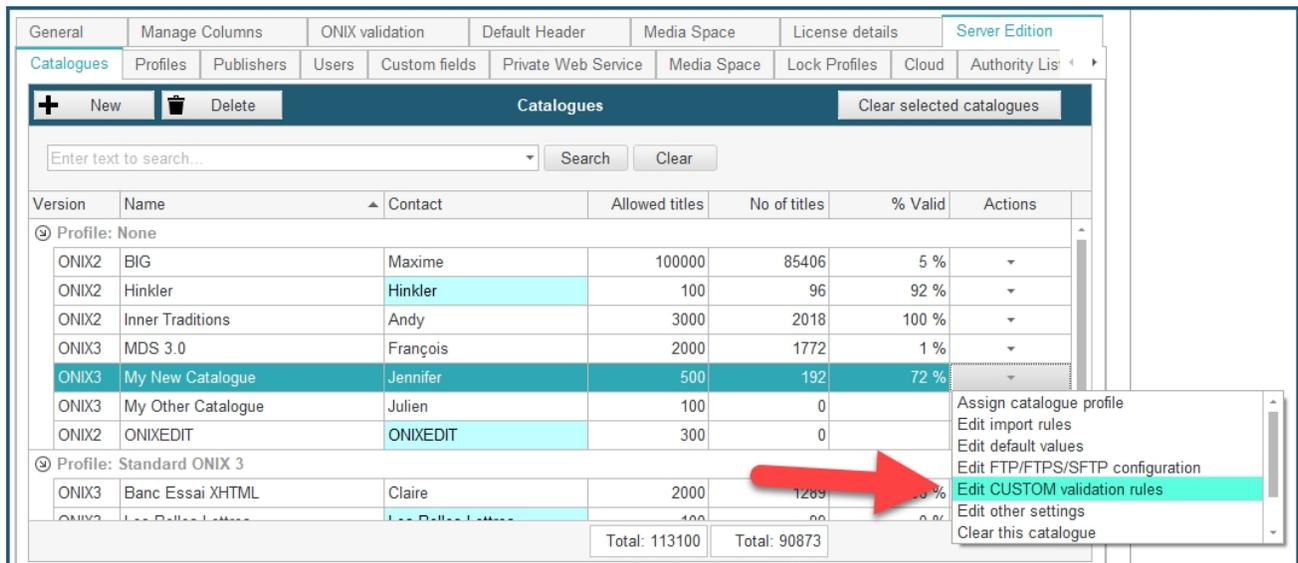


## Define Custom Validation rules

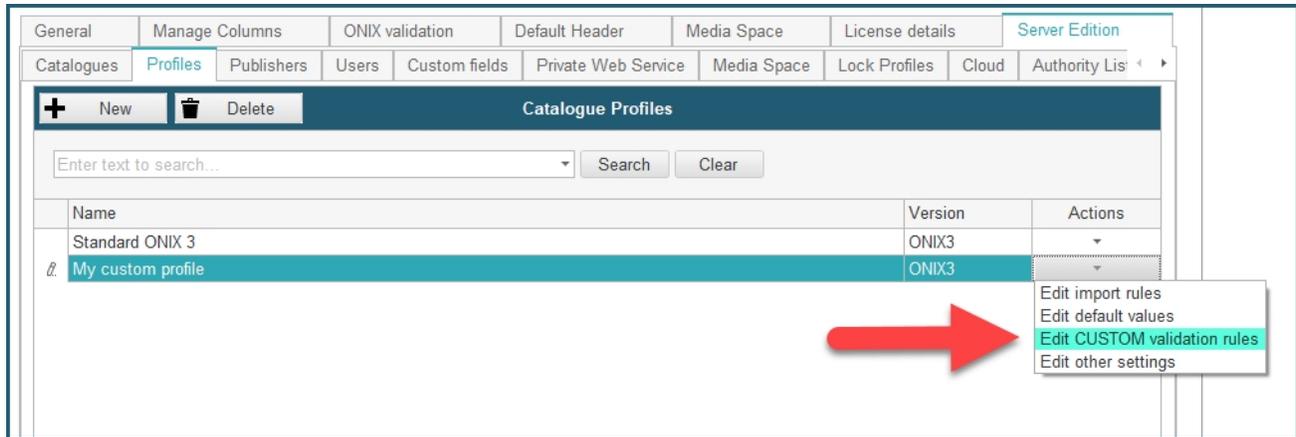
ONIXEDIT PRO (and optionally with ONIXEDIT Regular) allows you to set Custom Validation rules to define mandatory fields specific to your organization. With ONIXEDIT Server, you can define Custom Validation rules for each of your catalogues and your profiles.

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):

**Edit CUSTOM validation rules \***

File Edit View Help **CUSTOM validation** Switch to simplified form

Product Descriptive Set current element as Required/Optional F3  
Details Measure and Ex Define allowed values F4  
Contributor Event Illustrations Subject Audience Religious text  
Set XPath validation for current element F5  
Apply validation rule to each group item

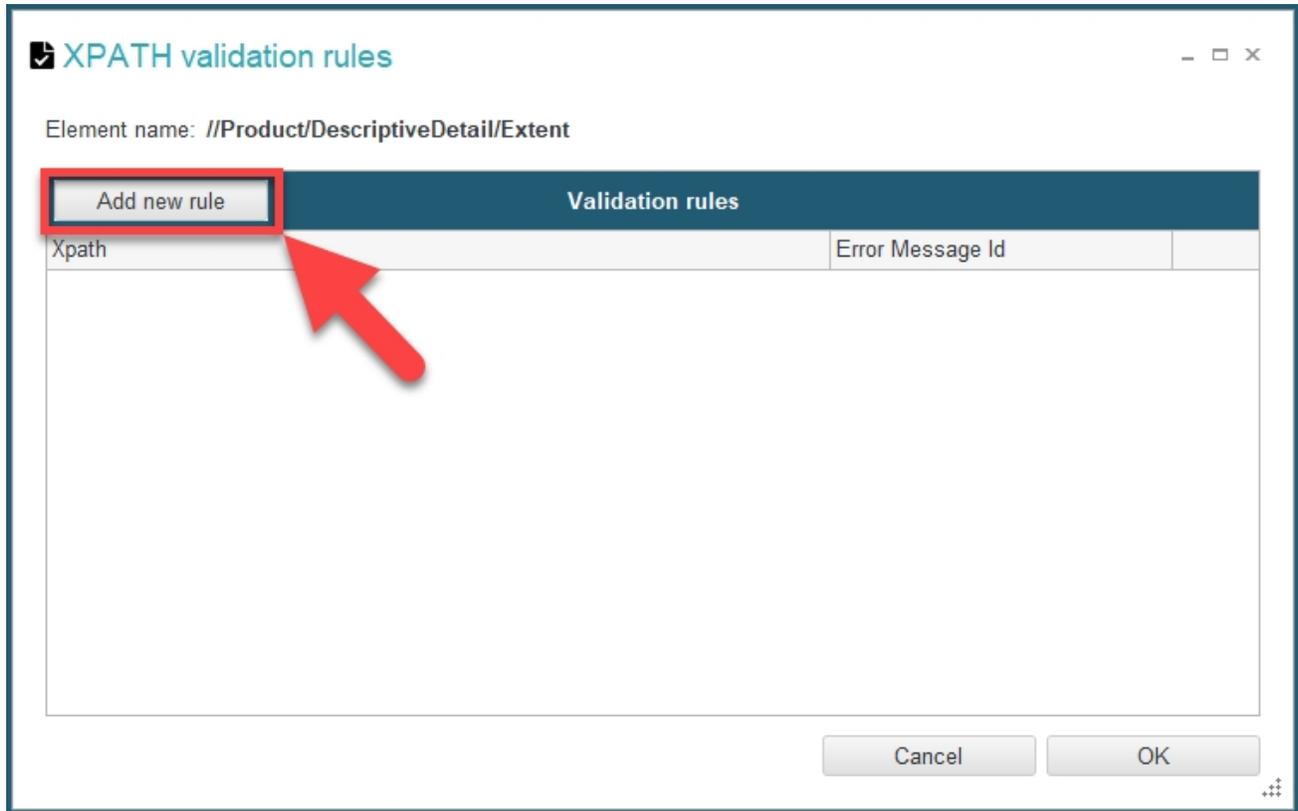
Type	Measurement	Unit code
Record 0 of 0		

Extent(s)

Type	Value	Unit
Record 1 of 1		

Table of content

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:

 Edit validation rule

1  2  3

XPath expression:

*You must define a valid XPATH expression returning a boolean value (True or False)*

4

5

XPATCH Validation Rule examples

Check if Main Content Page Count is between 0 and 10000:

```
number(//Product/DescriptiveDetail/Extent[ExtentType="00"]/ExtentValue)>0 and number(//Product/DescriptiveDetail/Extent[ExtentType="00"]/ExtentValue)< 10000
```

Check that ONIX Audience is set to Young Adult when a BISAC Subject code starts with "YA":

```
if(starts-with(//Product/DescriptiveDetail/Subject[SubjectSchemeIdentifier="10"]/SubjectCode,"YA")) then boolean(//Product/DescriptiveDetail/Audience[AudienceCodeType="01"]/AudienceCodeValue="03")
```

Error message:

Validation type:

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

 **XPATCH 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:

	[SubjectSchemeldentifier="10"]/SubjectCode,"YA") then boolean (//Product/DescriptiveDetail/Audience[AudienceCodeType="01"]/AudienceCodeValue="03")
Error message:	<input type="text"/>
Validation type:	Validate that at least one item of the group respects the condition
	<input type="button" value="Cancel"/> <input type="button" value="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:

**Error messages**

ID	Category	Message EN

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):

**Edit message** x

ID:

Category:

Language:

Message:

Mess	
Language	Message

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

### Edit message x

ID:

Category:

Language:

Message:

Messages		
Language	Message	
EN	Page number must be between 0 and 10000.	

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:

### Edit message ✕

ID:

Category:

Language:

Message:

#### Messages

Language	Message	
EN	Page number must be between 0 and 10000.	
FR	Le numéro de page doit être compris entre 0 et 10000.	
ES	El número de página debe estar entre 0 y 10000.	
PT	O número da página deve estar entre 0 e 10.000.	

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:

 **Manage error messages** \_ □ ×

Category:

**Error messages**

ID	Category	Message EN	
NumberPages	General	Page number must be between 0 and 10000.	 

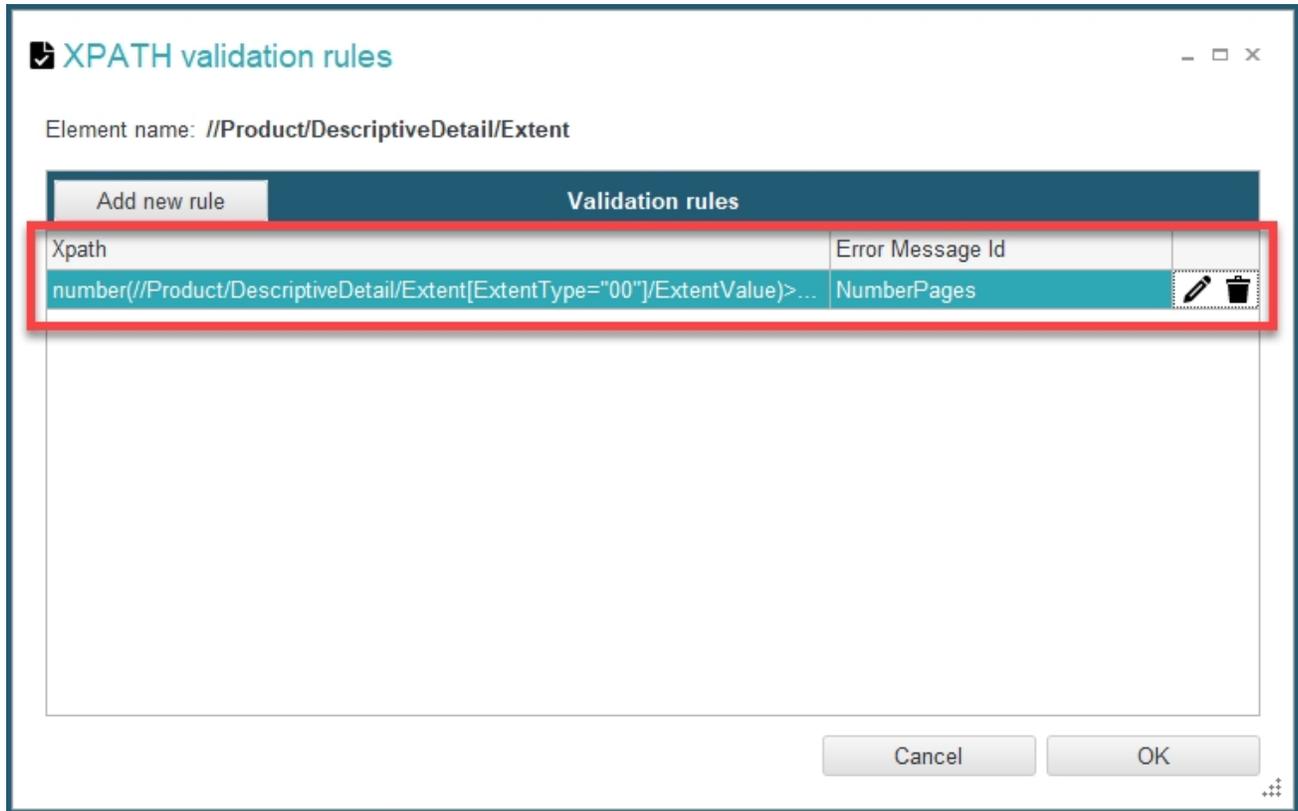
You can now select it and click **OK**. The error message is now selected and will be displayed when the rule is not applied.

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

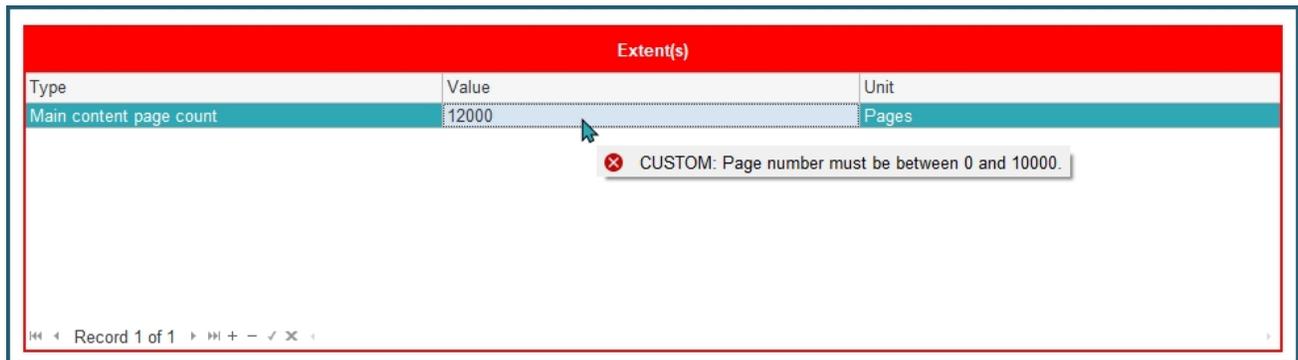
Error message:  ...

Validation type:

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:

The screenshot shows the 'Catalogues' tab in the ONIXEDIT Server interface. The table below represents the data shown in the interface:

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	MDS 3.0	François	2000	1772	1 %	▼
ONIX3	My New Catalogue	Jennifer	500	192	72 %	▼
ONIX3	My Other Catalogue	Julien	100	0		▼
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▼
⊙ Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000			▼
ONIX3	Les Belles Lettres	Les Belles Lettres	100	0	0 %	▼
			Total: 113100	Total: 90873		

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:

The screenshot shows the 'Profiles' tab in the ONIXEDIT Server interface. The table below represents the data shown in the interface:

Name	Version	Actions
Standard ONIX 3	ONIX3	▼
My custom profile	ONIX3	▼

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:

Contact:

Allowed titles:  ↕

No of titles: 192

Record Reference auto-numbering:

A valid ISBN13 or EAN must be supplied:

Send daily validation results to publishers:  Results type:  ▼

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:

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

- **Name:** Name of the catalogue (same as in the catalogue list).
- **Contact:** Same as in the catalogue list.
- **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.
- 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:

**Edit product # [AUTO NUMBER] \***

File Edit Onix View Help

Product Descriptive detail x Collateral detail x Publishing detail x

Record reference: [AUTO NUMBER] Deletion

Notification type: Notification confirmed on pub x

Record source type: x

Record source name:

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:

General Manage Columns ONIX validation Default Header Media Space License details Server Edition

Catalogues Profiles Publishers Users Custom fields Private Web Service Media Space Lock Profiles Cloud Authority Lis

+ New Delete Catalogues Clear selected catalogues

Enter text to search... Search Clear

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	MDS 3.0	François	2000	1772	1 %	
ONIX3	My New Catalogue	Jennifer	500	192	72 %	
ONIX3	My Other Catalogue	Julien	100	0		
ONIX2	ONIXEDIT	ONIXEDIT	300	0		
Profile: Standard ONIX 3						
ONIX3	Banc Essai XHTML	Claire	2000	1289	96 %	
ONIX2	Les Bulles d'Or	Les Bulles d'Or	100	0	0 %	
			Total: 113100	Total: 90873		

Allow updates of titles from different catalogues when importing a metadata file ⓘ

Set next RecordReference value for Catalogues with Auto-Numbering activated

Cancel Save

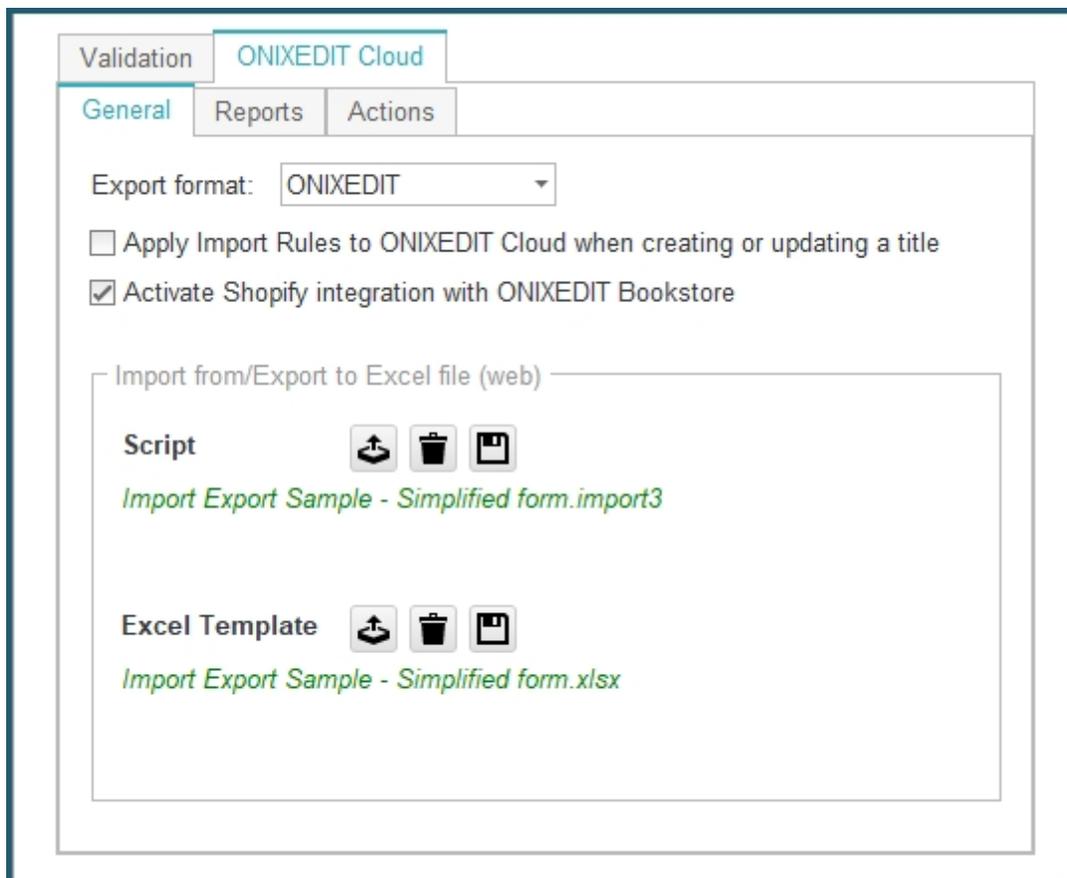
Under these settings, you will find 2 tabbed sections:

### 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:

- 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".
- 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.
- 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.

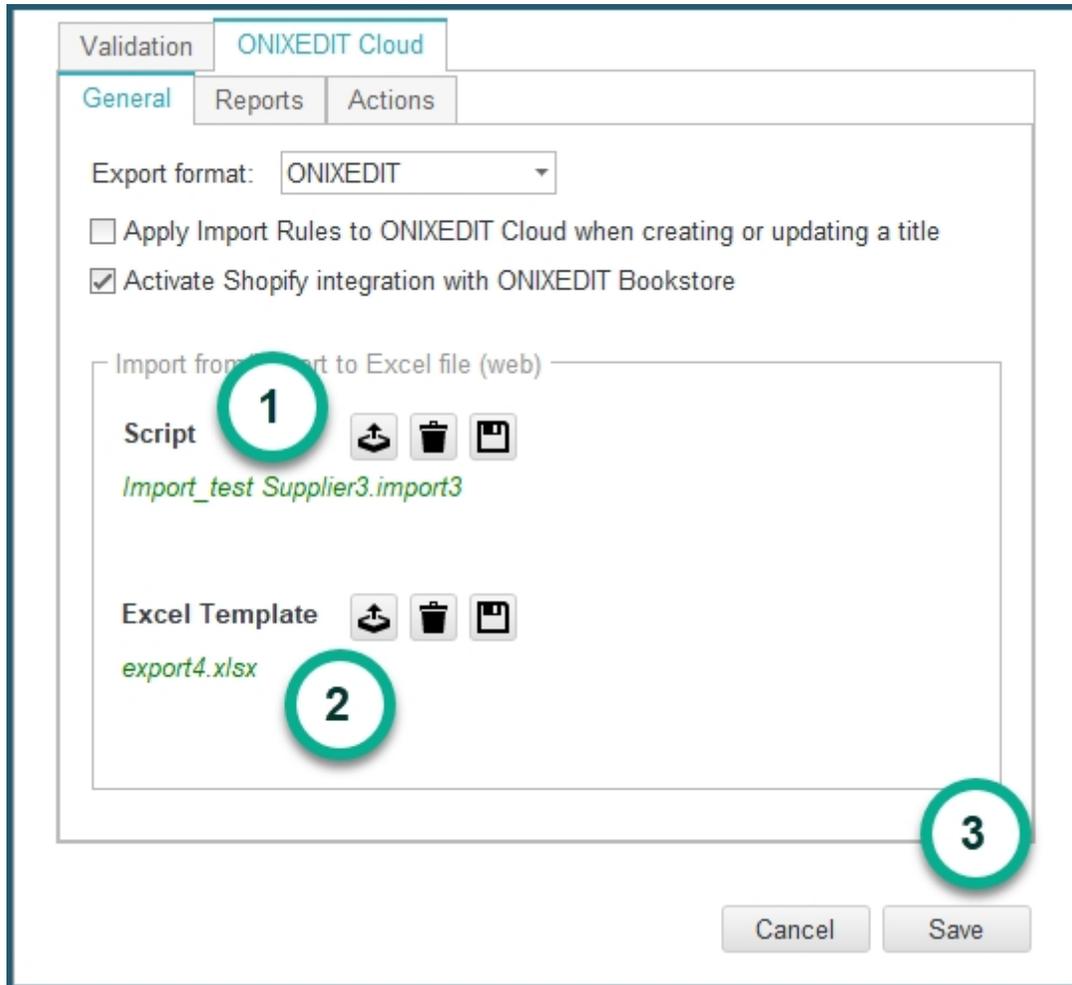


- The "*Import from/Export to Excel file (web)*" panel is used to set the ONIXEDIT import/export script and Excel template that can be used from ONIXEDIT Cloud as an alternative to create or export ONIX metadata to and from Excel files. The import/export script and corresponding Excel template that you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

The screenshot shows the ONIXEDIT Cloud interface with a dropdown menu open. The menu items are: Download the Excel template, Import metadata from Excel template, Import an ONIX file, Import images, Export selected products to ONIX 2.1 REF, Export selected products to ONIX 2.1 SHORT, Export selected products to Excel, and Delete selected products. Three callout boxes provide instructions:

- Get the Excel template that can be used to upload metadata to the catalogue.** (Points to "Download the Excel template")
- Upload the completed Excel file and apply the ONIXEDIT import script to add or modify titles in the catalogue.** (Points to "Import metadata from Excel template")
- Produce an Excel file with the selected titles using the ONIXEDIT Import/Export script.** (Points to "Export selected products to Excel")

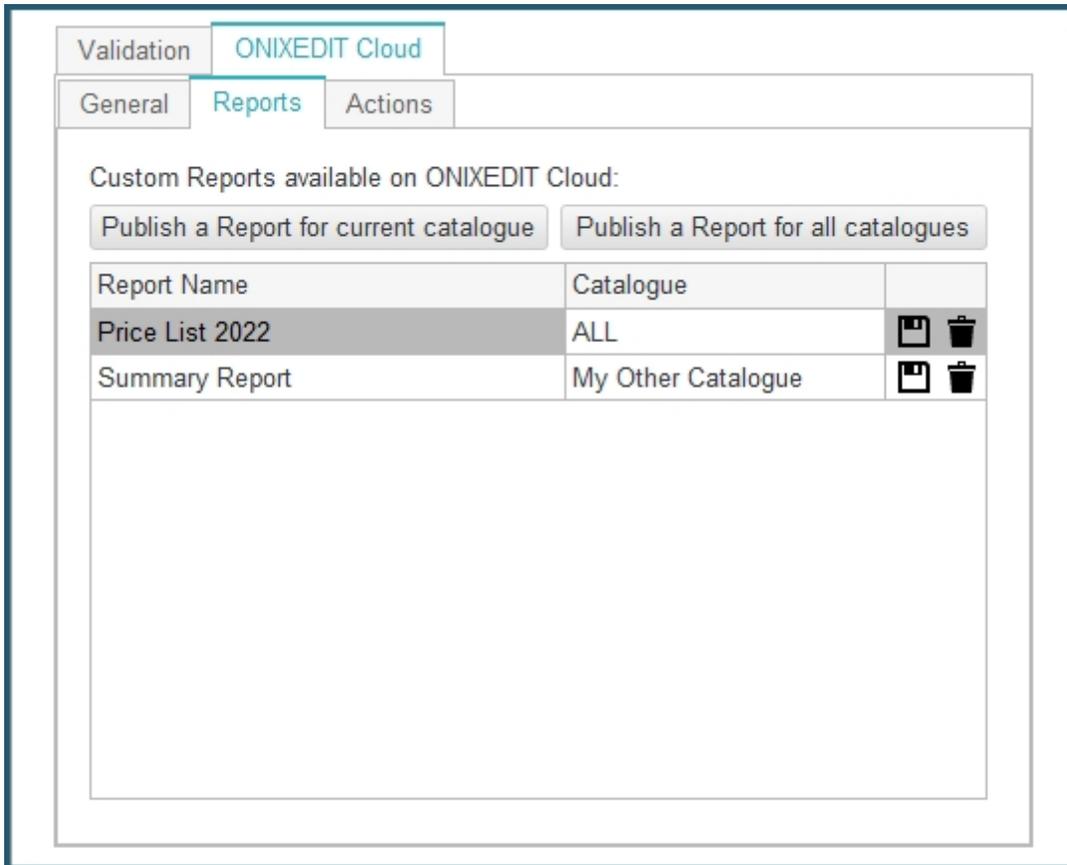
To define an Import/Export script and its corresponding Excel template, proceed as follows:



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:



The screenshot shows the ONIXEDIT Cloud interface. At the top, there are tabs for 'Validation' and 'ONIXEDIT Cloud'. Below this, there are sub-tabs for 'General', 'Reports', and 'Actions'. The 'Reports' tab is active. The main content area is titled 'Custom Reports available on ONIXEDIT Cloud:' and contains two buttons: 'Publish a Report for current catalogue' and 'Publish a Report for all catalogues'. Below the buttons is a table with two columns: 'Report Name' and 'Catalogue'. The table lists two reports: 'Price List 2022' associated with 'ALL' and 'Summary Report' associated with 'My Other Catalogue'. Each row has a save icon and a delete icon in the rightmost column.

Report Name	Catalogue	
Price List 2022	ALL	 
Summary Report	My Other Catalogue	 

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

onixEDIT Cloud Catalogue: My New Catalogue (ONIX 3.0)

View Default Fulltext search in produ... Actions Clear selection (1)

	Ref	Title ↑	ISBN13/EAN
<input checked="" type="checkbox"/>	1374	5 Steps to a 5: AP Chemistry 2019 Elite Student Edition	97812601...
<input type="checkbox"/>	1371	5 Steps to a 5: AP Comparative Government and Politics	97812600...
<input type="checkbox"/>	1378	5 Steps to a 5: AP Physics 1 Algebra-Based 2019	97812601...

Generate a report

- Column Format
- Detailed Format
- Price List 2022
- Summary Report

Currency: \_\_\_\_\_

Cancel OK

Contenu

## Actions

Under the Actions tab, you will find the FTP list actions as explained [here](#).

Validation
ONIXEDIT Cloud

General
Reports
Actions

Define custom functions in ONIXEDIT Cloud Actions menu:

Add a new FTP/FTPS/SFTP action

FTP actions		
Name	URI	
GPG	ftp.gogpg.com	✎ 🗑

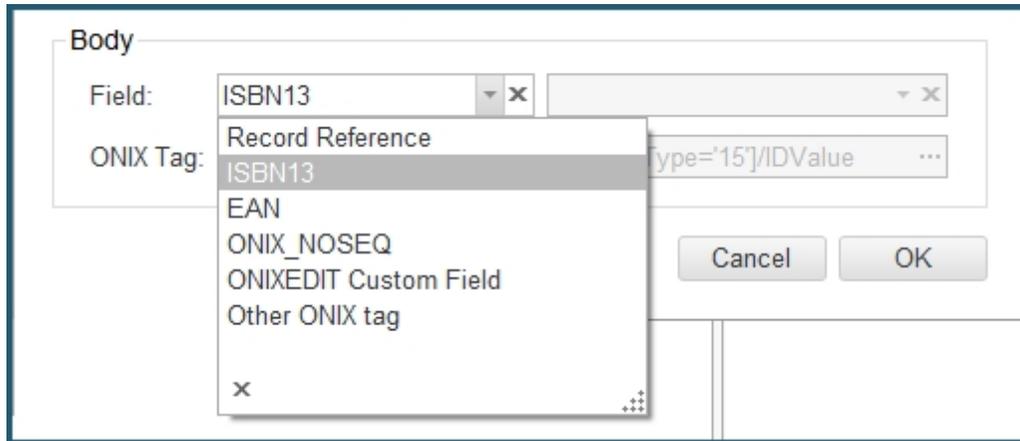
Add a new POST action

POST actions			
URI	Caption EN	Caption FR	

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:

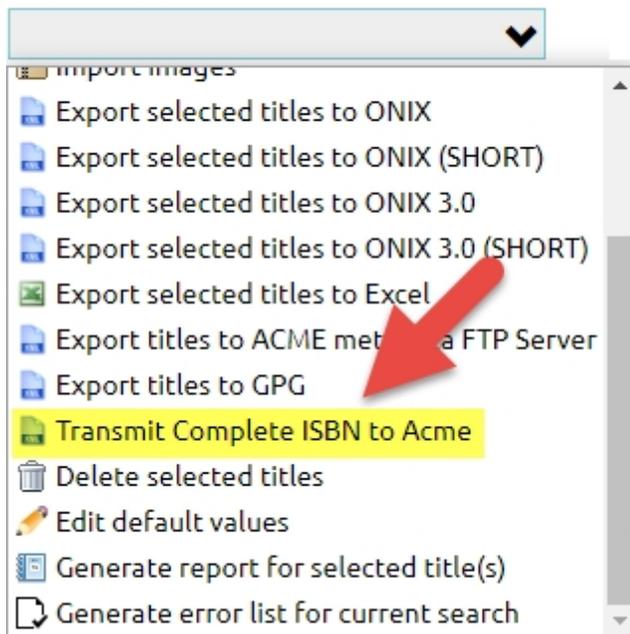
Complete the form above as follow:

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:



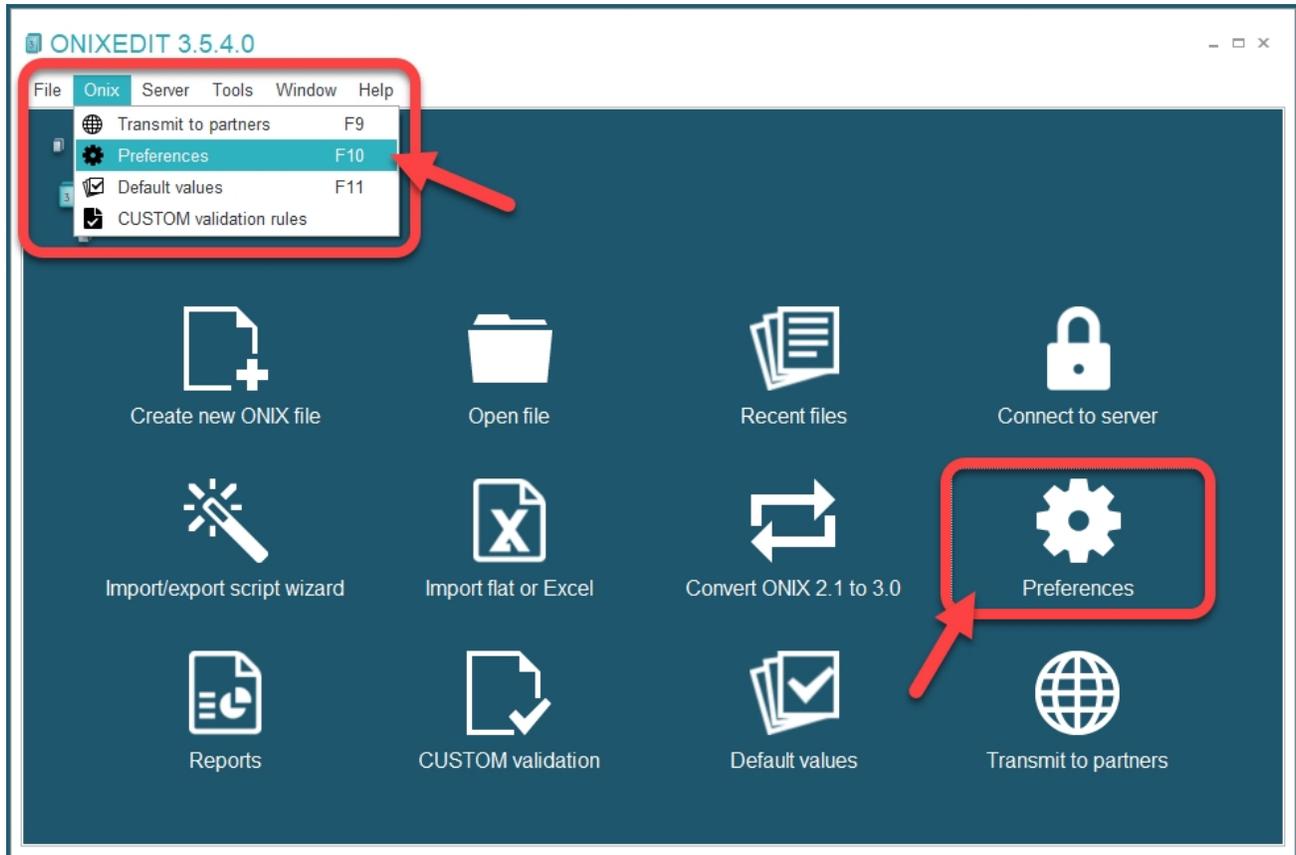
Once a new POST action is defined, ONIXEDIT Cloud users will be able to use it from the Actions menu:

## ACTIONS



## Manage Publishers

In this section, you will see how ONIXEDIT Server allows you to [create Publishers](#) and [assign them to your catalogues](#). You can [define attributes](#) for your Publishers, and then use these attributes when [setting default values](#) or [exporting your titles](#). 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:

**Preferences**

Contact: Server Demo  
Company: ONIXEDIT  
Serial number:   
Email: server\_demo@onixedit.com  
Edition: Professional + Server

SE

General | Manage Columns | On Validation | Default Header | Media Space | License | **Server Edition** | Catalogues | Profiles | **Publishers** | Custom fields | Private Web Service | Media Space | Lock Profiles | Cloud | Authority Lis

Manage Attributes

Delete publishers | Publishers |

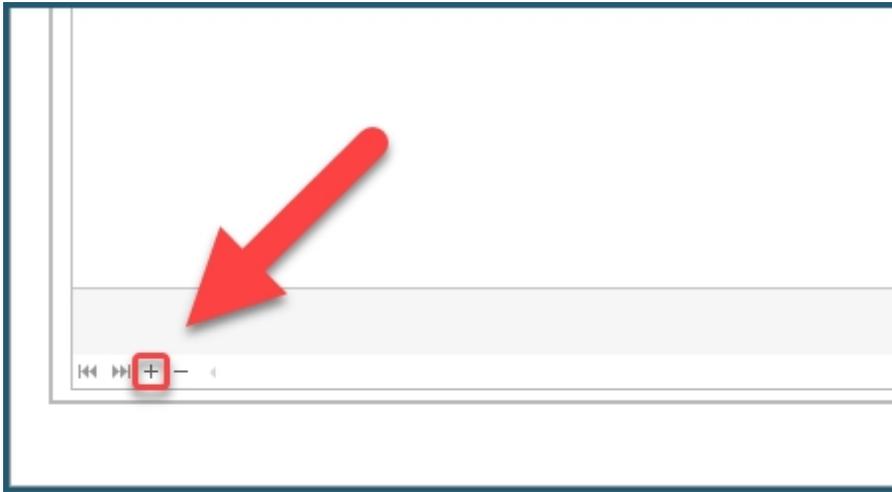
Name
------

Cancel Save

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):

**Edit Publisher** [Close]

General | Attributes | Class of Trade

Publisher name:  1

Contact name:  2

Email:

Phone:

Fax:

SAN:

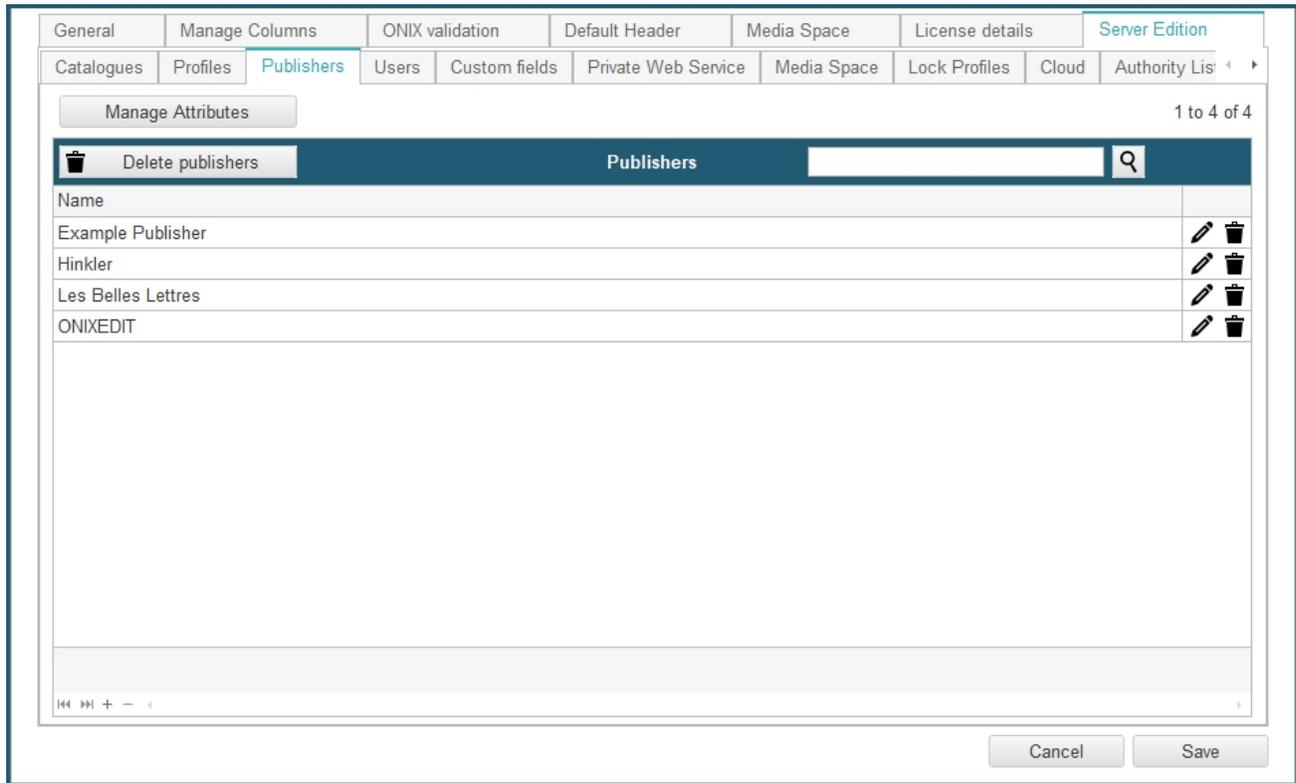
SAP:

3

4

OK

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:

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	MDS 3.0	François	2000	1772	1 %	▼
ONIX3	My New Catalogue	Jennifer	500	192	72 %	▼
ONIX3	My Other Catalogue	Julien	100	0		▼
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▼

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:

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	MDS 3.0	François	2000	1772	1 %	▼
ONIX3	My New Catalogue	Jennifer	500	192	72 %	▼
ONIX3	My Other Catalogue	Julien	100	0		▼
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▼

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.

Choose a Publisher x

**Publishers**

Name	Contact name	Email	Phone
Example Publisher	Julien	example@publisher.ca	
Hinkler	Mark	mark@hinkler.au	
Les Belles Lettres	Robert	Robert@lesbelleslettres.fr	
ONIXEDIT	Raoul	rguenette@onixedit.com	

1 to 4 of 4 11 11 <

2

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:

New

Enter text to search...

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	MDS 3.0	François	2000	1772	1 %	▼
ONIX3	My New Catalogue	Jennifer	500	192	72 %	▼
ONIX3	My Other Catalogue	Example Publisher ...	100	0		▼
ONIX2	ONIXEDIT	ONIXEDIT	300	0		▼

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:

Choose a Publisher
×

Publishers

🔍

Name	Contact name	Email	Phone
Example Publisher	Julien	example@publisher.ca	
Hinkler	Mark	mark@hinkler.au	
Les Belles Lettres	Robert	Robert@lesbelleslettres.fr	
ONIXEDIT	Raoul	rguenette@onixedit.com	

1 to 4 of 4

Define another contact name

Cancel
OK

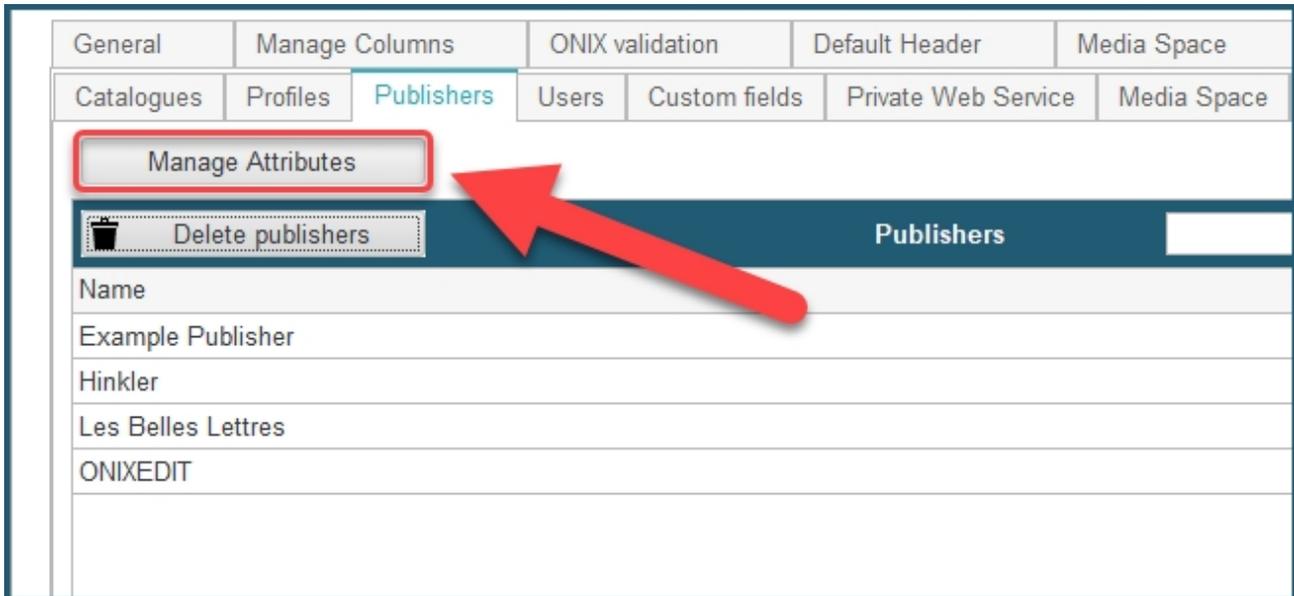


You will then just have to write the name of the contact, just like the other contacts with a white background.

### 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:



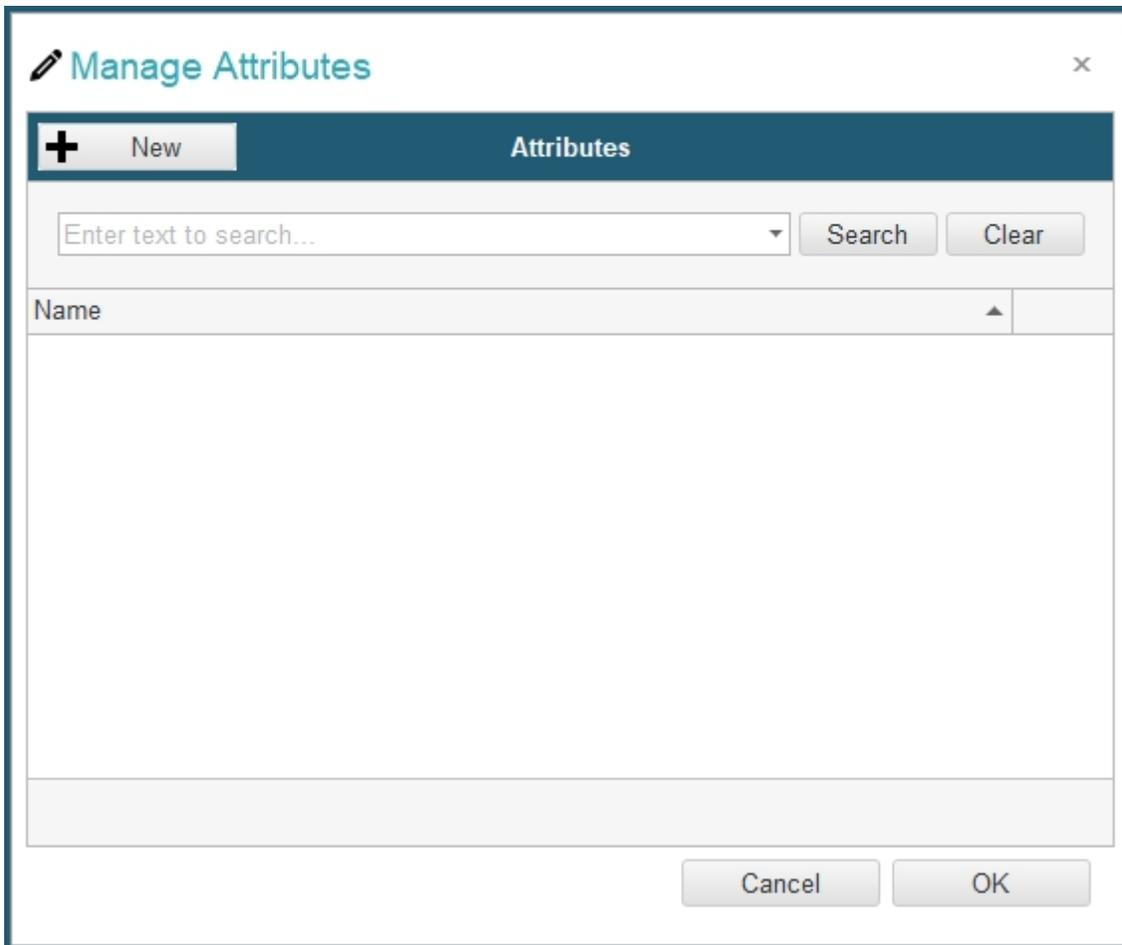
General	Manage Columns	ONIX validation	Default Header	Media Space		
Catalogues	Profiles	<b>Publishers</b>	Users	Custom fields	Private Web Service	Media Space

**Manage Attributes**

**Delete publishers** **Publishers**

Name
Example Publisher
Hinkler
Les Belles Lettres
ONIXEDIT

This pop-up dialog will appear:



**Manage Attributes** x

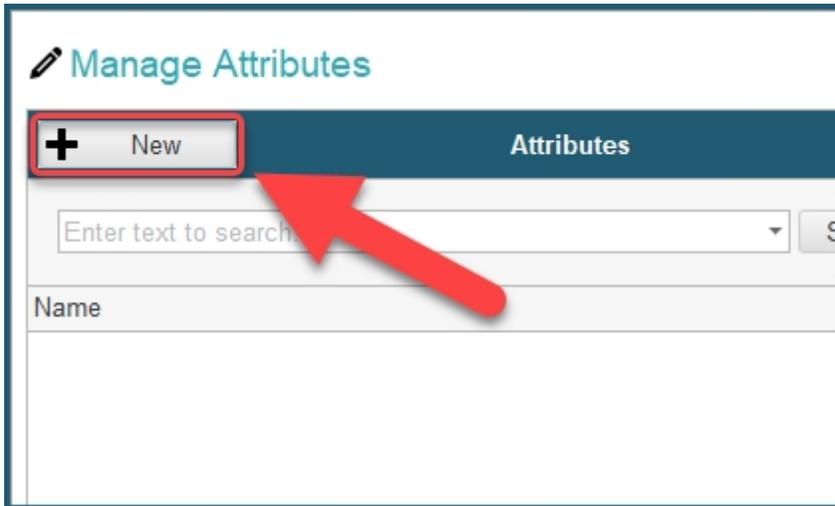
**+ New** **Attributes**

Enter text to search... Search Clear

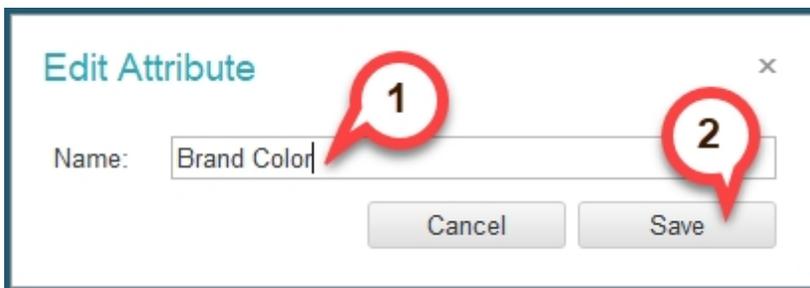
Name

Cancel OK

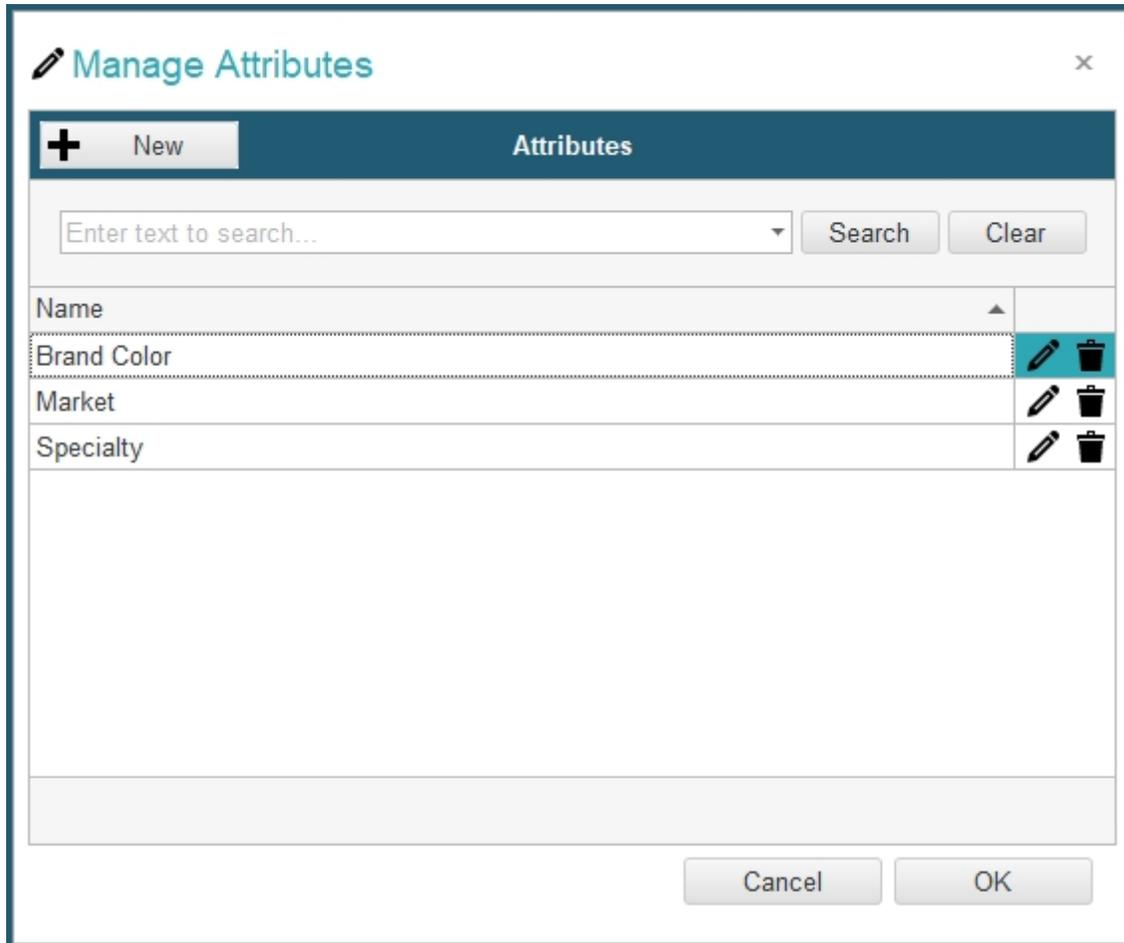
To **create** a new **attribute**, click on the **New** button in the upper left corner:



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:

The screenshot shows the 'Publishers' management interface. At the top, there are tabs for 'General', 'Manage Columns', 'ONIX validation', 'Default Header', 'Media Space', 'License details', and 'Server Edition'. Below these are more tabs: 'Catalogues', 'Profiles', 'Publishers', 'Users', 'Custom fields', 'Private Web Service', 'Media Space', 'Lock Profiles', 'Cloud', and 'Authority Lis'. A 'Manage Attributes' button is visible. The main area displays a table of publishers with columns for 'Name' and action icons (edit and delete). The publishers listed are 'Example Publisher', 'Hinkler', 'Les Belles Lettres', and 'ONIXEDIT'. A red arrow points to the edit icon for 'Example Publisher'.

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):

The screenshot shows the 'Edit Publisher' dialog box. It has tabs for 'General', 'Attributes', and 'Class of Trade'. The 'Attributes' tab is selected and highlighted with a red callout '1'. Below the tabs is a 'Manage Attributes' button. The main area displays a table of attributes with columns for 'Name' and 'Value'. The attributes listed are 'Brand Color', 'Market', and 'Specialty'. The 'Value' column for 'Brand Color' is highlighted with a red callout '2' and contains the text 'Green'. The 'Value' column for 'Market' contains 'Canada' and for 'Specialty' contains 'IT'. At the bottom right, there is an 'OK' button highlighted with a red callout '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 screenshot shows the 'Flat file and Excel generic import/export tool' interface. The 'Options' section includes fields for 'Name/Description' (Example Script 1), 'File type' (Excel), and 'Paper type' (Letter). The 'Columns definition' section has a 'List of available elements' panel with 'ONIX Element' listed. Below this, there are buttons for 'Unused column' and 'Xpath column', with the latter highlighted by a red box. A table at the bottom has a header with 'Import column definition' and a red arrow pointing to it. The table has columns for 'Col.', 'Caption', 'Group', 'Type', 'Element', 'Fixed value', and 'Filter value'. At the bottom, there are buttons for 'Display conversion ...', 'Cancel', and 'Convert and Export ONIX to Flat or Excel File'.

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

### 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

#### XPath examples

Here are some examples of XPath expression you can use:

*A price for a specific currency for a specific supplier (in this example, USD price for Amazon):*

```
//Product/ProductSupply/SupplyDetail[Supplier/SupplierName='Amazon']/Price[CurrencyCode='USD']/Pric
```

*Main Thema Subject:*

```
//Product/DescriptiveDetail/Subject[SubjectSchemeIdentifier='93']/SubjectHeadingText
```

*Keywords:*

```
//Product/DescriptiveDetail/Subject[SubjectSchemeIdentifier='20']/SubjectHeadingText
```

*Custom text based on an ONIX field:*

```
if(//Product/DescriptiveDetail/ProductForm='EA')
then 'EPUB'
else concat(
'DIMENSIONS: ',
//Product/DescriptiveDetail/Measure[MeasureType='02']/Measurement,
//Product/DescriptiveDetail/Measure[MeasureType='02']/MeasureUnitCode,
```

[For more information, see "Defining XPath expressions" from our user manual.](#)

Return value as string

If multiple values are found ...

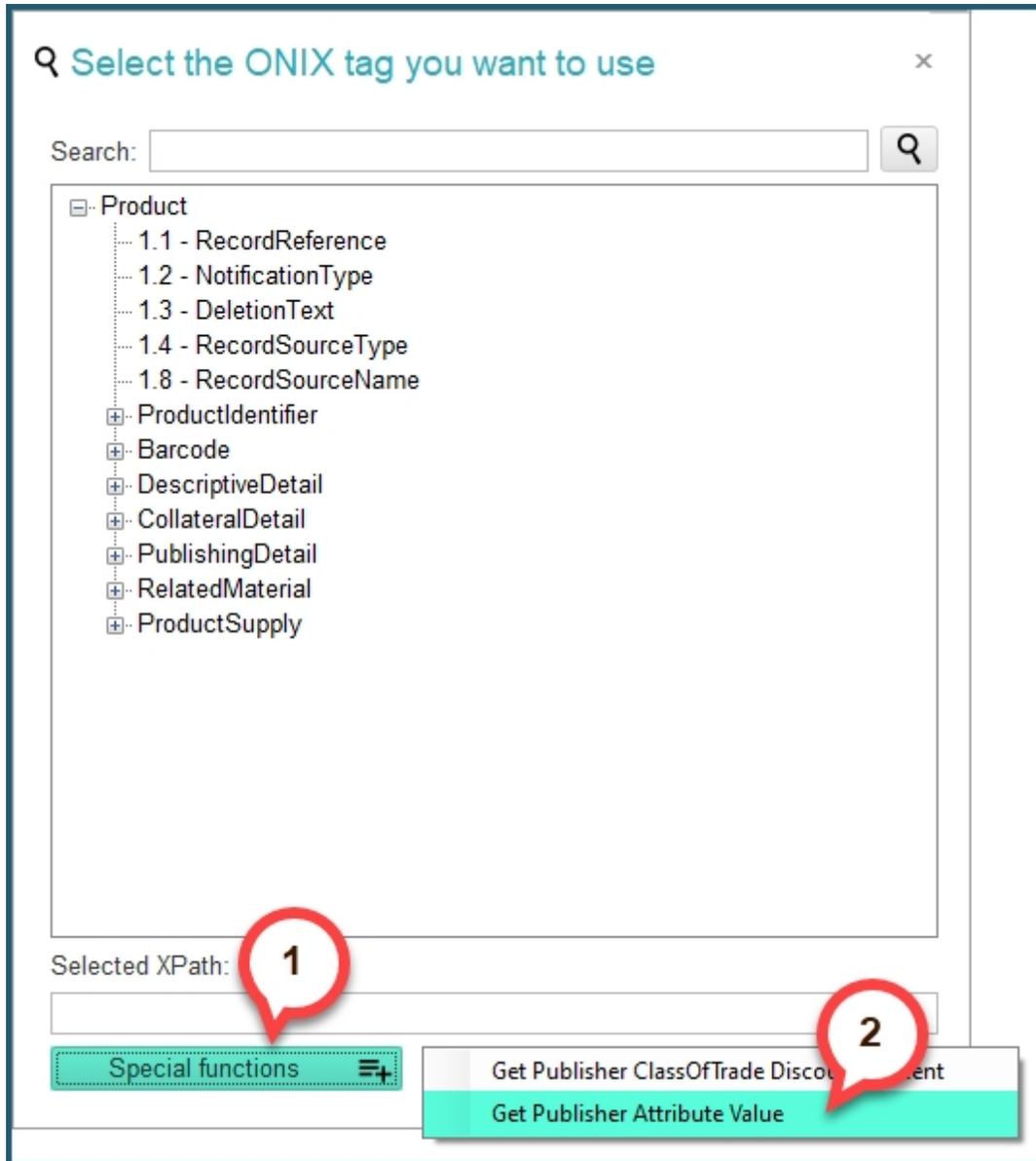
Process first value only

Process all values

Separator (optional):

Cancel Save

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.

**Manage Attributes** x

**Attributes**

Enter text to search... Search Clear

1

Name

Brand Color

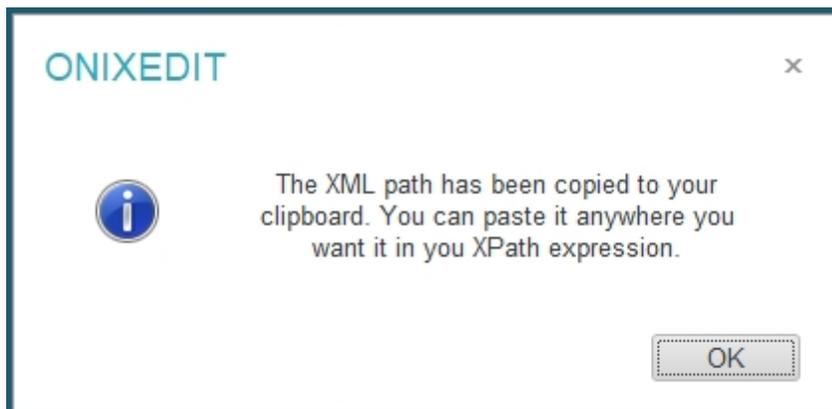
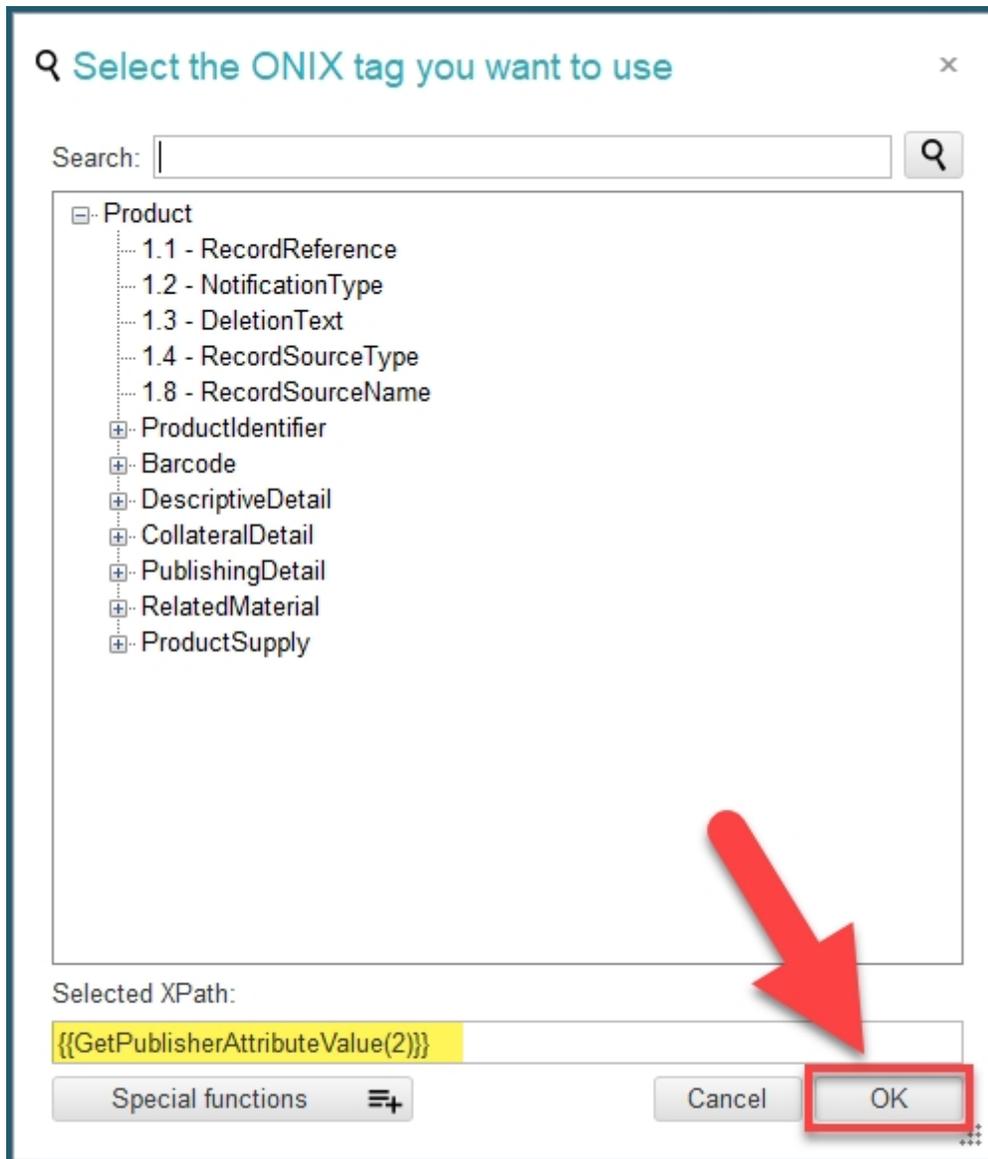
Market

Specialty

2

Cancel OK

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:

**Flat file and Excel generic import/export tool**

File Help

Options

Name/Description:  Number of lines to skip:

File type:   First line is header

File encoding:   Remove all leading and trailing white space characters

Delimiter:   Do not use the double-quotes as text qualifier

Columns definition

Usual tags:

Find:  Next

Group:

Type:

List of available elements

ONIX Element

Remove selected rows Duplicate group Script column definition Move up Move down

Order	Caption	Group	Type	Element	Fixed value	Filter value		
1		XPATH1	FIRST	{{GetPublisherAttrib...			<input checked="" type="checkbox"/>	<input type="checkbox"/>

Display conversion ...

0%

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

Remove selected rows Duplicate group Script column definition Move up Move down

Order	Caption	Group	Type	Element	Fixed value	Filter value		
1	Brand Color	XPATH1	FIRST	{{GetPublisherAttrib...			<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

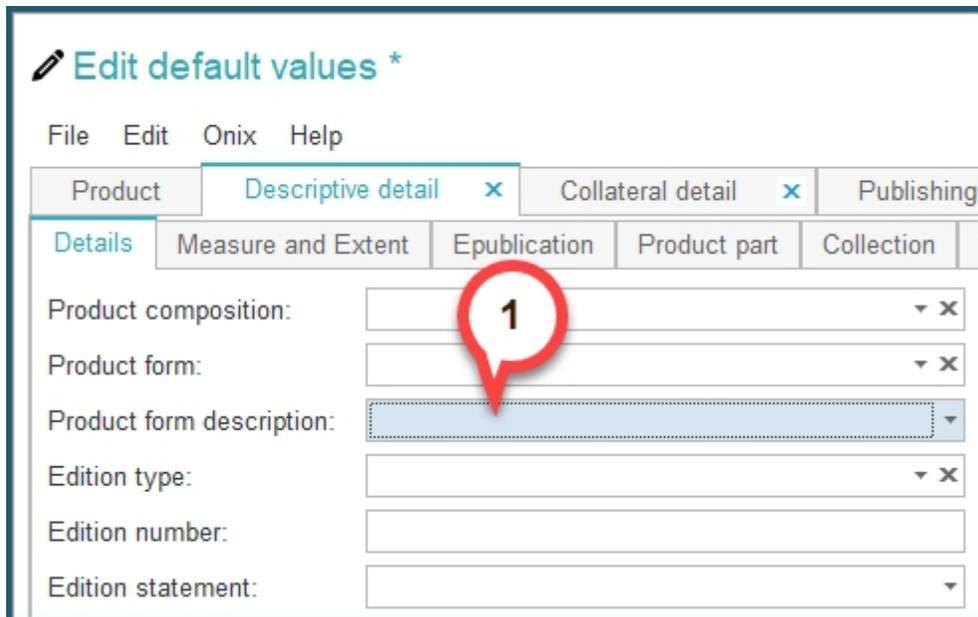
(Accessed using the **Display Conversion ...** button), the value **Green** will be exported based on the current catalogue, since it is associated with our **Example Publisher** defined earlier, which uses green:

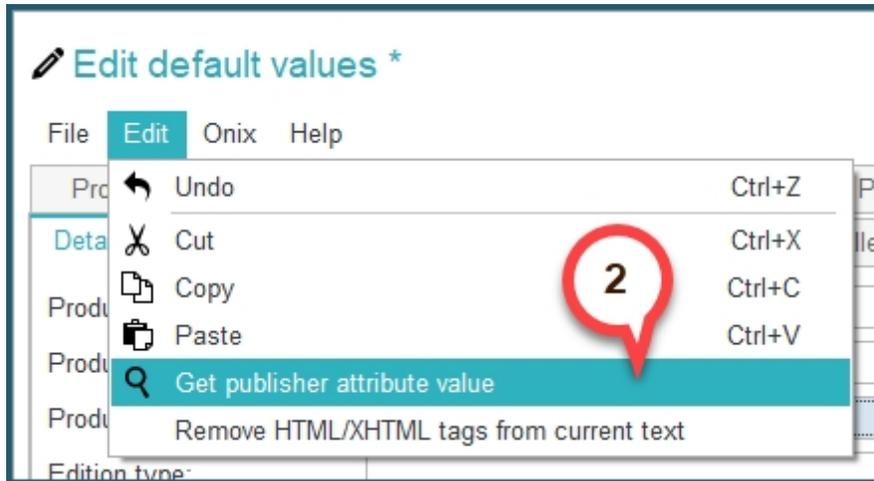


## 6. Use Publisher Attribute in Default Values

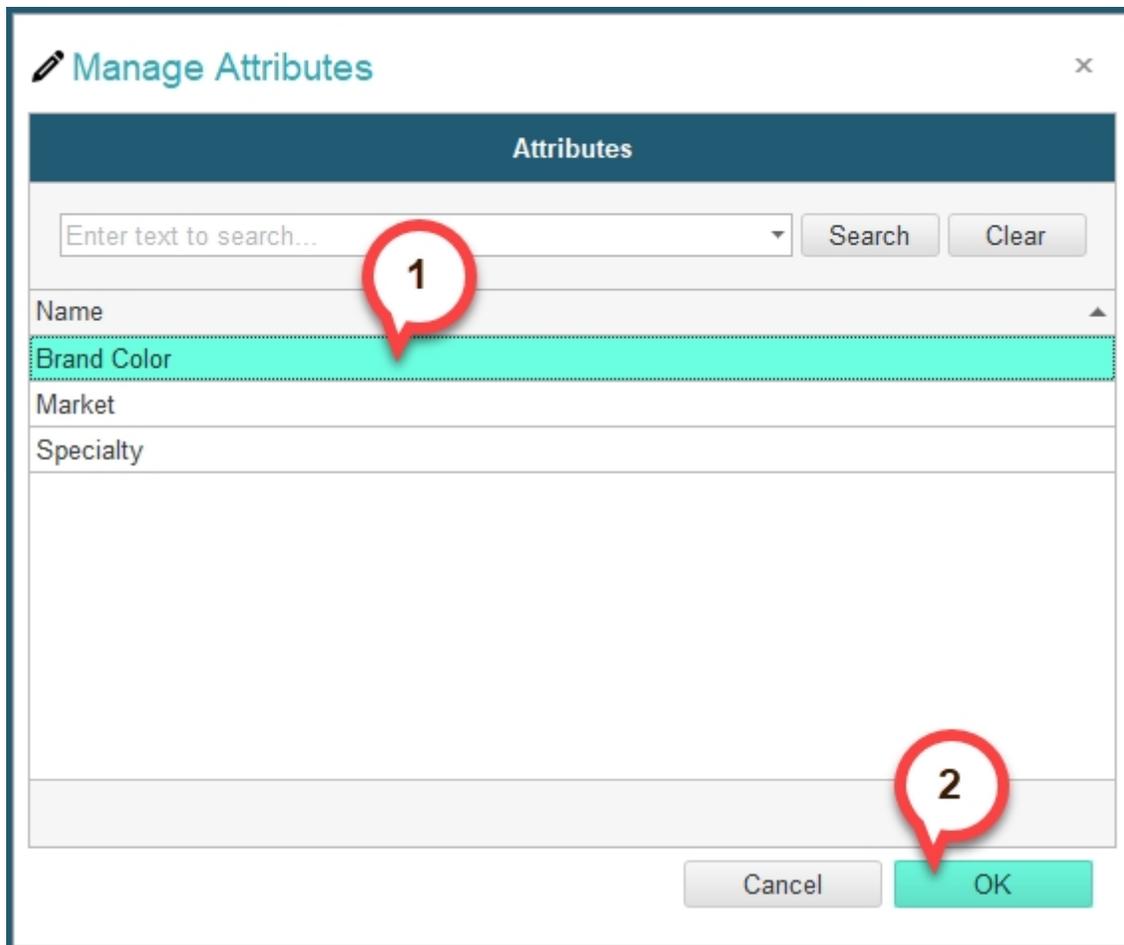
When editing the default values of a catalogue or a profile using the edition form, you can set a default value to be the value of a certain publisher attribute. Here is how to proceed to do so:

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:

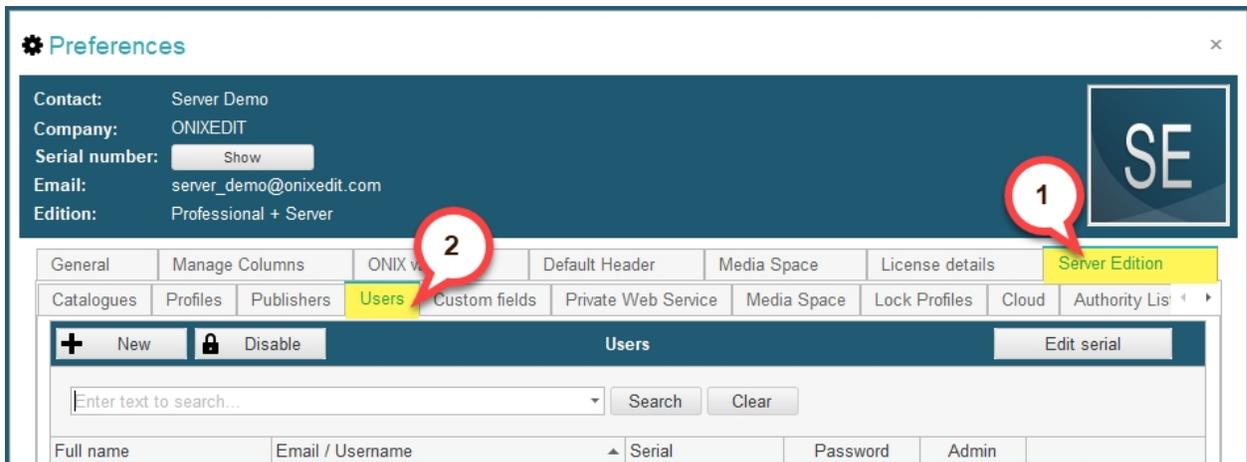
## Manage Users and their access rights

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

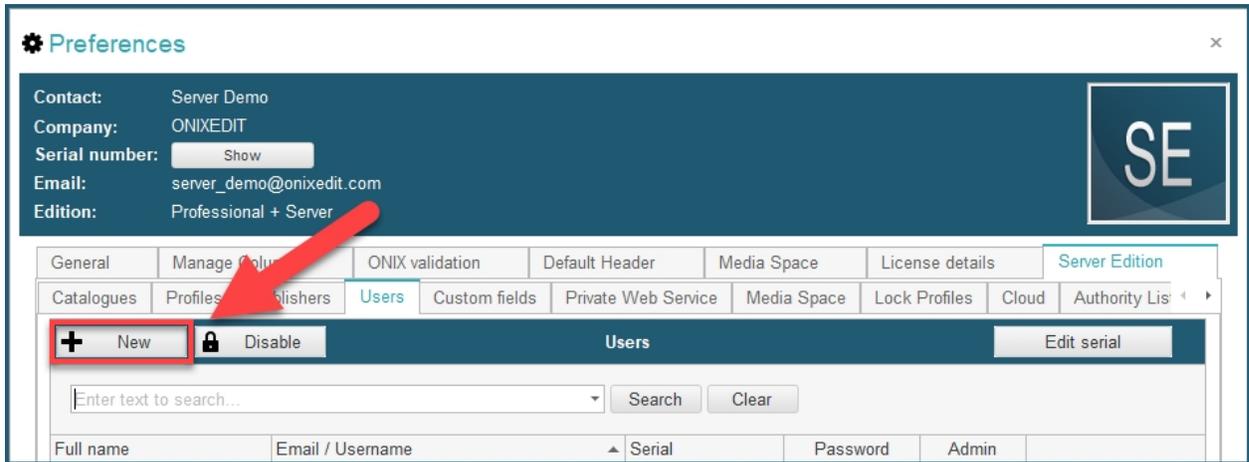
- **ONIXEDIT Pro users:** You can invite any ONIXEDIT Pro user to collaborate to one or many of your ONIXEDIT Server catalogues. They will use ONIXEDIT as the client interface to get access to the authorized catalogues.
- **Web users:** If your ONIXEDIT Server account has the Web option, you can define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

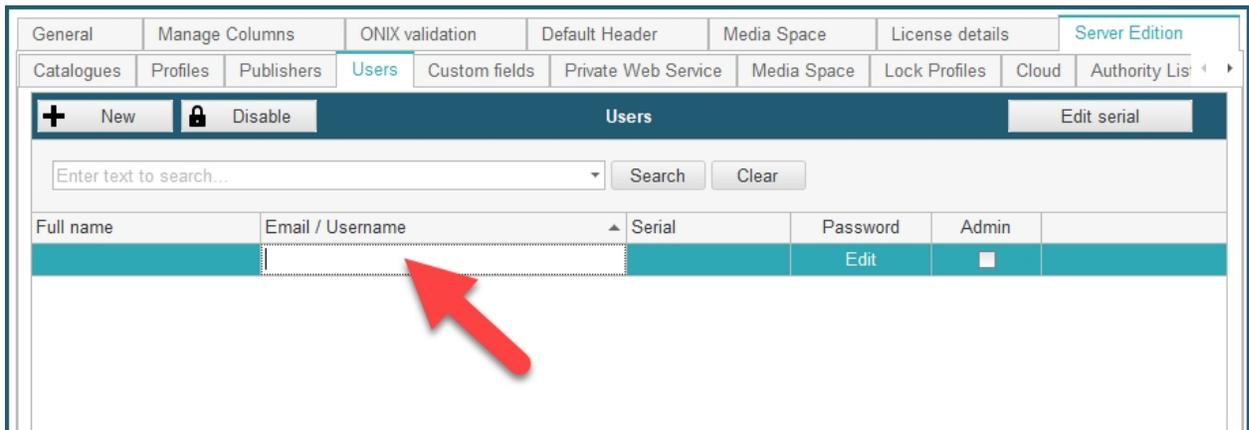
1. Make sure to know the ONIXEDIT Pro serial number of the user you want to authorize.
2. From the *Preferences* module, go to the **Server Edition / Users** tab:



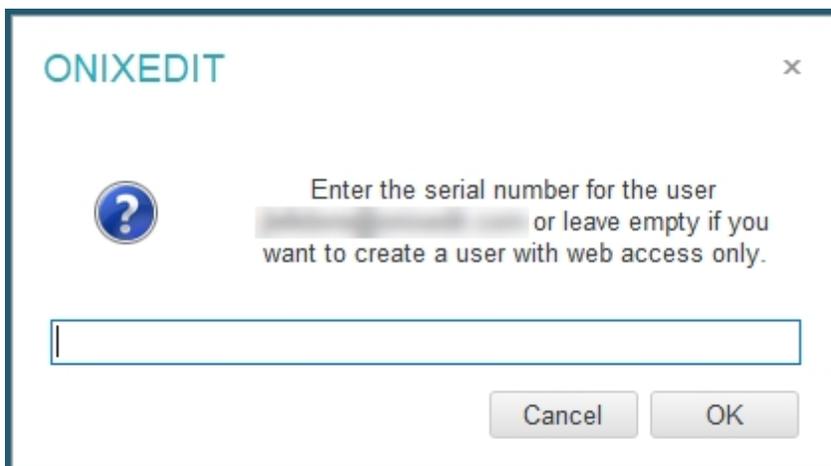
3. Click on the **New** button above the list of current users:



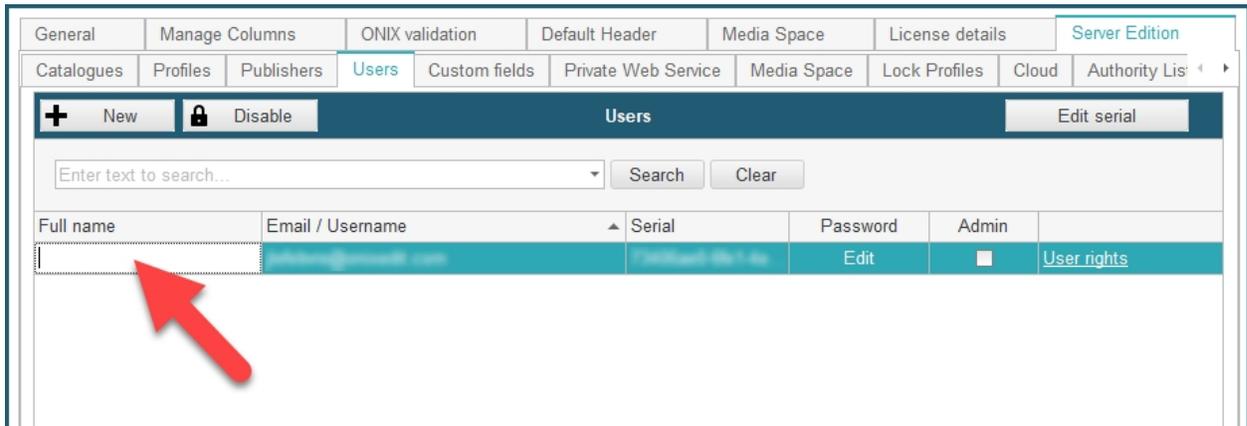
4. You will be prompted to enter the **email** of the user associated with the ONIXEDIT Pro license:



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:

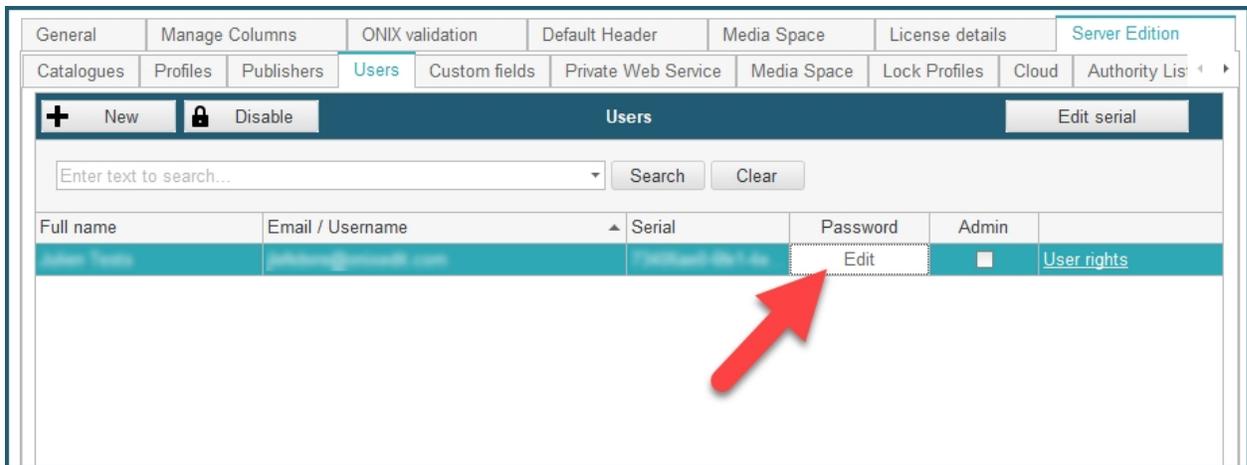


6. Then, you will have to enter the **full name** of that new user:



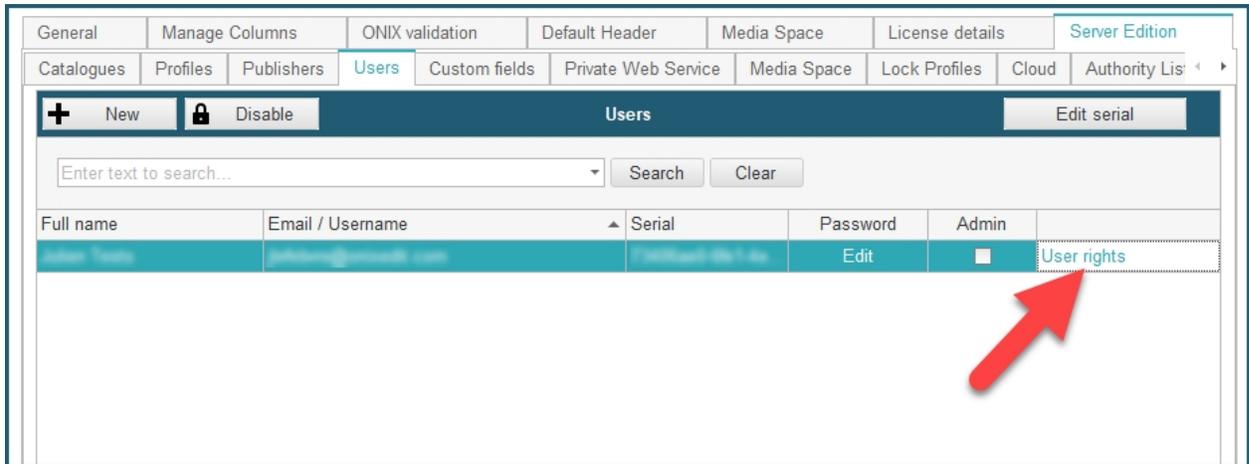
The screenshot shows the 'Users' management interface. At the top, there are tabs for 'General', 'Manage Columns', 'ONIX validation', 'Default Header', 'Media Space', 'License details', and 'Server Edition'. Below these are more tabs: 'Catalogues', 'Profiles', 'Publishers', 'Users', 'Custom fields', 'Private Web Service', 'Media Space', 'Lock Profiles', 'Cloud', and 'Authority Lis'. The 'Users' tab is active. The interface includes a '+ New' button, a 'Disable' button with a lock icon, and an 'Edit serial' button. A search bar with 'Enter text to search...' and 'Search' and 'Clear' buttons is present. Below the search bar is a table with columns: 'Full name', 'Email / Username', 'Serial', 'Password', 'Admin', and 'User rights'. A red arrow points to the 'Full name' field in the first row of the table.

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

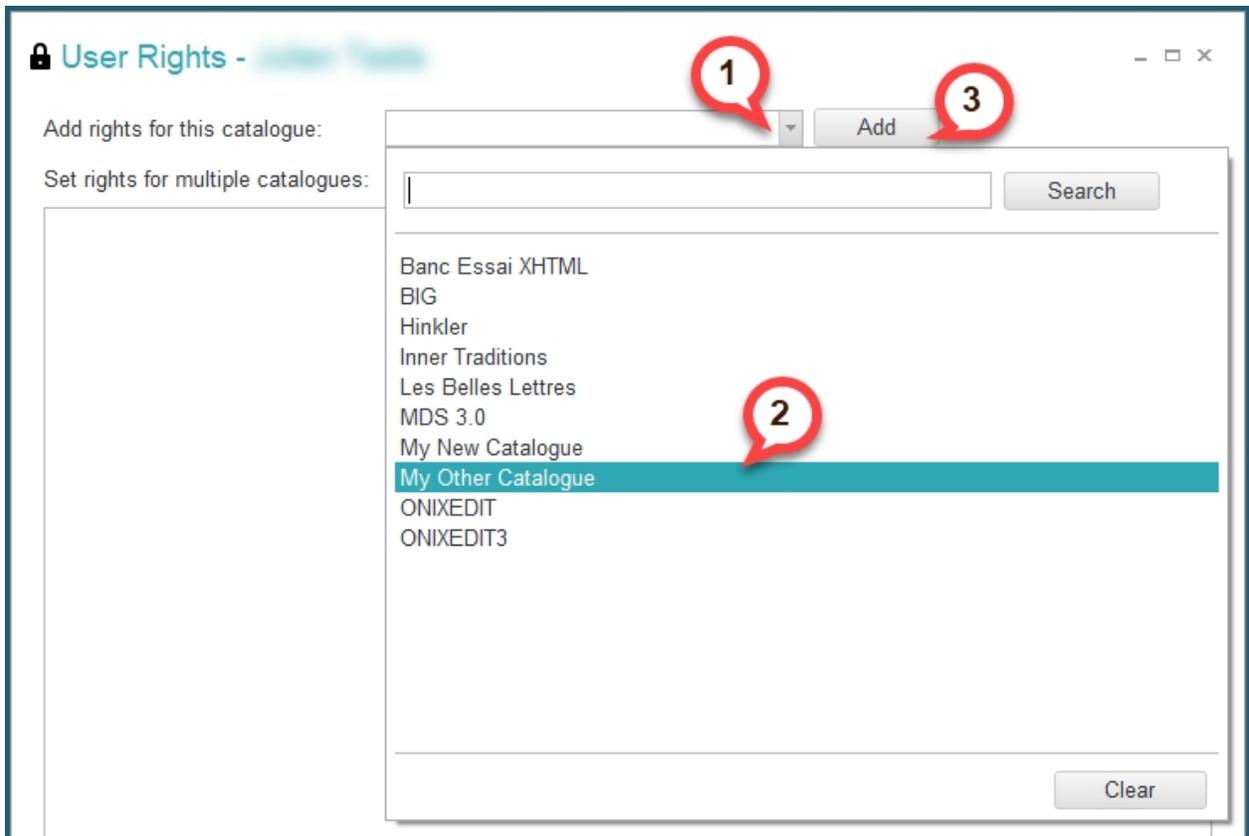


The screenshot shows the same 'Users' management interface as above. A red arrow points to the 'Edit' button in the 'Password' column of the first row of the table.

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:

**User Rights - My Other Catalogue**

Add rights for this catalogue:

Set rights for multiple catalogues:  ONIXEDIT SE modules permissions:

**Catalogue 2 / 3**

**My Other Catalogue**

**User rights:**

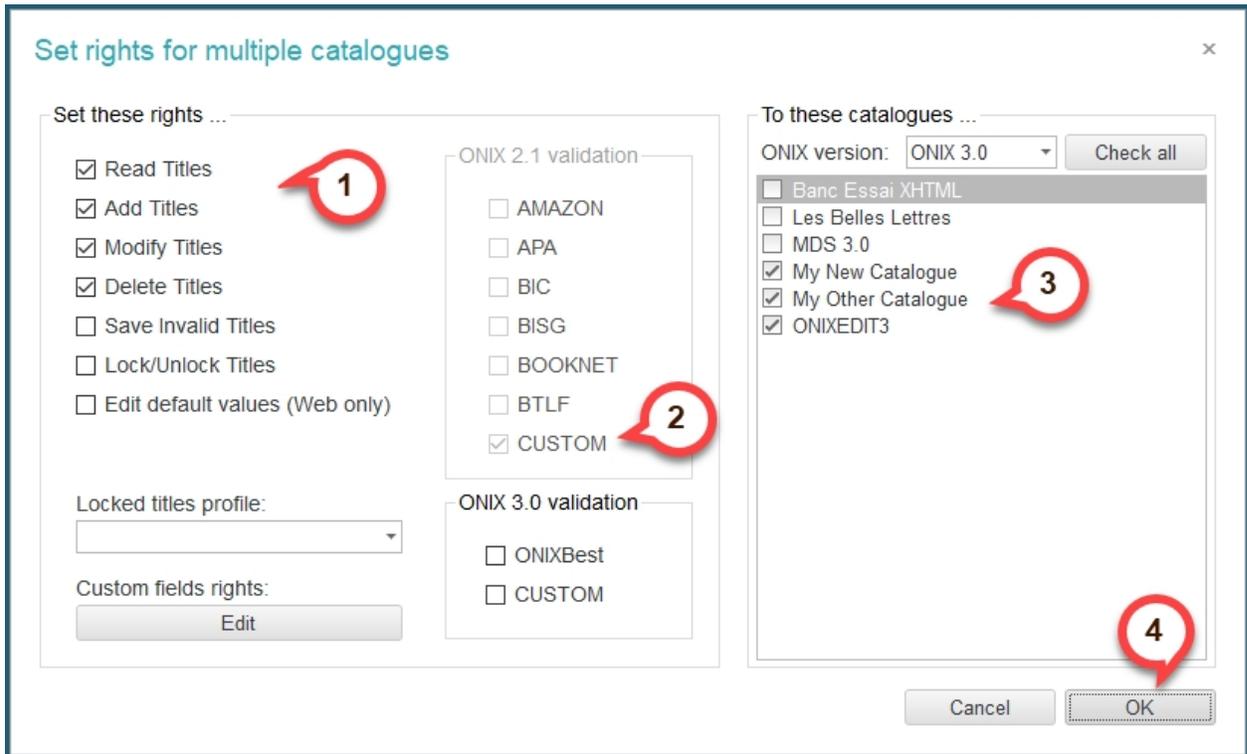
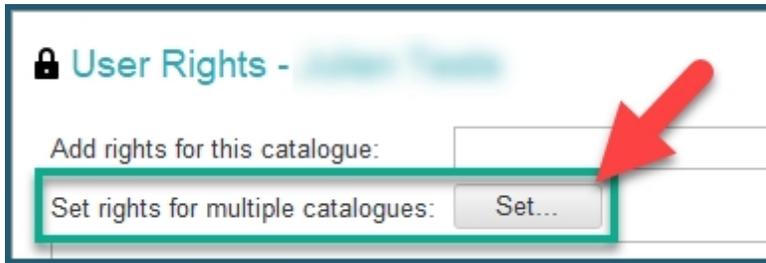
Read Titles:	<input checked="" type="checkbox"/>
Add Titles:	<input checked="" type="checkbox"/>
Modify Titles:	<input checked="" type="checkbox"/>
Delete Titles:	<input checked="" type="checkbox"/>
Save Invalid Titles:	<input checked="" type="checkbox"/>
Edit Custom Fields:	Edit
Lock/Unlock Titles:	<input checked="" type="checkbox"/>
Edit default values (Web only):	<input checked="" type="checkbox"/>
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)	<input type="checkbox"/>
APA (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BIC (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BISG (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BOOKNET (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BTLF (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
ONIXBest (ONIX 3.0) (N/A for this catalogue)	<input type="checkbox"/>
CUSTOM (ONIX 2.1 and ONIX 3.0) (N/A for this catalogue)	<input type="checkbox"/>

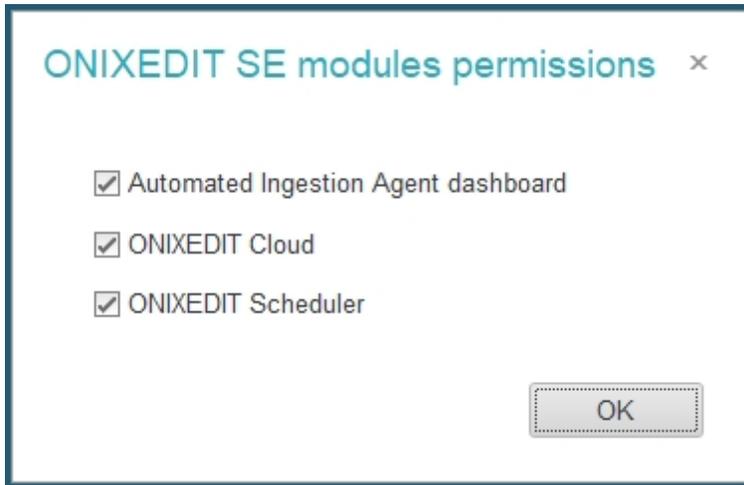
Note: You can search a catalogue using CTRL + F

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:

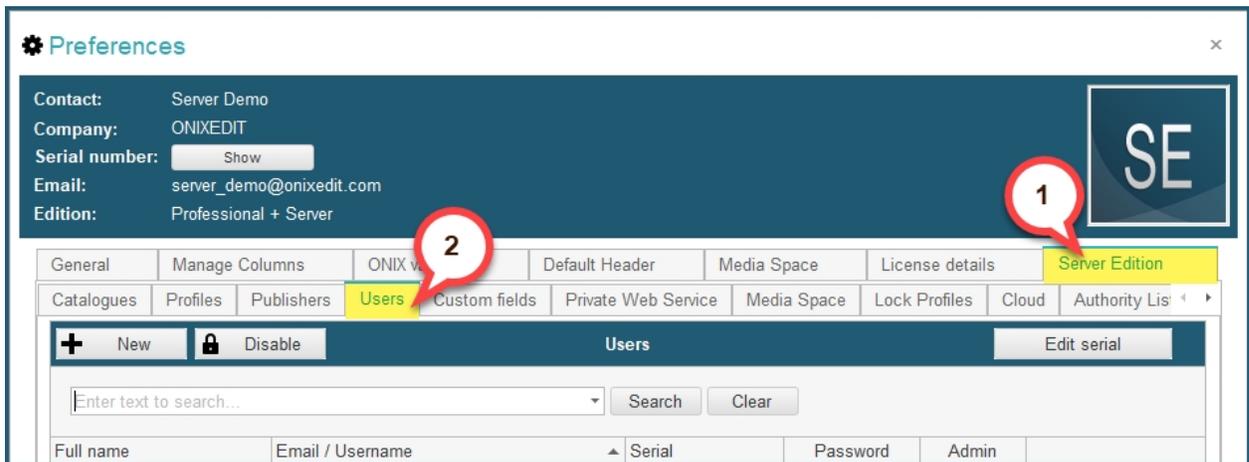




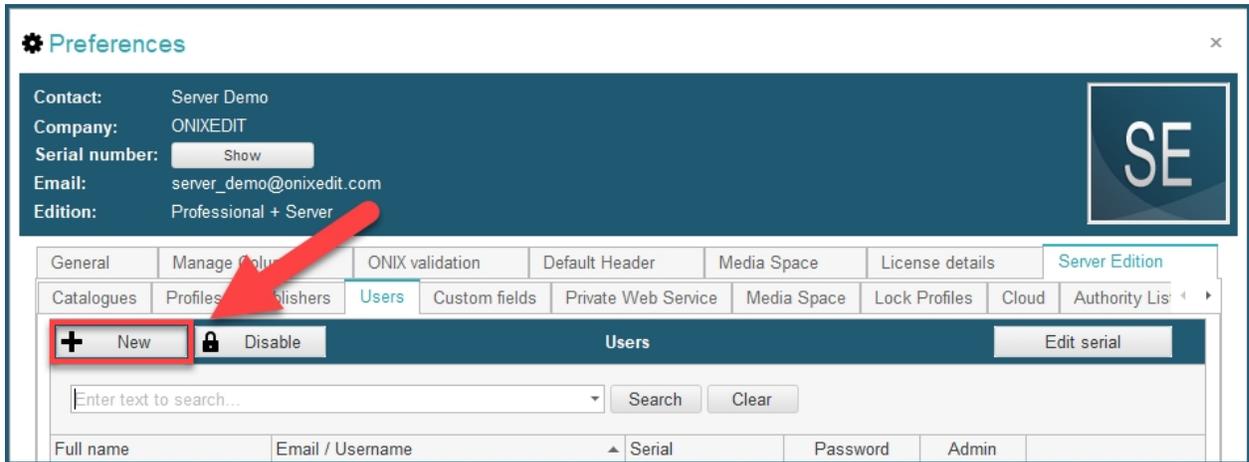
9. Finally, **Save** your ONIXEDIT Server preferences, and you are done!

**To define a Web user, follow these steps:**

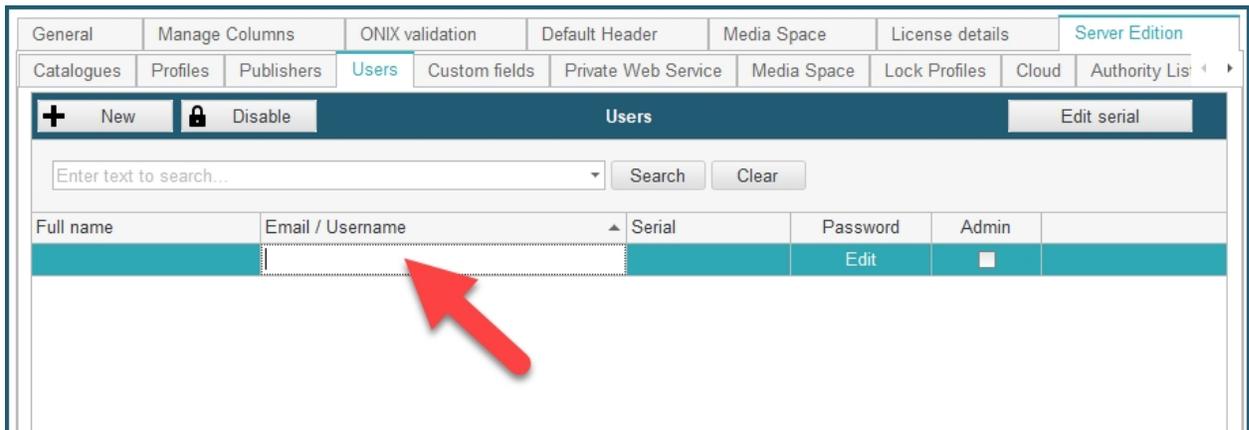
1. From the *Preferences* module, go to the **Server Edition / Users** tab:



2. Click on the **New** button above the list of current users:



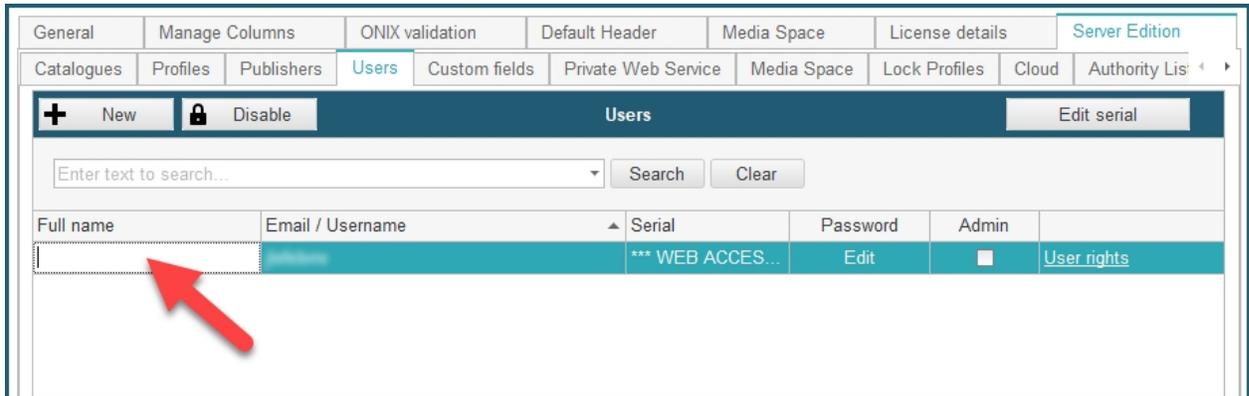
3. You will be invited to enter the **username** of the new web user. It could be any alphanumeric value:



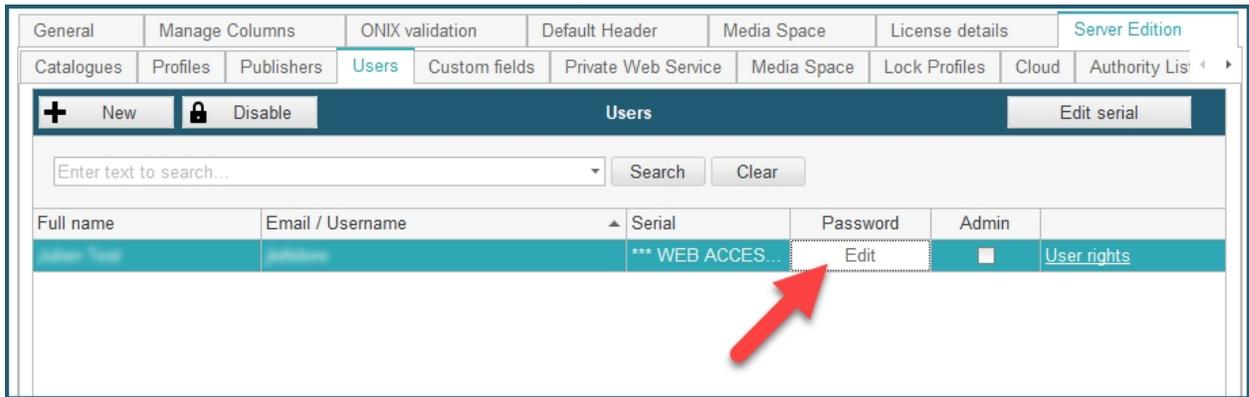
4. After entering the username, press **TAB**. You will see the following confirmation dialog. Click on **YES**:



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:

**Preferences**

Contact: Server Demo  
 Company: ONIXEDIT  
 Serial number:   
 Email: server\_demo@onixedit.com  
 Edition: Professional + Server

SE

1

2

General Manage Columns Validation Default Header Media Space License details **Server Edition**

Catalogues Profiles Publishers Users **Custom fields** Private Web Service Media Space Lock Profiles Cloud Authority Lis

+ New Delete Custom fields Manage custom field categories

Enter text to search... Search Clear

Category	Field name	Description	Type	Allowed val...	Default value	Repeatable	XPath
Pagination	Black and White		Checkbox	<input type="checkbox"/>		<input type="checkbox"/>	
Pagination	Color		Checkbox	<input type="checkbox"/>		<input type="checkbox"/>	
General	Date_publication_...		Date	<input type="text"/>		<input type="checkbox"/>	
PUV	Discipline		Alphanumeric	<input type="text"/>		<input type="checkbox"/>	
General	ePubSentDate		Date	<input type="text"/>		<input type="checkbox"/>	
Pagination	Excerpt		Checkbox	<input type="checkbox"/>		<input type="checkbox"/>	
General	IA_HotFolderPath		Alphanumeric	<input type="text"/>		<input type="checkbox"/>	
Pagination	Interiors		Checkbox	<input type="checkbox"/>		<input type="checkbox"/>	
Status	LibreDigitalStatus		Alphanumeric	<input type="text"/>		<input type="checkbox"/>	
General	NEEDA		Alphanumeric	<input type="text"/>		<input type="checkbox"/>	
Pagination	Notes		Alphanumeric	<input type="text"/>		<input type="checkbox"/>	
Pagination	Page		Integer	<input type="text"/>		<input type="checkbox"/>	
Pagination	Page Rank		Integer	<input type="text"/>		<input type="checkbox"/>	
Test	Prêt à impression		Checkbox	<input type="checkbox"/>		<input type="checkbox"/>	

Cancel Save

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:

The screenshot shows the ONIXEDIT Server interface for editing product # 1371. The 'Custom fields' tab is selected, and a calendar is displayed for the 'ePubSentDate' field. The calendar shows the date Wednesday, April 13, 2022. A red arrow points to the 'Switch to simplified form' button in the top right corner.

Field name	Value
General	
Date_publication_produit_lié	
ePubSentDate	Wednesday, April 13, 2022
IA_HotFolderPath	
NEEDA	
Service_Level	
UnitCost	
Updated	
Pagination	
Black and White	
Color	
Excerpt	
Interiors	
Notes	
Page	
Page Rank	
R or L Paging	
PUV	
Discipline	

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:

General Manage Columns ONIX validation Default Header Media Space License details Server Edition

Catalogues Profiles Publishers Users Custom fields Private Web Service Media Space Lock Profiles Cloud Authority Lis

+ New Delete Custom fields Manage custom field categories

Enter text to search... 1 Search Clear

Category	Field name	Description	Type	Allowed val...	Default value	Repeatable	XPath
Status	Statut_de_publica...		Alphanumeric	A		<input type="checkbox"/>	✎
Status	StatutPublication		Checkbox	a		<input type="checkbox"/>	✎
Test	Test		Alphanumeric	A		<input type="checkbox"/>	✎
Test	Test2		Alphanumeric	a		<input type="checkbox"/>	✎
Test	Test3		Alphanumeric	a		<input type="checkbox"/>	✎
Status	Translation_Status		Alphanumeric	A		<input type="checkbox"/>	✎
PUV	Type Article		Alphanumeric	a		<input type="checkbox"/>	✎
PUV	Type Média Article		Alphanumeric	a		<input type="checkbox"/>	✎
General	UnitCost		Alphanumeric	a		<input type="checkbox"/>	✎
General	Updated		Checkbox	a		<input type="checkbox"/>	✎
Status	ValiantStatus		Alphanumeric	A		<input type="checkbox"/>	✎
Status	WebPublicationSt...		Alphanumeric	A		<input type="checkbox"/>	✎
	Canada Sales	Sales in Canada	Real	a		<input type="checkbox"/>	✎

I Integer  
R Real  
T Time  
H HTML  
x

Cancel Save 3

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:

+ New Delete Custom fields Manage custom field

Enter text to search... Search Clear

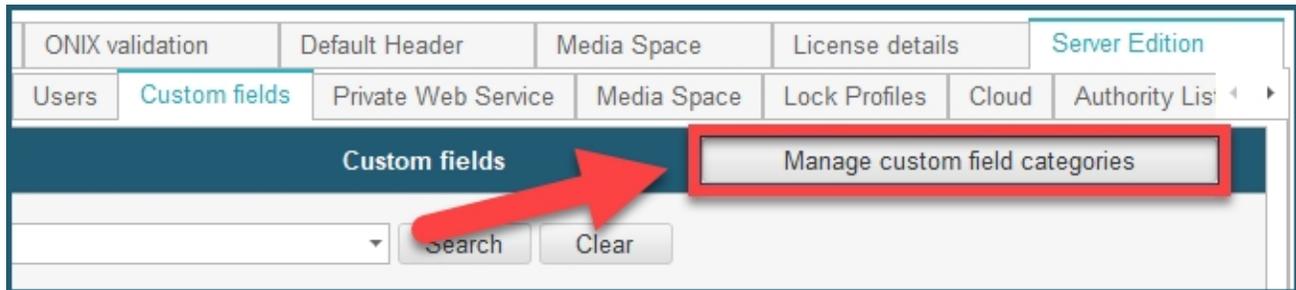
Category	Field name	Description	Type	Allowed val...	Default value	Rep
Pagination	Page Rank		Integer	a		
Test	Prêt à impression		Checkbox	a		
Test	Prix du produit lié		Real	a		
Pagination	R or L Paging		Alphanumeric	A		
Status	Revision_Status	Quality Control status	Alphanumeric	Right Left		
General	Service_Level		Alphanumeric			
Status	Status		Checkbox			
Status	Statut_de_publica...		Alphanumeric			
Status	StatutPublication		Checkbox			
Test	Test		Alphanumeric			
Test	Test2		Alphanumeric			
Test	Test3		Alphanumeric			
Status	Translation_Status		Alphanumeric	A		

Cancel OK

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:

The screenshot shows the 'Manage custom field categories' form. It has a title bar with the text 'Manage custom field categories' and a close button (X). Below the title bar is a dark blue header with a '+ New' button and the text 'Custom field categories'. The main area contains a table with the following columns: 'Category', 'Test', 'Status', 'Pagination', and 'PUV'. The 'General' category is expanded, showing its sub-items. An 'OK' button is located at the bottom right of the form.

Category	Test	Status	Pagination	PUV
▶ General				
Test				
Status				
Pagination				
PUV				

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

The screenshot shows the 'Custom fields' management interface. At the top, there are buttons for '+ New' and 'Delete'. Below is a search bar with the text 'Enter text to search...' and 'Search' and 'Cle' buttons. The main area is a table with the following columns: 'Field name', 'Description', 'Type', and 'A'. The table contains several rows of custom fields. A red box highlights the 'Category' column and a dropdown menu for the 'PubSentDate' row. The dropdown menu lists categories: General, Test, Status, Pagination, PUV, Test2, and an 'x' icon.

Category	Field name	Description	Type	A
Pagination	Black and White		Checkbox	
Pagination	Color		Checkbox	
General	Date_publication_...		Date	
PUV	Discipline		Alphanumeric	
General	PubSentDate		Date	
General			Checkbox	
Test			Alphanumeric	
Status			Alphanumeric	
Pagination			Checkbox	
PUV			Alphanumeric	
Test2			Alphanumeric	
x			Alphanumeric	
Pagination	Page		Integer	
Pagination	Page Rank		Integer	
Test	Prêt à impressi...		Checkbox	

Assigning categories to your custom fields will allow you to:

- Group and present your custom fields by category:

 Edit product # 9781743638644 \*

File Edit Onix View Help  Switch to simplified form

Supply detail Marketing Series / Set MediaFile Illustrations Epublication Rights Religious text Miscellaneous **Custom**

**Custom field(s)**

Field name	Value
<b>General</b>	
Date_publication_produit_lié	
ePubSentDate	
IA_HotFolderPath	
NEEDA	
Service_Level	
UnitCost	
Updated	<input checked="" type="checkbox"/>
<b>Pagination</b>	
Black and White	<input checked="" type="checkbox"/>
Color	<input checked="" type="checkbox"/>
Excerpt	<input checked="" type="checkbox"/>
Interiors	<input checked="" type="checkbox"/>
Notes	Include Best Selling Points from New Hope sell sheet
Page	3
Page Rank	1
R or L Paging	Right
<b>PUV</b>	
<b>Status</b>	
LibreDigitalStatus	
Revision_Status	To do
Status	<input checked="" type="checkbox"/>
Statut_de_publication_web	
StatutPublication	<input checked="" type="checkbox"/>
Translation_Status	
ValiantStatus	

This title is valid

- 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:

Set rights for multiple catalogues:  ONIXEDIT SE modules permissions:

#### Catalogue 3 / 3

#### ONIXEDIT3

**User rights:**

Read Titles:	<input checked="" type="checkbox"/>
Add Titles:	<input checked="" type="checkbox"/>
Modify Titles:	<input checked="" type="checkbox"/>
Delete Titles:	<input checked="" type="checkbox"/>
Save Invalid Titles:	<input checked="" type="checkbox"/>
Edit Custom Fields:	<input type="text" value="Edit"/>
Lock/Unlock Titles:	<input checked="" type="checkbox"/>
Edit default values (Web only):	<input checked="" type="checkbox"/>
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)	<input type="checkbox"/>
APA (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BIC (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BISG (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BOOKNET (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BTLF (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
ONIXBest (ONIX 3.0) (N/A for this catalogue)	<input type="checkbox"/>
CUSTOM (ONIX 2.1 and ONIX 3.0):	<input checked="" type="checkbox"/>

Note: You can search a catalogue using CTRL + F



## 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.

**Preferences**

Contact: Server Demo  
 Company: ONIXEDIT  
 Serial number:   
 Email: server\_demo@onixedit.com  
 Edition: Professional + Server

SE

General | Manage Columns | ONIX validation | Default Header | Media Space | License details | **Server Edition**

Catalogues | Profiles | Publishers | Users | Custom fields | **Private Web Service** | Media Space | Lock Profiles | Cloud | Authority Lis

Configuration #1 | Configuration #2 | Configuration #3

Name:   
 URL:   
 Username:   
 Password:

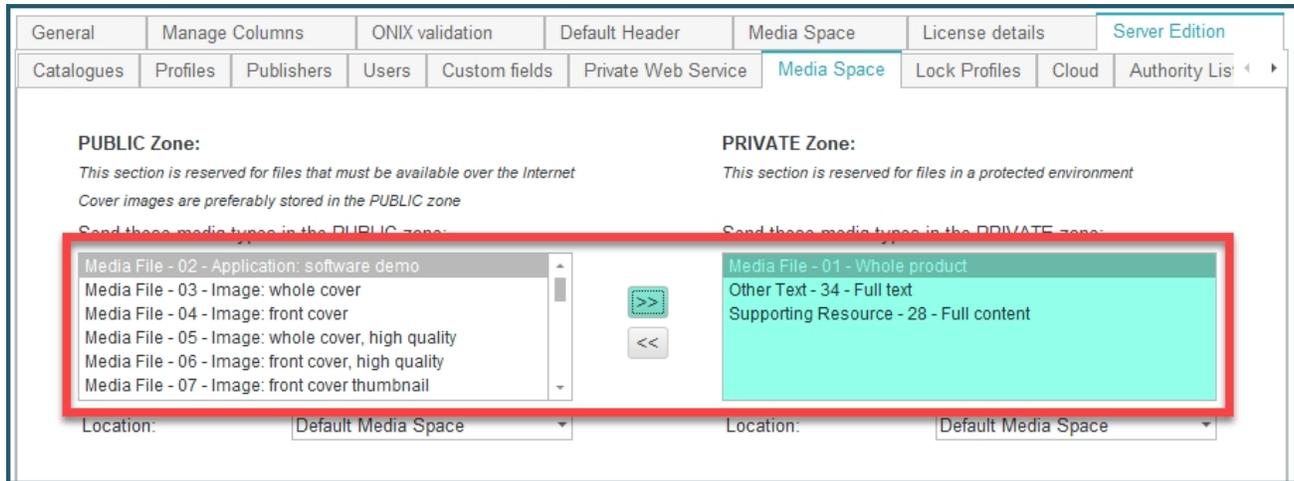
REST API:

## 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:

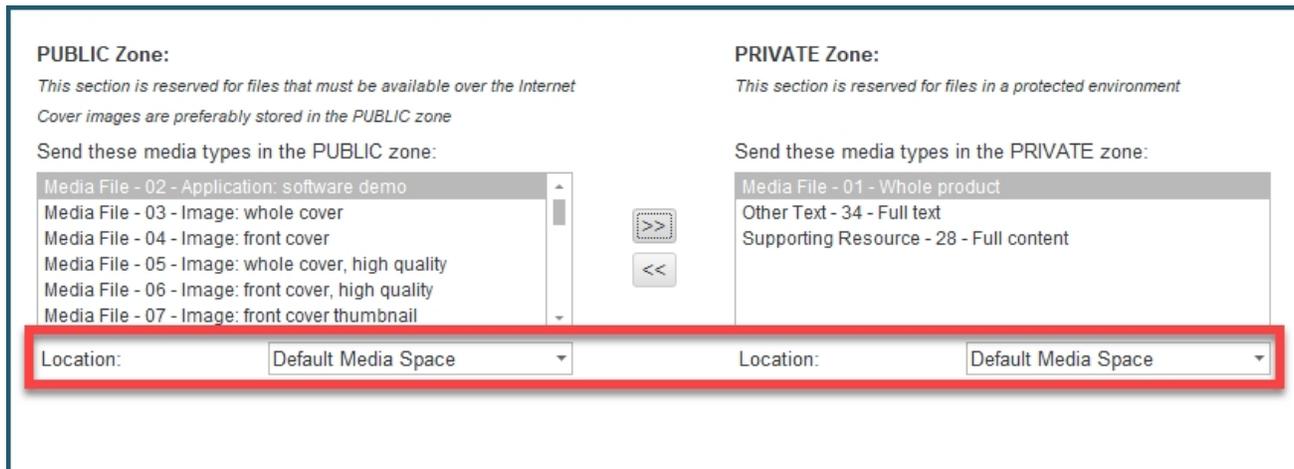
- **PUBLIC Zone** is where the files that you want to share with your trading partners, and public in general, will be located. For instance, this is where your cover images will go. Each file in your Public Zone will be published over the Internet and free to access by everyone knowing their corresponding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

Location:	<input type="text" value="Private FTP directory"/>
FTP address:	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="text"/>
HTTP address:	<input type="text"/>
<input type="button" value="Test connection"/>	

Or an Amazon S3 bucket:

Location:	<input type="text" value="Amazon S3"/>
Server:	<input type="text"/>
Bucket name/Folders:	<input type="text"/>
Access key:	<input type="text"/>
Secret access key:	<input type="text"/>
<input type="button" value="Test connection"/>	

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:

**Cover images validation and processing** ×

Reject images with width less than  pixels and  dpi

Reduce larger images width to  pixels and  dpi

Create thumbnails from cover images when sending them to media space

Using this dialog, you can set:

- Minimum image requirements.
- Automatic image reduction for high-resolution images.
- 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

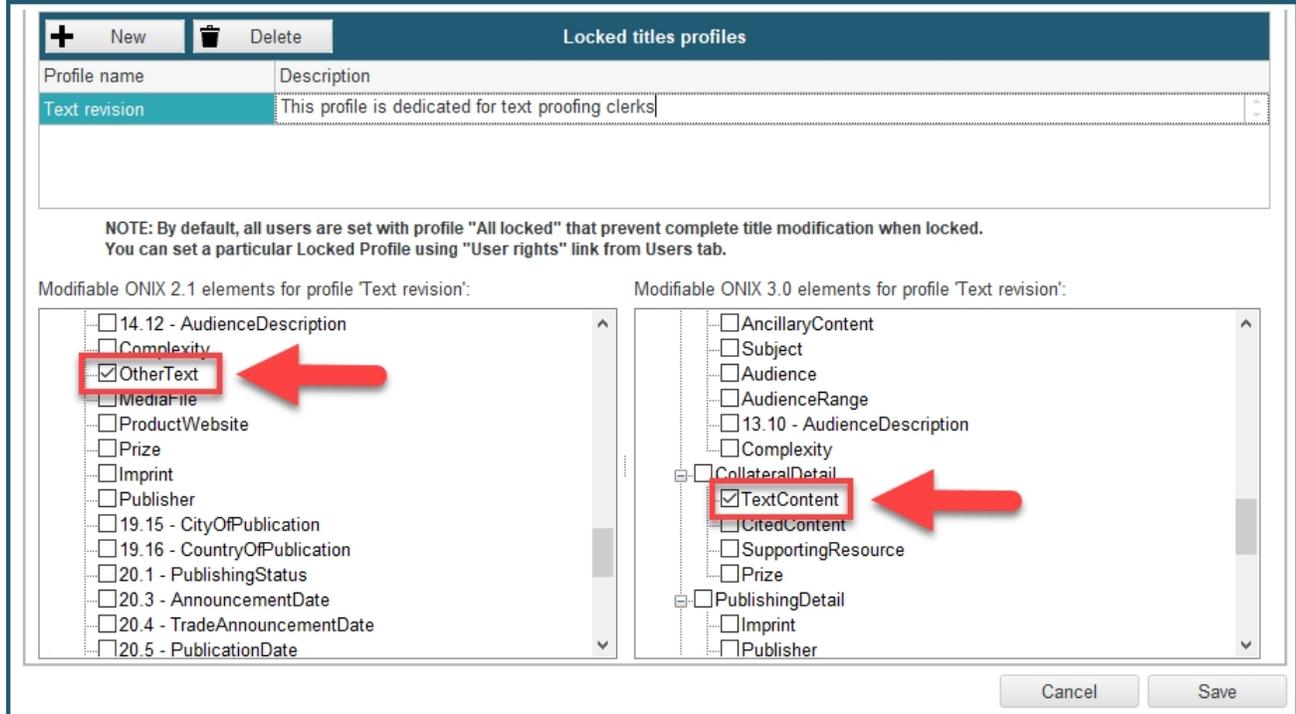
By default, when a title is locked, it can't be modified. You can lock specific titles of a catalogue using ONIXEDIT. Consult [Locking titles](#) section for more details about how to lock/unlock titles.

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](#):

**User Rights - Server Demo**

Add rights for this catalogue:

Set rights for multiple catalogues:  ONIXEDIT SE modules permissions:

**Catalogue 1 / 10**

**Banc Essai XHTML**

**User rights:**

Read Titles:	<input checked="" type="checkbox"/>
Add Titles:	<input checked="" type="checkbox"/>
Modify Titles:	<input checked="" type="checkbox"/>
Delete Titles:	<input checked="" type="checkbox"/>
Save Invalid Titles:	<input checked="" type="checkbox"/>
Edit Custom Fields:	Edit
Lock/Unlock Titles:	<input checked="" type="checkbox"/>
Edit default values (Web only):	<input checked="" type="checkbox"/>
Locked titles profile:	Text revision

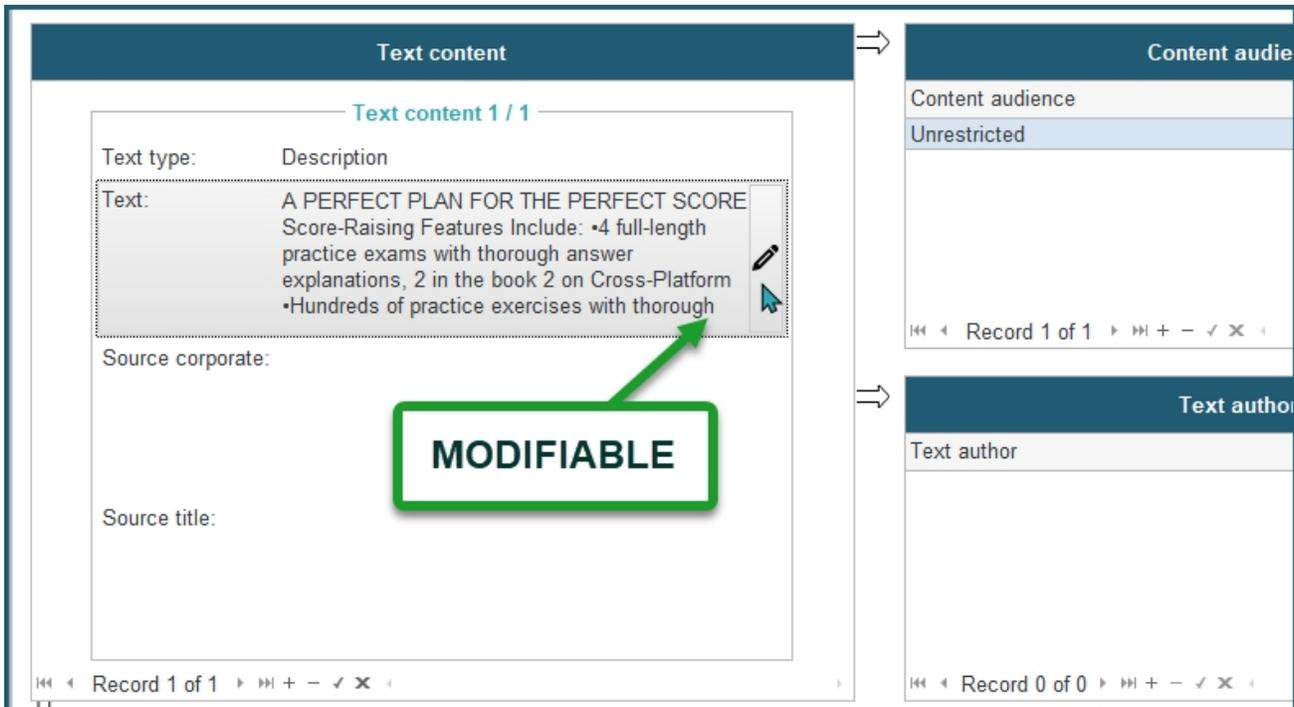
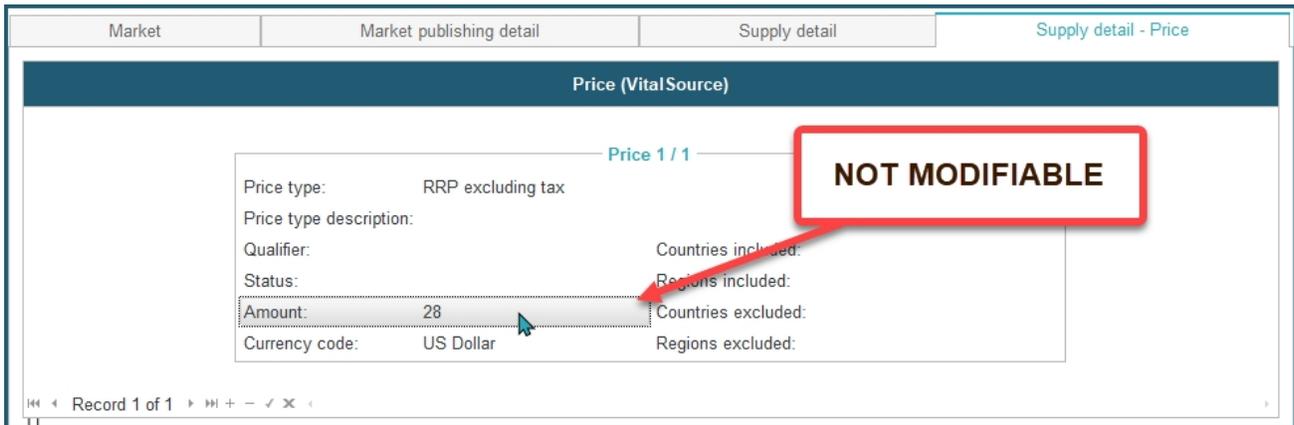
**Choose which formats are visible to this user (ONIXEDIT and Web):**

AMAZON (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
APA (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BIC (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BISG (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BOOKNET (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
BTLF (ONIX 2.1) (N/A for this catalogue)	<input type="checkbox"/>
ONIXBest (ONIX 3.0) (N/A for this catalogue)	<input type="checkbox"/>
CUSTOM (ONIX 2.1 and ONIX 3.0):	<input checked="" type="checkbox"/>

Note: You can search a catalogue using CTRL + F

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:

General	Manage Columns	ONIX validation	Default Header	Media Space	License details	Server Edition			
Catalogues	Profiles	Publishers	Users	Custom fields	Private Web Service	Media Space	Lock Profiles	Cloud	Authority Lis
Media files	Manage columns (ONIX 2.1)	Manage Columns (ONIX 3.0)							
Media file types authorized for ONIXEDIT Cloud									
Media File Type	Authorized	Multiple items	Unique Id	More settings					
Media File - 01 - Whole product	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 03 - Image: whole cover	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 04 - Image: front cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 05 - Image: whole cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 06 - Image: front cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 07 - Image: front cover thumbnail	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 08 - Image: contributor(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	...					
Media File - 10 - Image: for series	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 11 - Image: series logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 12 - Image: product logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 16 - Image: Master brand logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 17 - Image: publisher logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 18 - Image: imprint logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 22 - Image: table of contents	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 23 - Image: sample content	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 24 - Image: back cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 25 - Image: back cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 26 - Image: back cover thumbnail	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 27 - Image: other cover material	<input type="checkbox"/>	<input type="checkbox"/>	None	...					
Media File - 28 - Image: promotional material	<input type="checkbox"/>	<input type="checkbox"/>	None	...					

You can also click on the **More settings** button on the right to get access to a form similar to the following:

### Authorized media file settings

Current media file type: *Media File - 08 - Image: contributor(s)*

Authorized:  ?

Multiple items:  ?

Caption EN:  ?

Caption FR:  ?

File name mask:  + Uniqueld ?

Unique Id:  ?

	English interface	French interface
Caption: ?	<input type="text" value="Contributors"/>	<input type="text" value="Auteurs"/>
Alternate message when empty: ?	<input type="text" value="Please select one"/>	<input type="text" value="Sélectionnez un auteur"/>

Get Unique Id from metadata (All elements must be in the same composite): ?  

```
//Product/Contributor/SequenceNumber
//Product/Contributor/PersonNameInverted
```

Show help

**Tip:** activate the **Show help** check box at the bottom to get contextual help on each field:

e composite): ?  



Show help

### Authorized media file settings

Current media file type: *Media File - 08 - Image: contributor(s)*

Authorized:  ?

Multiple items:  ?

Caption EN: Contrib ? This option allows users to add more than one media file of that type

Caption FR: Photo d'auteur ?

File name mask: Author + UniqueId ?

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):

Media File Type	Authorized	Multiple items	Unique Id	More settings
Media File - 01 - Whole product	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 03 - Image: whole cover	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 04 - Image: front cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 05 - Image: whole cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 06 - Image: front cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 07 - Image: front cover thumbnail	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 08 - Image: contributor(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	...
Media File - 10 - Image: for series	<input type="checkbox"/>	<input type="checkbox"/>	None	...

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:

The screenshot shows the 'Authorized media file settings' dialog box. The title bar includes the text 'Authorized media file settings' and a close button 'x'. The main content area is divided into several sections:

- Current media:** A dropdown menu showing 'Media File 04 - Image: front cover'.
- Authorized:** A checked checkbox.
- Multiple items:** An unchecked checkbox.
- Caption EN:** A text input field containing 'Front cover'.
- Caption FR:** A text input field containing 'Image de couverture'.
- File name mask:** A text input field containing '[ISBN13]' followed by '+ Uniqueld'.
- Unique Id:** A dropdown menu set to 'None'.
- Language-specific settings:** A section with two columns: 'English interface' and 'French interface'. It includes:
  - Caption:** Two empty text input fields.
  - Alternate message when empty:** Two empty text input fields.
- Get Unique Id from metadata:** A section with the text '(All elements must be in the same composite):' and a trash icon and a plus icon.

At the bottom right, there are three buttons: 'Show help' (checked), 'Cancel', and 'Save'.

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...	
Media File - 25 - Image: back cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Media File - 26 - Image: back cover thumbnail	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Media File - 27 - Image: other cover material	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Media File - 28 - Image: promotional material	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Supporting Resource - 01 - Front cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...	
Supporting Resource - 02 - Back cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...	
Supporting Resource - 03 - Cover / pack	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Supporting Resource - 04 - Contributor picture	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	...	
Supporting Resource - 05 - Series image / artwork	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Supporting Resource - 06 - Series logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...	
Supporting Resource - 07 - Product image / artwork	<input type="checkbox"/>	<input type="checkbox"/>	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:


Catalogue: ONIXEDIT3 (ONIX 3.0)

Simplified Form ⓘ
 ! This product is invalid!([View error](#))

Add media file by dropping it here! Or click to browse

Record reference  
668888

---

EAN  
9781556228568

---

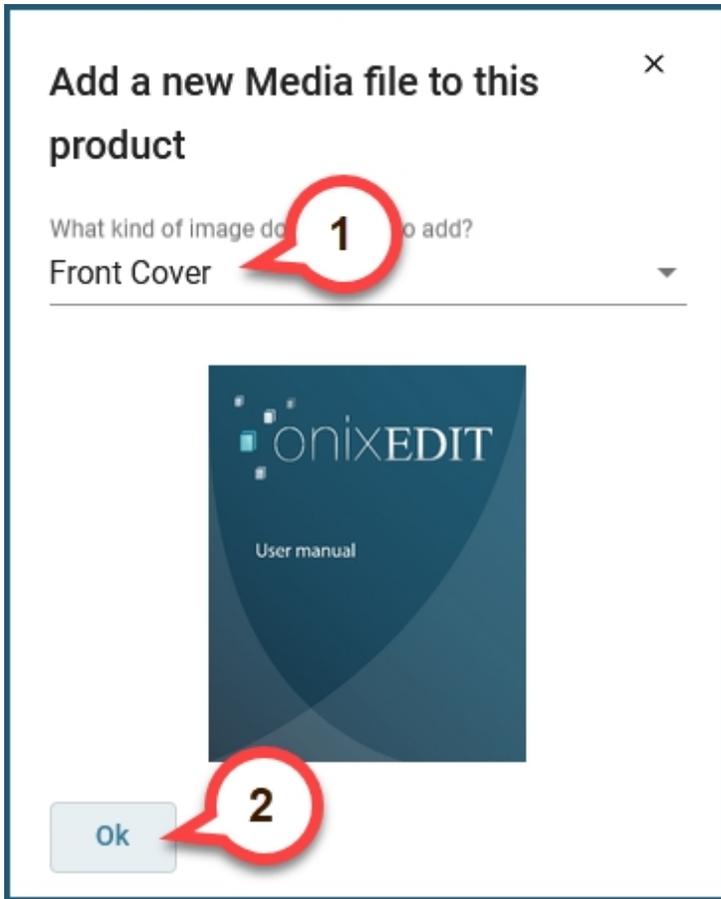
Title prefix: **The**      Title without prefix: **ONIXEDIT User Manual**

---

Title

<
General Information
Imprint
Contributors
Text
Supply detail
Subject & Audi

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:

onixEDIT Cloud

Catalogue: ONIXEDIT3 (ONIX 3.0)

Simplified Form ▼ ⓘ ! This product is inv...

Add media file by dropping it here! Or click to browse

Record reference  
668888

EAN  
9781556228568

Title prefix  
The

Title with  
ONIXE

Title

General Information Imprint Contributors Te

## 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):

Media file types authorized for ONIXEDIT Cloud				
Media File Type ▲	Authorized	Multiple items	Unique Id	More settings
Media File - 01 - Whole product	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 03 - Image: whole cover	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 04 - Image: front cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 05 - Image: whole cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 06 - Image: front cover, high quality	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 07 - Image: front cover thumbnail	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 08 - Image: contributor(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	...
Media File - 10 - Image: for series	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 11 - Image: series logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 12 - Image: product logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 16 - Image: Master brand logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 17 - Image: publisher logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 18 - Image: imprint logo	<input type="checkbox"/>	<input type="checkbox"/>	None	...

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

### Authorized media file settings ×

Current media file type: *Media File - 08 - Image: contributor(s)*

Authorized:

Multiple items:

Caption EN:

Caption FR:

File name mask:  + Uniqueld

Unique Id:

	English interface	French interface
Caption:	<input type="text" value="Contributors"/>	<input type="text" value="Auteurs"/>
Alternate message when empty:	<input type="text" value="Please select one"/>	<input type="text" value="Sélectionnez un auteur"/>

Get Unique Id from metadata (All elements must be in the same composite): 🗑️ ➕

```
//Product/Contributor/SequenceNumber
//Product/Contributor/PersonNameInverted
```

Show help

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**:

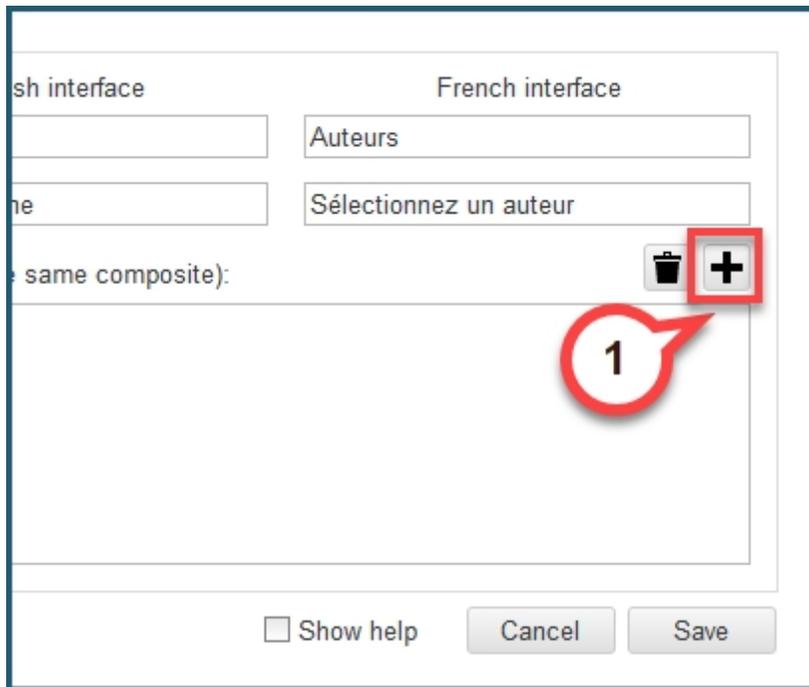


File name mask:  + Uniqueid

Unique Id: String

English interface

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.



English interface

French interface

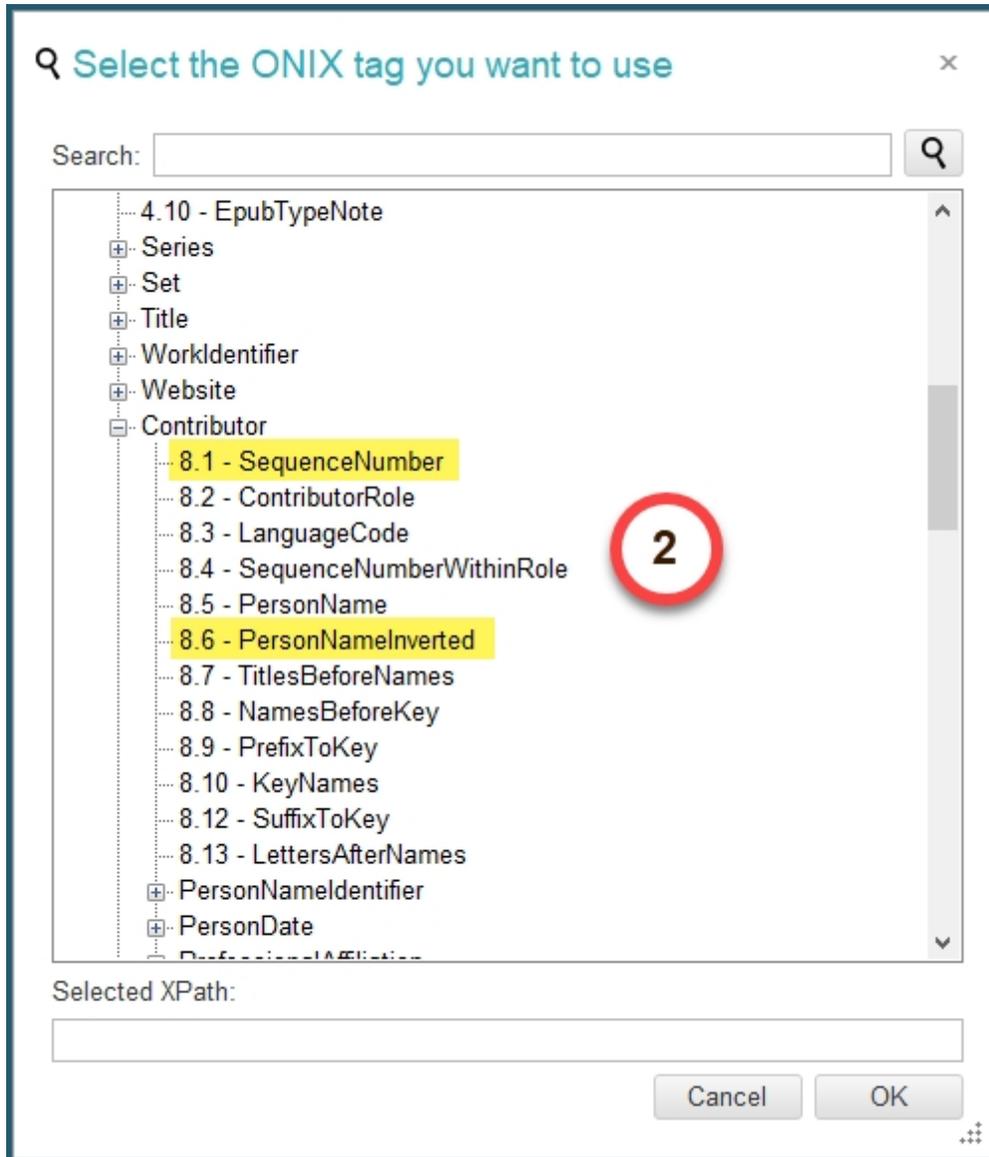
Auteurs

Sélectionnez un auteur

(e same composite):

1

Show help Cancel Save

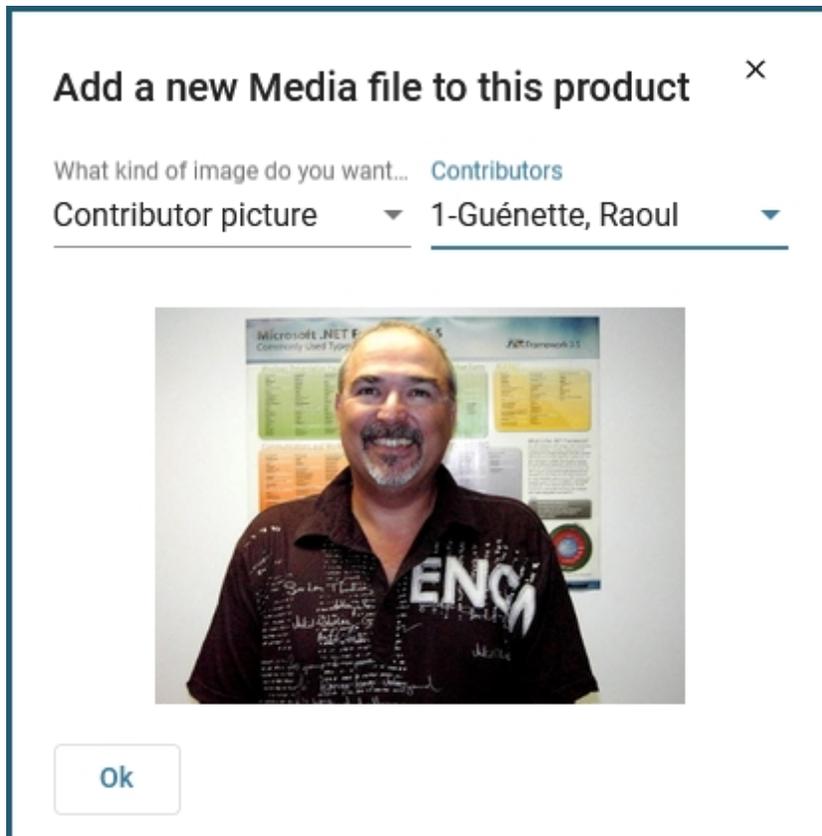


We **save** the media file settings dialog and did the same steps for **Supporting Resource 04 - Contributor picture** (ONIX 3.0):

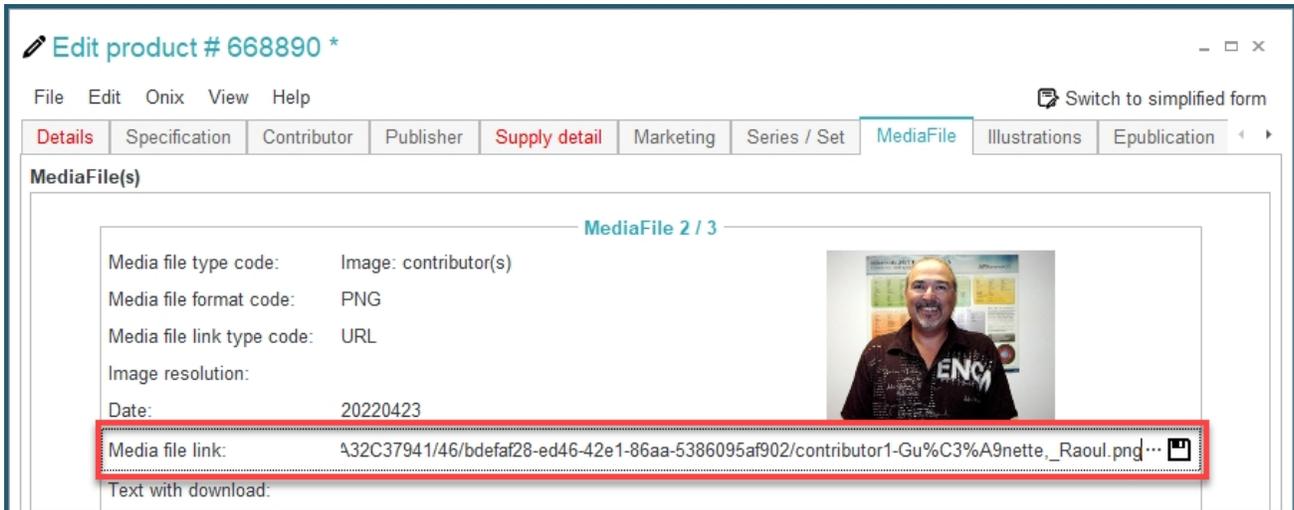
Media file types authorized for ONIXEDIT Cloud				
Media File Type	Authorized	Multiple items	Unique Id	More settings
Media File - 24 - Image: back cover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	None	...
Media File - 25 - Image: back cover, high quality	<input type="checkbox"/>	<input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

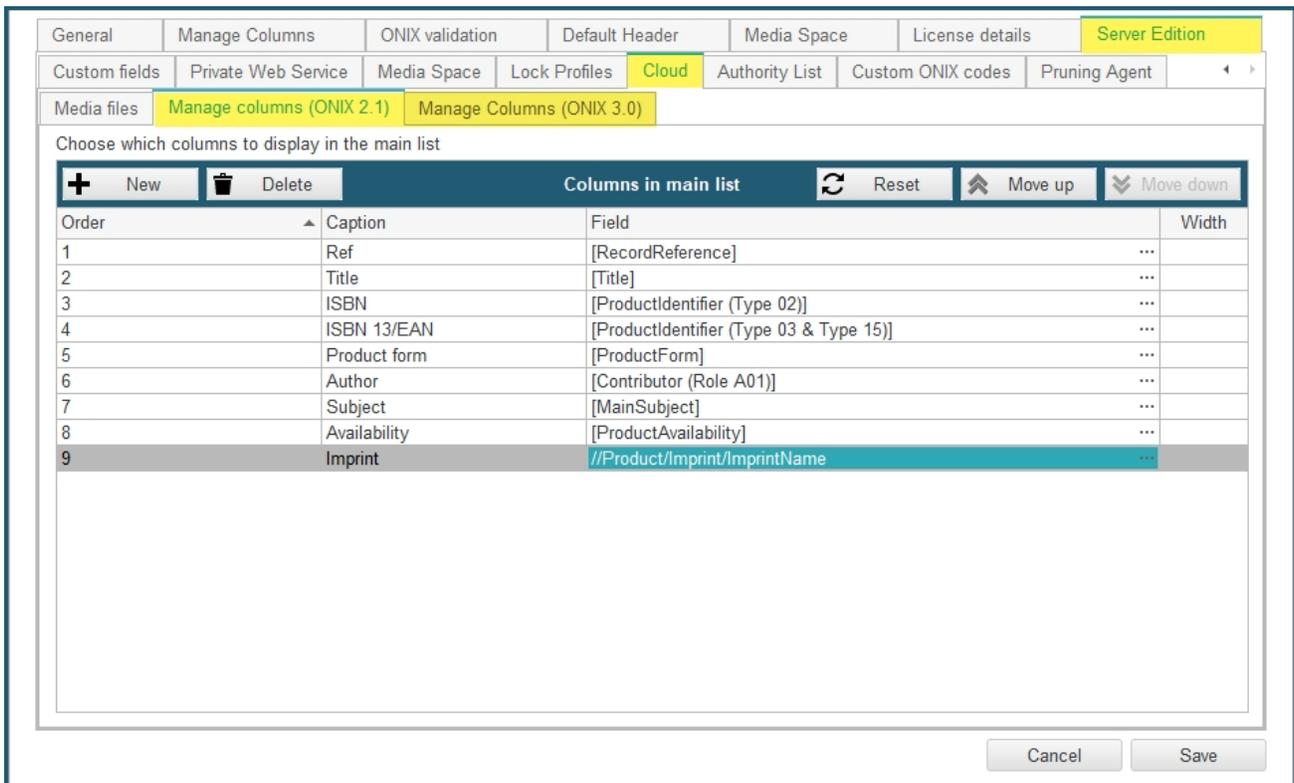


As a result in ONIXEDIT, we can see the media file link with a distinctive filename (in this case, "1-Gu%C3%A9nette,\_Raoul.png"):



## 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:



### Define a column ✕

Field:

ONIX tag:  Choose ?

Caption:

If multiple values are found ...

Show first value only

Show all values (separated by semi-colons)

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:

General
Manage Columns
ONIX validation
Default Header
Media Space
License details
Server Edition

Custom fields
Private Web Service
Media Space
Lock Profiles
Cloud
Authority List
Custom ONIX codes
Pruning Agent

Import/Export
Import pictures
Select catalogues
Apply Authority List to Catalogues
1 to 25 of 1401

Delete authorities
Authority list
🔍

ID	Last Modification	First name	Pref.	Last name	Suf.	Corporate	🔒	✎
9556	1/27/2022					Paul Brunton Philosophic Foundation		✎
9557	1/27/2022					The Findhorn Community		✎
9558	1/27/2022					Diana Cooper School		✎
9559	1/27/2022					GPG-Solutions		✎
9560	1/27/2022	M. J.		Abadie				✎
9561	1/27/2022	Ralph		Abraham				✎
9562	1/27/2022	Carl		Abrahamsson				✎
9563	1/27/2022	Mones		Abu-Asab				✎
9564	1/27/2022	Patch	G.	Adams	H.			✎
20854	1/27/2022	Janet		Adler				✎
9565	1/27/2022	Susanne		Aermecke				✎
9566	1/27/2022	Leslie M.		Alexander				✎
9567	1/27/2022	Dale		Alexander				✎

Authority list IDs:  Use ONIXEDIT IDs  Define my own IDs

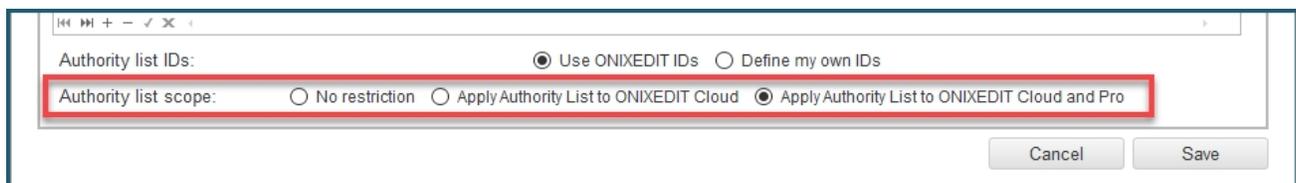
Authority list scope:  No restriction  Apply Authority List to ONIXEDIT Cloud  Apply Authority List to ONIXEDIT Cloud and Pro



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
  traditionnelle&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**:



- **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.
- **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.
- **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:

- **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:

**Authority list Import/Export tool**

File format:  Separator:

Do not use the double-quotes as text qualifier

Available fields	
Field	
▶ Role	
Prefix	
FirstName	
LastName	
Suffix	
CountryCode	
DateOfBirth	

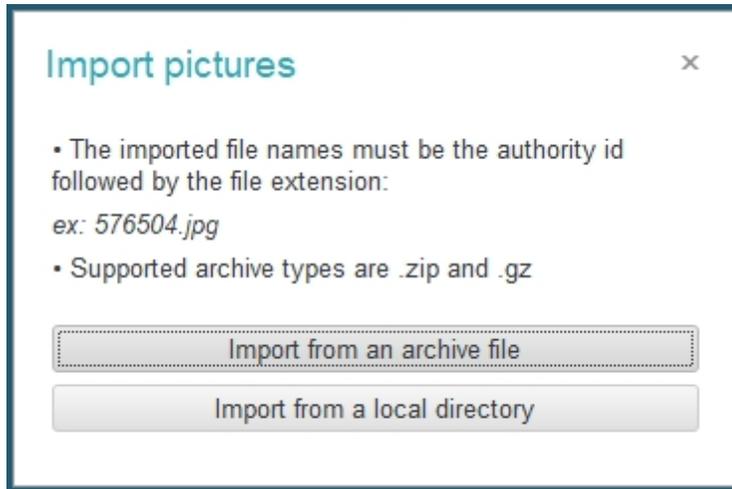
File fields	
Field	
▶ ID	
PersonNameInverted	
BiographicalNotes	

Import and update from file

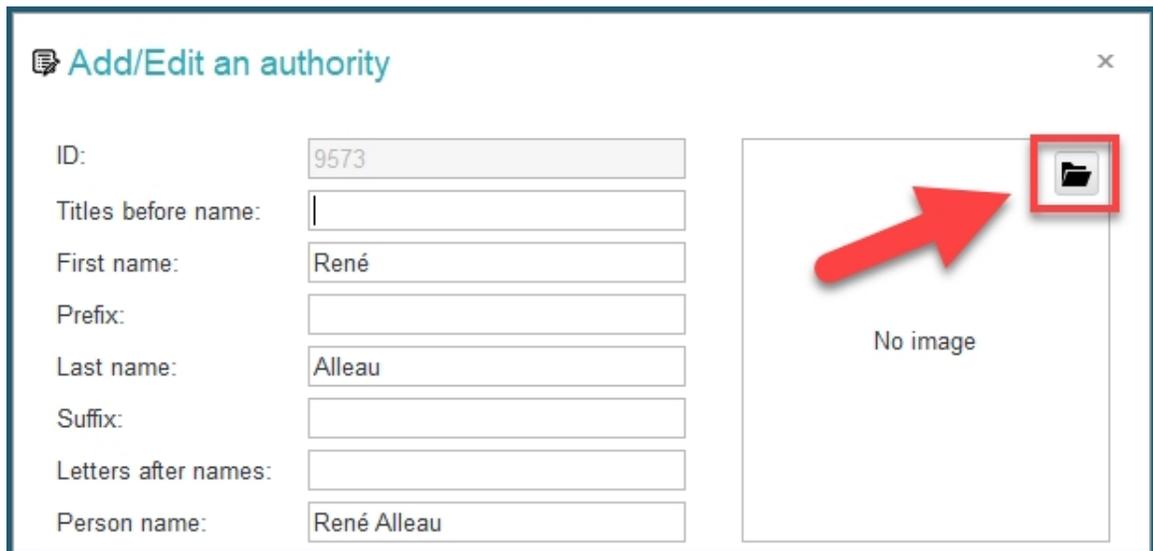
Export to file

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

- **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:



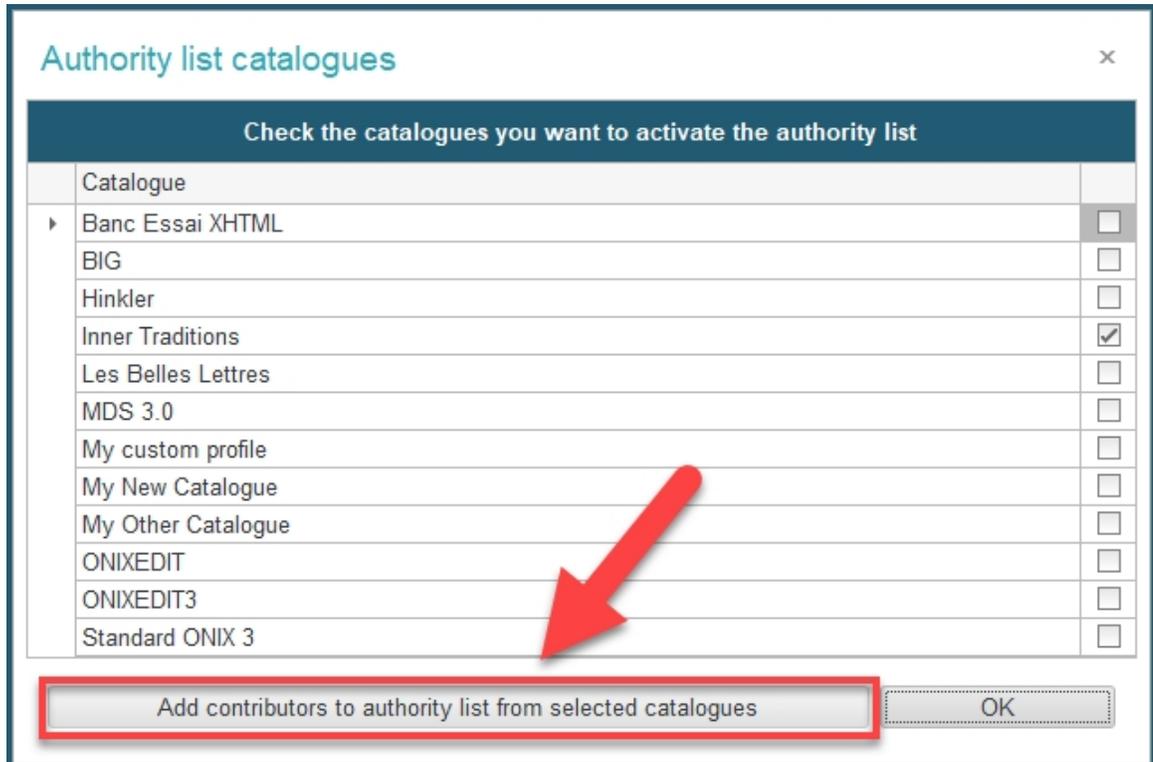
Once associated to a contributor, the corresponding image is automatically uploaded to your ONIXEDIT public Media Space. Each time a contributor from the Authority List is associated to an ONIX title, the corresponding URL is automatically added to that title.

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

The screenshot shows the ONIXEDIT Server interface with the 'Authority List' tab selected. A modal dialog titled 'Authority list catalogues' is open, displaying a list of catalogues with checkboxes for selection. The dialog includes a search bar and a table of catalogues. The 'Inner Traditions' catalogue is highlighted in blue. The 'Add contributors to authority list from selected catalogues' button is visible at the bottom of the dialog.

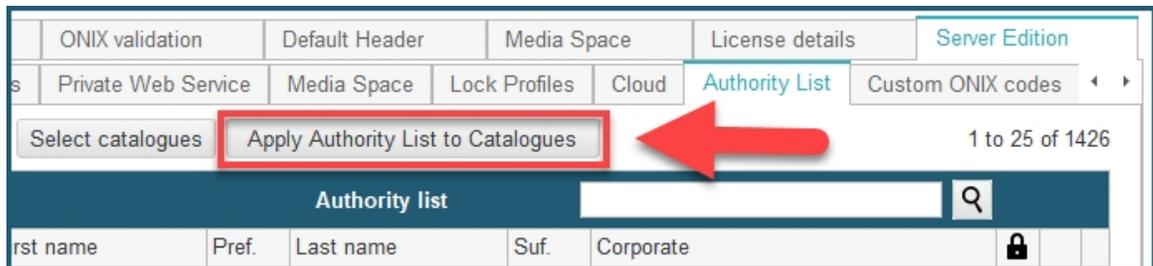
Catalogue	
Banc Essai XHTML	<input type="checkbox"/>
BIG	<input type="checkbox"/>
Hinkler	<input type="checkbox"/>
I Inner Traditions	<input checked="" type="checkbox"/>
Les Belles Lettres	<input type="checkbox"/>
MDS 3.0	<input type="checkbox"/>
My custom profile	<input type="checkbox"/>
My New Catalogue	<input type="checkbox"/>
My Other Catalogue	<input type="checkbox"/>
ONIXEDIT	<input type="checkbox"/>
ONIXEDIT3	<input type="checkbox"/>
Standard ONIX 3	<input type="checkbox"/>

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.

- **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.



- **The Search tool:** You can use the search tool to quickly find the contributors you want to edit:

Delete authorities		Authority list					Jeff	
ID	Last Modification	First name	Pref.	Last name	Suf.	Corporate		
9725	1/27/2022	Jeffrey J.		Bütz				
9823	1/27/2022	Jeff		Cushing				
9908	1/27/2022	Jeff		Eisenberg				
9952	1/27/2022	Jeffrey L.		Fine				
9973	1/27/2022	Leslie J.		Franks				
10380	1/27/2022	Donald		McCown				
10420	1/27/2022	Jeffrey		Miller				
10481	1/27/2022	Jeff D.		Nixa				
10678	1/27/2022	Richard Evans		Schultes				

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

Authority list						
First name	Pref.	Last name	Suf.	Corporate		
Chris		Alexandria				
Sarane		Alexandrian				
Toscun Bayrak		al-Jerrahi				
Abd al-Kerim		al-Jili				
D. S.		Allan				
René		Alleau				
Sasha		Allenby				
Ibn al-Husayn		al-Sulami				
Nathaniel		Altman				

**Additional information:**

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

Chris		Alexandria			
Sarane		Alexandrian			
Toscun Bayrak					
Abd al-Kerim					
D. S.					
René					
Sasha		Allenby			

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



General Manage Columns ONIX validation Default Header Media Space Li

Custom fields Private Web Service Media Space Lock Profiles Cloud Authority List Custom O

ONIX list: 22 - Language role ONIX version: ONIX3

18 - Person / organization name type

20 - Event role

21 - Edition type

Code 22 - Language role

01 23 - Extent type

02 24 - Extent unit

03 25 - Illustration and other content type

04 Rights language

05 Rights-excluded language

Custom 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:

General Manage Columns ONIX validation Default Header Media Space License details Server Edition

Custom fields Private Web Service Media Space Lock Profiles Cloud Authority List Custom ONIX codes Pruning Agent

ONIX list: 22 - Language role ONIX version: ONIX3

+ New Custom ONIX Codes

Code	Heading	Hide
01	Language of text	Hide
02	Original language of a translated text	Hide
03	Language of abstracts	Hide
04	Rights language	Hide
05	Rights-excluded language	Hide
06	Original language in a multilingual edition	Hide
07	Translated language in a multilingual edition	Hide
08	Language of audio track	Hide
09	Language of subtitles	Hide
10	Language of original audio track	Hide
11	Original language audio track in a multilingual product	Hide
12	Language of notes	Hide

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:

+ New Custom ONIX Codes		
Code	Heading	
01	Language of text	<a href="#">Hide</a>
02	Original language of a translated text	<a href="#">Hide</a>
03	Language of abstracts	<a href="#">Hide</a>
04	Rights language	<a href="#">Hide</a>
05	Rights-excluded language	<a href="#">Hide</a>
06	Original language in a multilingual edition	<a href="#">Hide</a>
07	Translated language in a multilingual edition	<a href="#">Hide</a>

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**.

ONIX list:  ONIX version:

+ New Custom ONIX Codes		
Code	Heading	
01	Language of text	<a href="#">Hide</a>
02	Original language of a translated text	<a href="#">Hide</a>
03	Language of abstracts	<a href="#">Hide</a>
04	Rights language	<a href="#">Show</a>
05	Rights-excluded language	<a href="#">Hide</a>
06	Original language in a multilingual edition	<a href="#">Hide</a>
07	Translated language in a multilingual edition	<a href="#">Hide</a>
08	Language of audio track	<a href="#">Hide</a>
09	Language of subtitles	<a href="#">Hide</a>
10	Language of original audio track	<a href="#">Hide</a>
11	Original language audio track in a multilingual product	<a href="#">Hide</a>
12	Language of notes	<a href="#">Hide</a>

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:

umns	ONIX validation	Default Header	Media Space	License details	Server Edition
eb Service	Media Space	Lock Profiles	Cloud	Authority List	Custom ONIX codes
update type			ONIX version: <input type="text" value="ONIX3"/>		Pruning Agent
Custom ONIX Codes					
Heading					
Early notification					<a href="#">Hide</a>

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

General	Manage Columns	ONIX validation	Default Header	Media Space	Li
Custom fields	Private Web Service	Media Space	Lock Profiles	Cloud	Authority List
ONIX list:	<div style="border: 1px solid red; padding: 5px;">           22 - Language role            18 - Person / organization name type            20 - Event role            21 - Edition type            22 - Language role            23 - Extent type            24 - Extent unit            25 - Illustration and other content type         </div>				ONIX version: ONIX3
<b>+</b>	<b>Custom ONIX Codes</b>				
Code					
01					
02					
03					
04	Rights language				
05	Rights excluded language				

Click on the **New** button:

General	Manage Columns	ONIX validation	Default Header
Custom fields	Private Web Service	Media Space	Lock Profiles
ONIX list:	22 - Language role		ONIX versio
<b>+</b>	<b>New</b>	<b>Custom ONIX C</b>	
Code	Heading		
01	Language of text		
02	Original language of a translated text		

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):

### Custom ONIX code

**WARNING:** If you use your own custom ONIX codes, your ONIX files could be declared invalid and rejected by your trading partners.

Code:

Language:

Heading:

Headings	
Language	Heading

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

 **Custom ONIX code** ×

*WARNING: If you define your own custom ONIX codes, your ONIX files could be declared invalid and rejected by your trading partners.*

Code:

Language:

Heading:

Headings		
Language	Heading	
EN	My own code	

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:

**Custom ONIX code**
×

*WARNING: If you define your own custom ONIX codes, your ONIX files could be declared invalid and rejected by your trading partners.*

Code:

Language:

Heading:

Headings

Language	Heading	
EN	My own code	
FR	Mon propre code	
ES	mi propio código	
PT	Meu próprio código	

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:

+ New		Custom ONIX Codes
Code	Heading	
01	Language of text	<a href="#">Hide</a>
02	Original language of a translated text	<a href="#">Hide</a>
03	Language of abstracts	<a href="#">Hide</a>
04	Rights language	<a href="#">Hide</a>
05	Rights-excluded language	<a href="#">Hide</a>
06	Original language in a multilingual edition	<a href="#">Hide</a>
07	Translated language in a multilingual edition	<a href="#">Hide</a>
08	Language of audio track	<a href="#">Hide</a>
09	Language of subtitles	<a href="#">Hide</a>
10	Language of original audio track	<a href="#">Hide</a>
11	Original language audio track in a multilingual product	<a href="#">Hide</a>
12	Language of notes	<a href="#">Hide</a>
19	My own code	<a href="#">Edit</a>

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:

The screenshot shows the 'Pruning Agent' configuration interface. At the top, there are several tabs: General, Manage Columns, ONIX validation, Default Header, Media Space, License details, Server Edition, Custom fields, Private Web Service, Media Space, Lock Profiles, Cloud, Authority List, Custom ONIX codes, and Pruning Agent. The 'Pruning Agent' tab is active. Below the tabs, there is a section for enabling the agent. The 'Enable Pruning Agent' checkbox is checked and highlighted with a red box. A red arrow points to this checkbox. Below the checkbox, there are several configuration options: 'Archive products from ONIX 2.1 catalogues using this search:' with an edit icon, 'Archive products from ONIX 3.0 catalogues using this search:' with an edit icon, 'Frequency:' set to 'Weekly', 'Day of the week:' set to 'Sunday', 'Day of the month:' set to '1', 'Time of day:' set to '2:00:00 AM', and 'Remove products from archive after' set to '365 days'.

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):

General	Manage Columns	ONIX validation	Default Header	Media Space	License details	Server Edition
Custom fields	Private Web Service	Media Space	Lock Profiles	Cloud	Authority List	Custom ONIX codes
						Pruning Agent

Enable Pruning Agent:

Archive products from ONIX 2.1 catalogues using this search:

Archive products from ONIX 3.0 catalogues using this search:

Frequency:

Day of the week:

Day of the month:

Time of day:

Remove products from archive after  days

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:

Q Advanced search

+

1 Last modification date

Older than (i... 365

Is null  
Is not null  
Greater than  
Greater than or equals to  
Less than  
Less than or equals to  
Older than (in days)

Query plan: (1)

Search name:

Search in all ONIX 3.0 catalogues

Load search OK Cancel Clear search Search

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:

General	Manage Columns	ONIX validation	Default Header	Media Space	License details	Server Edition
Custom fields	Private Web Service	Media Space	Lock Profiles	Cloud	Authority List	Custom ONIX codes
<b>Pruning Agent</b>						
Enable Pruning Agent: <input checked="" type="checkbox"/>						
Archive products from ONIX 2.1 catalogues using this search: 						
Archive products from ONIX 3.0 catalogues using this search: 						
Frequency: <input type="text" value="Weekly"/>						
Day of the week: <input type="text" value="Sunday"/>						
Day of the month: <input type="text" value="1"/>						
Time of day: <input type="text" value="2:00:00 AM"/>						
Remove products from archive after <input type="text" value="365"/> days						

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:

General	Manage Columns	ONIX validation	Default Header	Media Space	License details	Server Edition
Custom fields	Private Web Service	Media Space	Lock Profiles	Cloud	Authority List	Custom ONIX codes
<b>Pruning Agent</b>						
Enable Pruning Agent: <input checked="" type="checkbox"/>						
Archive products from ONIX 2.1 catalogues using this search: 						
Archive products from ONIX 3.0 catalogues using this search: 						
Frequency: <input type="text" value="Weekly"/>						
Day of the week: <input type="text" value="Sunday"/>						
Day of the month: <input type="text" value="1"/>						
Time of day: <input type="text" value="2:00:00 AM"/>						
Remove products from archive after <input type="text" value="365"/> days						

## 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**:

Version	Name	Contact	Allowed titles	No of titles	% Valid	Actions
<b>Profile: None</b>						
ONIX2	BIG	Maxime	100000	85406	5 %	▼
ONIX2	Hinkler	Hinkler	100	96	92 %	▼
ONIX2	Inner Traditions	Andy	3000	2018	100 %	▼
ONIX3	MDS 3.0	François	2000	1772	1 %	▼
ONIX3	My New Catalogue	Jennifer	500	192	72 %	▼
ONIX3	My Other Catalogue	Example Publisher	100	1	0 %	▼
ONIX2	ONIXEDIT	ONIXEDIT	300			▼
<b>Profile: Standard ONIX 3</b>						
ONIX3	Banc Essai XHTML	Claire		1289	1 %	▼
ONIX3	Les Belles Lettres	Les Belles Lettres		00	0 %	▼
			Total:	Total: 90874		

Allow updates of titles from different catalogues when importing a metadata file ⓘ

Allowed titles: 200000

Set next RecordReference value for Catalogues with Auto-Numbering activated

Cancel Save

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:

- 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.
- 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.
- 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

- 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

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- [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

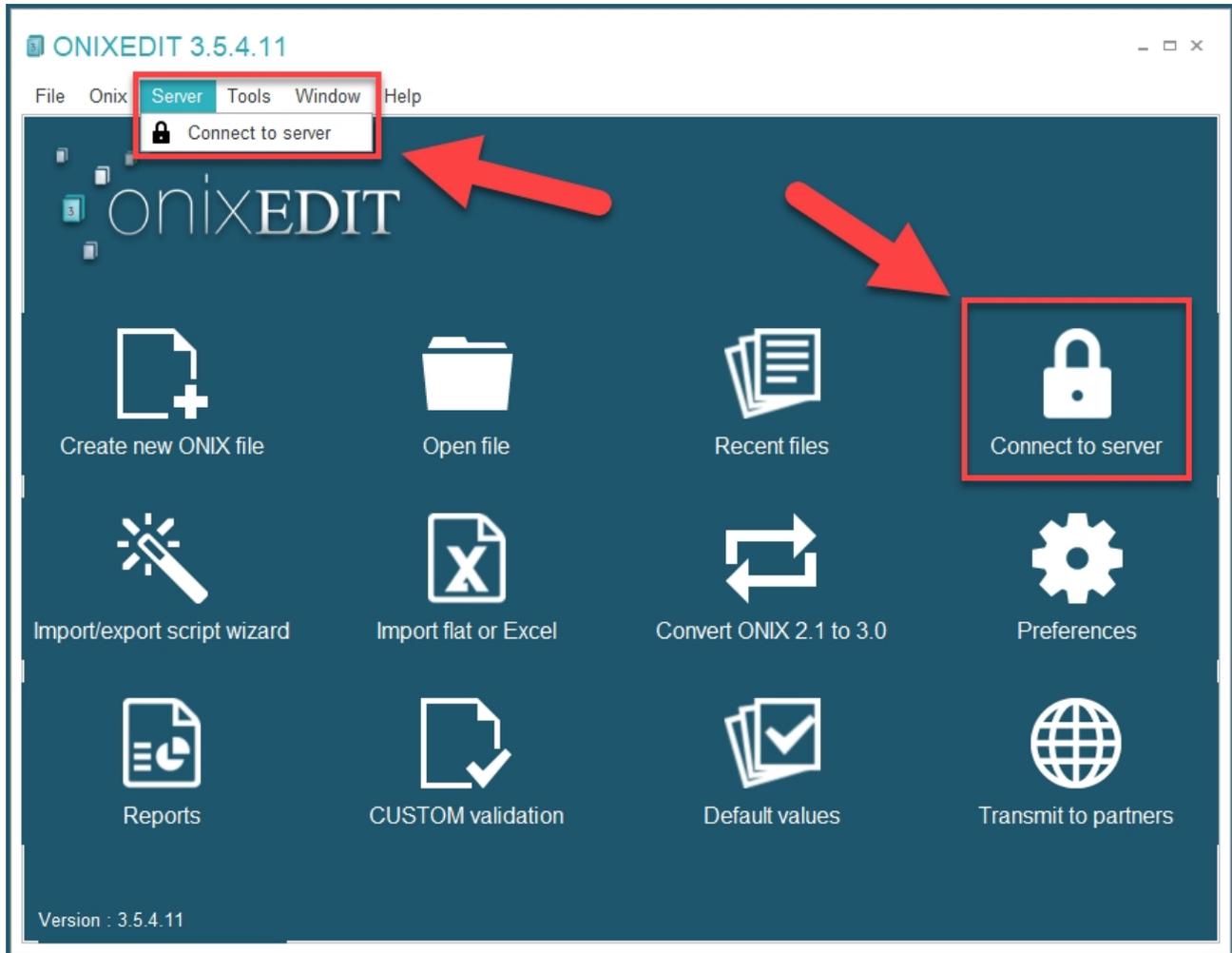
Using ONIXEDIT Pro, you can connect to an ONIXEDIT Server providing that you have been invited by the ONIXEDIT Server administrator. To be invited, you must provide your ONIXEDIT Serial number and a password of your choice to the Server administrator who will define you as a user of ONIXEDIT Server,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

**Authentication**

Email: server\_demo@onixedit.com

Password: \*\*\*\*\*

Cancel 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:

### Choose a catalogue - □ ×

Version	Company	Catalogue	Titles Allowed	Number of titles
ONIX3	ONIXEDIT	Banc Essai XHTML	2000	1289
ONIX2	ONIXEDIT	BIG	100000	85406
ONIX2	ONIXEDIT	Hinkler	100	96
ONIX2	ONIXEDIT	Inner Traditions	3000	2018
ONIX3	ONIXEDIT	Les Belles Lettres	100	99
ONIX3	ONIXEDIT	MDS 3.0	2000	1772
ONIX3	ONIXEDIT	My New Catalogue	500	193
ONIX3	ONIXEDIT	My Other Catalogue	100	2
ONIX2	ONIXEDIT	ONIXEDIT	300	0
ONIX3	ONIXEDIT	ONIXEDIT3	5000	1

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

File Edit Onix Server Tools Window Help

+ Add new title Upload media files Transmit to partners File header Generate report Help

@ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z \* | Items per page: 50

Catalogue 'My New Catalogue' (ONIX 3.0)

Ref	Title	ISBN	ISBN 13/...	Product form	Author	Subject	Availability	ONIX	Me...	Locked
			97815562...					✗	⚠	
1374	5 Steps t...		97812601...	Digital (deliver...	John T. M...	SCI00000...	Available	✗	⚠	
1371	5 Steps t...		97812600...	Digital (deliver...	Glenn P. ...	POL0000...	Available	✓	⚠	
1378	5 Steps t...		97812601...	Digital (deliver...	Greg Jaco...	SCI00000...	Available	✗	⚠	
1385	A History ...		97812606...	Digital (deliver...	R.R. Palme	HIS00000...	Available	✓	⚠	
1386	A Little Hi...		97803001...	Digital (deliver...	James W...	HIS00000...	Available	✓	⚠	
2351	A Separat...		97807432...	Book	John Kno...	FIC00000...	Available	✓	⚠	
1396	A Short C...		97801345...	Digital (deliver...	Barbara L...	PHO0000...	Available	✓	⚠	
1397	A Streetc...		97808112...	Digital (deliver...	Arthur Mill...	DRA0000...	Available	✓	⚠	
2337	A Wish in...		97815362...	Book	Christina ...	FIC00000...	Available	✓	⚠	
2326	Algebra 1 ...		97801332...	Book	Sawas Le...	MAT0020...	Available	✓	⚠	
2328	Algebra 2 ...		97801332...	Book	Sawas Le...	MAT0020...	Available	✓	⚠	
1454	Algebra a...		97801352...	Digital (deliver...	Michael S...	MAT0000...	Available	✓	⚠	
1459	Algebra a...		97811193...	Digital (deliver...	Cynthia Y...	MAT0000...	Available	✓	⚠	
1477	America: ...		97803936...	Digital (deliver...	David E. Shi	HIS00000...	Available	✓	⚠	
1123	American ...		97801352...	Digital (deliver...	Karen O'C...	POL0000...	Available	✓	⚠	
2213	American ...		97816068...	Digital (deliver...	BJU Press	HIS03600...	Available	✓	⚠	
1489	American ...		97813192...	Digital (deliver...	Karen Wa...	POL0000...	Available	✓	⚠	
1493	American ...		97813191...	Digital (deliver...	Eric Raws...	ART0000...	Available	✗	⚠	
1495	An Ameri...		97813240...	Digital (deliver...	Joy Harjo	LCO0000...	Available	✓	⚠	
1496	An Introd...		97813376...	Digital (deliver...	Joel Kriea...	POL0000...	Available	✓	⚠	

Record 1 of 50

Catalogue validation score: 72% (Click here for more options)

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

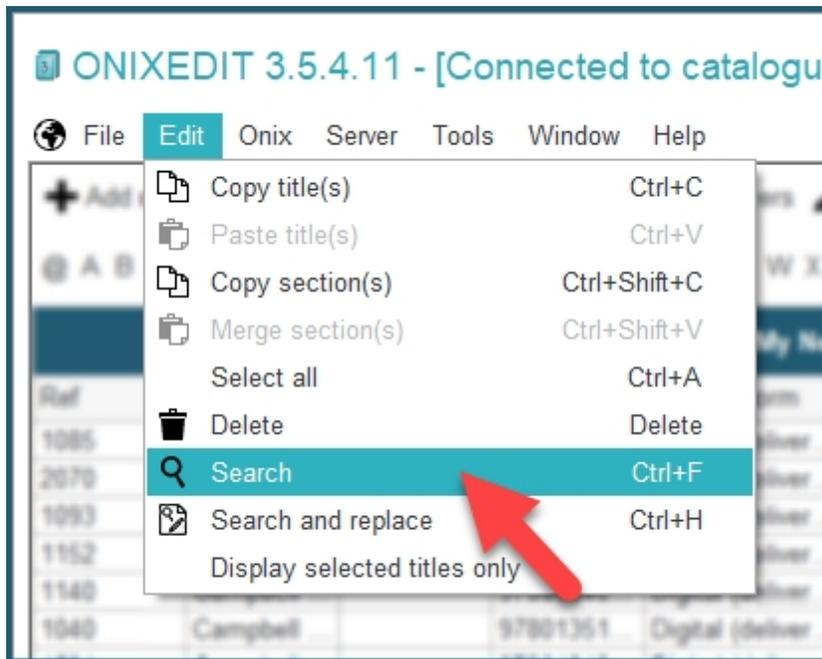
1197	Church M...		97811916...	Digital (de						
1212	College			Digital (de						
1213	College			Digital (de						
1214	College			Digital (de						
1597	Concep			Digital (de						

Record 1 of 50

Catalogue validation score

## 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:

The screenshot shows the 'Advanced search' window. At the top left is a '+' icon. Below it are three callout boxes: 'Add new search criterion' pointing to the '+' icon, 'Select the field to search' pointing to the 'In field' dropdown, and 'Delete search criterion' pointing to the trash icon. Below the search list are two more callout boxes: 'If you have several criteria, combine them with a logical operator' pointing to the 'and' operator, and 'Define a search operator and a value' pointing to the 'With operator' and 'For value(s)' fields. At the bottom, there is a 'Query plan' field showing '( 1 )', a 'Search name' field, a checkbox for 'Search in all ONIX 3.0 catalogues', and buttons for 'Load search', 'Save search', 'Cancel', 'Clear search', and 'Search'.

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:

This close-up shows the 'In field' dropdown menu open. The menu items are: Fulltext, Locked, Creation date, Last modification date (highlighted in blue), Validation status, Usual tags (with a minus sign), Product (with a minus sign), and CustomFields (with a minus sign). A red callout box points to the dropdown arrow with the text 'Click here to show the dropdown menu'.

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).

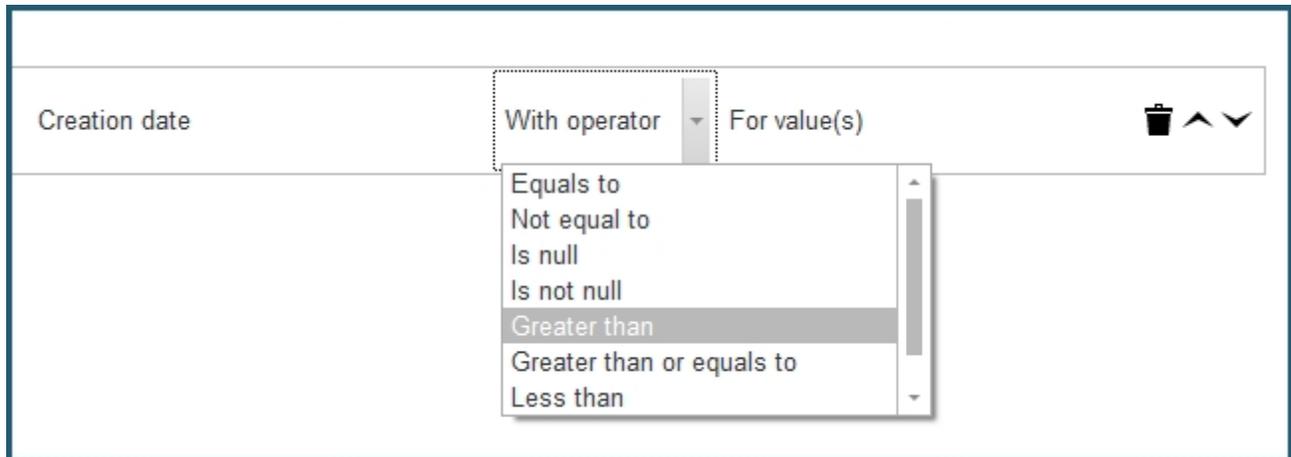
*Usual tags* will contain the most common ONIX fields.

*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	  																																																	
		<div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center;">Friday, April 29, 2022</p> <p style="text-align: center;">← March 2022 →</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>SU</th><th>MO</th><th>TU</th><th>WE</th><th>TH</th><th>FR</th><th>SA</th> </tr> </thead> <tbody> <tr> <td>27</td><td>28</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> <tr> <td>6</td><td>7</td><td style="background-color: #00a651; color: white;">8</td><td>9</td><td>10</td><td>11</td><td>12</td> </tr> <tr> <td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td> </tr> <tr> <td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td> </tr> <tr> <td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td> </tr> <tr> <td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td> </tr> </tbody> </table> <p style="text-align: center;">Clear</p> </div>		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
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																																														

10 catalogues

3.2 - ProductForm	Equals to	Book	  																
		<div style="border: 1px solid #ccc; padding: 5px;"> <table border="1" style="width: 100%; text-align: left;"> <tbody> <tr><td>BA</td><td>Book</td></tr> <tr><td>EA</td><td>Digital (delivered electr...</td></tr> <tr><td>00</td><td>Undefined</td></tr> <tr style="background-color: #f0f0f0;"><td>AA</td><td>Audio</td></tr> <tr><td>AB</td><td>Audio cassette</td></tr> <tr><td>AC</td><td>CD-Audio</td></tr> <tr><td>AD</td><td>DAT</td></tr> <tr><td>x</td><td></td></tr> </tbody> </table> </div>		BA	Book	EA	Digital (delivered electr...	00	Undefined	AA	Audio	AB	Audio cassette	AC	CD-Audio	AD	DAT	x	
BA	Book																		
EA	Digital (delivered electr...																		
00	Undefined																		
AA	Audio																		
AB	Audio cassette																		
AC	CD-Audio																		
AD	DAT																		
x																			

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):

Q **Advanced search** - □ ×

**+**

1	Title	Contains	Birds	  
2	and Title	Contains	Trees	  

Query plan:  

Search name:

Search in all ONIX 3.0 catalogues

Once a search is saved, you can use the **Load search** button to load it back and use it:

Query plan: ( 1 and 2 )

Search name:

Search in all ONIX 3.0 catalogues

 Load search  Save search

1

### Load search

Name		
Search 1		
Search by ISBN		
▶ Birds and Trees		

2

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

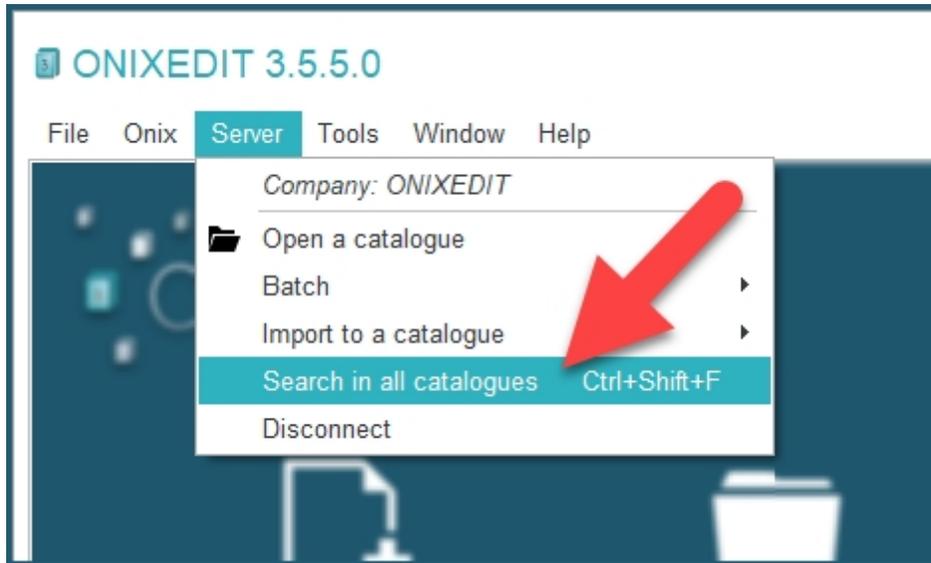
The screenshot shows the top navigation bar of the ONIXEDIT Cloud interface. The title is "Catalogue: My New Catalogue (ONIX 3.0)". On the right, there are icons for settings, messages, notifications, help, and a globe. Below the navigation bar, there is a search bar with the text "Fulltext search in products" and a button labeled "Advanced Search" which is highlighted with a red box and a callout bubble containing the number "1". To the right of the search bar are buttons for "Add new title", a refresh icon, and a filter icon labeled "A-Z". Below the search bar is a table with columns: Ref, Title ↑, ISBN13/EAN, Product Form, Authors, Subjects, CUSTOM, and ONIX.

The screenshot shows the "Advanced Search" dialog box. It has a title bar with "Advanced Search" and a close button. Below the title bar, there is a search field with a callout bubble containing the number "1" pointing to the "In field" dropdown. To the right of the search field are "With operat..." and "For value(s)" dropdowns, and a "+" button. Below the search field is a "Query plan (1)" section with an "Edit" button. At the bottom left, there are buttons for "Cancel", "Clear search", and "Search". At the bottom right, there are buttons for "Save" and "Load", with the "Load" button highlighted by a red box and a callout bubble containing the number "2".

The screenshot shows the "Load Search" dialog box. It has a title bar with "Load Search" and a close button. Below the title bar, there is a "Name" label. Below the label is a list of search results with three entries: "Search 1", "Search by ISBN", and "Birds and Trees". Each entry has a blue folder icon and a red trash icon. The folder icon for "Birds and Trees" is highlighted with a red box and a callout bubble containing the number "3".

### 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)**:

Catalogue 'My New Catalogue' (ONIX 3.0)										
Ref	Title ▲	ISBN	ISBN 13/...	Product form	Author	Subject	Availability	ONIX	Me...	Locked
2351	A Separat...		97807432...	Book	John Kno...	FIC00000...	Available	✓	⚠	
1396	A Short C...		97801345...					✓	⚠	
1397	A Streetc...		97808112...					✓	⚠	
2337	A Wish in...		97815362...					✓	⚠	
2326	Algebra 1 ...		97801332...					✓	⚠	
2328	Algebra 2 ...		97801332...					✓	⚠	
1454	Algebra a...		97801352...					✓	⚠	
1459	Algebra a...		97811193...					✓	⚠	
1477	America: ...		97803936...					✓	⚠	
2213	American ...		97816068...					✓	⚠	
1493	American ...		97813191...					✗	⚠	
1495	An Ameri...		97813240...					✓	⚠	
1496	An Introd...		97813376...					✓	⚠	
1497	An Introd...		97803001...					✓	⚠	
1515	Art A Brie...		97801352...					✓	⚠	
1534	Barron's ...		97814380...					✓	⚠	
1535	Basic Co...		97811183...					✓	⚠	
2360	Because ...		97803758...					✓	⚠	
1536	Beowulf (...)		97803930...					✓	⚠	
1028	Biology		97816285...					✓	⚠	
2358	Brown Gir...		97801475...					✓	⚠	

- Info
- + Add new title
- + Duplicate title
- Copy title(s)
- Paste title(s)
- Copy section(s)
- Merge section(s)
- Copy current cells values
- Delete
- Export
- Upload media files
- Transmit to partners
- Display selected titles only
- Add to new batch
- Add to existing batch
- Lock selected title(s)**
- Unlock selected title(s)
- Generate report



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

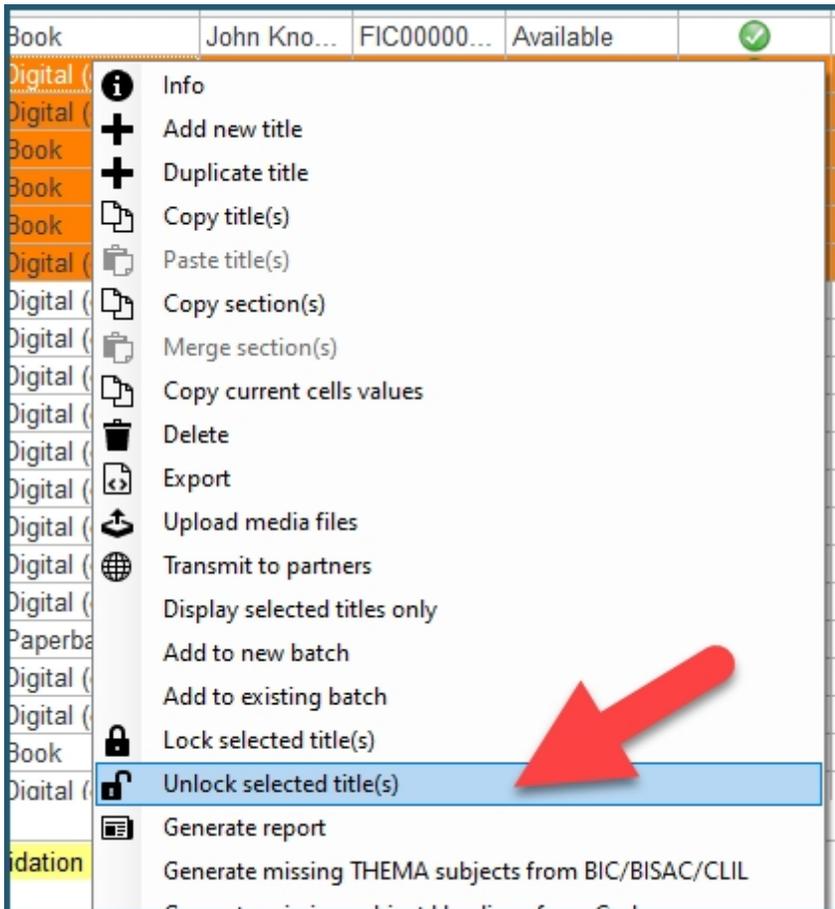
Catalogue 'My New Catalogue' (ONIX 3.0)										
▲	ISBN	ISBN 13/...	Product form	Author	Subject	Availability	ONIX	Me...	Locked	
at...		97807432...	Book	John Kno...	FIC00000...	Available	✓	⚠		
C...		97801345...	Digital (deliver...	Barbara L...	PHO0000...	Available	✓	⚠	🔒	
tc...		97808112...	Digital (deliver...	Arthur Mill...	DRA0000...	Available	✓	⚠	🔒	
in...		97815362...	Book	Christina ...	FIC00000...	Available	✓	⚠	🔒	
1 ...		97801332...	Book	Savvas Le...	MAT0020...	Available	✓	⚠	🔒	
2 ...		97801332...	Book	Savvas Le...	MAT0020...	Available	✓	⚠	🔒	
a...		97801352...	Digital (deliver...	Michael S...	MAT0000...	Available	✓	⚠	🔒	
a...		97811193...	Digital (deliver...	Cynthia Y...	MAT0000...	Available	✓	⚠	🔒	
a: ...		97803936...	Digital (deliver...	David E. Shi	HIS00000...	Available	✓	⚠		
an ...		97816068...	Digital (deliver...	BJU Press	HIS03600...	Available	✓	⚠		
an ...		97813191...	Digital (deliver...	Eric Raws...	ART0000...	Available	✗	⚠		
ri...		97813240...	Digital (deliver...	Joy Harjo	LCO0000...	Available	✓	⚠		
d...		97813376...	Digital (deliver...	Joel Krieg...	POL0000...	Available	✓	⚠		
d...		97803001...	Digital (deliver...	Raymond ...	REL0000...	Available	✓	⚠		
ie...		97801352...	Digital (deliver...	Marilyn St...	HIS00000...	Available	✓	⚠		
...		97814380...	Digital (deliver...	Gary S. T...	STU0000...	Available	✓	⚠		
o...		97811183...	Digital (deliver...	Leo J. Ma...	SCI00000...	Available	✓	⚠		

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)***:

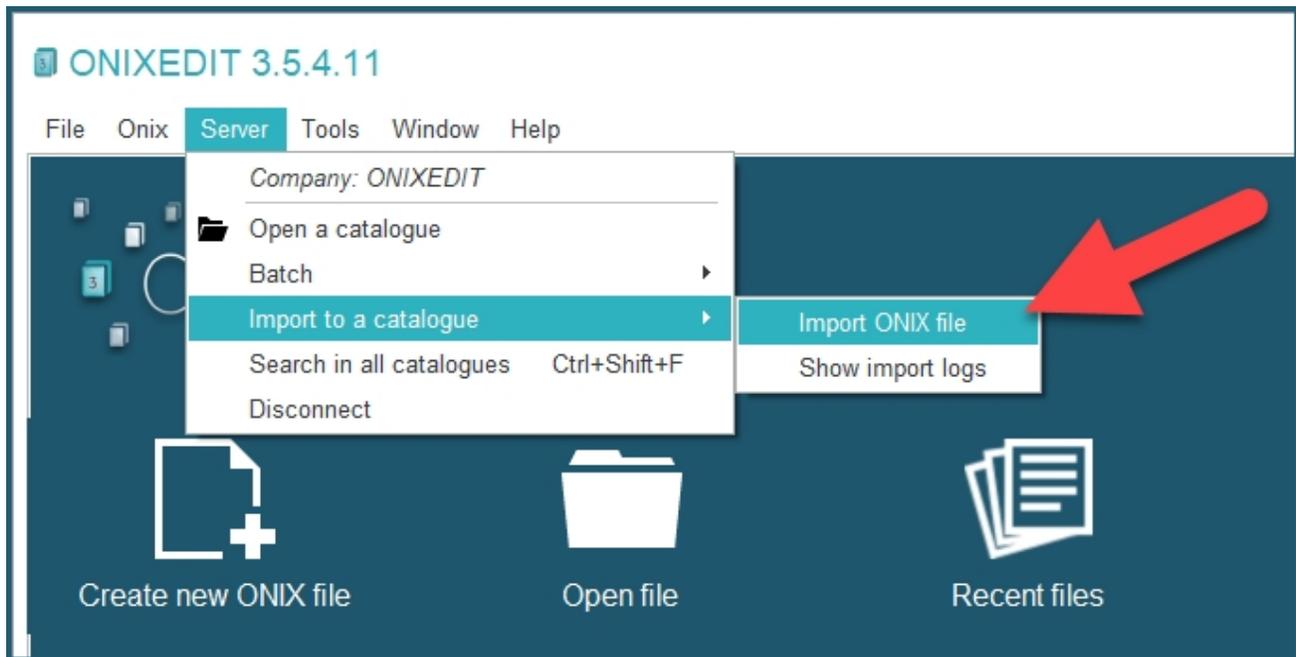


Alternatively, locked titles can be partially modified if you defined **Lock Profiles**. Consult [Manage Lock Profiles](#) section for more details.

## Importing ONIX files to a catalogue

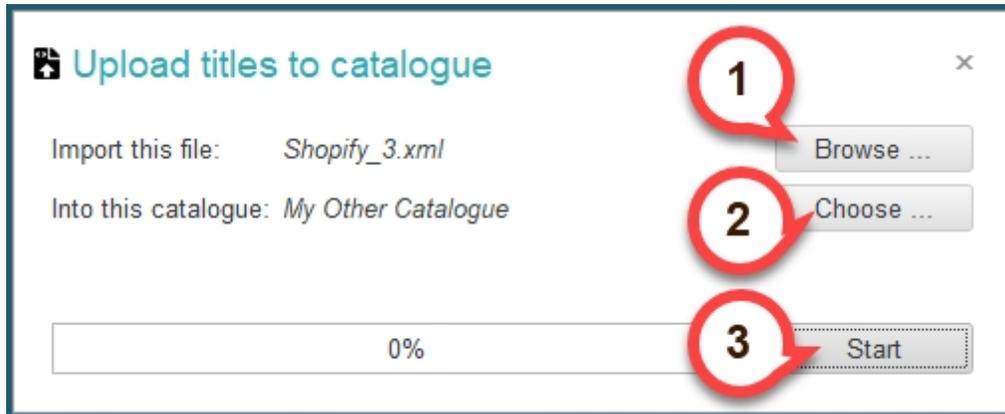
Using ONIXEDIT connected to ONIXEDIT Server, you can import huge ONIX 2.1 or 3.0 files to an ONIXEDIT Server catalogue.

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 3.5.4.11

File Onix Server Tools Window Help

C:\Users\Documents\ONIX Files\Shopify\_3.xml \* **Local ONIX file**

+ Add new title Save Validate Upload media files Transmit to partners File header Generate report Help

@ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z \* Q

ONIX 3.0										
Ref	Title	ISBN	ISBN 13/EAN	Product form	Author	Subj...	Availability	ONIX Best	ONIX	Me...
0545818109	10 True Tales: Battle Hero...	0545818109	97805458181...	Paperback / s...	Allan Zullo	JUV...	In stock	✗	✓	✓
0545818125	10 True Tales: FBI Heroes	0545818125	97805458181...	Paperback / s...	Allan Zullo	JNF0...	In stock	✗	✓	✓
0545818389	10 True Tales: Surviving S...	0545818389	97805458183...	Paperback / s...	Allan Zullo	JNF0...	In stock	✗	✓	✓
0545818400	10 True Tales: War Heroe...	0545818400	97805458184...	Paperback / s...	Allan Zullo	JNF0...	In stock	✗	✓	✓
0545204585	10 Week-by-Week Sight ...	0545204585	97805452045...	Paperback / s...	Lisa Fitzge...	EDU...	In stock	✗	✓	✓
0439940621	100 blagues #12	0439940621	97804399406...	Paperback / s...	Julie Lavoie	JUV0...	In sto	✗	✓	✓
0439942683	100 blagues! Et plus... n° 16	0439942683	97804399426...	Paperback / s...	Julie Lavoie	JNF0...	In st	✗	✓	✓
1443138568	100 blagues! Et plus... N° ...	1443138568	97814431385...	Paperback / s...	Julie Lavoie	JNF0...	In st	✗	✓	✓

Record 29 of 29

File validation score: 0% (Click here for more options)

Error summary

Connected to catalogue My Other Catalogue

+ Add new title Upload media files Transmit to partners File header Generate report Help

@ A B C **ONIXEDIT Server catalogue** R S T U V W X Y Z \* Items per page: 50 Q 0 to 0 of 0

Catalogue 'My Other Catalogue' (ONIX 3.0)										
Ref	Title	ISBN	ISBN 13/EAN	Product form	Author	Subject	Availability	ONIX	Media	Locked
Double-click here to add a new title ...										

Record 0 of 0

Catalogue validation score: 100% (Click here for more options)

ONIXEDIT will automatically copy the selected titles to your ONIXEDIT 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:

**Flat file and Excel generic import/export tool**

File Help

Options

Name/Description:

File type:

File encoding:

Delimitter:

Number of lines to skip:

First line is header

Remove all leading and trailing white space characters

Do not use the double-quotes as text qualifier

Import and merge with opened file

Import directly into an ONIXEDIT Server Catalogue

Primary key:

Columns definition

Usual tags:

Find:

Group:

List of available elements

<input type="checkbox"/>	ONIX Element
--------------------------	--------------

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:

Cancel

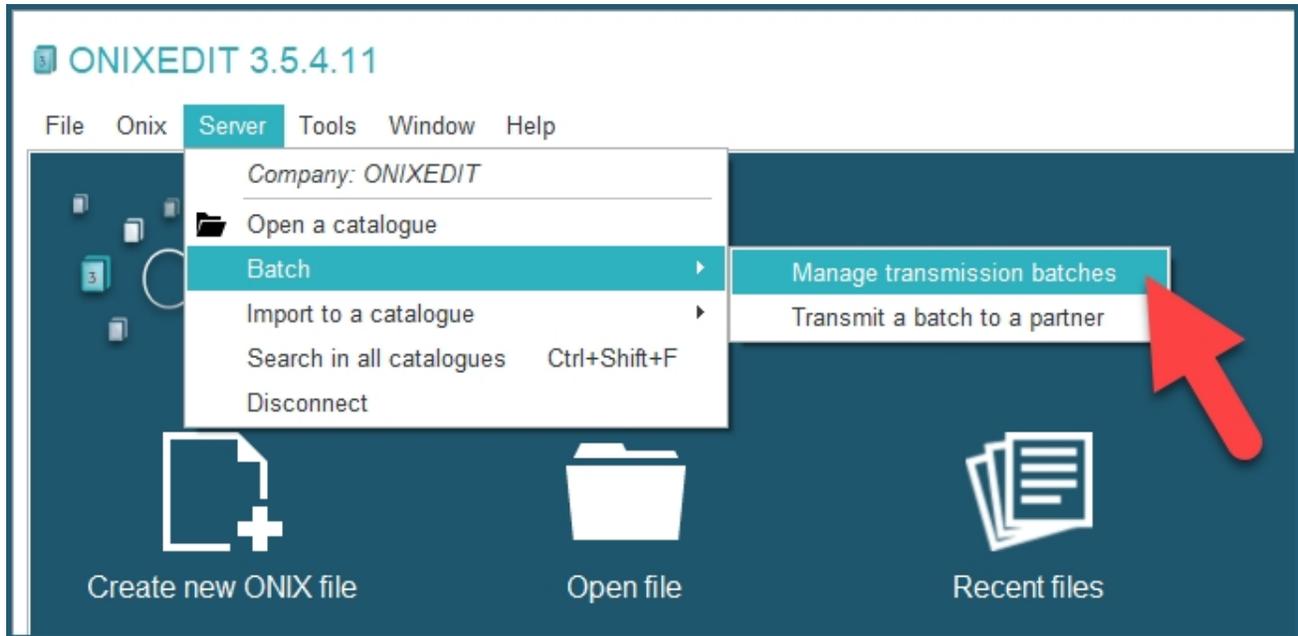
Instead of creating a new local ONIX file, ONIXEDIT will import the flat file directly to your ONIXEDIT Server catalogue and will apply the [Import Rules](#) defined for that catalogue.

Consult [ONIXEDIT User manual](#) for more details on importing from flat files or Excel.

## Batches and Automated Ingestion Agent log

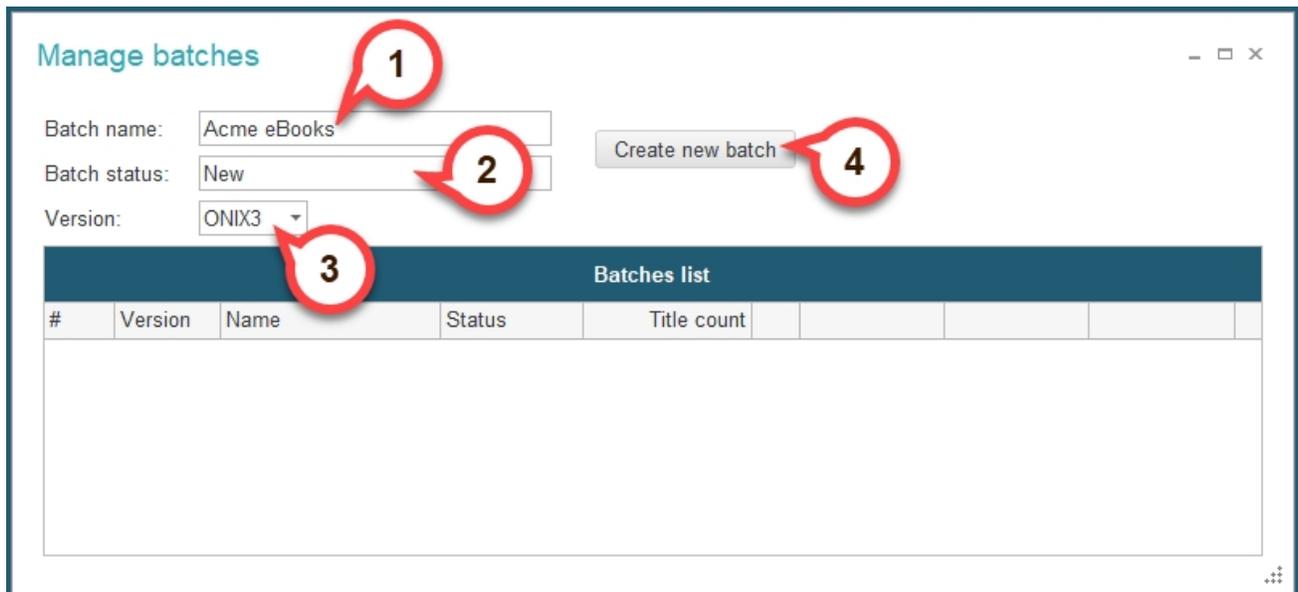
Using ONIXEDIT connected to ONIXEDIT Server, you can define "batches". A batch identifies a group of titles that belong to one or more ONIXEDIT Server Catalogues. You can then use batches to easily find that group of titles and send them to your trading partners.

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:

**Manage batches** - □ ×

Batch name:

Batch status:

Version:

Batches list									
#	Version	Name	Status	Title count					
222	ONIX3	Acme eBooks	New	0		Show titles	Show logs	Export titles	

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

**Manage batches** - □ ×

Batch name:

Batch status:

Version:

#	Version	Name	Status
222	ONIX3	Acme eBooks	New

**Double-click the batch to edit**

**Edit batch # 222** ×

Number of titles:

Batch name:

Status:

Version:

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**:

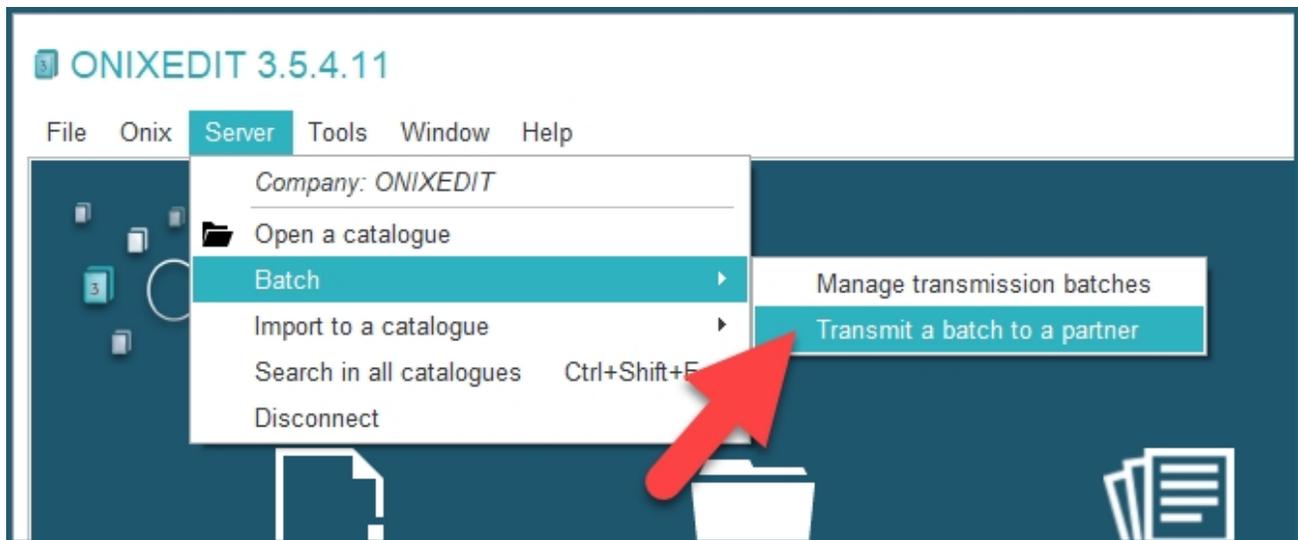
Catalogue 'My New Catalogue' (ONIX 3.0)

Ref	Title	ISBN	ISBN 13/...	Product form	Author	Subject	Availability	ONIX
1497	An Introdu...		97803001	Digital (deliver	Raymond	PEL 00000	Available	✓
1515	Art A Brie...		9780135					✓
1534	Barron's ...		9781438					✓
1535	Basic Con...		9781118					✓
2360	Because ...		9780375					✓
1536	Beowulf (...)		9780393					✓
1028	Biology		9781628					✓
2358	Brown Girl...		9780147					✓
1068	Business ...		9781316					✓
1085	Calculus		9781133					✓
2070	Calculus f...		9781337					✓
1093	Calculus I...		9781133					✓
1152	Calculus:		9780618					✓
1140	Campbell ...		9780134					✓
1040	Campbell ...		9780135					✓
1594	Campbell ...		9780134					✓
1160	Campbell ...		9780134					✓
1165	Chemistry		9780321					✗
2209	Chemistry...		9781606					✓

Record 19 of 50

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**:

**Manage batches**

Batch name:

Batch status:

Version:

**Batches list**

#	Version	Name	Status	Title count			
222	ONIX3	Acme eBooks	New	0		Show titles	Show logs

A red arrow points to the "Show titles" button.

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

**Batch # 222 - Acme eBooks**

Items per page:  1 to 7 of 7

Ref	Title	ISBN10	ISBN13/EAN
COM.ONIXSUITE.9782...	"Basiléia"	2251328866	9782251328867
COM.ONIXSUITE.9782...	"Laissez fai	2251390286	9782251390284
COM.ONIXSUITE.9782...	"Ouvrez-mo ent...	2251334440	9782251334448
COM.ONIXSUITE.9782...	1914-1919. Ce qui pr...	2251444394	9782251444390
COM.ONIXSUITE.9782...	1929 jours	2251446079	9782251446073
COM.ONIXSUITE.9782...	428	225138099X	9782251380995
COM.ONIXSUITE.9782...	72 heures à Angkor	2251441638	9782251441634

Record 6 of 7

Annotations: A red circle with '1' points to the row for '1929 jours'. A red circle with '2' points to the 'Remove selected titles from batch' button.

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.

 The screenshot shows the ONIXEDIT Cloud web interface. At the top, there is a navigation bar with the ONIXEDIT Cloud logo, the current catalogue name "ONIXEDIT3 (ONIX 3.0)", and various utility icons. Below the navigation bar, there is a search and filter section with a "Fulltext search in products" dropdown, an "Advanced Search" button, and buttons for "Add new title", "Refresh", and "A-Z" sorting. The main content area is a table listing products. Each row includes a checkbox, a book cover image, a reference number, title, ISBN/EAN, product form, author, subject, and action buttons (Edit, Duplicate, Delete). A validation score of 94% is displayed at the bottom left, and page navigation controls are at the bottom right.
 

View	Default	Fulltext search in products	Actions	Advanced Search	+ Add new title	Refresh	A-Z		
Ref	Title ↑	ISBN13/EAN	Product Form	Authors	Subjects	CUSTOM	ONIX		
<input type="checkbox"/>		668892	10 True Tales: Battle Heroes	9780545818100	Livre broché / livre de poche broché	Allan Zullo	JUVENILE NONFICTION / Biography & Autobiography / ...	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input type="checkbox"/>		668893	10 True Tales: FBI Heroes	9780545818124	Livre broché / livre de poche broché	Allan Zullo	JNF007000	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input type="checkbox"/>		668894	10 True Tales: Surviving Sharks	9780545818384	Livre broché / livre de poche broché	Allan Zullo	JNF007000	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input type="checkbox"/>		668895	10 True Tales: War Heroes From Iraq	9780545818407	Livre broché / livre de poche broché	Allan Zullo	JNF007000	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<a href="#">Edit</a> <a href="#">Duplicate</a> <a href="#">Delete</a>

Validation score: 94% (Click here for options)

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Powered by ONIXEDIT

## Automated Ingestion Agent

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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

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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

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13. ONIXEDIT also uses the French translation of the ONIX code lists produced by the Cercle de la Librairie whose website is here: <https://cercledelelibrairie.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](https://dilve.es/dilve/dilveweb/index_dilve.jsp)

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