

PExOD User's Guide

version 1.3 (corresponding to PExOD v2.20)
June 30, 2004

Table of Contents

PExOD: Introduction and Background	2
About this document	2
About ONIX	3
Getting started with PExOD	3
The PExOD interface	4
The “Other Data” menu	5
The Title List	6
Saving and Updating	6
Confirmations and error messages	6
Entering a New Title	8
Main Info	9
Contributor Details	10
Subject	12
Dimensions and Extents	12
Publisher	13
Publication Details	14
Media File Details	14
Extended Description	15
Promotional Info	15
Related Products	15
Blurb Details	15
Prize Details	16
Supplier & Price Details	16
Audience Range Details	17
Importing Legacy Data	18
Creating an importable file	18
ONIX Code Values	18
Configuring a Data Import Profile	19
Setting up the fields and columns to import	20
A note about blurbs and descriptive text	20
Using the Upload tool for updating data	21
Some Helpful Tips for Uploading	22
Exporting to Supply Chain Partners	23
Setting up an Export	23
For More Information	25
about PExOD	25
about the Supply Chain Initiative	25
about ONIX.....	25
about the CCSP	25
Index	26

PExOD: Introduction and Background

PExOD is a web-based database application for managing bibliographic data. It was developed at the Canadian Centre for Studies in Publishing at SFU to serve two key purposes:

- to allow Canadian publishers to leverage their own bibliographic data, for instance, in order to produce a database-driven website
- to allow publishers to easily exchange bibliographic data with distributors, suppliers, and retailers.

PExOD was designed around the ONIX standard for bibliographic data, which means that PExOD features a very large set of data elements and structures—a larger set than individual publishers are likely to come up with on their own. This also means that PExOD has more features than you are likely to use at once. But getting familiar with the basic ONIX way of doing things will help you standardize your practices with others across the country.

About this document

This documentation is intended for publishers who want to use PExOD to manage and exchange their bibliographic information. It assumes a basic familiarity with using a computer and web browser; it does, however, assume knowledge about bibliographic data: what the critical information is, who should receive it, and when.

This document assumes that you have PExOD installed and running, either on your own server or on an external host site. This document does not cover installation of PExOD, nor administration of the software itself; nor does this document cover PExOD's ability to produce a public website. Both these areas—installation and customization—require technical skills outside the present scope. This document focuses solely on managing bibliographic data.

This document does not assume any special knowledge about ONIX; nor is it a guide to ONIX per se. Since PExOD has been designed with ONIX in mind, you will gain familiarity with this data standard as you use it, but you should consult other sources—some good ones are suggested in the final section of this document—if you have specific questions about ONIX.

This document is arranged in five main sections. The first, this introduction, is intended as a general orientation to what ONIX and PExOD are and do.

The second section, *Entering a New Title*, walks you through entering and editing bibliographic data about a title.

The third section, *Importing Legacy Data*, shows how to use PExOD's upload tool to batch-import backlist data, and also to update existing records.

The fourth section, *Exporting to Supply Chain Partners*, covers the use of PExOD to export formatted bibliographic data for distributors, retailers, and other data aggregators.

The final section, *For More Information*, suggests a number of sources you can consult if you have additional questions.

Where possible, the information in this guide is presented in two complementary modes. The first of these, labelled *The Concept*, gives you a top-down conceptual overview of how PExOD treats a particular kind of information. The second, labelled *In Practice*, takes a tutorial form, walking you through the specific steps to managing a particular piece of information.

If you don't find what you're looking for in this guide, please have a look at the final section for suggestions on where to go next.

About ONIX

ONIX is an emerging international standard for the exchange of bibliographic data in the book trade. It is developed and maintained by a consortium with members from the UK, USA, Canada, Germany, and France. ONIX itself is a data format expressed in XML; its purpose is to enable a variety of different organizations to exchange bibliographic data across disparate systems, platforms, and databases. ONIX does not specify how a bibliographic database should operate; it only specifies how bibliographic data should be talked about. ONIX, therefore, is not in and of itself a practical solution for bibliographic data management. You need a set of tools that make ONIX operational. Hence PExOD.

A tool like PExOD takes care of most of the details of ONIX for you; you'll learn about ONIX as you use PExOD, but you don't need to concern yourself with the nuts and bolts of the interchange format. For specific information about ONIX details, you should consult BookNet Canada's *ONIX Guidebook to the Canadian Bibliographic Standard*. (available at http://www.booknetcanada.com/booknet/biblio_onix.shtml). Information about the (quite lengthy) data specification itself and the standardized code values, see the main ONIX website at <http://www.editeur.org/onix.html>

Getting started with PExOD

There are two basic ways to get your title information into PExOD:

- entering information manually, title by title
- batch upload via a tab-separated spreadsheet file

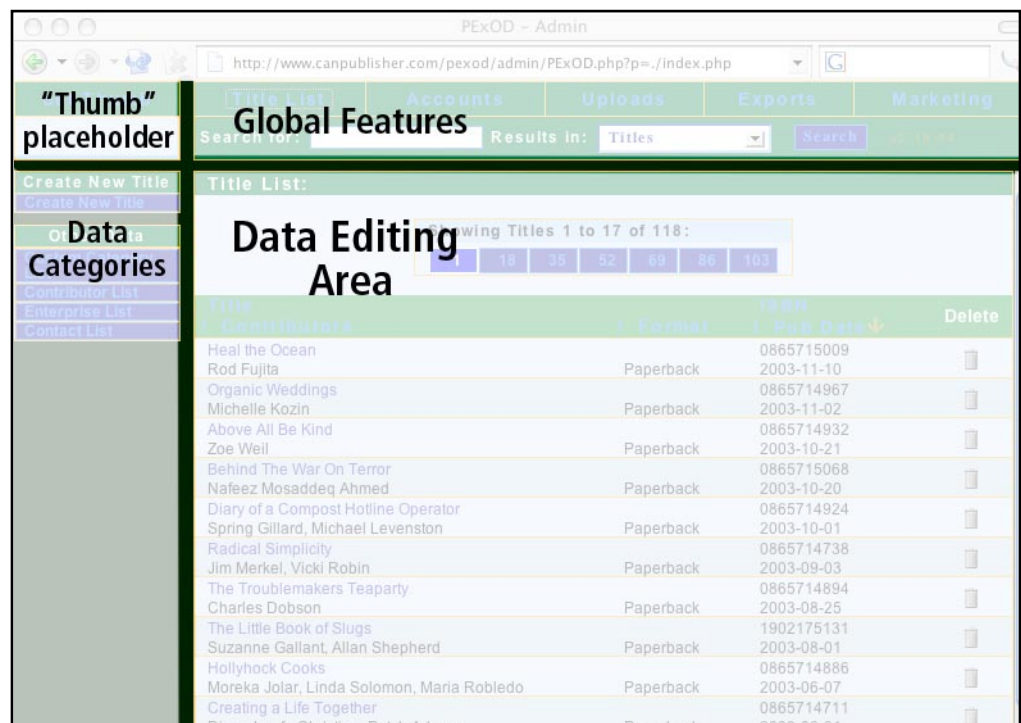
If you're starting anew with PExOD, you'll probably use some combination of these two. We will cover each of these in detail below; but in order to get started, you should make some decisions about how best to proceed.

If you currently have bibliographic data in some structured format (for instance, in an Excel spreadsheet or an Access or FileMaker Pro database), you can probably batch-import that data directly into PExOD. Chances are, however, you probably don't have much "rich data" (blurbs, marketing copy, cover images, etc.) in your spreadsheet—you might need to go back to your catalogues to retrieve this information—so this will likely be added manually. As well, you should consider the manual process as an editorial one, in which you ensure that the information for each title is as complete and accurate as possible. This may be a laborious step, but it need only be done once. Once established, you will have a single, authoritative source of bibliographic data, accessible in a variety of ways by internal staff, supply chain partners, and even the reading public.

The PExOD interface

PExOD is accessed entirely through the web, so your favourite **web browser** will be the tool you use—please note that PExOD makes use of some "modern" browser features, so please make sure you're using a "modern browser." We recommend browsers like Internet Explorer 6, Apple's Safari 1.2, or one of the Mozilla-based browsers (Mozilla 1.6, Firefox, Camino, or Netscape 7). *Macintosh users please note that Internet Explorer 5 on the Macintosh no longer qualifies as a "modern" web browser—you might want to switch to Safari or Mozilla.*

The PExOD user interface has four main parts, arranged in quadrants:



PExOD's main interface: 4 quadrants

The top two quadrants are “Global” features, allowing you to move between different major categories of PExOD’s functions. The **Thumb** placeholder acts as a quick book-marking feature, to hold your place for easy return navigation later.

From the **Global Features** area you can quickly access:

1. **Title List**—this is the main listing of titles entered into PExOD so far.
2. **Accounts**—this is where you can set up additional login/ password accounts allowing different people to work within PExOD’s administrative interface.
3. **Uploads**—this is where you can configure “import” profiles for batch uploading data from spreadsheet files.
4. **Exports**—this is where you can configure “export” profiles for exchanging bibliographic data with supply chain partners.
5. **Marketing**—this contains experimental features for creating TI sheets; this area will be developed further in future versions. This topic is not covered in the current documentation.
6. **Search**—you can quickly search for keywords in the title of an entry, or author/ contributor names, or publication dates. The results of your search appear as a Title List.

The bottom two quadrants are where you will do most of your work. On the left is a dynamic navigation area for **Data Categories**—depending on what you’re viewing in the main “Data editing area,” you will see different options here. The “Data categories” area is broken into two main sections: the upper one is contextual and follows what appears in the Data editing area; the bottom section—**Other Data**—allows access to special data collections, such as contributors, contacts, supplier and publisher enterprises, and custom subject classifications.

The **Data Editing** area contains either a Title List or interactive forms for working with your data directly. This is where you work on most title information.

The “Other Data” menu

The four items in the lower portion of the leftmost quadrant allow access to a set of data that exists beyond individual titles. You can think of this as “global” data, since it is commonly used through all parts of PExOD.

In practice, it is a good idea to fill out as much of this “global” data before you start entering title information, as you’ll find that specific title information draws on these global lists in several key places.

The four data categories here are:

Custom Category List: This keeps track of your firm’s own internal classification scheme. It is usually used in assigning subject categories to titles beyond what the BISAC standard provides (many publishers and booksellers use their own scheme in addition to the BISAC scheme). If you enter your own category names here, you’ll then be able to assign them to individual titles in PExOD.

Contributor List: This keeps track of all the authors, illustrators, editors, and other people who are responsible for the titles you publish. Keeping these names and their associated data (bios, pictures, etc.) separate from the titles themselves makes good data-management sense, because the relationships between books and contributors is often more complex than a simple one-to-one relation. PExOD will draw from this list in order to specify the contributor data for any given title.

Enterprise List: Enterprises are publishers, suppliers, and retailers, generally. This list maintains a central store of information about the organizations you deal with. At the very least, your own firm needs to be listed here. More effectively, all the organizations you exchange information with—co-publishers, publishers you distribute, suppliers that sell or distribute your books, and retailers that sell your books to the public, should be listed here.

Contact List: The Contact list is closely related to the Enterprise list, but it maintains a store of personal contact information about individuals representing the Enterprises you have a relationship with—this information gets used in data export files. It also keeps track of information about who has access to your PExOD database; login account information is partially stored here; so at a bare minimum, *you* ought to be listed here.

The Title List

The Title List—which appears in the main Data Editing quadrant when you first enter PExOD’s administrative interface—summarizes quite a bit of information about your books: title, contributors (authors, illustrators), format, ISBN, and publication date. By default, the list sorts by publication date (latest first), but you can re-sort the title list simply by clicking on any of the column headings. If you have more than a few books, the Title List is broken into a number of small batches, so that you don’t have to wait for your entire list to load each time. You can step from batch to batch by clicking on the sequence buttons that appear at the top of the listing.

Saving and Updating

Each of the forms you will work with in PExOD has at least one “Save” button on it; in fact, there are usually two: one at the top of the form, and one at the bottom of the form (which is handier if you’ve had to scroll down to get to all the data on the form). When entering or editing data via any of these forms, you need to explicitly “Save” your changes by clicking on one of these buttons.

If you’re editing information that already exists in PExOD, the “Save” buttons say “Update” instead—this lets you know that you’re changing values instead of adding new data.

Confirmations and error messages

Whenever you perform any action on data in PExOD—entering it, changing it, uploading it, exporting it, the application will respond with either a confirmation message—that the operation was successful—or an error message that gives you some information about what went wrong. These messages always appear in a distinctive box at the top of the Data Editing area—immediately above the forms you’ve been working with.

Confirmation messages appear in green type on a bright yellow background; error messages appear in yellow type on an angry red background. An error message usually appears at the top of the same data editing form, so you can simply scroll down and make whatever changes are needed.



Failed to validate data - addition of new record not attempted
Product Identifier: Product Identifier value is invalid

An example error message: invalid Product Identifier (ISBN)

Entering a New Title

You create a new title record in PExOD by clicking on “Create New Title” in the Data Category area at the left. Doing so brings you to a new, blank, title information form.

The screenshot displays the PExOD Admin interface. The browser address bar shows the URL: <http://www.canpublisher.com/pexod/admin/PEXOD.php?p=../index.php>. The interface features a green navigation bar with tabs for 'Title List', 'Accounts', 'Uploads', 'Exports', and 'Marketing'. Below this is a search bar with the text 'Search for:' and a dropdown menu showing 'Results in: Titles'. A 'Search' button is located to the right of the dropdown. On the left side, there is a vertical menu with options: 'Set Thumb', 'Create New Title' (highlighted in blue), 'Other Data', 'Custom Category List', 'Contributor List', 'Enterprise List', and 'Contact List'. The main content area is titled 'Main Info:' and contains several form fields: 'Titles:' with a dropdown menu showing '(None Selected)', 'Distinctive title', and 'ISSN key title of serial'; 'Title Type:' with a dropdown menu; 'Complete Title:' with a text input field; 'Title Prefix:' and 'Title without Prefix:' with text input fields; 'Subtitle:' with a text input field; 'Product Identifier:' section with 'Identifier Type:' dropdown (showing '(None Selected)', 'ISBN-10', 'Proprietary') and 'Identifier Value:' text input; 'Language of Text:' dropdown (showing 'English'); 'Imprint:' text input; and 'Is Barcoded:' dropdown (showing 'No barcode'). There are 'SAVE' buttons in the top right and bottom right corners of the form area.

A new title entry form

Main Info

The “Main Info” form which appears when you click “Create New Title” allows you to set up the most basic information about a title. The minimum information required here is Title and Product Identifier (usually ISBN).

The pull-down menu for “Title Type” is set by default to “**Distinctive Title**,” which is the simplest choice: you can simply type the entire title text of the work into the field labelled “**Complete Title**.” If the title text begins with “A” or “The,” you should break the title text into its **Title Prefix** (that is, “A” or “The”) and **Title Without Prefix** (the rest of the title). Doing so allows the title list to sort properly, and many data aggregators prefer this format.

As you can see, there are a host of other options for setting the title of a work; this range of options is defined by the ONIX specification. For most books, however, you can simply enter the “Complete Title”. You can enter multiple titles, or multiple versions of the same title, if you like. Click “Add Title Text” to enter your data each time.

Under “**Product Identifier**,” the default type is set to “ISBN-10,” as this will likely be the most common way of specifying a unique identifier; ISBN-10 refers to the standard 10-digit ISBN. Note that PExOD will only accept valid ISBNs; if you enter a number which is not valid, or which has already been used in PExOD’s database, the application will show an error. PExOD will accept ISBNs entered with hyphens or without. Click “Add Product Identifier” to enter the data each time.

You can also set the “language of text,” “imprint,” and set a flag for whether or not the title has an associated barcode. None of these fields is required.

You can now click on the “Save” button, either at the top or the bottom of the screen. Doing so will cause PExOD to create a new entry in the database (your title now appears as part of the Title List. You should see a confirmation message at the top of the Data Editing area:



New title confirmation

Once the Main Info has been saved, you should now see that the Data Categories are at the left contains links to 13 sub-categories—these cover the ONIX data you can set for a given title.

Title Description
Create New Title
Main info
Contributor Details
Subject
Dimensions & Extents
Publisher
Publication Details
Media File Details
Extended Description
Promotional Info
Related Products
Blurb Details
Prize Details
Supplier & Price Details
Audience Range Details

Data Categories for any title

Each of these data categories, when clicked on, reveals a different form for entering various pieces of information about a title. The categories themselves, and the details on each form, are drawn from the ONIX specification.

Contributor Details

The Concept: ONIX treats authors, illustrators, editors, and other people responsible for books as different kinds of **Contributor**. The Contributor Details section allows you to create links between contributors—authors, illustrators, editors, and so on—and particular titles. The important thing to remember is that an author’s name is not recorded directly as part of the information for a title; this is because that same author may be responsible for multiple titles. So contributor information is *kept separate* from title information, and then related or linked to the appropriate titles. A good practice is to enter as many contributor names in the master Contributor List before adding titles—afterward, it will be a simpler job to link in the existing contributors.

In Practice: First, the author’s (or other contributor’s) name must be known to PExOD, through the **Contributor List** found in the “Other Data” of the Data Categories area.



Master Contributor List (with Thumb placeholder set).

This is a good opportunity to use the **Set Thumb** placeholder feature. While you're looking at the Contributor Detail screen for a particular title, click on "Set Thumb"—this sets up a quick bookmark link to that location. Then, click on "Contributor List" in the "Other Data" menu at the left. You will see a list of all contributors that have been entered into PExOD so far. If the contributor isn't already in the list, you can enter it now, by clicking on "New Contributor" at the left. At a minimum, you should enter the surname and first name of the person, and click on "Save." The new contributor will now be part of the list.

Once you're confident that the contributor name is in the list, you can click on the bookmark link you set in the "Thumb" area, and you will return directly to the "Contributor Detail" for the title you were entering.

You can now click on "New Contributor Link", which shows you a new screen with a picklist of all the contributors. There are three pieces of information required at this point. First is the "Role" of the contributor in the context of this title. The most common one is the first one in the list: "By (author)." Next, select the contributor from the master list. Last, you need to specify an order number. If there is only one contribu-

tor, then it will simply be “1,” but otherwise, please give each contributor a sequence number—this tells PExOD in which order to display the contributors; there is no default order (alphabetic would be the only automatic possibility, and that’s generally not what we want!). Once you have those three pieces of information set, click the “Save” button. You should see a confirmation message.

You can create as many New Contributor Links as you require for a given title, as long as you assign each one a Role and a sequence number.

Subject

The Concept: PExOD provides you with two separate systems for categorizing titles according to subject. The first is the standard, coded **BISAC subject categories**. The second is a “custom” set of categories which you can define yourself—e.g., “social activism” or perhaps the categories you use to organize your catalogues—you can use those in PExOD alongside the more standard BISAC classifications.

As with the master contributor list, there is a master **Custom Category List** which you can access in “Other Data” menu. And, as with contributors, it is probably a good idea to enter as many of these as you can before you start adding title information.

In Practice: In the Data Categories at left, there is a heading for Subject. Clicking on this reveals a form for setting Subject classifications. The first thing you’ll see here is a 5-part form that allows you to quickly find and set a BISAC subject for a title. First pick the general classification in “Category select 1”, and then choose from “Category select 2” from the choices that appear there based on your first selection. Continue down to the third or fourth field, depending on the specific categorization; once you’ve selected a valid BISAC subject, it will appear in the uppermost field (sometimes this requires two selections, sometimes as many as four). Click on “Update” to enter this subject.

You can add additional BISAC classifications by clicking on “New BISAC Subject” at the left, and going through the same process. Note that for additional BISAC subjects, you will need to specify a sequence number (the second one you add would be 2, and so forth).

Adding your custom category classifications is even simpler; click on “New Cust. Subject” at the left, and pick the subject from the list there (you can access and modify this list by going to “Custom Category List” in the “Other Data” menu at the left). You will need to add a sequence number here, in case you make multiple classifications.

Dimensions and Extents

The Concept: Dimensions and extents refers to the physical description of a title, along the lines of “trade paperback, 273 pages, 6x9” ONIX specifies a particular way of describing this. There are three main pieces of information here: number of pages (which is as simple as it can be); **Product Form** codes and details, which specify the title’s format type; and **dimensions**, which is where you can specify the exact height, width, and weight of a title.

In Practice: The simplest thing to enter here is the number of pages; type this number into the first field.

Specifying the format is a two part process; first, pick the general type from the first list, “Product Form Code”—this will often be simply “hardback” or “paperback.”

The second part adds specificity: here you can distinguish between “mass market (rack) paperback” and “trade paperback (US),” among other choices. For hardback books, you will probably frequently choose “With printed dust jacket.” Note that you have up to four Product Form Detail lists to work with, so you might choose “Trade paperback (US) in the first, and “With flaps” in another in order to specify a book with French flaps. Click “Save” to save this information.

Next, you can specify dimensions (height, width, weight). Start by clicking on “New dimension” at the left, then fill in the three fields (e.g. “Height,” “9,” “inches”). Click “Save” to save this, then click on “New dimension” at the left again to add the values for width or weight. Keep saving, each time you add a new dimension.

The screenshot shows the PEXOD Admin interface for the title "Travels with Farley" (ISBN 0882669397). The "Dimensions & Extents" section is active, showing the following fields:

- Number of Pages: 295
- Product Form Code: Paperback
- Product Form Detail #1: Trade paperback (US)
- Product Form Detail #2: (None Selected)
- Product Form Detail #3: (None Selected)
- Product Form Detail #4: (None Selected)
- Product Form Description: (empty text area)

Below the form is a table for "Dimension Details":

Dimension Name	Dimension	Units	Delete
Height	9	in	
Width	5	in	

The interface also includes a sidebar with navigation options like "Set Thumb", "Title Description", "New Dimension", and "Other Data".

Dimensions and Extents form filled out

Publisher

The Concept: One enterprise is specified as the main Publisher. As with contributors and custom categories, there is a master **Enterprise List** which you can access at the left

(this list includes both publishers and suppliers). Once a publisher has been entered, you can simply select it from the pick-list subsequently.

Additional publishers can be added to a given title, in the role of **co-publisher**, sponsor, original publisher, and so on.

In Practice: The “Publisher” Data Category shows any publisher enterprises associated with this title. Click on “New Publisher” at the left, and select an existing enterprise from the list. If the publisher is not already in the list, you’ll need to go to the master Enterprise List and add it there—use the “Thumb” placeholder to make it easy to come back to the Publisher category for this title. Once the Publisher has been selected from the picklist, you’ll need to select the Publisher Role from the list, and add information for Country of Publication and City / Town of Publication. The first publisher you set should always be the main publisher for the title, but if you have a co-publication arrangement, you can add additional publishers here, so long as you set the Role and give each one a Sequence number

Tip: If you find yourself entering the same Publisher information for each and every one of your titles, you can batch-set the same information for a number of titles by using the Upload tool—see *Using the Upload tool for updating data* below for details.

Publication Details

Here are a number of specific details about the status of a title. The two essential ones are:

Publishing Status—“active” for titles that are orderable; a variety of other options for books that aren’t currently orderable. Note that “orderable” here is not the same thing as “available” or “in print”; these designations are specific to a particular supplier (see *Supplier and Price Details* below).

Publication Date—the official date of release for a title. This date is used when sorting the Title List, and is a key piece of information for supply-chain exports.

Media File Details

The Concept: ONIX—and PExOD—allows the inclusion of images and other “rich data” elements in title data. This section allows you to manage the linkages between title information and various files: front cover images, audio clips, even the whole product (in the case of an e-book, for instance). Perhaps the most common use of media files is to allow the cover image to appear on a website (your own or at a retailer’s site).

There are a number of ways of linking to media files. The simplest is to let PExOD store the file itself, though obviously this may present filespace issues if there are many large files. Another option is to simply link to media files stored somewhere on the WWW, by specifying their URL.

In Practice: To add a cover image, first click “New Media File” at the left. Enter the filename in the “Name” field—make sure the filename has a descriptive “extension” (.gif; .tiff; .jpg, etc.). Next, from the picklist, choose “Front cover image.” Then pick the file format from the list of types; please make sure this corresponds to the filename extension you entered in the first field.

Then, choose the “Link options.” As mentioned above, the simplest options are either “URL”—which links to a file existing on your webserver; or “filename,” which means PExOD will store the file internally. The net result is the same; if the file already exists on the web, it is more efficient to merely link to it; otherwise, you can add it to PExOD directly.

If you chose “filename,” then you need to “Browse” to the “Local file to upload”—this lets PExOD import the media file directly.

If you chose “URL,” make sure that the complete URL is entered in the “Name” field at the top of the form.

There are a number of free-text fields which follow, in which you can enter caption text, attributions, or rights notices. Make sure you click “Save” to enter your changes.

Extended Description

Here are opportunities to describe the **Series, Set,** and/or **Edition** of a title. There is also a field here for **Illustrations** notes (e.g. “18 colour plates”).

Promotional Info

Here are a number of descriptive fields for specifying information about the sales of a title, including **Initial Print Run**, **Number of Copies Sold**, **Book Club Adoption**, and notes on **Marketing Campaigns**.

Here you can also toggle how a title appears on PExOD’s **public web side**. You can choose to hide a title from the public side, or flag it as a new (frontlist, for instance) title.

Related Products

These fields allow you to relate a particular title to a previously published title that it supersedes.

Blurb Details

The Concept: Along with media files, ONIX and PExOD allow you to attach a wide variety of textual information to a title, from short descriptions to review quotes to the entire text of a book, if you desire.

As with media files, you can choose to either store the information internally, or link to it externally on the web. With textual content, which is comparatively small, it generally makes more sense to store the content within PExOD.

In Practice: To add a text blurb which will appear on PExOD’s public web interface, click first on “New Blurb.” Specify a sequence number (you may have multiple blurbs), and then choose “public” from the list (choosing “private” will keep this content off the web).

The main category for general **website text** is “Description for Readers,” but you can choose from a large number of types here: descriptions, reviews, headlines, excerpts, and so on. The blurb types here can be used for many purposes, not just websites; PExOD can be used as an internal content management system by storing items such as catalogue copy (“Description for Salespeople”), back cover and flap copy, reviews, and so on.

If the text that you're including has formatting (e.g., HTML), you need to specify that under "Other text format." Otherwise, if it is simply plain text, choose "ASCII text" as the format. "Text Link Type" should be "stored" unless you specifically want to link to an outside source. Please note: if you're pasting text in from a word processor or DTP program, you may run into trouble with typographer's quotes, em-dashes, and accented characters, since these are not part of the "ASCII" alphabet; you'll need to convert these either to plain-text equivalents (dashes, straight quotes), or use HTML entities (e.g., *´*;) as you would on your website.

You can add as many blurbs—of any type—as you want. Just click "New blurb" and fill out the form each time.

Prize Details

Here you can enter a general text description of awards this title has won, or you can click on "New Award" to enter specific information about an award.

Supplier & Price Details

The Concept: ONIX specifies that the **Price** of a title is information that is attached to a **Supplier**. A Supplier is an enterprise who makes a title available *in a particular market*. As such, price is not attached to the title itself, but is a sub-component of Supply detail.

There can be any number of Suppliers for a given title, so long as their geographical coverage (e.g., within Canada, within US, etc.) is specified. The Supplier may or may not be the same as the Publisher; ONIX treats the Supplier and the Publisher distinctly, even though they may happen to be the same enterprise.

A Supplier, once entered, is part of the master **Enterprise List**, and has an associated contact in the master **Contact List**, just like with Publishers. But the relationship between a particular Supplier and a given title is more complex: this is where the title's availability, geographical coverage, ship and sale dates, and pricing information are set. In general, you need to set up a Supplier Detail (that is, linking a title to a Supplier) first in order to set a price and other details for a title.

In Practice: As with contributors, you'll need to make sure that whatever suppliers we use are entered in the master Enterprise List.

If you're currently looking at title information, now would be a good time to click on "Set thumb" in the upper left corner, and set a quick bookmark that we can easily return to.

In the "Other Data" section of the Data Categories area, click on "Enterprise List." Here you will see the list of all enterprises (Publishers and Suppliers) entered so far. If there is a Publisher here which you also want to refer to as a supplier, you can go into that entry and make sure that the checkbox for "Is a supplier" is checked.

Next, go to the title you wish to add Supplier Detail to (or click on the "Thumb" bookmark you set to return to the place you were). You're now ready to click on "New Supplier Detail" at the left.

In the form that appears, you can choose your Supplier enterprise from the list at the top. Then choose the Supplier Role from the next picklist, and set the

Availability—“available” means “in print,” all the other options mean *not* in print—*choose carefully*.

The next critical piece of information is **Supply To Countries**, which sets the geographical territory for this Supplier’s rights to sell this particular title. You can use the additional lists if needed (“countries excluded”, “supply to territories”), but the basic one is the first one, for setting up the Canadian supplier, the US supplier, and so on.

Click Save and the Supplier Detail is entered.

Setting a Price: Once the Supplier Detail has been saved, you will see a new option at the left: “New Price.” Click on this to bring up a new form, in which you can specify, at a minimum, the **price** amount, the **currency** (remember that this should correspond to the geographical coverage you set in the Supplier Detail), price Type and Status, and various details about Discounts.

Click Save and the price details are added to the Supplier Detail. If you return now to the Supplier Detail, you will see the price information summarized at the bottom of the form.

Supply to Specific Enterprise: It is possible to specify that pricing and discount details are kept private. By selecting a Specific Enterprise, you can later configure an ONIX export that sends only this particular Supplier Detail. This may be useful if you have discounts that you don’t want to make generally known. See the Exports section below for more detail. In practice, you will probably want to set up a Supplier Detail specifically for Chapters/Indigo, so that discount information can be set up specifically for that relationship and not shared with other data clients.

Supply to Web: If you mean to sell books via your website, you can set up a Supplier Detail for this by checking the “Use this **supplier detail for web**” box. This Supplier Detail will be distinct from any others you set up.

Audience Range Details

This is a simple form that allows you to optionally specify audience ranges for a title. There are two ways to do so; the easiest is to pick a general audience type from the picklist. The second, and more detailed method, is to click on “New Aud. Range” at the left, which brings you to a form which accepts very specific age or grade ranges; if you’re an educational or children’s publisher, you’re probably familiar with these already.

Importing Legacy Data

PExOD includes a general data import tool that can **upload** large amounts of structured (tab-separated) data automatically. If you can save your existing data as text (from a database or spreadsheet), then, by letting PExOD know about the structure of the data, you can import it as a batch, rather than hand-entering each title.

The tool is reasonably flexible, and covers a good amount of basic bibliographic data. It is not, however, a panacea; you will want to go through your backlist data carefully to look for errors, omissions, and to add rich data. That said, the import tool can go a long way toward getting your backlist in shape—as well as being a handy tool for batch-updating your existing PExOD data.

Creating an importable file

PExOD can import data from a simple spreadsheet. To do this, you will need to export your data from whatever system you are currently using. This file should be a plain text spreadsheet, using **tab-separated-values** (TSV, or “CSV” with tabs set as the field/column delimiter). You can easily “Save As” or “Export” to this format from programs like MS Excel and most databases. The general structure of your import file will be as follows: one row per title; one column per field.

It doesn’t matter so much what order the fields are, but it does matter that you have only one thing in each field (or “cell”). For instance, the import tool allows up to five contributors (authors) by providing five separate sets of fields. But if, in your spreadsheet, you have multiple authors in a single field, you will have to fix this manually, either by editing the exported spreadsheet, or editing the contributors in PExOD after the initial import—it is usually easier to fix it first in the spreadsheet.

ONIX Code Values

Since PExOD is based on the ONIX standard for bibliographic data, many of the values stored are in the form of ONIX codes. An example of this is “Product form”; rather than saying “paperback” or “hardcover,” ONIX uses standardized **Codelists** for these. The standard codes help avoid redundancy and ambiguity. So, your import spreadsheet needs to have certain values coded as per these ONIX lists:

- Contributor Role (author, illustrator, foreword, etc.)
- BISAC Subjects

- Audience Ranges
- Product Form Codes and Product Form Details (hardback, trade paperback, etc.)
- Measurement Units (inches, grams, etc.)
- Publisher and Supplier Role (publisher, distributor, wholesaler, etc.)
- Availability (available, out of print, etc.)
- Supply-to Countries (supplier's geographical coverage)
- Price type and discount details
- Language Codes (English, French, etc.)

In each of these cases, there is a quick reference link to the appropriate code list values next to the respective upload form field right in PExOD's upload tool. Additionally, a listing of all the ONIX Code List values is downloadable from the ONIX information site at <http://www.editeur.org/onix.html>

You will have to either have your database export values in these formats, or change your existing values to these codes in the spreadsheet itself (not difficult to do with search-and-replace).

PExOD's upload tool also allows you to set up a **Default Value**, so if you find that you have the same piece of information for every title you're importing (e.g., Publisher), you can specify this easily in the Data Import Profile itself.

Configuring a Data Import Profile

Go to the Uploads area by clicking on the "Uploads" tab at the top of your admin interface.

The Uploads section allows you to create, set up, and save one or more Upload profiles. Click on "New upload" in the navigation area at the left to create a new profile. You should see a new admin form for "Upload/Data Import Profile". The profile configuration form allows you to tell PExOD about the structure of the data file from which you will be importing.

The profile form is split into two sections: The top part of the form specifies some global settings; the bottom part tells PExOD which bit of data is in which column of your import file.

You should give your import profile a description. Something like *Acme Books Oct04 Basic Data* would be appropriate, but you can call it anything you like.

To begin with, import only a small number of rows of data. In other words, set the "First row" and "Last row" numbers to be only a couple of rows apart... 3 and 5, for instance (if your import spreadsheet has any labels in the first row, you won't want to import row 1 at all).

Once you've done this, hit the "Save" button to establish your profile. PExOD should confirm that the profile has been saved OK.

The next thing to do is to “Test the dataset for validity”. Start by clicking on the “Browse...” button, and locate your import file. Open the file, then click the “Check” button. PExOD should confirm that your file is OK. Note that this test only confirms that the file is readable; it doesn't say anything about whether the data in it make sense.

If the validity check comes back with an error, or if the test goes on and on for a long time without any response (a minute or more), you need to confirm that your import file is in fact plain text.

Setting up the fields and columns to import

There are very many fields listed in the lower part of the form. We recommend that you work iteratively through this part of your setup; that is, start with only a few, and gradually add more until your entire spreadsheet is handled properly. If you work a bit at a time, it will be easier to correct mistakes as they appear. Remember that you can keep saving your import profile as you go, by clicking on the “Update” button.

A good place to start is to set up the ISBN and title. Have a look at your import file, and note the column numbers that the ISBN and “distinctive title” data resides in. Type the appropriate column numbers into the fields for ISBN and distinctive title. Check the “On” checkbox for each of these, to tell PExOD that we want to pay attention to these values. Note that if you have some piece of information that is the same for each and every title, you can use the Default Value field instead of reading it from the spreadsheet.

“Update” your profile to save this initial setup. Then use the “Browse” button to find the import file, and hit the “Upload” button. PExOD should confirm that the upload was completed without errors. Now, if you go to the main Title List, you should see a title for each of the rows that you imported.

If you're satisfied with your initial results, you can now return to your Upload profile, specify the column number and turn “On” more of the fields, and re-upload your import file (note that you do have to Browse and specify the file each time). Try it with a few new columns each time, and check that the data is coming in correctly.

If your importing goes awry for some reason, you can always simply fix or delete the titles from PExOD's Title List and re-import them from scratch. This is why it is a good idea to work with only a small number of titles until you're confident that the profile is configured correctly.

Once you have all the columns in your import profile, you can then set the “First row” and “Last row” numbers to import a different set of rows. While it may be tempting to import the entire file at once, if you need to fix or delete titles, it's easier to do so if you've only imported a few at a time. If you're feeling totally confident, import the whole file.

A note about blurbs and descriptive text

Be careful when **importing descriptive text** and long blurbs. Multiple paragraphs (i.e. with line breaks, carriage returns, or tab characters embedded) will cause problems for the import process. The best strategy for importing descriptive fields is to leave them out of your main spreadsheet, and handle them in a second round—that is, to build a

separate spreadsheet, and a separate Import Profile, with just ISBNs and text, plus the keywords BLURBSTART and BLURBEND. Here, we're using the ISBN to associate the blurb text with the appropriate title record already in PExOD. The column format for the new spreadsheet should be as simple as the following. *NOTE: do not count the BLURBSTART and BLURBEND columns; in this example, the text would be counted as column #2.*

0735711372	BLURBSTART	Words cannot describe how great this book is. This first novel by Joseph Bloe surely establishes him as one of the great...	BLURBEND
0735723433	BLURBSTART	Readers of great zoological fiction will love this new tome by award winning writer A. A. Aardvark...	BLURBEND
etc...			

Using the Upload tool for updating data

As you might have guessed from reading the previous section, you can use the upload tool for **updating data** or making changes to title information that's already in PExOD. The concept is simple: if you prepare an import spreadsheet with ISBNs that are already in PExOD, whatever data you import will be applied to those ISBNs. There are a few applications of this:

- Adding new information to existing title records, such as blurbs or review quotes;
- Adding the same piece of information to a large number of titles. For instance, say you have acquired a new US distributor. You can enter the new information into the Enterprise list, but you would then have to add the new Supplier Detail to every title in the database. Or, you could use the import tool, with a spreadsheet consisting of nothing more than ISBNs and prices. In the Data Import Profile, you could set up the new Supply Detail with all the information that will be the same for each title: Supplier, Supply To Country, Currency, Price Status, and so on. This information doesn't even need to be in the spreadsheet, since you can enter it as Default Values on the import form.
- Changing information across the entire database. For instance, say you wanted to change your pricing information. All you'd need is a spreadsheet with ISBNs and the new Supplier Details, and you can set up the Data Import Profile to read the new data into the existing records.

Please note that when updating data in PExOD via spreadsheet uploads, there are situations in which data will be overwritten (changed) and other situations where new

data will be added to the old. An example of data which will be overwritten is Imprint, because there is only one possible Imprint field for a title; and example of data which would be added on is a blurb, because PExOD allows you to have multiple blurbs of various types.

The area where this causes the most confusion for people is Supplier Details—when is it appropriate to change an existing Supplier Detail and when is it appropriate to add a new one? To alleviate this confusion, there is an entry in the Upload Profile, immediately preceding the Supplier Details fields, which allows you to specify “Force Over-write.” Setting this to “yes” will cause PExOD to attempt to change the data for the same Supplier (or at least the one that most closely matches the information coming from the spreadsheet).

Some Helpful Tips for Uploading

Work incrementally: Don’t try to upload your entire spreadsheet right off the bat. Instead, test it with a couple of rows, and a few columns at first. If everything goes well, add additional columns. Once you’re confident that all your columns can be imported correctly, then you can increase the number of rows to include the whole dataset.

Use multiple spreadsheets/import profiles: Don’t try to do everything in a single import; it is often more manageable to break the importing process into a number of specialized steps: the first one could be for general information (e.g., title, contributor, dimensions and extents, publisher); a second import could handle Supplier Details; a third import profile could be set up to do only the blurbs. As long as the list of ISBNs is in each spreadsheet, all the imported data will find its way into the right places.

Since PExOD saves your import profiles, having a set of specialized imports may well be easier to come back to next season than a single, complicated profile.

Do data-cleanup work in Excel: Conversion to ONIX Code List values, splitting titles into Prefix and after-Prefix components, and general data cleanup can often be done efficiently in Excel immediately prior to uploading. In the spreadsheet form, you can see the data at a glance (as long as your spreadsheet isn’t too vast), sort, and perform search-and-replace operations on it easily. For batch changes, it is often easier to do data cleanup before importing to PExOD.

Your three minimum Supply Details: You’ll likely want to set up three initial Supply Details, each with your own firm listed as the Supplier. These are: 1) a “Supply-to-web” version; 2) a Chapters/Indigo version that is set to “Supply to Specific Enterprise” in order to keep discount information private when exporting; and 3) a “General Trade” version for general information going to other data clients. If these Supply Details apply to every title in your list, why not use the Upload tool to set this up for every ISBN in your list.

“Browse” every time: When working on configuring your Upload profile, it is easy to forget to “Browse” for your spreadsheet file each time you upload or test your upload profile. Remember, the static “File Name” field in the profile form is intended as a reminder, not as a permanent reference to a dataset.

Exporting to Supply Chain Partners

Much of PExOD's value is in its ability to prepare specially formatted data reports and send them to your distributors, retailers, and other data aggregators. The overall trend in the industry is to use ONIX as the format for data exchange, and more and more data clients are prepared to receive ONIX data. However, a few key organizations still expect their own proprietary formats. PExOD can export data as **ONIX Messages** in v2.1 and v1.2 formats, and also in proprietary formats for Amazon, Chapters/Indigo, and the National Library of Canada (CIP program). PExOD can also ensure that your ONIX 2.1 exports conform to BookNet Canada's **silver standard** for bibliographic data.

Setting up an Export

The Concept: There are three components of an Export: The first ("Manage") simply specifies the data format (ONIX 2.1, ONIX 1.2, Amazon, Indigo, National Library) and the transfer protocol (how the data gets sent: by FTP, by e-mail, or as a web form posting. The second ("Details") holds the detail settings: the destination address (either an e-mail address, an FTP site and login, and related items. If the Export format is ONIX, these details also include a number of items specific to the ONIX message itself: the message type, the sender, receiver, message number, and so on.

The third component is the title listing itself, with a validation process that ensures that each title record has all the required information; if a title is missing a required element, the keyword "BAD" appears next to the title in the list. Clicking on this keyword will produce a summary of the reasons why the title information is not valid for this particular export type.

You can set up as many Exports in PExOD as you need; each one has its own set of details.

In Practice: To set up a new Export, first navigate to the Exports interface by clicking "Exports" at the top of the screen. A list of any exist Exports appears in the main area. To set up a new Export, click on "New Export" at the left. A form will appear which allows you to do the initial Management of the Export. Give it a distinctive name, add some descriptive notes if you wish, then select the Update format and Update protocol.

The preferred Update format is ONIX 2.1—if you wish, you can choose the "ONIX 2.1 - XML Message - Silver Standard" choice, which performs an additional validation check on your title information; titles will be marked invalid unless they meet the

BookNet Canada “silver” data standard (for more information on the BookNet Canada standards, see http://www.booknetcanada.ca/booknet/biblio_data.shtml)

The Update protocol is usually FTP, but you should confirm this with the data client you will be sending to. Click “Save” to enter your new Export; once you’ve done so, you can click on “Details” at the left, to set up the details for your Export.

You’ll need to have the destination address and login information as provided by your data client. Enter this information in the top of the form, and click on “Save” to save it. Next, you’ll need to make some decisions about the particulars of your message.

An ONIX message can be of several Types. “Update” is the most general, but you may also configure an export to do advance notifications or confirmations, or to delete title information from your data client’s database.

Each ONIX message at minimum needs “Message from” and “Message to” information; you can pick these values from the lists provided (taken from the master Enterprise List). Click “Save” to enter these details.

If you check “Use Supplier Details specific for this recipient,” you can constrain PExOD to only export specific Supplier Details, which is useful if you have arranged discount or pricing strategies that are specific to certain firms and which you would prefer to keep private. Otherwise, the default is to include all Supplier Details in an ONIX message.

At this point, you can now send title information. In the Data Categories at the left, click on the button corresponding to the Export (the name you gave it in the first step above). PExOD now performs a validity check on your title information, according to the Export details you’ve set up. You will now see a Title List, with two additional columns: one with checkboxes for selecting titles to send, and a second that reports the validity of each title record. If there is no “BAD” keyword in the final column, you can click on the checkboxes to select titles for Export. Once you’ve made your selections, you can click on “Send Selected Titles” at the left, and the titles will be exported according to the details you set up so far.

If a title has the “BAD” keyword next to it, you can click on the keyword itself to view a summary of problems PExOD has found; these will typically be missing data. In the case of ONIX exports, you can click directly on the reported problems to navigate directly to the particular form that pertains to that information. Or, you can click on the Title itself to access all the data for that title.

You can set up as many Exports as you like: you should certainly have one for each of your data clients, but you may also set up variations if you need them (ONIX updates vs Advance notification, for example).

For More Information

about PExOD PExOD is evolving software. This documentation will evolve too. To check for new versions of both the software and this guide, as well as other information about PExOD and its role in the Canadian publishing industry, please see our website:
<http://www.cbsp.sfu.ca/APuRL/PEXOD>

about the Supply Chain Initiative BookNet Canada is the overseer of activities around Canadian Heritage's *Supply Chain Initiative*. The three strands of the Initiative—EDI, Sales Data, and Bibliographic Data—are covered in respective sections of BookNet Canada's website:
<http://www.booknetcanada.com/>

about ONIX BookNet Canada publishes an ONIX implementation guide for Canadian publishers, called the *ONIX Guidebook to the Canadian Bibliographic Standard*. It is available at:
http://www.booknetcanada.com/booknet/biblio_onix.shtml

BookNet Canada's Silver and Gold bibliographic data standards are summarized in a document available at:
http://www.booknetcanada.ca/booknet/biblio_data.shtml

For detailed information about ONIX, including the data specification itself, and the standardized "code list" values, please see the main ONIX website, hosted by Editeur:
<http://www.editeur.org/onix.html>

about the CCSP PExOD is software developed by the Canadian Centre for Studies in Publishing at Simon Fraser University, thanks for funding from the Department of Canadian Heritage. In addition to developing software like PExOD, the CCSP conducts industry research and hosts two educational programs: the Master of Publishing Program and the Summer Publishing Workshops. For more information about the CCSP and our programs, please see:
<http://www.cbsp.sfu.ca/>

Index

Accounts	5	“Other Data” menu.....	5
Audience Range	17	Price	16, 17
Availability	17	Prize Details	16
BISAC subject categories	12	Product Form	12
Blurbs	15, 20	Product Identifier	9
Book Club Adoption	15	Promotional Info	15
Codelists	18	“Public” web side	15
Complete Title	9	Publication Date	14
Confirmations and error messages	6	Publication Details	14
Contact List	6, 16	Publisher	13
Contributor s	6, 10	Publishing Status	14
Co-publisher	14	Related Products	15
Currency	17	Saving and Updating	6
Custom Category List	5, 12	Search	5
Data Categories	5	Series	15
Data Editing	5	Set	15
Default Value (uploads)	19	Silver standard (BNC)	23
Dimensions and Extents	12	Subject	12
Distinctive Title	9	Supplier & Price Details	16
Edition	15	Supplier	16
Entering a New Title	8	Supplier detail for web	17
Enterprise List	6, 13, 16	Supply Chain Initiative	25
Exports	5, 23	Supply To Countries	17
Extended Description	15	Supply to Specific Enterprise	17
Global Features	5	Supply to Web	17
Illustrations	15	Tab-separated-values	18
Imports and Import Profiles	5, 18ff	Thumb	5, 11
Initial Print Run	15	Title List	5, 6
Main Info	9	Title Prefix	9
Marketing	5	Title Without Prefix	9
Marketing Campaigns	15	Updating data	21
Media File Details	14	Uploads	5, 18ff
Number of Copies Sold	15	Web browser	4
ONIX	3, 23, 25	Website text	15
ONIX Code Lists.....	18		