

Uploading Data

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~~Update to documentation: Covering improved data upload tool.~~

Uploading Data

NOTE: This is consistent with PExOD version 2.42.31. It is probably consistent with recent versions, but is only partially consistent with much older versions.

Introduction The Upload tool allows you to import data from a tab-delimited spreadsheet into PExOD. Typically tab-delimited files have a

.txt filename extension. The tool tends to support commonly used cases and not so much low frequency or obscure cases.

In order to accomplish an upload you have to configure an Upload Profile which consists of a list of information which indicates which columns in the spreadsheet to upload and which fields in PExOD correspond to each column.

The Upload Profile requires some basic information:

- Upload Profile Name
- A range of rows to upload

Once the above are saved, you can return to the profile at a later date and do further work on it, or upload data from similarly configured spreadsheets.

The Local File to Upload is located by clicking on the

Browse button and navigating to the local file. If you then click on Test or Upload, the File Name will be automatically set. (File Name is intended to provide you with a reminder of the file that you were using with the profile -- not as an automatic way of locating the file. Due to security issues, each time you want to test or upload a file you have to Browse for it.)

Basic Configuration:

1/ There are 5 columns in the uploader:

- **Field Description:** an indication of what PExOD field the data is going to populate
- **Column:** the column from the spreadsheet where the data is coming from, you can enter an alphabetic value for a column number, but PExOD will change it to a numeric one
- **Default Value:** this provides 2 services, for fields that are not included in the spreadsheet, but have the same value for all the rows that you are uploading, or for columns in your spreadsheet that have missing data, the Default Value will be used when there is no data in the spreadsheet. Note that in the case when you are mimicking a column that doesn't actually exist, you don't need to provide a Column number
- **On:** this toggles the active state of the import rule, when the box is checked the rule is active for Checks and Uploads, and if the box is unchecked the rule is ignored. The intended use of this is to allow you modify an upload by temporarily disabling rules. This helps when you are configuring an Upload Profile and if you have a spreadsheet that has a slightly different configuration than the one the Upload Profile was configured for.
- **Order:** this provides a default order to display the Upload Profile rules. By clicking on any of these 5 headings you can reorder the list of rules. This is helpful when you want to review the rules that are active, check for default values, and so on.

2/ Some PExOD fields require a code value. The uploader provides a way to review the available code values: in the Default Value column of the uploader you can see

Code Value: This indicates such a field and the

Codes link that follows will bring up a list of available codes. The text box is where you enter a default code value, if that is appropriate.

3/ The uploader will not use blank cells in your spreadsheet to overwrite existing data held in PExOD. You cannot use the uploader to blank-out existing data. This is the case for 2 reasons:

- if you're wanting to remove data, you likely need to verify the data that you want to remove, and since you do this via the editor, the editor is the best way to do the actual removal, and
- this is safer, since you can't accidentally wipe out a slew of data, and
- it's more convenient, since if you need to only provide data for only those fields that you want to change, instead of data for all fields

How To Do It:

1/ Configure a new Upload Profile and save it (Save or Update buttons at top right and bottom right corners) Set the First and Last Row to Import to a small range of rows to start with.

2/ Open your data file with your spreadsheet editor. Be careful not to corrupt the data with Excel, which will damage ISBNs, for example. Also, be sure that your file is in tab-delimited form.

3/ For each column of data in your spreadsheet, configure a rule in the uploader. If you have ISBNs in the first column of your spreadsheet, enter 1 (or a) in the Column box for the Field

ISBN, leave Default empty, and put a check in the On checkbox.

4/ When you have most, or all, of your columns configured, you can test the upload by using a small range of rows, Browsing to your data file, and clicking

CHECK. Note that the Check function is reasonably comprehensive, but you should take all available care to make sure your data is good, using the Check as an aid, not as a guarantee.

5/ If you have problems with your data, and it's likely that you will, the errors will be listed at the top of the tool. When fixing problems, it's generally more effective to start from the top of the list and work your way down. Sometimes an error will cause a cascade of ensuing problems, so the top-down approach tends to be more efficient.

6/ While you are knocking your upload into shape, it's handy to Check the upload from time to time. The advantage of using a small range of rows is that the list of error messages is easier to make sense of. As well, it's a good idea, while you are learning how to use the uploader, to build up the profile in steps, Checking as you go.

7/ Finally, when you have all the columns configured it's worth doing a Check on all the rows before attempting to do the upload.

8/ It is also worth trying an Upload with a small number of rows before doing the full upload. This allows you to go into the editor and verify that the upload is making the changes to the data that you expect.

9/

Special note regarding multiple publishers (or multiple suppliers) in the same spreadsheet: Because the uploader doesn't allow you to set the the "Use-existing" publisher or supplier in your spreadsheet data, instead requiring that you set the value in the upload tool, the net effect (and limitation) is that any single upload of this data can only use that publisher or supplier. This is mitigated by the fact that the upload tool supports 2 simultaneous publishers and 4 simultaneous suppliers. For some users, however, this will mean that they are more comfortable breaking their supply detail uploads up by supplier.

Contributors:

1/ If the row of data contains a title and one or more contributors, then each contributor requires a Contributor Role Code.

2/ At least a Last Name, Inverted Name or Corporate Name is required for each contributor. (A Corporate Name is the name of the corporation that contributed, not the name of the corporation to which a contributor belongs.)

Publishers:

1/ If the row of data contains a title and one or more publishers, then each publisher requires a Publisher Role Code. As well, in this case, the Principal Publisher (i.e. Publisher 1) requires Country of Publication.

2/ A publisher is specified by

Use Existing. This requires that you first establish the publisher with the

New Enterprise tool (Title List/Other Data/New Enterprise) Note that you have to check

Is a Publisher Note that the Use Existing drop-down list is populated only with those enterprises that are marked Is a Publisher.

3/ If the newly uploaded publisher is the principal publisher then this will replace any existing principal publisher set for the title, otherwise, if the newly indicated publisher is already assigned to the indicated role for the given title, the existing country and city of publication data will be removed and replaced with what is being uploaded.

Blurbs:

1/ Uploading blurbs is potentially complicated. This hasn't changed since the PDF documentation was produced. I can update this documentation should there be any need for it. Suffice it to say: blurbs can be uploaded via that upload tool, even those that contain awkward elements such as tab characters -- which interfere with the tab-delimited files.

Suppliers and Prices:

1/ A Supplier, supplying a book under certain trade conditions, for certain prices, is related to that book by a

Supply Detail

2/ There are 3 flavours of Supply Detail:

- Supply to Specific Enterprise: this contains specific discount information that can only be shared between the trading partners,
- Supply to Web: this provides the supply and price information that is displayed on the public website,
- Generic Supply Detail: this can be sent to any supplier or retailer since any discount information it contains is coded.

3/ The uploader no longer provides a mechanism to update the supplier's details, instead this has to be done via the editor. If you want to change the information relating to the supplier, eg contact information for the supplier, you have to use the editor. The reason this change has been made is to reduce the fields that have to be configured to manage Supply Detail uploads.

4/ Thus, in order to manage Supply Detail data, you need to provide:

- ISBN
- Supplier Use Existing
- Supplier Role Code
- Supplier Product Availability

5/ When providing price data you need to (at least) include:

- Supplier Price Amount
- Supplier Currency Code
- Supplier Price Status Code
- Supplier Price Type Code

6/ You can upload 2 (or more) prices to the same supply detail at the same time. Note that the Supplier Role Code has to be the same for the successive instances; otherwise you will create multiple Supply Details. As well, if you are doing Supply to Web or Supply to Specific, these will cause successive instances to apply to the same Supply Detail.

7/ If you use Supplier Force Over-Write while uploading Supply to Web or Supply to Specific, any existing Supply to Web or Supply to Specific (respectively) will be replaced by the data that you are uploading. That is, within the context of the given ISBN.

8/ Otherwise, if you are uploading a generic Supply Detail and indicate Supplier Force Over-Write, provided the uploaded can locate exactly one existing Supply Detail that matches the Supply Detail that you are uploading, the existing Supply Detail (and its Prices) will be replaced. Again, the match is made if the following things match:

- Title
- Supplier Use Existing
- Supplier Role Code

9/ On the other hand, if you don't indicate Supplier Force Over-Write, the uploader will attempt to merge the data that you are uploading with any existing data. Data is merged & uploaded data replaces existing data in most cases, country-lists are extended, and uploaded fields that contain nothing are ignored. The decision to merge a Price record is based on a match of:

- Title
- Supplier
- Currency

If these match the uploaded Price data is merged with the existing Price record, otherwise, if they don't match, the uploaded data creates a new Price record.