



**Anthology, Inc.**

## Working with Databases of Books in Visual Anthology

### Overview

Visual Anthology provides access to several databases of books (DBOB) including Title Source, Companion, and BIP. Access to these DBOBs is provided via the DBOB interface and Visual Anthology's CD Import module. This module imports the file(s) exported by the database of books.

### Installation

Instructions for installation are the responsibility of the vendor providing the database software. If you do not have installation instructions you should contact the vendor and request them.

### Setup Concerns

No setup is required within the Visual Anthology software itself. However, each DBOB vendor may have a different export format. This format must match what Visual Anthology is expecting to find when it imports the file for that vendor. During the setup process you may be asked to provide specific information relating to Visual Anthology and or directory structures. Listed below is the information needed for the three DBOB supported by Visual Anthology.

- Title Source:
  - Requires a specific export format be assigned. This can be done at the time of installation or to an existing installation. The following steps are used to modify an existing installation – the items and options are the same in either case.
  - Open Title Source
  - Select the *Setup | Export Formatter* menu option.
  - Select the following options:
    - Comma Delimited
    - Number Format: 0
    - Price Format: 0.00
    - Date Format: mm/dd/yy
    - Field Delimiter: , (comma)
  - Place a checkmark in the following options:
    - Quotes around numbers
    - Quotes around prices
    - Quotes around dates
    - Upper case conversion

- Select the following fields to be exported.
  - ISBN
  - Title
  - Author
  - Binding
  - List Price
  - Pub Date
  - Pub Code
  
- Companion:
 

You will need to configure the format for the export file. This needs to be done exactly as described or Visual Anthology will not recognize the file and/or bring in unformatted data.

  - Open Companion.
  - Select the *File | Display Formats...* menu option.
  - Move to the Export Formats tab.
  - Select the following fields by dragging them from the bottom list to the top part of the window.
    - ISBN
    - Title
    - Contributor
    - BISAC Binding Type
    - Ingram List Price
    - Publication Date
    - BISAC Subject
    - Publisher Code
  - Click Save
  - You will be prompted to give a format name. Enter Anthology.
  
- Books In Print:
  - Select the *File | Admin Setup* menu option. The option box named “Export Record Display” should be unchecked. This allows you to choose the export format for your export files.

## Using the DBOB

Manuals for using the DBOB are the responsibility of the vendor who supplied it. However, there are some special formatting options that should be followed during the export process to ensure that Visual Anthology will be able to read the file. Listed below is the information needed to correctly format an export file for use with Visual Anthology. For some DBOB the changes made to the setup file will become the default for all future exports. You should note this if you are using your DBOB with other products.

- Title Source:
 

**Note:** During the setup process Visual Anthology will require a specific format for the export file. Refer to the setup section above for Title Source.

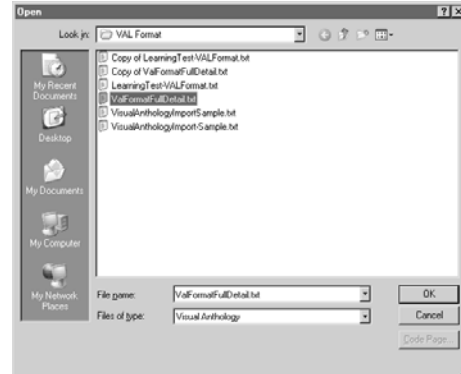
  - Open Title Source
  - Select desired books for export.
  - Create a marked list. See Title Source documentation for details.
  - Export the marked list. See Title Source documentation for details.

- The Export Files Dialog should have the correct settings already checked in the Formatter screen. That is – if you have setup the software correctly. Refer to the setup section above for Title Source.
  - Export type should be comma delimited.
  - Titles to export defaults to Selected titles in the marked list. You should select all titles if you want to export the entire marked list.
- Select Export.
- You are asked to provide a file name and location. Visual Anthology is able to import from anywhere on the system. However you will need to know where the file is located to begin importing it. **Important:** The export file must have the extension CSV or Visual Anthology will not recognize it as a B&T file and the import process will stop. The default setting is (\*.csv).
- Companion:
  - Open Companion
  - Select the *File | New Search* menu option.
  - Select the desired books.
  - Select the *File | Export* menu option.
  - In the format pull down box select Anthology. This is the format you just created in the setup section above.
  - In the type pull down box select CSV(comma delimited).
  - Click the export button.
  - In the Save As dialog screen choose the directory where the export file will be saved. Visual Anthology is able to import from anywhere on the system. However you will need to know where the file is located to begin importing it. **Important:** The file must have the extension txt or Visual Anthology will not recognize it as a Companion file and the import process will stop. The default setting is (\*.txt).
- Books In Print:
  - Open BIP
  - Select desired books for export.
  - Select *File | Save* from the BIP menu.
  - Move to the Record tab. If this tab is not visible refer to the setup section above for BIP.
  - Set the “Save As” field on this screen to Baker & Taylor if not already defaulted to this value. This is the format of the export file and Visual Anthology accepts the B&T format.
  - In the Save As dialog screen choose the directory where the export file will be saved. Visual Anthology is able to import from anywhere on the system. However you will need to know where the file is located to begin importing it. **Important:** The file must have the extension txt or Visual Anthology will not recognize it as a BIP file and the import process will stop. The default setting is (\*.txt).

Once you have created the export file in your DBOB software you are ready to import the books using Visual Anthology’s Import module. This is located on the ***Tools | Import External*** menu of the Visual Anthology screen.

## Importing into Anthology

Once you have created the format and saved the file you can begin the process of importing into Visual Anthology.



- Go to TOOLS | IMPORT EXTERNAL
- On the new screen press “F6 Get” to begin browsing for your file.
- You must select the appropriate “Files Of Type” of “VisualAnthology” for the import utility to locate your file.
- Next you must browse to find the file you created.
- When you select OK on the file you will be back on the CD Import screen, and seeing the titles you have selected to import.

## IMPORTANT! Dealing with Reference values

When you import the file the program does not pre-fill in your Department, Section, Media or Publisher directly. Instead the grid will show those values in a special set of “Reference” fields. This is so you can accurately select those exact pre-existing values from the drop down lists. Note that you must already have those values existing before the import, the import cannot create them for you.

<u>Import File Field Name</u>	<u>Import Screen Column Name</u>
Type-DeptCode	RefDepartment
Binding-MediaCode	RefBinding
Subject-SectionCode	RefSubject
Publishercode	RefPub

To speed up the selection of the actual values for the records being imported, you can sort the grid by a particular column and then mass highlight all the items with the same RefSubject and mass reassign (shift+click on first and last record in the bunch). Then go to the Actions menu and choose Reassign. For example, say your items had “Grade 1-3” and “Grade 3-5” in the import file under Subject-SectionCode itself but in reality you just store those items in the Section called “Childrens”. Just click once on the column header for RefSubject which will sort/group all similar records together. You can than mass highlight, go to Actions, choose Reassign and change the Section on all of those items at the same time.

## **Putting items on an order**

If you wish to add these records to an existing order or memo use the field marked “Add Listed Records To:” to choose purchase order, receiving memo, customer order, etc. As you post the records you will be asked to select the memo/order from a list. You may need to create the PO or Receiving Memo just before starting the import.

## **Completing the Import**

When you have made all the needed modifications press “F12 Post” to begin adding the items to your inventory.

If you have chosen to add listed records to a PO or Receiving Memo you will be asked to “Select” the item from a list. Select the item, you will be then asked to add the items or cancel, choose OK. The importing process will begin. If you are adding a large amount of records please wait for the processing to complete before continuing on.