Your Identify Audit

It is with great pleasure that we enclose your completed Identify Audit data in the form of Identify Audit System Files.

Your customer records have now been normalized against the Identify Database, and linked to its rich metadata and hierarchies via the Ringgold Identifier (Ringgold ID). Our researchers have mapped each one of your records to the most granular level of the organization indicated by your data. In some instances, it may appear as if we have mapped your record to the incorrect *Identify* record; for example, if the Ringgold ID indicates a university, but the majority of the original address details are for an agent. It is Ringgold's policy to make every effort to map your records to the end user, if there is enough information to make a definite identification.

Example of how customer data may compare to Ringgold *Identify* data:

Customer Account ID	Ringgold ID	Customer Account name	Ringgold Name
52585	115095	UC Berkeley - Engg School	University of California Berkeley College of Engineering
15488	115095	Univ CA-Berkeley Library, Engineering Coll.	University of California Berkeley College of Engineering
12691	243411	Kiel Univ, Dept of Geosciences	Christian-Albrechts-Universitat zu Kiel Institut fur Geowissenschaften
38775	243411	Uni Kiel Geowiss.	Christian-Albrechts-Universitat zu Kiel Institut fur Geowissenschaften

You can use these files to append the Ringgold Identifier (Ringgold ID) to your customer records. With the Ringgold ID held against your customer records, you may:

1. identify duplicate records, meaning any customer records which refer to the same institution. Using the Ringgold ID, you can determine how many unique institutions are represented by your customer numbers, and decide how best to utilize those records, according to your business rules.
2. retrieve additional Identify Database elements, and embed them into your data systems. Each Ringgold ID provides a link into that institution's *Identify* record, the complete data for which is in these files. Commonly, Clients will use the Ringgold Name, Alternate Names, Ringgold Type (industry sector), size metrics, links to parent organizations, and other fields to help support strategic analysis of their subscriber base and daily customer operations. You can embed this information in as many internal systems as is useful for you, such as fulfilment, finance, sales, etc. You may also transmit Ringgold IDs and Ringgold Names to third parties as part of information regarding institutional subscriber or journal transfers.

The System Files consist of six .csv files, summarized below. For more detailed specifications on each file, including the complete list of the metadata elements included, please refer to the separate Audit Data Exchange Document.

Subs

This file is the primary file in the set, for it contains the mapping of your original customer IDs to the equivalent Ringgold Identifier. This file also contains your original customer account name and location data. Note the Ringgold Type for the organization is also included.

Ringgold does not make amendments to customer data in this file, except to correct inaccurate country information. The number of records in this file may be less than was originally supplied, either because of duplication of customer numbers, or because we have not been able to determine the equivalent *Identify* record and allocate a Ringgold ID. Any records that fall into this latter category are returned in the Unallocated and Distributor file (see below).

All subsequent files in this set contain only Ringgold *Identify* data, linked via Ringgold ID.

Parents

This file contains much of the descriptive metadata from the Identify Database for each organization assigned to a customer record in the Subs File.

This file also contains the links to the parent organization which is the next level up in the Identify Database hierarchy for each organization, and so on up to the top the hierarchy. Each hierarchical parent record also includes the appropriate *Identify* metadata, including ISNI Numbers and Open Funder Registry IDs. Because parent records are included, there are therefore usually more records in this file than in the Subs file. It is possible for your systems to reconstruct a hierarchy by following the Ringgold IDs and Parent ID columns; see example below:

Parent ID	Ringgold ID	Name	City	State	*Notes:*
1438	115095	University of California Berkeley College of Engineering	Berkeley	CA	*This is the subscriber.*
1439	1438	University of California Berkeley	Berkeley	CA	
96640	1439	University of California System	Oakland	CA	
0	96640	State of California	Sacramento	CA	*This is the top of the hierarchy, as there is no Parent ID.*

Here is another representation of this hierarchy, from the Identify Online interface:

The upward hierarchy records enable you to reveal all related organizations in your customer base. Common uses for this information include verifying access entitlement, application of discounts for member organizations, creation of compete holdings reports, and identification of sales opportunities.

There will be some fields which appear to contain no data, such as size or state. This is because that metadata element does not apply to the institution, or because we have not been able to obtain that piece of data from an authoritative source.

Altnames

This file contains alternative names for all organizations in the Parents file, one row per alternative name. These include translations, acronyms, library names, former names, names of acquired companies, and other versions of names. The altnames file, if loaded into your internal systems, can support better searching and entry points into your customer records.

Consortia

This file contains details of every consortium that has members within the Parents file, with one row for each consortium member. Consortia and member institutions may appear more than once, particularly if an institution is a member of several consortia. This information can be used to assess the marketing and sales possibilities for consortium deals.

Please note that Ringgold does hold more comprehensive consortia information in our [Consortium Directory Online (CDO).](#) CDO is a separate database comprising detailed information for over 400 consortia. We would be happy to provide more information about CDO if you feel this may be relevant to you.

Classifications

This file contains details of the nine new Ringgold Classifications, for each Academic-sector institution in the Parents file (except 'academic/school and 'academic/sector'). Metadata elements include Ringgold Subjects, reach, economic model, level within the hierarchy, and more. As with the other system files, the Ringgold ID is the single piece of data that connects the file to the others, and it also includes the Ringgold Names (official name of the institution in its native language, for most countries). Classifications data enables very granular analysis of your customer base in terms of subject interest, reach, governance etc. In combination with the data held in the Parents file, your records can be further selected by country, city etc.

Unallocated and Distributor

Occasionally customer records cannot be mapped unambiguously to a single institution within *Identify*. Ringgold returns these records as a separate Excel file with three worksheets containing the following information:

Distributors - where end-user information is lacking, Ringgold allocates the Ringgold ID for the distributor (e.g. subscription agent, bookseller, sales agent), which is returned in this worksheet. By sorting the sheet by Ringgold ID, it is possible to group together all the records for content being

supplied to each of the distributors. The data in this file can be used to request enhanced end user information from the agents and distributors. If enhanced information is supplied back to Ringgold as part of an Audit Update, we can re-audit the record, and allocate the end user Ringgold ID instead.

Personal – the customer record refers only to an individual's name and/or home address; it is therefore not possible to unambiguously link the customer record to an institution. Ringgold returns these records, unaudited, in this worksheet. If further information is supplied in a subsequent Audit Update, we will re-audit the record, and map it to the correct *Identify* institutional record, if we are able.

Pass – this sheet contains all the records where we have not got enough information to identify an end user, or where the information is too confusing to enable us to map it to a single institution. If further information is supplied in a subsequent Audit Update, we will re-audit the record, and map it to the correct *Identify* institutional record.

Further Assistance

If you require clarification on any aspects of these files please do not hesitate to contact us. Email your enquiries to Ringgold Customer Support support@ringgold.com.