

# Identify Audit Service

## Quick Start Guide for Sending Data

### 1. Introduction

This document is designed to provide simple instructions for our clients sending source data files securely to Ringgold for the Identify Audit Service. The information applies to all files sent for an Initial Audit or ongoing Audit Updates. Kindly pass this document to the staffer who will generate the files to be sent.

#### See also:

- Section 5: Support, below, for more information.
- [Identify Audit Data Submission Form.xlsx](#), which includes a Data Submission Sample tab.

To begin your Identify Audit, we will need two files from you:

**1. Source data file.** Send to Ringgold securely via ShareFile – instructions here:

<https://support.ringgold.com/general-document-exchange-sharefile-instructions>

**2. Completed Identify Audit Data Submission Form.** Download blank form here:

<https://support.ringgold.com/identify-audit-service-data-submission-form> and please complete the tab 'Data Summary to Ringgold'. This details the scope of records and data which you are sending us. Send securely via ShareFile or email.

### 2. Source Data File

#### 2.1 Scope of Records to be Sent

Most often, clients will send records relating to all current institutional subscribers and licensees:

- Direct subscribers
- Consortium & multisite accounts
- Aggregator clients
- All formats (print + online)

Sometimes clients wish to send data for multiple years of subscribers, this is up to you. Please indicate the scope in the Audit Data Summary sheet.

#### 2.2 Data Elements to Include

***Please see: Audit Data Submission spreadsheet for details and a sample.***

Required Institutional Data Elements

**At a minimum we require your unique customer or account number, and all address fields relating to the end user institution.** You may send more data, but this is the minimum which we would like to see.

## Optional Institutional Data Elements: Useful fields

We can also find the following fields extremely useful: **Contact email addresses, URLs, or additional delivery addresses** for your institutional customers.

If you have **Ringgold IDs** which were supplied to you in a previous Identify Audit job, you may include these, but they are not required.

## Optional: Subscription Data Elements

You may submit the details of each account's subscriptions. Ringgold does not require this information, but we will return it back to you in the Human-Readable Audit Files, and include it in Identify Online (for Identify Database clients) for analysis.

We can accommodate up to 5 fields of subscription data. What they contain is entirely up to you, we recommend the following:

1. Title or Product Code
2. Agent
3. Subscription Start or End Date
4. Revenue field (price paid for the subscription)
5. Your Tier Classification

Please indicate in your Audit Data Summary what columns of source data pertain to the Subscription Data Elements.

## 3. File Formats

Ringgold can accept the following file formats:

- Field delimited formats such as comma separated value (csv) or tab or pipe separated formats.
- Excel files
- Text files, .txt, which will require the same formatting components as a .csv file (see below)

### 3.1 File Consistency

The data within the file can be organized as you desire, bearing in mind the following:

- **Keep data layout consistent within the file.**  
If you add files together from different sources, make sure that the data in each file is aligned. For example, that columns are consistently applied. If you cannot guarantee this, then please provide separate files.
- **Keep the data consistent within the fields.**  
It is desirable for the contents of fields within a column to be consistent. For example, that the organization name contains the names of organizations rather than the first line of a street or mailing address or an individual's name. We realize this is not always possible, but it will help us work more effectively with your data.

For Audit Update clients:

- **Keep the file layout consistent for each Audit Update.**  
If the format changes, or you are sending different data elements from your previous file, please let us know.
- **Consistent customer numbers.**  
If you have changed your customer numbers, it is very important that you let us know. We use the customer number to map a new audit data submission to the previous one, and identify records which are unique to your new data set.

## 4. How to send your Audit Data Files to Ringgold

For security reasons, Ringgold uses the ShareFile portal for all documents exchange.

**Full instructions for using Ringgold's ShareFile portal can be found here:**

<https://support.ringgold.com/category/sharefile/>

We provide a choice of two different ways to submit files to Ringgold via ShareFile:

- **ShareFile web platform**
- **FTP client login to ShareFile**

**Step 1:** Complete the attached Identify Audit Data Summary. Please send to Ringgold via email, or you may send it along with your source data via ShareFile.

**Step 2:** Please send your source data to us using the secure ShareFile server. We do not advise using email to transmit sensitive customer data.

You will have received ShareFile credentials, but please contact us if you need these resent to you.

## Support

Audit Data Exchange Document:

<https://support.ringgold.com/identify-audit-service-data-exchange>

Ringgold Support site:

<https://support.ringgold.com>

<http://support.ringgold.com/category/identify-audit-service/>

For further support, contact your account representative:

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