

# Metadata Submission Guide



**Version 1**  
Last updated April 2015

# Table of Contents

<b>Table of Contents</b> .....	<b>1</b>
<b>Introduction</b> .....	<b>2</b>
<b>Saving the Metadata Template</b> .....	<b>2</b>
<b>Entering Data</b> .....	<b>2</b>
<b>Basic Publisher Information</b> .....	<b>3</b>
<b>Contributors</b> .....	<b>4</b>
<b>Pricing</b> .....	<b>5</b>
<b>Sales Rights</b> .....	<b>6</b>
<b>Publication Dates</b> .....	<b>7</b>
<b>Title Details</b> .....	<b>7</b>
<b>BISAC Codes</b> .....	<b>8</b>
<b>Product Descriptions</b> .....	<b>8</b>
<b>Related Products</b> .....	<b>9</b>
<b>Distribution Partners</b> .....	<b>9</b>
<b>Associated Content File Naming Conventions</b> .....	<b>10</b>
<b>Questions?</b> .....	<b>10</b>

## Introduction

This Metadata Template is designed for clients who do not have an ONIX solution for their products. The template can be used for eBooks, print books, and audio books.

This guide not only provides instruction as to how to populate particular metadata elements but also points to those as being required in order to provide an optimal user experience and consumption of your content in **VitalSource** Bookshelf. Submitting metadata as specified within this guide ensures that our mutual customers have a complete metadata record, regardless of where the content is purchased. At present, content can be made available through both B2B and B2C channels. Complete metadata can also help drive adoptions of your content as it is made available in the **VitalSource** Educators Portal for evaluation purposes by faculty. Certain metadata elements also ensure certain tools in Bookshelf function as expected such as the citation tool for credit attribution. The **VitalSource** content operations team can provide additional information as needed.

The purpose of this document is to provide help with the following tasks:

- Saving the Metadata Template
- Filling out the Metadata Template
- Loading the Metadata Submission

Important Note: The template is subject to change due to continuing development and improvements.

## Saving the Metadata Template

To save the metadata template file:

1. Enter a new file name. This should be the publisher name and the current date, and should take the following format: PublisherName\_YYYYMMDD. Additionally, time (HHMM/HHMMSS) can be used to differentiate between submissions made on the same day. If multiple metadata files are present in a single job, the oldest will be processed first.
  - a. Examples:  
JoePublishing\_20150304.xls (March 4, 2015)  
JoePublishing\_201503041641.xls (March 4, 2015, 4:41 PM)
2. Click Save.

The file is saved and ready for data entry. **Note:** Do not alter field and column names. For additional help, comments and instructions are embedded in the first row under most column headings on the metadata template.

## Entering Data

The Metadata Template contains 6 worksheets:

- **Instructions:** This sheet provides instructions on how to use the template. Used for reference only.
- **Metadata Non-Audio Products:** This is the worksheet onto which you will enter all data.
- **Asset Types:** This sheet contains a descriptive list of all asset types. Used for reference only.
- **Glossary of Terms:** This sheet provides a glossary of terms listed in the Metadata Template. Used for reference only.
- **Code Lists:** This sheet provides preformatted list values that are embedded in columns with drop-down menus in the Metadata Template worksheet. Used for reference only.

- **List Values:** This sheet provides preformatted list values that are embedded in columns with drop-down menus in the Metadata Template worksheet. Used for reference only.

## Basic Publication Information

The first section in the metadata template is the Basic Publication Information section. Column headings highlighted in red denote required fields in order to ensure successful ingestion into the platform.

1. **(Required) Title Group ID:** Enter the VBID under which the family or group of assets for a title is organized. The VBID, otherwise known as a Vital Book Identifier, is the unique identifier used to track assets in the VitalSource system. It is typically the eISBN used for the title.
2. **(Required) ISBN13:** Enter the 13-digit eISBN (without dashes) of the title. The related content file name must contain this exact ISBN.
3. **(Required) Asset Type:** Select an option from the drop-down list. Note: For a detailed description of each asset type, open the Asset Types worksheet. Most common asset types will be EPUB3, EPUB, Web PDF, and Print PDF.
4. **Asset Status:** In the Asset Status drop-down list, choose one of the options:
  - a. **Active:** Used for assets that are considered eligible for distribution. All deliveries to VitalSource should be set to Active.
  - b. **Inactive:** Used for assets that are unfinished or if the data is not ready for distribution
5. **(Required) Alternate ID 1, Alternate ID 2, and Alternate ID 3:**
  - a. In the Alternate ID 1 field, enter the VBID. Then, in the **Alternate ID 1 Type** drop-down list, choose VBID as the value.
  - b. In the Alternate ID 2 field, enter the FPID. The FPID, otherwise known as the Format Public Identifier, is the CourseSmart designation for a title. It is usually an ISBN and is unique to every title. If entering an FPID, please note that it must be the same ISBN as the value entered in the VBID field. Then, in the **Alternate ID 2 Type** drop-down list, choose CourseSmart FPI as the value.
  - c. In the Alternate ID 3 field, enter the eISBN used in CourseSmart. Then, in the **Alternate ID 3 Type** drop-down list, choose CourseSmart Online SKU as the value.
6. **Publishing Status:** In the drop-down list, choose a value (e.g. Active) that identifies the current status of the product. Note: If you need to place a title in limited distribution or remove a title from distribution, please contact the Content Support team at [content.support@vitalsource.com](mailto:content.support@vitalsource.com).
7. **(Required) Title:** Enter the title of the published work. Then, in the **Subtitle** field, enter the subtitle (if applicable).
8. **(Required) Publisher & Imprint:** Enter the name of the publisher for the asset. Then, in the **Imprint** field, enter the name of the imprint. Both values must exactly match the publisher and imprint names as set up in VitalSource and CourseSmart.

## Contributors

Contributors for a product may include authors, translators, editors, narrators, photographers, etc. This section allows you to enter the names and roles of contributors. Go to the Contributors section:

1. **(Required) Contributor 1 Role:** Select Author as the role from the drop-down list.
2. **(Required) Contributor 1 Full Name:** Enter the first and last names of the first author.
3. **(Required) Contributor 1 First and Middle Name:** Enter the first (required) and middle (if available) names of the first author.
4. **(Required) Contributor 1 Last Name:** Enter the last name of the author.
5. If applicable, repeat steps 1-4 in the Contributor 2 fields to enter information about the secondary contributor.

If you have more than two contributors, copy all contributor columns listed above and insert copied cells to the right of the Contributor 2 fields. Then, rename the column heading on each set added (i.e. Contributor 3, Contributor 4, etc.) and enter the appropriate information for each additional contributor. You can enter information for up to 10 contributors. Distribution partners will display multiple contributors at their discretion.

	AM	AN	AQ	AS
1	<b>Contributors</b> (Contributor 2)			
2				
3	<b>Contributor 2 Role</b>	<b>Contributor 2 Full Name</b>	<b>Contributor 2 First and Middle Name</b>	<b>Contributor 2 Last Name</b>
4	Author	Jane Elizabeth Doe	Jane Elizabeth	Doe
5				
6				
7				
8				
9	If more than 2 contributors are required, select columns AM-AS, copy, and insert the copied cells just before column BE. Then, change the 2 in the headers to a 3. Repeat as necessary for as many contributors as you need.			
10				

## Pricing

This section allows you to define pricing for the asset for different business models and for different currencies. To define pricing for an asset, go to the Prices (All Prices) section:

1. **(Required) Price Business Model Flag:** From the drop-down list, select the model (e.g. Agency, Retail, Library, Rental, All) to which the price applies. Retail and Rental are the two most commonly used models. Retail generally equates to digital list price and rental equates to the digital list price for a specific duration of access (e.g. 180 days).
2. **(Required) Currency Code:** From the drop-down list, select the currency code. Acceptable currency codes are USD – US Dollar, AUD – Australian Dollar, and GBP – Pound Sterling. Note: If providing multiple currencies, each currency must be on its own row and associated with the appropriate business model flag as noted above.
3. **(Required) Price 1:** Enter the price for the asset in the selected currency.
4. **(Required) Price Type Desc 1:** From the drop-down list, select a value to define the price type. Note: For a full description of price types, see the List Values worksheet. The standard for Retail/Rental Pricing is code 01 or 02. 01 is excluding Value Added Tax, and 02 is including Value Added Tax. For successful ingestion into VitalSource, prices should be submitted as 01 (excluding tax).
5. **(Required) Price Type Rental Duration (in Days):** Enter the number of days for which the asset will be available to a user at this price. Note: To denote multiple rental durations in the same currency, continue entering prices on the same row.

In order to add pricing for a different currency and/or business model:

- Add another row.
- Copy and paste the information in the first three columns in the Basic Info area.
- In the Price 1 area, enter the information with the new currency and/or business model.

	BE	BF	BG	BH	BJ
1	Prices (All Prices)		Price 1		
2	Retail=DLPor rental	USD GBP AUD	\$\$	01	# days
3	Price Business Model Flag	Currency Code	Price 1	Price Type Desc 1	Price 1 Rental Duration (in Days)
4	Retail	USD - US Dollar	39.95	01 RRP excluding tax	
5	Rental	USD - US Dollar	29.95	01 RRP excluding tax	120
6	Rental	USD - US Dollar	18.95	01 RRP excluding tax	90
7	Retail	USD - US Dollar	69.95	01 RRP excluding tax	
8					
9	Retail should be selected for each price that is a perpetual duration, such as the perpetual Web format and the print format. Rental should be selected for each duration that's less than perpetual.	A new line item must be created for each new currency.		All submissions to VitalSource must be code 01, which is exclusive of Value Added Tax. Please ensure tax has been removed from all pricing provided.	
10					

	A	B	C
1	<b>Basic Publication Information</b>		
2	<b>VBID</b>	<b>eISBN</b>	<b>File Format</b>
3	<b>Title Group ID</b>	<b>ISBN13</b>	<b>Asset Type</b>
4	9781604276039	9781932159172	Web PDF
5	9781604276039	9781604276039	Web PDF
6	9781604276039	9781604276039	Web PDF
7	9781604276039	9781604276039	Print PDF
8			
9	These 3 columns must be filled out for every line item in the sheet. A new line item must be created for every price.		
10			
11			For capturing print ISBN, select Print PDF in this field. Otherwise, choose the Web format for each line where a new duration/price needs to be entered.
12			

## Sales Rights

The Sales Rights at Asset Level section allows you to define the terms under which the product can be sold:

1. **(Required) Sales Rights Type:** From the drop-down list, select Type 01 as the sales rights type. Note: For each sales rights type, at least one country or region must be included.
2. **(Required) Countries Included:** List the countries or regions based on the sales rights type selected. Available country codes for deliveries to VitalSource are US, AU, and GB, as these are the regions in which VitalSource hosts eCommerce storefronts. Note: Separate multiple code entries with a space only.

## Publication and Copyright Dates

1. **(Required) Publication Date:** Enter the publication date for the product. Use YYYYMMDD format.
2. **(Required) Copyright Date:** Enter the copyright date for the product. Use YYYY format.

## Title Details

The Title Details section allows you to enter additional information (e.g. series, editions, language, page count, etc.) about the product. Use only the fields that are applicable to the product:

1. **(Required) Edition Number:** Enter the edition number.
2. **Edition Type:** If there is no Print ISBN for a title, choose Digital Original from the drop-down list. Note: This is required if there is no Print ISBN available.
3. **(Strongly Recommended) Language:** From the drop-down list, choose the language code to indicate the language in which the product is written or presented.
4. **(Strongly Recommended) Page Count:** Enter the total page count of the current selling print edition of the title.

## BISAC Codes

The BISG (Book Industry Study Group) organization creates standards in North America for the use of subject categories. This information is used in the transmission of electronic information between parties and to facilitate searching. A BISAC is required for deliveries to VitalSource.

1. **(Required) BISAC Code(s):** Enter the 9-digit alphanumeric code (e.g. ARC022000) for the product.
  - a. You may mark one code (if multiple exist) as the main code by adding an asterisk to the beginning of the code (e.g. \*ARC022000).
  - b. If no main is marked, during distribution where this is required, the system will select the first one it comes to.
  - c. Note: Multiple BISAC codes can be entered in this field, but should be separated with a space, comma, or semicolon.
  - d. Note: For more information about BISAC codes, go to the Instructions worksheet and select the link for BISAC codes that are available.

	EQ	EY
1	<b>BISAC &amp; BIC Codes</b>	
2		
3	<b>BISAC Code(s)</b>	<b>Main Description</b>
4	BUS064010	Written by a team of CPAs, professors, and tax lawyers with over 100 years of combined
5		
6		
7		
8		
9	See Subject Codes tab of this workbook for a list from which to choose.	
10		

## Product Descriptions

The Product Descriptions section allows you to enter descriptions of the product content, which is helpful in store searching.

1. **(Required) Main Description:** Enter a main description for the product's content. Note: There is a 4,000-character limit on this field.

## Related Products

Print information about the product is entered in this section.

1. **(Required) Related Product Relation Code:** From the drop-down menu, choose 13 Epublication based on (print product) as the value.
2. **(Required) Related Product Identifier Type:** From the drop-down menu, choose 15 ISBN-13 as the value.
3. **(Required) Related Product Identifier:** Enter the 13-digit Print ISBN for the title.
4. **(Required) Copyright Date:** Enter the date on which the work was copyrighted.

	FM	FN	FO	FP
1	<b>Related Products</b> (repeatable - must repeat all four columns)			
2				
3	<b>Related Product Relation Code</b>	<b>Related Product Identifier Type</b>	<b>Related Product Identifier</b>	<b>Related Product Binding Type</b>
4	13 Epublication based on (print product)	15 ISBN-13	9781932159172	
5				
6				
7				
8				
9	This section is for capturing print information, such as the print ISBN. Any data filled in in this section should correspond to a Print PDF Asset Type in column C of the same row.			
10				

## Distribution Partners

This section allows you to enter details specifically related to distribution partners. For the product, enter information as required for deliveries to VitalSource. Note: These values are not part of ONIX standards.

### VitalSource

For distribution to VitalSource, utilize this section for fields specifically related to that platform:

1. **(Required) Kind:** Select an option from the drop-down list. The kind of asset is the content type, and, for convenience, Textbook is used most often.
2. **Instructor Resource:** Enter Yes if the asset is available only to instructors, not to students. Enter No if the asset is available to both students and instructors.
3. **Faculty Review Only:** Enter Yes or No in this field. Faculty Review Only describes the asset as available for instructor sampling only, and indicates that the presentation of the content gets special treatment (a watermark).
4. **Fulfillment Only:** Enter Yes or No in this field. Fulfillment Only denotes that an asset is not available in any store, nor discoverable in any public catalog.

	HV	HW	HX	HZ
1	VitalSource			
2				
3	Kind	Instructor Resource	Faculty Review Only	Fulfillment Only
4	Textbook	No	No	No
5				
6				
7				
8				
9	These fields are required for deliveries to VitalSource. Note that Kind is almost always Textbook, but other choices are in the drop-down menu of this field.			
10				

## Associated Content File Naming Conventions

To ensure proper association of content files to metadata, please use the following file naming conventions when uploading your submission:

- For PDF files: ISBN\_Web.pdf
- For EPUB files: ISBN\_EPUB.epub

Additionally, please see the PDF and EPUB submission guides, available as free VitalBook downloads, for details on file specifications:

- PDF: [PDF Submission Guide](#)
- EPUB: [EPUB3 Implementation Guide](#)

## Questions?

For additional assistance with metadata and file deliveries you may contact the VitalSource team at [content.support@vitalsource.com](mailto:content.support@vitalsource.com).