



User Guide

Validate

Contents

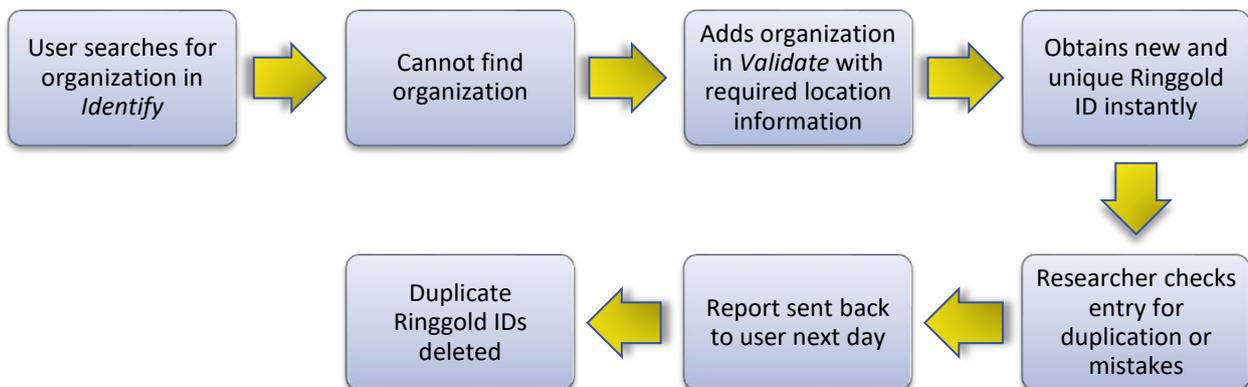
What is <i>Validate</i> ?	3
How <i>Validate</i> works	3
What if I need more help?	3
Getting started.....	4
Search organizations in the Identify Database	5
Search Tips and Tricks.....	6
Adding New Identify Records.....	7
New Organization	7
Alternate Names for Organization.....	8
Subscriber	8
Subscriptions.....	8
Saving New Identify Records	9
Possible Duplicates Found	9
Saved Record Confirmation	9
Rejected Ringgold IDs	10
Appendix – Glossary of common terms in Identify Online.....	11

What is *Validate*?

Validate enables Ringgold's Identify Database customers to obtain Ringgold Identifiers for organizations that are not currently held in the Identify Database, with immediate effect. The advantages are numerous; you are able to obtain a new Ringgold ID for addition into multiple internal systems, and to use that number to link systems together.

How *Validate* works

Users search for an organization, either in the Identify Online interface or internal systems; if the organization does not appear to be in the Identify Database a new record can be added, allowing a unique Ringgold ID to be immediately obtained.



Ringgold's expert staff and researchers manually check all entries made in the *Validate* system. The next working day you will receive a report of duplicate records, with any associated corrections. The daily report also includes cumulative counts for the records entered for the current month and year-to-date.

All provisional Ringgold IDs which were supplied via *Validate*, but found to be duplicates or rejected entries, are officially recorded and deleted forever. We do not recycle Ringgold Identifiers.

What if I need more help?

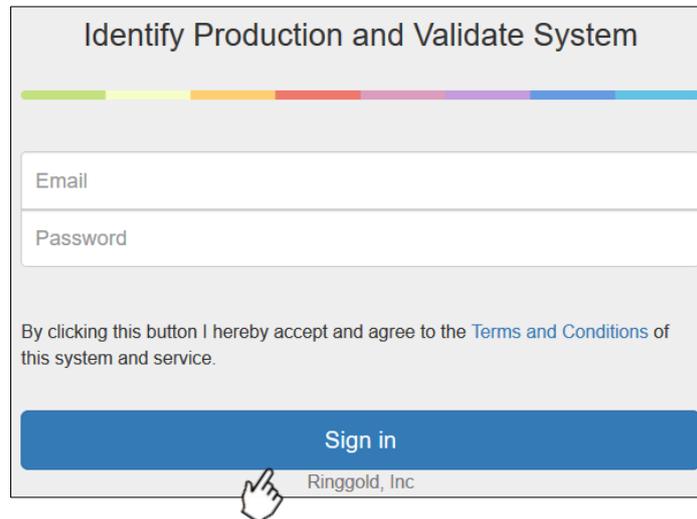
If you require clarification on any aspects of *Validate* please do not hesitate to contact us directly. Alternatively, extra training can be provided online or in person.

Email your enquiries to Customer Support support@ringgold.com
 Technical queries should also be emailed to Customer Support

Getting started

Login:

Go to: <https://idproduction.ringgold.com> → **Enter** email and password → **Click** login



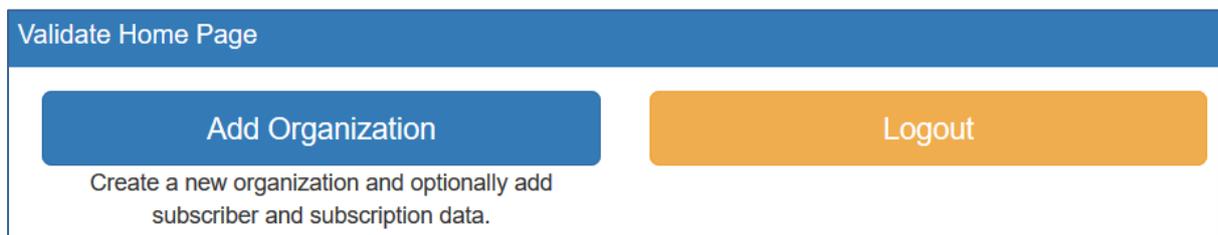
The screenshot shows a login form with the following elements:

- Title: Identify Production and Validate System
- Decorative bar: A horizontal bar with segments in green, yellow, orange, red, purple, and blue.
- Input fields: Two text boxes labeled "Email" and "Password".
- Terms and Conditions: A line of text stating "By clicking this button I hereby accept and agree to the [Terms and Conditions](#) of this system and service."
- Sign in button: A blue button labeled "Sign in".
- Footer: The text "Ringgold, Inc" is located at the bottom right of the form area.

A hand cursor icon is positioned over the "Sign in" button.

If you need a reminder of your login please contact us support@ringgold.com

You will now be presented with the *Validate* home page:



The screenshot shows the "Validate Home Page" with the following elements:

- Header: "Validate Home Page" in a blue bar.
- Buttons: Two buttons, "Add Organization" (blue) and "Logout" (orange).
- Description: Below the "Add Organization" button, the text reads "Create a new organization and optionally add subscriber and subscription data."

Search organizations in the Identify Database

Before making a new Identify Record in *Validate* it is important to first check that the organization **does not** already exist in the Identify Database. Use Ringgold's Identify Online to search the database <https://ido.ringgold.com> (see separate [Identify Online User Guide](#) for detailed help). Follow these steps to check for existing records in *Identify*:

1. Find the official organization on Google and copy its URL. It may not be displayed on the first page of search results, so check a few pages of results if you can't find it.
2. If a URL is found in Google, search *Identify* with the **domain** part of the URL. Remove the http part and add the wildcard* to find anything within that domain:

X <http://www.whcdc.org/home/index.htm> **✓** *whcdc.org*

The screenshot shows the 'Advanced Search' form with the following fields:

- Institution**
 - Ringgold ID: [Ringgold ID]
 - Organization Name: [Organization Name]
 - ISNI: [ISNI]
- City**
 - City: [City]
 - Postal Code: [Postal Code]
 - Admin. Area Level: [Admin. Area Level]
- IP**
 - IP: [IP]
 - URL**: [*whcdc.org*]

If results are found, expand the hierarchy view for the highest-level record to find other records associated with that domain.

3. If no organization records are found for that URL, or if you cannot find a URL on Google, clear the form and instead search for keywords in the organization name:

X *Wuhan Centers for Disease Prevention and Control* **✓** *Wuhan Disease*



Keyword searches will ensure that word variations in names are eliminated from the search such as centre/center, hospital/medical centre/health centre, etc.

The screenshot shows the 'Advanced Search' form with the following fields:

- Institution**
 - Ringgold ID: [Ringgold ID]
 - Organization Name**: [wuhan disease]
 - ISNI: [ISNI]

4. If no records are found for a URL or keyword search, or if you have too many search results, try being more specific - search the City OR Postcode fields, and perhaps include one or more types. You can also try a keyword in the name field but using the most unique words from the organization name will help.

Search Tips and Tricks

- **Cities.** To search on more than one city, enter multiple city names separated by commas (no spaces) and results will contain any of these, e.g. York,London,Exeter. The search will only work on a complete city name, wildcards can't be used here. Please be aware that city is not the same as region.
- **Cultural differences.** A Name search will look on the main native legal name, English translation or any alternate names such as acronyms or former names. Consider variations in spellings e.g. centre/center, behavioral/behavioural, organisation/organization, defence/defense.
- **No results.** Searching by name with the most unique or significant keyword in the organization name will help narrow your results. Or find the URL for the organization on Google first and then use the database to search for the URL. Try also searching for the parent record and then expand the hierarchy to look for subsidiaries. And consider synonyms, e.g. medical center/hospital/clinic/health centre.
- **Ringgold naming policy.** Name searches are not case sensitive. We change '&' to 'and' unless it is part of the legal name, e.g. 'Texas A&M University'. All punctuation including commas are removed except ' (replaces ") and – (for campus records). No diacritics are used. All abbreviations are spelled out, except Co, Inc, GmbH, Ltd, LLC etc, unless part of the legal name, e.g. Company, Limited, St, etc. Definite and indefinite articles are removed from the beginning of names, such as 'The', 'A', 'An', 'Der', 'Le' except where part of the legal name, e.g. 'The Open University'.
- **Truncation.** Use the wildcard * for truncation e.g. medic* will find records containing both "medicine" and "medical".
- **Tiers.** Use [Ringgold Tiers](#) in Identify Online to narrow your results of organizations. For example, use tier A4 in a search to find doctorate-granting, research-heavy academic institutions. Searching for all Ringgold H2 and H5 tiers within a particular city will give all hospitals, rather than typing the word *hospital* in the name field. **[A complete list and description of Ringgold Tiers is here.](#)**
- **Type differences and similarities.** Review all Ringgold Types used in the Identify Database to ensure you have captured everything relevant for your search. Some Type sectors can also be a Ringgold Type in their own right, e.g. 'academic', 'govt', 'hospital', 'public', 'school'. Some organizations may be classified as one of several similar Ringgold Types. If you are looking for all hospitals, for example, be sure to select hospital and hospital/children and academic/hospital. If you want to see ALL medical research institutes, select academic/medres AND other/medres. **[Click here for a complete list and descriptions of Ringgold Types.](#)**
- **URLs** are retained by specific domain level, where available, for records in the Identify Database. Searching for *rai.ox.ac.uk will provide more precise results than the wider domain of *ox.ac.uk, for example. Replace any part of a domain with the wild card * for potentially more search results, e.g. www.pfizer.co.uk/pfizer-worldwide or www.pfizer.it/0801/1600/progetti.asp > *pfizer* will find all.

More Tips & Tricks are available on our Support Site: <https://support.ringgold.com/tips-and-tricks/>

Adding New Identify Records

When you're sure that the organization does not already exist in Identify Online you may now use the *Validate* service to add the new organization record to the database:



Add Organization

Create a new organization and optionally add subscriber and subscription data.

You will be presented with a blank submission form. Complete the form as follows:

1. New Organization

New Organization Form with Optional Subscriber

1) New Organization

Name *	<input type="text"/>
Street 1 *	<input type="text"/>
Street 2	<input type="text"/>
Street 3	<input type="text"/>
Street 4	<input type="text"/>
Street 5	<input type="text"/>
Street 6	<input type="text"/>
Street 7	<input type="text"/>
Street 8	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/>
Post Code *	<input type="text"/>
Country *	UNITED STATES [US]
URL *	<input type="text"/>
Notes	<input type="text"/>

Street Provide as much information as you can to help us distinguish one organization from another - some colleges have the same name but are in different cities or towns, for example

City NOT suburb but the largest town or city mentioned in the street address

URL Provide clean URL if known, eg
 www.college.org NOT
 http://www.college.org/
 823756/page.htm

Name Provide the full legal name. Academic departments should have full titles, eg University of Oxford Department of English. Give the full legal name for corporations including Inc, Ltd, etc.

State Required for US, Canada, and Australia. Use the ISO state code e.g. TX for Texas

Post Code Add the postal address post/zip code if known

Important: Remove all punctuation including commas from all fields except ' (replaces ") and - (for campus records).
 Change '&' to 'and' unless it is part of the legal name, e.g. 'Texas A&M University'.
 Definite and indefinite articles should be removed from the beginning of names, such as 'The', 'A', 'An', 'Der', 'Le' except where part of the legal name, e.g. 'The Open University'.

Adding New Identify Records (cont.)

2. Alternate Names for Organization

2) Alternate Names for Organization (Optional) Add Row			
Name	City	State	Post Code
<input type="text"/>	<input type="text" value="City"/>	<input type="text" value="State"/>	<input type="text"/>

This section is optional - if you know of any Alternate Names for the new organization you may enter them here. Alternate names types can include: former names, acronyms, English translations, AKA's. Categorize any Alternate Names used in the Notes field.

Notes
<input type="text" value="AB - Abbreviation"/>

3. Subscriber

3) Subscriber	
Subscriber Number *	<input type="text"/>

Add your customer's Subscriber Number, if known.
If you don't have a subscriber number, enter 'A' for an automatic number.

4. Subscriptions

4) Subscriptions (Optional) Add Row				
Product Code	Local 1	Local 2	Local 3	Agent Id
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add any optional information here about your subscriptions.
If you need any further information about adding data here, please get in touch.

When you have finished entering data on the form, click Save New Record

Save New Record



Saving New Identify Records

Possible Duplicates Found

The organization may already exist in the Identify Database.

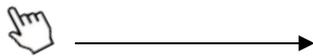
When saving a new organization record, the system will search names, alt names and URLs for possible existing duplicate data. If discovered, a list of potential duplicates matches will be displayed:

Check to make sure the new organization record you have made is NOT in the list of possible duplicates.

If the record you are trying to save already exists in the database, please abandon the process. Use the existing Ringgold ID. You can then go back to the home page or add a different organization instead.

Or, if you are sure that your new organization record is indeed unique, you can over-ride the error message by clicking this button at the bottom of the list:

Ignore Duplicates and Save New Records



The screenshot shows a web interface with the following elements:

- A red error message: "Unable to save."
- A yellow message: "Possible duplicates found."
- A blue header: "New Organization Form with Optional Subscriber"
- A grey message: "Valid Records, but possible duplicate data found."
- A table of duplicates:

InstMatch	302930::Oxford College of Emory University Bookstore,Oxford,GA,30054-2291,US
InstMatch	
InstMatch	
InstMatch	
InstMatch	
- A green box labeled "saved data" containing a table:

Identifier	519763
Name	University of Anywhere
City	Anytown
- A blue header for the confirmation dialog: "New Subscriber & Organization Form Confirmation"
- A "Return to Menu" button.
- The "New Organization" table above.

Saved Record Confirmation

Upon saving a new organization record, you will be presented with your saved data and a new Ringgold Identifier.

You may now use this ID. New records will appear in Identify Online within one working day.

Rejected Ringgold IDs

Ringgold’s specialist staff and researchers manually check all entries made in the Validate system. During the checking process we may reject new organization IDs if they are found to be duplicates or do not adhere to the Identify Database editorial policy.

If a new ID is deleted you will usually be notified within one working day of a replacement Ringgold ID. We do not recycle deleted Ringgold IDs.

At the end of each month, we send an on-going statistical summary and overview report of all accepted and rejected Ringgold IDs:

Time Period	User Email	Validate Ringgold ID	Replacement Ringgold ID	Reason for deletion
2020-12	user4@publisher.com	583060		
2020-12	user4@publisher.com	581037		
2020-12	user4@publisher.com	583284		
2020-12	user4@publisher.com	582295	524512	duplicate
2020-12	user4@publisher.com	583287	219191	duplicate
2020-12	user5@publisher.com	581443		
2020-12	user6@publisher.com	584183		
2020-12	user6@publisher.com	584184		
2020-12	user6@publisher.com	584179		
2020-12	user6@publisher.com	584318	74864	duplicate

ID in bold is a new deletion.

Your new Ringgold IDs

Replacement Ringgold ID, where a new record is found to be a duplicate

Time Period	User ID	Initials	Email	#Records Created	#Records Deleted	Rejected due to duplication	Rejected due to lack of information	Rejected due to editorial policy	Rejected for other reasons	Total
2020-12	15219	PVF	user5@publisher.com	1	0	0	0	0	0	1
2020-12	17681	PBZ	user1@publisher.com	30	0	0	0	0	0	30
2020-12	1170	PJE	user2@publisher.com	16	0	0	0	0	0	16
2020-12	21170	PJY	user3@publisher.com	1	0	0	0	0	0	1
2020-12	14542	PWE	user4@publisher.com	13	2	2	0	0	0	13
2020-12	15222	PXO	user6@publisher.com	4	1	1	0	0	0	4
2020-12				65	3	3	0	0	0	65

Useful user stats

Appendix – Glossary of common terms in Identify Online

Alternate Name – Former names, abbreviations, acronyms, AKA's, common names, English translations if record is non-English. There are several forms of alternate name. Click here for the full list.

City – the location of the organization; the postal city not street address.

Country – the location of the organization, provided as the ISO3166 2-digit country code.

ISNI – International Standard Name Identifier (ISNI) is a 16-digit ISO standard (ISO 27729) that identifies public identities of individuals and organizations.

Name – The legal name of the organization in its native language (where appropriate) or transliteration to Latin characters.

Notes – free text notes in an Identify Record. Can contain information about mergers, closures, etc.

Post code – postal code or zip code part of the mailing address of the organization in the format used in each country.

Ringgold Identifier – Unique numerical organizational identifier assigned by Ringgold. Ringgold IDs are numeric, unique and sequentially assigned. They contain between four and six digits, but there is no limit to the number of digits, and the individual digits do not signify anything. Ringgold IDs are not recycled, so the number for a record which is deleted is never used again.

Ringgold Tier – Applied to every organization in the Identify Database, a Ringgold Tier indicates industry sector, size and type of the organization.

Ringgold Type – the Ringgold Type classification has been specifically developed to categorize organizations worldwide. The Ringgold Type classification has two parts: Sector/subject or type.

Sector – classification category of our Ringgold Types: Academic, Corporate, Government, Hospital, Other, Public, School.

Size – For academic institutions this is the number of students. Where possible FTE figures are used but may be total enrollment. For all other kinds of organization, size represents the total number of employees.

Staff – For academic institutions this is number of faculty members or teachers. For all other kinds of organization, it is the number of professionals of predominant interest (e.g. lawyers, faculty, researchers, and teachers). This figure is a subset of size, with the exception of student and faculty figures. Where possible FTE figures are used.

URL – Main domain, sub-domain or specific department URL. Long strings are not used and 'http' is not included. We also retain alternative sites, former sites and email domains.

For more help on Identify Online please visit our [Customer Support site](#)
Or contact support@ringgold.com for further assistance.