



SUBMISSION GUIDELINES

The information below is intended to outline some common preferred criteria and practices in order to send electronic data to EBSCO Information Services. These guidelines describe our preferred data formats and deliveries. EBSCO does not have strict guidelines for content submissions, but following the guidelines outlined below will improve the customer experience as well as processing time and quality. We are happy to review sample files in advance.

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JOURNALS/SERIALS

WHAT TO SEND

REQUIREMENTS - BRIEF

Our preferred data deliveries contain the following, listed in order of preference, for the best quality and customer experience:

1. PDF Files paired with XML or other structured metadata, preferably containing ASCII Full Text.
2. If XML or other structured metadata is not available, PDF files can be submitted independently.
3. If PDF Files are not available, XML or other structured metadata containing ASCII Full Text can be submitted independently.

Full Text Formats: Full Text is required in either PDF or ASCII format. PDF is our preferred format.

Metadata Formats: Metadata is preferred in XML or SGML format. Please deliver your metadata in a consistent manner and format.

File Structure and Naming Convention: File naming consistency is most important. Please name and organize your files in a consistent manner, which includes a journal identifier and unique issue/article identifiers within the file name.

Delivery: FTP (File Transfer Protocol) is our preferred delivery method.

1. PDF DATA

- 1.1. Resolution Setting: 300 dpi or lower; screen optimized, low resolution files.
- 1.2. Security: Submit files free of encryption, password protection, or any security features applied in Acrobat.
- 1.3. Adobe Version Compatibility: PDF 1.5 or later, created with Adobe Acrobat version 4.0 or higher.
- 1.4. Fonts: Embedded as complete sets.
 - 1.4.1. For processing only, all text MUST be available for search, and copy and paste. (Note: Restrictions will be added to content on product.)
 - 1.4.1.1. All fonts should be embedded as complete sets. Subset fonts, while acceptable, limit the editing capabilities within the PDF.
 - 1.4.1.2. Avoid using custom fonts because they can contain unsupported encoding.
- 1.5. Orientation: Portrait.
- 1.6. Images:
 - 1.6.1. Quality of the images should be sufficient to display at the recommended size (700 pixels wide) and resolution (150 dpi).

2. METADATA AND ASCII FULL TEXT

- 2.1. Metadata: The metadata provides us with any available information you have about the issue or article contents. Some metadata fields are required, while others are optional and will yield improved quality and customer experience. Our preferred and required metadata fields are:
 - 2.1.1. Required:
 - 2.1.1.1. ISSN and/or EISSN (At least one is required)
 - 2.1.1.2. Publication Date



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- 2.1.1.3. Cover Date
- 2.1.1.4. Volume
- 2.1.1.5. Issue
- 2.1.1.6. Article Title
- 2.1.1.7. Start Page
- 2.1.1.8. End Page
- 2.1.1.9. Author Last Name
- 2.1.1.10. PDF Link (If PDFs are provided, the PDF file name must be referenced in the metadata.)
- 2.1.2. Preferred:
 - 2.1.2.1. Article Language (If Article Language is not provided, we can default to English.)
 - 2.1.2.2. Article ID (If you do not have article unique identifiers, we can assign an internal identifier.)
 - 2.1.2.3. Page Count (Can be parsed together if other page values provided.)
 - 2.1.2.4. DOI
 - 2.1.2.5. Journal Title
 - 2.1.2.6. Publisher Name
 - 2.1.2.7. Magazine ID or Journal ID (If ISSN is unavailable, JID is required)
 - 2.1.2.8. Author First Name
 - 2.1.2.9. Author Email/Affiliations
 - 2.1.2.10. Abstract
 - 2.1.2.11. Keywords
 - 2.1.2.12. URL link to Full Text (preferred), or Abstract
- 2.2. ASCII Full text: In addition to the metadata described above, we would also like to receive the full article text included in the metadata file. Ideally the full text would include formatting tags which will allow us to properly represent the full text.
 - 2.2.1.1. Examples of formatting tags: Bold, Italic, Paragraph, Superscript, Subscript.
 - 2.2.1.2. We do not currently support MathML or LaTeX
- 2.3. Document Type Definitions or DTDs: We are not as concerned with which DTD that will be used as much as that the data format consistent. We prefer metadata in the NLM/JATS DTD.

3. FILE STRUCTURE AND NAMING CONVENTIONS

- 3.1. Organization: Files can be submitted organized at either the issue level or the article level. We prefer files at the article level.
 - 3.1.1. Please include the table of contents.
 - 3.1.2. Cover matter is optional, but preferred.
- 3.2. File Naming Conventions: Once you establish a file name for a title, it would be helpful if you could deliver all subsequent files for that title with the same file name format.
 - 3.2.1. The file should be labeled with the magazine name (initials are fine) or ISSN/ISBN, the volume, and the issue separated by an underscore.
 - 3.2.2. For data files at the article level, each file name should also include page number the article begins on.
 - 3.2.3. Please do not include any spaces or special characters in the file name. (Back slashes (\), colons (:), question marks (?), ampersands (&) etc.)



Example:

For an article beginning on page 1:

1234-5678_v01_i01_p001.pdf

3.3. File Size: Reducing the size of your files before sending may be helpful.

3.3.1. Using a compression program, such as WinZip or 7-Zip, to send files in a *standard zip file format*. Zip files should contain a full issue, or a full article with all PDFs and XML files associated with the issue or article.

4. DELIVERY METHOD

Delivery methods are listed below in order of preference.

4.1.1. Third Party Electronic File distribution Feeds.

4.1.1.1. Please let us know if you already work with a third party distributor such as Atypon, MetaPress, Silverchair, or Ingenta.

4.1.1.2. Please let the distributor know to add your content to the regular EBSCO Publishing delivery feed.

4.1.1.3. We accept most aggregator's standard feed formats as long as metadata and PDF are delivered paired.

4.1.2. FTP (File Transfer Protocol) – Upon request we will provide you with a link to an FTP directory.

4.1.2.1. We recommend using an FTP client such as FileZilla to transfer your files.

4.1.2.2. We will provide the FTP Username and Password.

4.1.2.3. Instructions for download and setup of FileZilla are also available.

4.1.3. Publisher's FTP Site - We are happy to download from your FTP site.

4.1.3.1. Please provide the address, username and password.

4.1.3.2. Website Retrieval - We are able to download from your website.

4.1.3.3. Please provide the address, and any required credentials.

EBOOKS

WHAT TO SEND

REQUIREMENTS – BRIEF

Our preferred data deliveries contain the following, listed in order of preference, for the best quality and expedience:

1. Metadata and Book Content together
2. Metadata ahead of Book Content

Book Formats: PDF and/or EPUB 2.0.1

Metadata Formats:

1. ONIX 2.1
2. Excel Spreadsheet in EBSCO-formatted template
3. 3rd party Excel Spreadsheet (must meet minimum metadata requirements)

File Structure and Naming Convention:

Metadata Naming Convention (Preferred): File name contains publisher or title information plus date in yyyyymmdd. Metadata updates also contain “_update” in the file name.

Book Content Naming Convention (Preferred): File name contains ISBN (format specific ISBN ideal). Replacement files also include “_replacement” in the file name.

Delivery: FTP (File Transfer Protocol) is our preferred delivery method.

1. PDF/EPUB DATA

1.1. EPUB 2.1

- 1.1.1. EPUB 2.1 Minimum Requirement: Must meet industry standard.
- 1.1.2. EPUB 2.1 Recommended: Internal content files not exceed 300 KB; Cover Image in RGB mode

1.2. PDF

1.2.1. PDF Minimum Requirements

- 1.2.1.1. Security: No Security encryption or password protection
- 1.2.1.2. Adobe Version Compatibility: PDF 1.5 or later created with Acrobat version 4.0 or higher
- 1.2.1.3. WebReady (searchable text; optimized for on-screen viewing; page labels; bookmarks; electronic Table of Contents (eTOC))
- 1.2.1.4. Cover Image: embedded or delivered separately. JPG format preferred. Recommended size/resolution = 700 pixels wide and 150 dpi resolution. Minimum requirements = 250 pixels wide (assuming portrait orientation) and 72 dpi.

1.2.2. PDF Recommended WebReady Specs

- 1.2.2.1. Electronic Table of Contents:



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- 1.2.2.1.1. eTOC should mirror the book table of contents, matching level hierarchies up to but not exceeding three nested levels deep.
- 1.2.2.1.2. Use Standard fonts (Western Latin 1252 (Western European) and Unicode 8 character entities) and encoding to ensure the original book's TOC conversion to the eTOC.
- 1.2.2.1.3. Set the bookmarked table of contents destinations to the correct book location.
- 1.2.2.2. Pagination
 - 1.2.2.2.1. A unique Page Label for every page, including front matter (CIP and all title pages), specialty sections (such as photo and/or plate sections), parts, chapters, end matter (indices, appendices, etc.), and blank pages.
 - 1.2.2.2.2. Each Page Label MUST match the page number represented on the page.
 - 1.2.2.2.3. Cover page labeled: "Cover" or similar.
 - 1.2.2.2.4. Blank pages and pages without a page number MUST have a unique page label.
 - 1.2.2.2.5. Roman numerals may be either lower or upper case, but do NOT use both, because the Online PDF Reader cannot differentiate between them.
- 1.2.2.3. Searchable and Selectable Text
 - 1.2.2.3.1. Fonts MUST be embedded as complete sets. Subset fonts, while acceptable, limit the editing capabilities within the PDF.
 - 1.2.2.3.2. Text MUST be captured in order for the PDF to be full-text searchable online. If all or part of PDF was created from hardcopy scans, text must be captured using an optical character recognition (OCR) program.
 - 1.2.2.3.3. Text MUST be available for search, and copy/paste.
 - 1.2.2.3.4. Do NOT use custom fonts because they can contain unsupported encoding.
- 1.2.2.4. Supported Fonts
 - 1.2.2.4.1. Supported fonts include: Western Latin 1252 (Western European) and Unicode 8 character entities.
 - 1.2.2.4.2. The Standard Base 14 fonts, supplied with the Adobe Reader can be handled through font emulation.
- 1.2.2.5. Cropping Pages
 - 1.2.2.5.1. Pages shall be cropped and free of registration and/or printer marks.
 - 1.2.2.5.2. Pages shall be created with consistent page display settings.
 - 1.2.2.5.3. Crop pages uniformly throughout the PDF, with even and odd page text centered on the page.
 - 1.2.2.5.4. Set the crop to eliminate as much "dead space" outside the live area as possible.
 - 1.2.2.5.5. Cropping should be relatively tight, compared to a printed page, so that the text is as large as possible within the page image box in EBSCO's Online PDF Reader, but not so tight that it becomes unsightly or endangers the text.
- 1.2.2.6. Optimizing PDF
 - 1.2.2.6.1. Files must be optimized (for the web) to be as small as possible, using the Acrobat Pro "Save As" option before submitting the eBook.

2. METADATA

- 2.1. Metadata Minimum Requirements: (For ONIX element mapping to these required fields see [Addendum A](#))
 - 2.1.1. Publisher Name
 - 2.1.2. Product Title
 - 2.1.3. PDF/EPUB ISBN



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- 2.1.4. Print ISBN
- 2.1.5. Price (USD)
- 2.1.6. Year of Publication
- 2.1.7. Editor/Author
- 2.1.8. Territory Rights (“World” or 2-letter ISO Country Code(s))
- 2.2. Metadata Recommended (In addition to Minimum): (There are a variety of ONIX fields that may be used for many of the recommended headings. As a result, EBSCO doesn’t prescribe particular ONIX fields for these, but instead, works with each publisher to ensure we capture the data correctly.)
 - 2.2.1. Book Summary
 - 2.2.2. Audience
 - 2.2.3. Language
 - 2.2.4. Embargo/On Sale Date
 - 2.2.5. Edition (ABR/UBR)
 - 2.2.6. Awards
 - 2.2.7. Reviews
 - 2.2.8. Author Notes
 - 2.2.9. Related Products

3. FILE NAMING CONVENTION

3.1. Metadata Naming Convention (Preferred)

3.1.1. New Metadata Multiple Titles: file name contains publisher or title information plus date in yyyyymmdd

Eg: *Auto_Distribution_ACME_Publishing_20131025.xlsx* or *Auto_Distribution_ACME_Publishing_20131025.xml*

3.1.2. New Metadata Single Title: Alternatively, file name contains ISBN plus date in yyyyymmdd

Eg: *ACME_Publishing_ISBN_20131025.xlsx* or *ACME_Publishing_ISBN_20131025.xml*

3.1.3. Update: File name contains above information PLUS “_update”

Eg: *ACME_Publishing_20131026_update.xlsx* or *ACME_Publishing_20131026_update.xml*;

3.2. Book Format Naming Convention (Preferred)

3.2.1. ISBN.extension (format-specific ISBN preferred)

3.2.2. ISBN_Title.extension (format-specific ISBN preferred)

3.2.3. ISBN_Replacement.extension (for replacement files)

4. DELIVERY METHOD

4.1. FTP (File Transfer Protocol)

4.1.1. We will provide the FTP Username and Password.



APPENDIX A: EBOOK REQUIRED METADATA ONIX MAPPING

<p>Excel (EBSCO MDSSv3.3 Spreadsheet Template Preferred)</p>	<p>ONIX (ONIX files must adhere to the schema outlined by EDItEUR for ONIX 2.1 files in “ONIX For Books: Product Information Message Product Record Format” and its associated code lists: http://www.editeur.org/15/Previous-Releases/.)</p>
	<p>PR.1.1: Record reference number Every product in your ONIX file must contain a unique record reference number (<RecordReference>/<a001>).</p>
<p>Publisher Name</p> <p>OR</p> <p>Imprint Name</p>	<p><Publisher> Composite</p> <ul style="list-style-type: none"> • PR.19.7 Publishing Role <PublishingRole> <b291> • PR.19.11 Publisher Name <PublisherName> <b081> <p>OR</p> <p><Imprint> Composite (Optional)</p> <ul style="list-style-type: none"> • PR.19.1 Imprint Name <ImprintName> <b079>
<p>Title</p>	<p><Title> Composite. Every product must contain a title, at least:</p> <ul style="list-style-type: none"> • PR.7.8: Title type code (<TitleType>/<b202>) • PR.7.11: Title text (<TitleText>/<b203>) or • PR.7.12: Title prefix (<TitlePrefix>/<b030>) and PR.7.13: Title text without prefix (<TitleWithoutPrefix>/<b031>)
<p>PDF/EPUB ISBN</p>	<p><ProductIdentifier> composite. Every product must contain at least one product identifier. Acceptable product identifiers include an ISBN-13 or an ISBN-10 associated with the product form to be delivered/hosted:</p> <ul style="list-style-type: none"> PR.2.7: Product identifier type code (<ProductIDType>/<b221>) PR.2.9: Identifier value (<IDValue>/<b244>)
<p>Print ISBN</p>	<p><RelatedProducts> Composite (This is where ONIX captures related ISBNs [print, or other digital format])</p> <ul style="list-style-type: none"> • PR.23.7 Relation Code <RelationCode> <h208> <ul style="list-style-type: none"> ○ <ProductIdentifier> Composite (Must be within <RelatedProducts> to identify the title) Refer to Original Documentation for requirements for this Composite
<p>Price</p>	<p><Price> composite. Every product should have only one price in US dollars.</p> <ul style="list-style-type: none"> • PR.24.63: Price amount (<PriceAmount>/<j151>) • PR.24.64: Currency code (<CurrencyCode>/<j152> with a value of “USD”) <p>OR</p> <ul style="list-style-type: none"> • MH.22: Default currency (<DefaultCurrencyCode>/<m186> with a value of “USD”)
<p>Publication Year</p>	<p><PublicationDate></p> <ul style="list-style-type: none"> • PR.20.5 Publication Date <PublicationDate> <b003>
<p>Editor/Author</p>	<p><Contributor> Composite</p> <ul style="list-style-type: none"> • PR.8.2: Contributor Role <ContributorRole> <b035> • PR.8.5: Person Name <PersonName> <b036>
<p>Territory Rights</p>	<p><SalesRights> or <NotForSale> Composite. Every product must contain sales rights.</p> <ul style="list-style-type: none"> • PR.21.1: Sales rights type code (<SalesRightsType>/<b089>) • PR.21.2, PR.21.5: Right country (<RightsCountry>/<b090>) <p>OR</p> <ul style="list-style-type: none"> • PR.21.3, PR.21.6: Rights territory (<RightsTerritory>/<b388>) if “WORLD” Note that the only territory code EBSCO accepts is “WORLD.”