

INGRAM.



INTEGRATION GUIDE

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Introduction

Integration Checklist/ Timeline/ Overview of process

CoreSource provides clients with succinct overviews of the integration process in the form of a task list. The task list includes all steps required to establish a customer in CoreSource. An example is listed below.

Project Phase	Task Name	Assigned To
Preliminary	Integration Specialist sends integration packet to publisher	
Preliminary	Publisher to complete new publisher form located in the packet	
Preliminary	Set up conference call to discuss integration packet and integration process	
Preliminary	Set time for CoreSource demo, focusing on any areas publisher has questions on	
Preliminary	Determine Title Group ID	
Preliminary	Discuss discount codes	
Preliminary	Publisher to send metadata sample for verification of all required data	
Preliminary	Discuss how metadata requirements can be different for each distribution partner	
Preliminary	Receive verification of complete metadata from team	
Preliminary	Ask publisher for spreadsheet containing where assets have been distributed outside of CS	
Preliminary	Preliminary Phase Complete	
Development	Publisher to upload first set of files and metadata to supplied SFTP	
Development	Establish QA instance. Setup publishers and imprints	
Development	Establish Production instance. Setup publishers and imprints	
Development	Add publisher logo to CoreSource	
Development	Establish QA instance. Setup notifications	
Development	Establish QA instance. Setup CS PLUS distribution partners	
Development	Establish QA instance. Setup direct distribution partners	
Development	Establish Production instance. Setup external notifications	
Development	Establish Production instance. Setup CS PLUS distribution partners	
Development	Establish Production instance. Setup direct distribution partners	
Development	Insert Pre-CS asset history	
Development	Development Phase Complete	
Testing	Ingest metadata into QA	
Testing	Address any failures that occurred with publisher	

Testing	Ingest assets into QA
Testing	Address any failures that occurred with publisher
Testing	Verify that content matches metadata
Testing	Validate distribution partners
Testing	Testing Phase Complete
Implementation	Ingest metadata and assets from SFTP into Production
Implementation	Setup first user with access to CoreSource and provide instructions on how to add additional users
Implementation	Training session covering administration, notifications, and jobs
Implementation	Have publisher set up internal notifications
Implementation	Turn on automatic ingestion from SFTP
Implementation	Setup training session covering ingestion, failures, and metadata
Implementation	Have publisher verify all channel setups
Implementation	Notify partners of upcoming CoreSource deliveries
Implementation	Training session covering distribution channels, and distribute small set of titles to each distribution channel during training
Implementation	Validate distribution failures with publisher and fix
Implementation	Redistribute any failed distributions with publisher
Implementation	Follow up with all distribution partners to ensure proper delivery
Implementation	Implementation Phase Complete
Implementation	Turn on automatic distribution

CoreSource Processes

Training Process

We have made a fundamental commitment to providing a positive, professional experience between our publishers and the CoreSource team. We will work diligently to assist each publisher reach their maximum success level by providing essential training during the CoreSource integration process. This training is designed to introduce each publisher to essential aspects of our platform. As new features and functionality are added, enhanced training will be available as needed.

Ongoing Support

See the FAQ section – [Appendix A](#) – for some of our most commonly asked questions.

There is also additional information available on the help menu in CoreSource- including a user guide and helpful videos.

Webinars are held on a regular schedule to inform users of new upgrades, refresh current functionality, and more. Watch your email for invites to the webinars.

If your question is not addressed in any of these places, please contact CoreSource at coresourcesupport@ingramcontent.com.

Billing Information

All invoices related to CoreSource are sent out by Lightning Source (LSI). Below are different types of invoices that a customer may or may not receive based on their contract and if they are using additional programs.

Integration Fee

The integration fee will be billed based on the contract signed by the publisher. It is a manual invoice that gets sent out from LSI Finance at the point a successful distribution has been completed for the new customer.

File will be in PDF only.

Example:

Terms		Due Date		Sales Person		
30 NET		01/29/2012				
SKU	Description	C	Quantity		Unit Price	Extended Price
			Ordered	Shipped		
	CoreSource Title Setup Fee		0	1	5,000.00	5,000.00
Subtotal						5,000.00
Tax						0.00
Freight						0.00
Total						5,000.00

Currency in USD

Title Management Fee

CoreSource billing occurs based on Ingram’s accounting calendar. At month end, the billing report cycle commences. The finance team delivers reports to customers. Each billing package includes a summary of charges along with itemized detail about the titles and/or conversions comprising those charges.

Billing for system usage begins during the month of the first successful distribution of content to a distribution partner.

This is an automated process, and the publisher will receive an email the first week of the month for the number of title groups with content. If the contract states the publisher will pay for title groups that are > 1 GB and overages are present, the overages will also be included on the invoice.

Two files will be included in the email: a PDF as shown below and a detailed TSV file that can be opened in Excel.

There are two versions of the PDF report. The first will give the publisher ISBN level detail for all title groups with content on the PDF statement. The second option is consolidated and only has one line on the PDF summary showing the number of title groups with content. The detail on the TSV will still provide ISBN level detail. The default is to give the ISBN level detail on the PDF summary; however, if a publisher wishes to change to the consolidated statement, they should discuss with their account manager.

Example:

Terms		Due Date		Sales Person			
30 NET		02/26/2012					
SKU	Description	C	Quantity		Unit Price	Extended Price	
			Ordered	Shipped			
1	T		1	1	1.67	1.67	
1	C		1	1	1.67	1.67	
1	T		1	1	1.67	1.67	
1	T		1	1	1.67	1.67	
1	T		1	1	1.67	1.67	
1	T		1	1	1.67	1.67	
1	X		1	1	1.67	1.67	
1	Q		1	1	1.67	1.67	
1	N		1	1	1.67	1.67	
1	Li		1	1	1.67	1.67	
1	P		1	1	1.67	1.67	
1	E		1	1	1.67	1.67	
1	Y		1	1	1.67	1.67	
1	T		1	1	1.67	1.67	
1	S		1	1	1.67	1.67	
Subtotal						625.66	
Tax						0.00	
Freight						0.00	
Total						625.66	

Digital Title Management Fee - Monthly charge per each title group stored per the terms of your contract with Ingram.

Currency in USD

Example- Consolidated:

Terms		Due Date		Sales Person			
Net 30 LG		03/04/2012					
Description			Quantity		Extended Price		
Consolidated Invoice Summary Line			10,405		18,208.75		
Subtotal						18,208.75	
Tax						0.00	
Freight						0.00	
Total						18,208.75	

Digital Title Management Fee - Monthly charge per each title group stored per the terms of your contract with Ingram.

Currency in USD

Publishers can also access the information passed to LSI by viewing the new [Billing Snapshot](#) report in CoreSource. This is a snapshot of title group numbers, etc. present at the time of billing.

Conversion Fee

If the publisher is using Ingram Conversion Services, a separate invoice will be sent each month with the conversion details.

Billing for conversion services begins with the completion of the first conversion job. The conversion team manages the conversion work orders and provides the information monthly to LSI Finance. LSI Finance sends manual invoices monthly. The email will include a PDF (as shown below) and a detailed Excel file.

Example:

Terms		Due Date		Sales Person		
Net 45 EOM-LG		03/15/2012				
SKU	Description	C	Quantity		Unit Price	Extended Price
			Ordered	Shipped		
	CoreSource Conversion Fees		0	1	6,923.32	6,923.32
Subtotal						6,923.32
Tax						0.00
Freight						0.00
Total						6,923.32

Currency in USD

Conversion Work Order & Process

ICG offers conversion services for common file conversions. The list of standard services and their estimated costs are listed on the attached [Appendix C](#).

In the event you require services that are not part of the standard offering, submit a request to your integration specialist outlining in detail the services needed. Ingram will then determine whether your requirements can be accommodated and whether any additional charges apply.

Conversion services are billed monthly. Charges for conversion work begin immediately following the completion of the first job. Standard turnaround for conversion is fifteen (15) business days for EPUB and ten (10) business days for web PDF. This timeline may be impacted by non-compliant file submissions or large-scale jobs.

Account Setup

Publisher Information

Information is critical to setting up the business relationship and CoreSource profiles accurately. Please review each section of the New Publisher Form (provided separately), and return the requested information to your integration specialist quickly.

Communication Plan

Communication during integration process is critical to the success of this integration. Your integration specialist will be your main point of communication during the process. He or she will guide you through all aspects of the system including delivery of content and distribution of content.

The integration project phases are:

- Preliminary
- Development
- Testing
- Implementation

An overview of the project tasks and timeline by phase are in [Appendix H](#).

Technical Information

Browser Requirements

CoreSource is actively supported by the following browsers.

Computer	Browser
PC	IE 8 IE 7 Firefox 3 Google Chrome
Mac	Firefox 3 Safari 4 Google Chrome

Delivery to CoreSource

Ingestion is the process of importing customer assets and metadata into CoreSource. The ingestion process is fully automated and requires files to be named by the standard file naming conventions. These standard naming conventions are basic requirements to successfully import content and metadata delivered to a CoreSource SFTP server. Files can be submitted by either the customer or a customer vendor. However, the ingestion process operates within a strict set of business rules.

FTP Connection

All content files and metadata files must be submitted via SFTP. CoreSource customers will have access to a personalized SFTP site.

Customers may elect to send metadata and content files themselves or to require their third party vendors (printers, compositors, conversion houses, art houses, metadata vendors) to submit content on their behalf. To request multiple ingestion accounts, customers should submit the name of the partner(s) needing access along with a contact name to their CoreSource integration specialist.

SFTP Locations

US customers should use the location listed below.

SFTP location: cs2ftp.ingramcontent.com
Port = 22

Non-US customers may prefer to submit material to our UK-based location.

SFTP location: cs2ftp.ingramcontent.co.uk
Port = 22

Content Review

As part of the implementation process, your integration specialist will review the metadata submissions and identify any issues that would give rise to validation failures for your channel partners. The list of required fields and validation rules for partners will be provided once you submit your partner list, and this is also available as a report within CoreSource as the Metadata Validation Report.

Content Submissions

All content ingested into CoreSource is assigned to a Title Group. The association of an asset to a Title Group is handled in the metadata. CoreSource strictly enforces the content business rules for delivery of content files to CoreSource.

CoreSource Content Business Rules

CoreSource uses business rules to govern content submissions. Customers must follow these rules for successful content processing.

The CoreSource metadata business rules are:

1. ISBN is a required component of naming conventions. Items that do not contain a valid ISBN will fail ingestion. ISBN check digits are validated during ingestion. Files can be named with an ISBN10 and CoreSource will convert to an ISBN13 during ingestion and store that value.
2. Content files must be submitted under their unique ISBN13. For example, an eBook file must be submitted under its unique ISBN13 and a print PDF under its unique ISBN13.

3. CoreSource supports the following conventions as regards ISBN assignments:
 - a. Publisher names all eBook formats with the same ISBN. For example, an EPUB and a Web PDF asset will have the same eISBN.
 - b. Publisher names eBook assets with unique ISBNs per format. For example, the EPUB, Web PDF and Mobipocket files for a title each carry unique ISBNs.
 - c. Publisher names eBook assets with a unique ISBN for XML versions of content (EPUB, Mobipocket for example) and another for PDF versions of content (Web PDF).
4. Font packages must be compressed to protect against file corruption.
5. When an asset is received with the file name as that of a file previously submitted, the newly submitted asset replaces the older content and becomes version 2 (or greater) of the asset.
6. Duplicate submissions of the same file will be rejected. CoreSource uses a checksum validation to find duplicate files.
7. CoreSource does not “act on” a compressed file in a special way during ingestion. Compressed packages ingest into CoreSource as single, whole entities.
8. For those products comprised by multiple files (example: an audio book), customers should submit full content sets each time they supply content to CoreSource.
9. Versioning will apply to the entire set.
10. The entire set will be replaced by a resubmission. This will ensure that parts of the set are not accidentally overwritten or placed into the incorrect order. If a set gets smaller, replacing the full set will ensure that the “extra” files are deprecated.
11. If no title group ID has been supplied through metadata for content at the time of ingestion, the ISBN attached to the file or record is used as a placeholder until metadata updates the record appropriately.

Metadata Submissions

CoreSource accepts metadata in four formats. All formats should be UTF-8 encoded.

- ONIX 2.1 (short and long tag accepted)
- ONIX 3.0 (short and long tag accepted)
- CoreSource Excel submission template
- CoreSource CSV ONIX supplement template
- CoreSource Excel ONIX supplement template

How to Use Metadata Templates

Microsoft Excel or another spreadsheet editor is needed to work with the template. You can download the newest template from the help menu at any time.

Once opened in a spreadsheet editor, click on a cell and type in the needed information. The three columns in red are required to create a new title in CoreSource or to update an existing title.

When you click on a cell in row 2, a tip will appear with more information about what is needed in the field.

For assets with multiple currencies, an additional line is needed to express the second currency.

CoreSource Metadata Business Rules

CoreSource uses business rules to govern metadata submissions. Customers must follow these rules for successful metadata processing.

The CoreSource metadata business rules are:

1. **Title Group ID, ISBN13, and Asset Type** are required for metadata ingestion. Any submission without this information will fail ingestion.
2. ISBN10 is not supported in the CoreSource metadata templates.
3. Users may not alter field/column names.
4. Field/columns can be reorganized or deleted.
5. Worksheets/tabs may not be renamed.
6. The file naming convention for metadata files is Customer_YYYYMMDD. Hour, minute and second notations may also be included if multiple submissions are sent in a day.
7. ONIX files may be sent in a zip package containing only the ONIX file, provided the zipped package is named in the Customer_YYYYMMDD format.
8. CoreSource provides six (6) flexible or wild card fields for customers' use. These are available in the metadata templates only and require setup by the development team.
9. Users may make metadata updates in the CoreSource UI if they have permission to do so.
10. CoreSource records all updates to metadata in a manner allowing for appropriate partner distribution. If desired, when a record has been updated, a full version of the record is forwarded to partners who previously received the information.
11. CoreSource ingests all metadata records submitted (provided the record(s) submitted meets CoreSource's rule set).
12. Customers may submit metadata files in advance of content. All properly formatted records will be ingested into CoreSource as metadata-only assets. All assets are linked together based on their Title Group ID.
13. In order to update the asset status, customers submitting ONIX metadata must submit a sidecar template or edit in the application.
14. Non-standard contributor names like Cher, Anonymous, and Aristotle need to be submitted in the last name field of the metadata template.
15. Publisher or corporation names like Dorling Kindersley or Mayo Clinic are submitted in the last name field. They are paired with the contributor role of "manufactured by."
 - a. Customers do not need to submit metadata for every asset provided that the asset is named with an ISBN explicitly associated with a Title Group via a previous or upcoming metadata submission, **AND** the asset will not be the primary target of a distribution (ie: covers).

ONIX Submission Guidelines

CoreSource accepts ONIX 2.1 and ONIX 3.0. Ingram updates its code lists regularly based on new publications from ONIX. Revisions to Ingram's ingestion procedures for ONIX will be communicated to customers prior to their implementation.

While ONIX is a standard, CoreSource has best practices regarding how specific pieces of information like "Title Group ID" and "Asset Type" should be communicated. Those business rules are located in [Appendix E](#) and briefly described below.

To learn more about the ONIX standard, users are encouraged to review the materials available for download on <http://www.editeur.org/>.

Communicating required fields in ONIX

Title Group ID

Title Group ID's are the base to how content is organized in CoreSource. Different formats of the same title will be tied together using the Title Group ID. Title Group IDs should be submitted to CoreSource using the Work Identifier tag.

For all formats of the same title, the Title Group ID should be the same.

Example where the Title Group ID is 1839:

```
<workidentifier>
  <b201>01</b201>
  <b244>1839</b244>
</workidentifier>
```

Asset Type

Asset types define the type of content being submitted. A Title Group can have many assets inside of it.

CoreSource will determine the asset type in the following ways:

- <b014> should include CS asset type name (See list of CS Asset Types).
 - <b012> and <b014> combination should be carefully used. If <b014> is not sent and <b012> has any print product form codes (B*), then CS will create "Print Metadata" assets.
- If <b014> is not sent, then <b211> should be sent with one of the following codes only if <b012> has DG code: 001, 002, 004, 005, 010, 022, 027, 029, 031, 044, 045.
- If <b014> is not sent and <b211> has a code other than those mentioned above, then <b213> can include one of the values from CS Asset Type list. This works only when <b012> is DG.

Ingestion Guidelines

All content and metadata submissions to CoreSource are governed by a set of business rules, including a required set of naming conventions. Content that is not submitted according to the following business rules will fail the ingestion process.

The content submission business rules are:

12. CoreSource ingestion is fully automated.
13. CoreSource SLA for standard ingestion transactions is 24 hours from receipt of content or metadata.
14. Ingram sets up ingestion channels for customers.
15. CoreSource customers define recipients of ingestion messaging.
16. CoreSource customers may have one or multiple ingestion channels associated with their account.
17. Customers and their vendors need to name content and metadata submissions following CoreSource's naming conventions. Naming conventions for assets are located in [Appendix D](#).
18. Items that do not adhere to the CoreSource naming conventions will fail ingestion and need to be renamed by the customer.
19. Naming conventions are not case-sensitive.
20. CoreSource SLA reporting requires Ingram to record the SFTP arrival time for content submissions as well as the subsequent ingestion time. These two times will be used to calculate the total ingestion time.
21. Because of the impact to ingestion and distribution, revisions or additions to naming conventions and asset types require the approval of the CoreSource business unit.

22. CoreSource reports on ingestion failures completely and thoroughly. Reasons for failures are made transparent so that clients know how to correct issues.
23. Ingestion reporting will be accessible through the Reports menu in the CoreSource UI as well as through email messaging.
24. All files must be delivered to one location. Subdirectories on the SFTP location are not needed and will not be supported.
25. At the time of ingestion assets are stamped with a version number, ingestion time, and source.

File Naming Conventions

CoreSource requires clients to submit files using its standard naming conventions. A list of available conventions appears in [Appendix D](#) of this document and is also provided in a separate attachment.

CoreSource ingests only those files that adhere to the naming standards. Using a convention not found in the list of accepted formats will result in an ingestion failure.

Content Distribution to Channel Partners

CoreSource distributes content to the channel partners you setup (depending upon the format compatibility for each client). For the implementation cycle, we prefer to focus on a known set of partners (up to 10) with whom you have agreements and delivery credentials already in place. Our experience is that this provides for an effective implementation cycle.

During the implementation, your integration specialist will ask you for all the delivery credentials for your currently active distribution partners. It is the publisher's responsibility to provide credentials and ensure their accuracy. We will also ask you for details of your contacts at each partner. For partners new to Ingram it is essential that the publisher provides the name, email address and telephone number of an appropriate contact for our technical team. After these details have been provided, your integration specialist will help you distribute files and follow the batch through the process to ensure proper delivery.

As the implementation cycle closes, customers are welcome to submit additional partners to their distribution network.

Requests for new partners should be submitted to your support service. CoreSource will follow-up on these requests from clients and will schedule a call to discuss them as needed.

The integration plan is designed for an implementation cycle that lasts up to six weeks. In the event that it is not possible to negotiate a commercial relationship within the planned timeframe, CoreSource expects to finalize the implementation cycle with only those partners who currently maintain a commercial relationship.

CoreSource Plus

CoreSource Plus is an additional turnkey solution for publishers to assist them in maximizing their return on their digital investment.

Ingram contracts with and directly maintains the relationship with the retailer so that the publisher is not required to do so.

The key services provided are:

- Full content delivery – metadata and assets – to retailers where security risks are low.
- DRM-protected content fulfillment where the retailer receives only the metadata needed to attract sales and Ingram will provide a link to the consumer to access the content from our servers.
- Ingram manages the billing and accounts received through Ingram contracts.

Including retailers in which the publisher chooses to maintain a direct relationship on a fee basis

CoreSource Plus provides content to major and smaller online retail partners with an emphasis on global market penetration. Currently we serve over 60 channels, but anticipate rapid growth in the next year. CoreSource Plus does not currently support Agency (excluding Apple) nor Library channel partners.

The program has been designed to assume each publisher will want to include distribute all content to all CoreSource Plus retailers. Should the publisher wish to exclude a particular retail partner, they will need to “opt out” of that partner with proactive notice to CoreSource Plus administration, their Sales Rep.

CoreSource Plus Discount Codes

For the CoreSource Plus program, Ingram will be distributing titles and metadata (including pricing data) to retailers who have signed a contract with Ingram. Ingram is sending these titles on behalf of the CS+ publisher but because the financial relationships are between Ingram and the CS+ retailers, we must ensure we are

sending the title level discount code information for all titles correctly. In order to do this, Ingram must be able to assign a discount code to each title being distributed in the CS+ program.

In the CS+ program, publishers agree to set a discount percentage based on type of book. Ingram currently has 4 levels of discounts: Trade books = 50%, Professional books = 40%, Scholarly books = 30%, and Amazon = 52.5%.

In order for Ingram to send the correct discount percentage to the retailer, we are asking publishers to send us a discount code within ONIX or XLS metadata files at a title level. We prefer if the publisher would use the discount codes listed below. If a publisher has their own discount codes that map to the below discount percentages, Ingram can set up the mapping within CoreSource.

CS+ Discount Code Mapping		
Type	Discount Code	Purchase Discount
Trade Digital Media Files	01	50%
Professional Digital Media Files	02	40%
Scholarly Digital Media Files	03	30%
Amazon Digital Media Files	04	52.5%

Example XLS template (price section) for Trade (50%)

The screenshot shows an XLS spreadsheet with columns labeled AL, AM, AN, AO, AP, and AQ. Row 1 is a header for 'Price 1' and 'Discounts for Price 1'. Row 2 contains the following headers: 'Price 1', 'Price Type Desc 1', 'Discount Code Type 1', 'Discount Code Name 1', 'Discount Code 1', and 'Discount Percentage 1'. Row 3 contains the data: '9.99', '01 RRP excluding tax', '02 Propriet', 'CSPLUS', '01', and an empty cell. Row 4 is highlighted in yellow and is currently empty.

Example ONIX for Trade (50%)

```
<discountcoded>
<j363>02</j363>
<j378>CSPLUS</j378>
<j364>01</j364>
</discountcoded>
```

As a default, Ingram will also need to set a discount percentage for each publisher and/or imprint level, so that if we do not receive a discount code at the title level from the publisher upon ingestion, Ingram has a default percentage to send to the distribution partners.

Sales Reporting

Frequency

CoreSource will report eBook sales during the first week of each month. CoreSource Plus retailers have 25 days after month end to report sales to CoreSource. For this reason, the sales report received will be for sales 60 days

prior. For example, the report sent in March covers January sales. The January sales were reported to CoreSource in February, and CoreSource will then report the sales during the first week of March.

Month Ebook Sold from Retailer Website:	Retailer Reports Sale to Ingram	Ingram Reporting Month	Ingram emails reports to Customer	Payment from Ingram sent
January	February	February	First week of March	First week of June
February	March	March	First week of April	First week of July
March	April	April	First week of May	First week of August
April	May	May	First week of June	First week of Sept
May	June	June	First week of July	First week of Oct
June	July	July	First week of Aug	First week of Nov
July	August	August	First week of Sept	First week of Dec
August	September	September	First week of Oct	First week of Jan
September	October	October	First week of Nov	First week of Feb
October	November	November	First week of Dec	First week of March
November	December	December	First week of Jan	First week of April
December	January	January	First week of Feb	First week of May

Separate reports are generated for wholesale eBook sales and agency eBook sales. Separate reports are also generated per currency. If you are selling in the retail and agency business models in both USD and EUR, you would then receive four sales reports.

First Payment

The first payment will be received 90 days from the date when your first title sales were reported.

Following the first payment, publishers can expect to receive a Publisher Compensation Statement from Ingram within one week after Ingram’s month-end. Example: Sales reported to CoreSource in April reports are e-mailed to publishers by the end of the first week of May.

Note: If zero titles sales were reported, a Publisher Compensation Statement will not be generated.

Payments

Publishers can choose to receive their payment either electronically or via printed check. Those wishing to receive payment via an electronic check will be required to complete a form and return it to CoreSource before the electronic payments can be sent.

Appendices

Appendix A: Frequently Asked Questions

Q. What metadata formats are used by CoreSource?

A. CoreSource accepts metadata in the following formats: ONIX 2.1, ONIX 3.0, Excel Template, and CSV ONIX supplement template.

Q. What type of security restrictions does CoreSource have?

A. CoreSource Customer Administrators can restrict their users' access to the system at both a functional and content level. Functional permissions manage user access and actions – download, edit metadata, distribute, etc. Content permissions are related to asset types – EPUB, MP3, Web PDF, etc – and also restrict which publishers and imprints a user can access.

Q. How do I request help with CoreSource software?

A. For assistance, you are encouraged to email a description of the type of assistance you are requesting to [CoreSource Support](mailto:coresourcesupport@ingramcontent.com) at coresourcesupport@ingramcontent.com.

Q. Which browsers are supported by CoreSource?

A. Internet Explorer, Firefox, Safari, Chrome

Q. How do I know which metadata fields are required?

A. The metadata requirements specific to your Distribution Partners are covered during the integration process and are available in the CoreSource UI through the Metadata Validation Report.

Q. What eBook formats do I need?

A. CoreSource recommends that customers provide eBooks in EPUB and Web PDF (ePDF or Universal PDF) for their titles. Large retailers commonly use EPUB files. Search partners and many library eBook vendors use web PDFs.

Q. Do I have to distribute all of my content to all CoreSource partners?

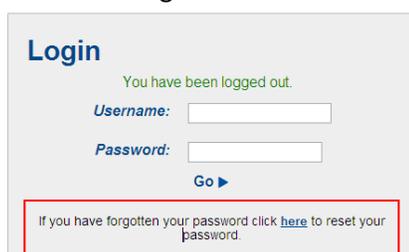
A. No. CoreSource customers must have an established relationship with each Channel Partner that they wish to send content and may, if they choose, select which partners will receive specific content.

Q. Do I establish contracts with vendors prior to using CoreSource to send content/assets?

A. Yes. CoreSource is a tool you use to distribute content/assets to your Channel Partners (excluding CoreSource Plus relationships).

Q. How do I reset my CoreSource password?

A. Ask your Customer Administrator to reset your password, or submit a request for your password reset at the CoreSource login menu.



Login

You have been logged out.

Username:

Password:

Go ►

If you have forgotten your password click [here](#) to reset your password.

Appendix B: Glossary of Terms

Term	Definition
Business Rules	The set of rules that must be followed in order to successfully complete an action in CoreSource.
CoreSource Support	The dedicated person or team of people that will provide ongoing support after the integration phase is complete.
CSV	Comma separated value file stores data in plain-text form and commonly viewed in spreadsheet software.
EPUB	Common eBook format that uses reflowable text.
Flexible Field	CoreSource provides customers with six flexible fields to be used as needed. These fields have open formatting and are essentially "wild card" fields. Possible uses for these fields include the addition of proprietary item IDs or content classifications.
Integration Specialist	The dedicated team member who will guide you through the setup and familiarization process in CoreSource.
ONIX	(ON line I nformation eX change) XML files used to disseminate metadata information.
Short Description	A brief description of the product's content. CoreSource recommends that data submitted in this field not exceed 1,000 characters.
Street Date	Often referred to as "on sale date," this is the date on which the product can be placed on sale or made available to a consumer. Often there are legal ramifications for placing products on sale prior to a street date.
Territory Rights	Descriptions of where a product can be sold. CoreSource accepts industry standard ISO codes for this information. A link to online resources for ISO codes is on the Instructions tab of this workbook.
Title Group ID	The Title Group ID is the ISBN under which a family, or title group, of assets is organized. For example, if a title, meaning a "work," has a print package, two e-books and an audio book associated with it, the Title Group ID is the ISBN that links all of the assets together. The previous version of CoreSource referred to Title Group ID as "parent" ID. In many cases the Title Group ID is the hardcover ISBN or original print ISBN.
Web PDF	eBook format of PDF utilizing web optimization for best online experience.

Appendix C: Standard Services & Pricing

Service	Input	Output	Fee Per Page	Fee Per Book	Service Level (Business Days)
Conversion	Print PDF	ePDF	N/A	\$26.00	10
		ePDF – Redacted	See Note 2	\$10.40	
		ePUB	\$0.33	N/A	15
		ePUB – Redacted	See Note 2	\$6.50	
		ePUB – Complex	\$0.33 (See Note 3)	N/A	
		DocBook 4.5 XML	\$0.85	N/A	10
	XML	DocBook 4.5 XML	\$0.46	N/A	5
	Web PDF	DocBook 4.5 XML	\$1.04	N/A	10
	Native Files (See Note 4)	ePDF	\$0.33	N/A	10
		ePUB	\$0.33	N/A	15
		DocBook 4.5 XML	\$0.85	N/A	10
Validation	ePUB (ePUB validated under 1.0.3 or lower)	ePUB (1.0.5)	NA	\$1.95	5
As of 5/13/2010					
Notes					
1. Non-standard offerings quoted on request.					
2. Redaction is an additional per-book charge. The base ePub or ePDF conversion is required before a redaction service can be performed.					
3. Incremental charge per-page on top of base ePub conversion charge. Additional charges may apply depending on level of complexity (I.E. Charts or Graphs). Publisher will be provided a quote if additional charges are necessary.					
4. No support for native files prepared in PageMaker, MS Word, MS Publisher, CorelDRAW, etc.					

Appendix D: File Naming Conventions

Category	Asset Type	Example	Description
Audio	Digital Audio, MP3	eISBN_MP3	Our preferred lossy audio track format
Audio	Lossless Format Audio, FLAC	eISBN_FLAC	Our preferred lossless audio track format - Compressed using open source FLAC
Audio	Digital Audio, WMA	eISBN_WMA	A lossy audio track format, Overdrive requires this format
Audio	Lossless Format Audio, WAV	eISBN_WAV	A lossless audio track format - Uncompressed WAV format, Overdrive requires this format
Audio	Lossless Format Audio, WMA	eISBN_WMAlossless	A lossless audio track format - compressed (Not added to the database yet)
eBook	Apple iBook	eISBN_iBook	Apple TextBook or Multi-Touch books.
eBook	EPUB	eISBN_EPUB	EPUB (http://www.idpf.org/)
eBook	EPUB, Enhanced	eISBN_EPUBenhanced	EPUB format with enhanced content, such as multimedia, Links to other website or other content
eBook	PubXML	pISBN_PubXML	Publisher-specific package of XML files and content needed for conversion
eBook	Sample EPUB	eISBN_SampleEpub	EPUB that is being used solely as a sample for preview/free download
eBook	Sample Mobi	eISBN_SampleMobi	Proprietary Mobipocket format that is being used solely as a sample for preview/free download
eBook	Web PDF	eISBN_WEB	Web Ready PDF
eBook	Web PDF, Enhanced	eISBN_WEBenhanced	Web Ready PDF with enhanced content, such as multimedia
eBook	Custom Book	eISBN_Custom	A book made from selected chapters from several different books. E.g. course book created by a college prof.
eBook	DocBook5 XML	eISBN_Doc5	XML content formatted based upon DocBook v5.0 schema
eBook	DocBookSJV XML	eISBN_docSJV	XML content formatted based upon DocBookSJV (Safari Joint Venture) schema
eBook	EPUB Export	eISBN_EPUBexport	EPUB (Used only by Penguin for their EPUBs with international ISBNs)
eBook	EPUB Proof	eISBN_EPUBproof	An EPUB that is in a Quality Assurance stage
eBook	EPUB with DRM	eISBN_EPUBdrm	EPUB that is wrapped in DRM
eBook	EPUB, Compositor	eISBN_EPUBcomp	EPUB that is being worked upon by compositors
eBook	EPUB, First Pass	eISBN_EPUBfirstpass	EPUB - Generally used when composition vendors need to rework (adding new images, reflowing links, etc..) on the eBook
eBook	EPUB, Fixed	eISBN_EPUBfixed	EPUB - Fixed layout format
eBook	eReader	eISBN_eReader	Palm's proprietary format
eBook	Excerpt	eISBN_ExcerptCustomWeb	A selection of text from an ebook in Web-optimized PDF

Category	Asset Type	Example	Description
	Custom Web PDF		format
eBook	Excerpt First Pass HTML	eISBN_ExcerptFirstPassHTML	The first pass of excerpt of an ebook in HTML format - Generally used when composition/conversion vendors need to rework
eBook	Excerpt Standard HTML	eISBN_ExcerptStandardHTML	The first chapter of an ebook in HTML format
eBook	Excerpt Standard Web PDF	eISBN_ExcerptStandardWeb	The first chapter of an ebook in Web-optimized PDF format
eBook	HTML	eISBN_HTML	Hypertext Markup Language (Simple Web Pages)
eBook	Kindle	eISBN_Kindle	Used on Amazon's Kindle device (the AZW file)
eBook	Manifest XML	eISBN_Manifest	Generally used in conjunction with other formats, e.g. EPUB, Sony (Manifest file would normally list all the files associated with the main format)
eBook	Microsoft Reader	eISBN_MSR	Proprietary Microsoft Reader format
eBook	Mobile Read	eISBN_imp	Proprietary Mobile Reader format (http://www.ebooktechnologies.com/)
eBook	Mobipocket Encrypted	eISBN_EncMobi	Proprietary Mobipocket format, encrypted
eBook	Mobipocket Unencrypted	eISBN_Mobi	Proprietary Mobipocket format, unencrypted
eBook	Nook Kids ePIB	eISBN_EPIB	Nook Kids format
eBook	OEB	eISBN_OEB	Open eBook format, succeeded by ePub
eBook	PDF Export	eISBN_PDFexport	PDF Format (Used only by Penguin for their PDFs with international ISBNs)
eBook	Redacted EPUB	eISBN_EPUBr	Redacted EPUB (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Redacted eReader	eISBN_eReaderR	Palm's proprietary format (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Redacted Microsoft Reader	eISBN_MSRR	Proprietary Microsoft Reader format (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Redacted Mobipocket Encrypted	eISBN_EncMobiR	Proprietary Mobipocket format, encrypted (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Redacted Mobipocket Unencrypted	eISBN_MobiR	Proprietary Mobipocket format, unencrypted (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)

Category	Asset Type	Example	Description
eBook	Redacted Sony eBook	eISBN_SonyR	Proprietary Sony eBook format (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book) (http://ebookstore.sony.com/)
eBook	Redacted Web PDF	eISBN_WEBr	Web Ready PDF (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Redacted Web PDF with DRM	eISBN_WEBdrmR	Web Ready PDF wrapped in DRM (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Rocket Book	eISBN_rb	Proprietary Rocket eBook format (http://www.myrocketbook.com/)
eBook	Sony eBook	eISBN_Sony	Proprietary Sony eBook format (http://ebookstore.sony.com/). Also known as BBeB.
eBook	TOCXML	eISBN_TOCXML	An XML-formatted document that contains the ToC of an ebook.
eBook	VitalBook	eISBN_Vital	Proprietary VitalSurce eBook format (http://www.vitalsource.com/). Also known by its extension, VBK.
eBook	Web PDF with DRM	eISBN_WEBdrm	Web Ready PDF wrapped in DRM
eBook	WebPDF, Proof	eISBN_WEBproof	Web Ready PDF that is in a Quality Assurance stage
eBook	Sample EPUB, Fixed	eISBN_SampleEpubFixed	Fixed Layout EPUB that is being used solely as a sample for preview/free download
eBook	EPUB3	eISBN_EPUB3	EPUB3 (http://idpf.org/epub/30)
eBook	EPUB3 Proof	eISBN_EPUB3proof	An EPUB3 that is in a Quality Assurance stage
eBook	EPUB3, Compositor	eISBN_EPUB3comp	EPUB3 that is being worked upon by compositors
eBook	EPUB3, First Pass	eISBN_EPUB3firstpass	EPUB3 - Generally used when composition vendors need to rework (adding new images, reflowing links, etc..) on the eBook
eBook	Redacted EPUB3	eISBN_EPUB3r	Redacted EPUB3 (Redacted - some or all images may have been removed, because publishers do not have copyright for images in eBooks even if they had rights for print version of the same book)
eBook	Nook Page Perfect	eISBN_Nookpageperfect	B&N's proprietary PDF
eBook	XML Doc	eISBN_XMLdoc	Generic XML Document. No specific schema to follow.
Image	Front Cover	ISBN_FC	Front Cover in the RGB colorsystem
Image	Front Cover, High Resolution	ISBN_FChigh	Front Cover, High Resolution.
Image	Back Cover	ISBN_BC	Back Cover image
Image	Contributor Photo	ISBN_Cphoto	Contributor Photo

Category	Asset Type	Example	Description
Image	Front Cover, Low Resolution	ISBN_FClow	Front Cover, Low Resolution
Image	Cover, LSI POD	ISBN_CVRLSIPOD	LSI POD Specific cover (LSI template)
Image	Jacket, LSI POD	ISBN_JKTLSIPOD	LSI POD Specific jacket (LSI template -- front cover, back cover, spine)
Image	Illustration, Art	ISBN_Iart	Illustration - art image (Publishers, like UCP, would send these images as separate assets that were inserted/used in final Print book and/or eBook)
Image	Illustration, Figure	ISBN_FIG	Illustration - Figure, e.g. figure showing anatomy of human body, figures used in Geometry (Publishers, like UCP, would send these images as separate assets that were inserted/used in final Print book and/or eBook)
Image	Illustration, Map	ISBN_Imap	Illustration - Map (Publishers, like UCP, would send these images as separate assets that were inserted/used in final Print book and/or eBook)
Image	Illustration, Photo	ISBN_Iphoto	Illustration - Photo (Publishers, like UCP, would send these images as separate assets that were inserted/used in final Print book and/or eBook)
Image	Image Contracts	ISBN_ImgContracts	Publishers can zip multiple file types together.
Marketing	Advertisement	ISBN_Ad	An advertisement file
Marketing	Contributor Interview	ISBN_Interview	An author interview file (May come in as a Word Doc, PDF doc, MP3 audio file, or Video file)
Marketing	Excerpt	ISBN_Excerpt	A document of an excerpt (May come in as PDF, Word or HTML file)
Marketing	Marketing Misc	ISBN_MkgtMisc	Publishers can zip multiple file types together.
Marketing	Press Release	ISBN_Press	A document of a press release (May come in as PDF, Word or HTML file)
Marketing	Review	ISBN_Rev	A document of a review (May come in as PDF, Word or HTML file)
Marketing	Screenshot	ISBN_Screenshot	Screenshot
Marketing	Trailer	ISBN_Trailer	An advertisement trailer
Print	Interior	pISBN_INT	Interior package of a book. Could include InDesign or Quark files. Ideally, this should only include text content of a book
Print	Jacket	pISBN_JKT	Dust Jacket
Print	Print PDF	pISBN_Print	PDF that is meant to go to a printing press or eBook search programs. Generally OCR'd.
Print	Scanned PDF	pISBN_Scan	PDF that was a direct scan of a print book, non-OCR'd, generally non-optimized
Print	Back Flap	pISBN_BF	Jacket Back Flap
Print	Belly Band Art	pISBN_Bband	A piece of a paper that slips over the entire book horizontally
Print	Belly Band Art Mechanical	pISBN_BbandMech	A piece of a paper that slips over the entire book horizontally
Print	Box Art	pISBN_BoxArt	Box Art for a collection of books that are boxed together.

Category	Asset Type	Example	Description
Print	Box Art Mechanical	pISBN_BoxArtMech	Box Art for a collection of books that are boxed together.
Print	Case Cover	pISBN_Case	The cover design under a dust jacket. Generally non-generic.
Print	Case with Jacket	pISBN_CVRJKT	Book Jacket (paper wrap) and a printed case. JKT would be just the paper wrap, CASE or CVR would be just for the printed case.
Print	CD Face Art	pISBN_Cdface	CD Art for what's printed directly onto a CD
Print	CD Face Art Mechanical	pISBN_CdfaceMech	CD Art for what's printed directly onto a CD
Print	CD Wrap Art	pISBN_Cdwrap	CD Art for what's wrapped onto the CD case
Print	CD Wrap Art Mechanical	pISBN_CdwrapMech	CD Art for what's wrapped onto the CD case
Print	Cover Mechanical	pISBN_CVRmech	This includes all the files (drawings, layout, typeset, images, etc.) used in creating the final cover file that is then used for printing
Print	Design File	pISBN_Design	Design application package (not InDesign or Quark)
Print	DVD Face Art	pISBN_DVDface	DVD Art for what's printed directly onto a DVD
Print	DVD Face Art Mechanical	pISBN_DVDfaceMech	DVD Art for what's printed directly onto a DVD
Print	DVD Wrap Art	pISBN_DVDwrap	DVD Art for what's wrapped onto the DVD case
Print	DVD Wrap Mechanical	pISBN_DVDwrapMech	DVD Art for what's wrapped onto the DVD case
Print	Endpapers	pISBN_endpaper	From Wikipedia - The endpapers or end-papers of a book are the leaves of paper before the title page and after the text. One part is pasted to the inside cover. They hold the text and cover together. Also called end leaf or end sheet. The free half of the end paper is called a flyleaf. Booksellers sometimes refer to the front end paper as FEP. Before mass printing in the 20th century it was common for the endpapers of books to have paper marbling. Sometimes the endpapers are used for maps or other relevant information. They are the traditional place to put bookplates, or an owner's inscription.
Print	Front Flap	pISBN_FF	Jacket Front Flap
Print	InDesign Package	pISBN_InDesign	InDesign package
Print	Insert	pISBN_INS	Inserted pages (e.g. folded maps) of a book
Print	Interior, First Pass	pISBN_interiorfirstpass	Interior of a book - First Pass is generally used when composition vendors need to rework (adding new images, reflowing links, etc..) on the book
Print	Interior, Proof	pISBN_interiorproof	Interior of a book that is in a stage of Quality Assurance
Print	J Wrap Art	pISBN_Jwrap	A piece of paper in the shape of a J that slips over a book vertically
Print	J Wrap Mechanical	pISBN_JwrapMech	A piece of paper in the shape of a J that slips over a book vertically
Print	Jacket Cover	pISBN_CVR	Exactly the same as a JKT

Category	Asset Type	Example	Description
Print	Jacket Mechanical	pISBN_JKTmech	This includes all the files (drawings, layout, typeset, images, etc.) used in creating the final jacket file that is then used for printing
Print	Jacket Proof	pISBN_JKTproof	Dust Jacket that is in a stage of Quality Assurance
Print	Manuscript	pISBN_MNU	The story submitted by author to the publisher (mostly as a WORD or WordPerfect or Text file)
Print	Manuscript with DRM	pISBN_MNUdrm	The story submitted by author to the publisher (mostly as a WORD or WordPerfect or Text file) that has DRM protection
Print	O Wrap Art	pISBN_Owrap	A piece of paper in the shape of an O that slips on the back or front cover of a book
Print	O Wrap Mechanical	pISBN_OwrapMech	A piece of paper in the shape of an O that slips on the back or front cover of a book
Print	Partial Interior	pISBN_INTpartial	Part of the interior of a book (Used by publishers when they want to update only a part of already published book. This is also used by publishers to send the printers just a new copyright page for new Paperback edition of already published Hardcover edition. The copyright page would have the edition type and new ISBN for that edition type. This may also include new cover, back-cover with barcode for new ISBN)
Print	Partial Interior, First Pass	pISBN_INTpartialfirstpass	See Description for Partial Interior - First Pass is generally used when composition vendors need to rework (adding new images, reflowing links, etc..) on the book
Print	Plates	pISBN_Plates	Plates (see description for endpapers) - Generally used for decorative labels used within books. From Wikipedia - A bookplate, also known as ex-libris [Latin, "from the books of..."], is usually a small print or decorative label pasted into a book, often on the inside front cover, to indicate its owner. Simple typographical bookplates are termed 'booklabels'. Bookplates typically bear a name, motto, device, coat-of-arms, crest, badge, or any motif that relates to the owner of the book, or is requested by him from the artist or designer. The name of the owner usually follows an inscription such as "from the books of . . ." or "from the library of . . .", or in Latin, ex libris Bookplates are important evidence for the provenance of books. In the United States, bookplates replaced book rhymes after the 19th century.
Print	POD Jacket	pISBN_PODJKT	Print on Demand-specific dust jacket
Print	POD PDF	pISBN_POD	Print on Demand-specific PDF
Print	Production Misc	ISBN_ProdMisc	Publishers can zip multiple file types together.
Print	Print metadata		Metadata only asset for Print Books
Print	Quark Package	pISBN_Quark	Quark package of a book
Print	Search PDF	pISBN_Search	PDF made specifically to be distributed to Search partners. Typically created from Print PDF. If there were multiple print editions of a book (Hardcover, Paperback, Trade Paper), then there could be those many Search PDFs, each with corresponding Print ISBN.
Video	Video	ISBN_Video	A video file

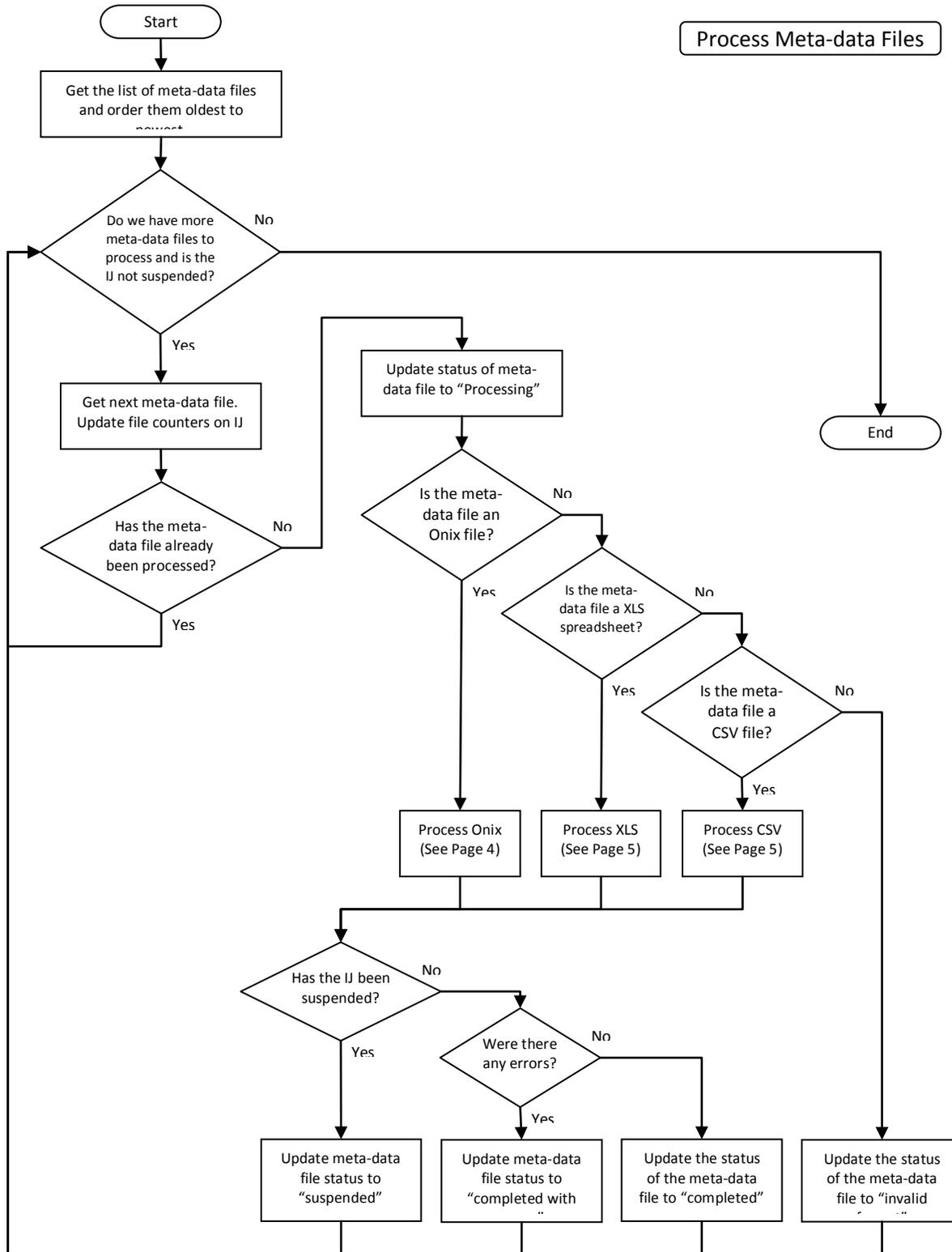
Appendix E: ONIX Guidelines

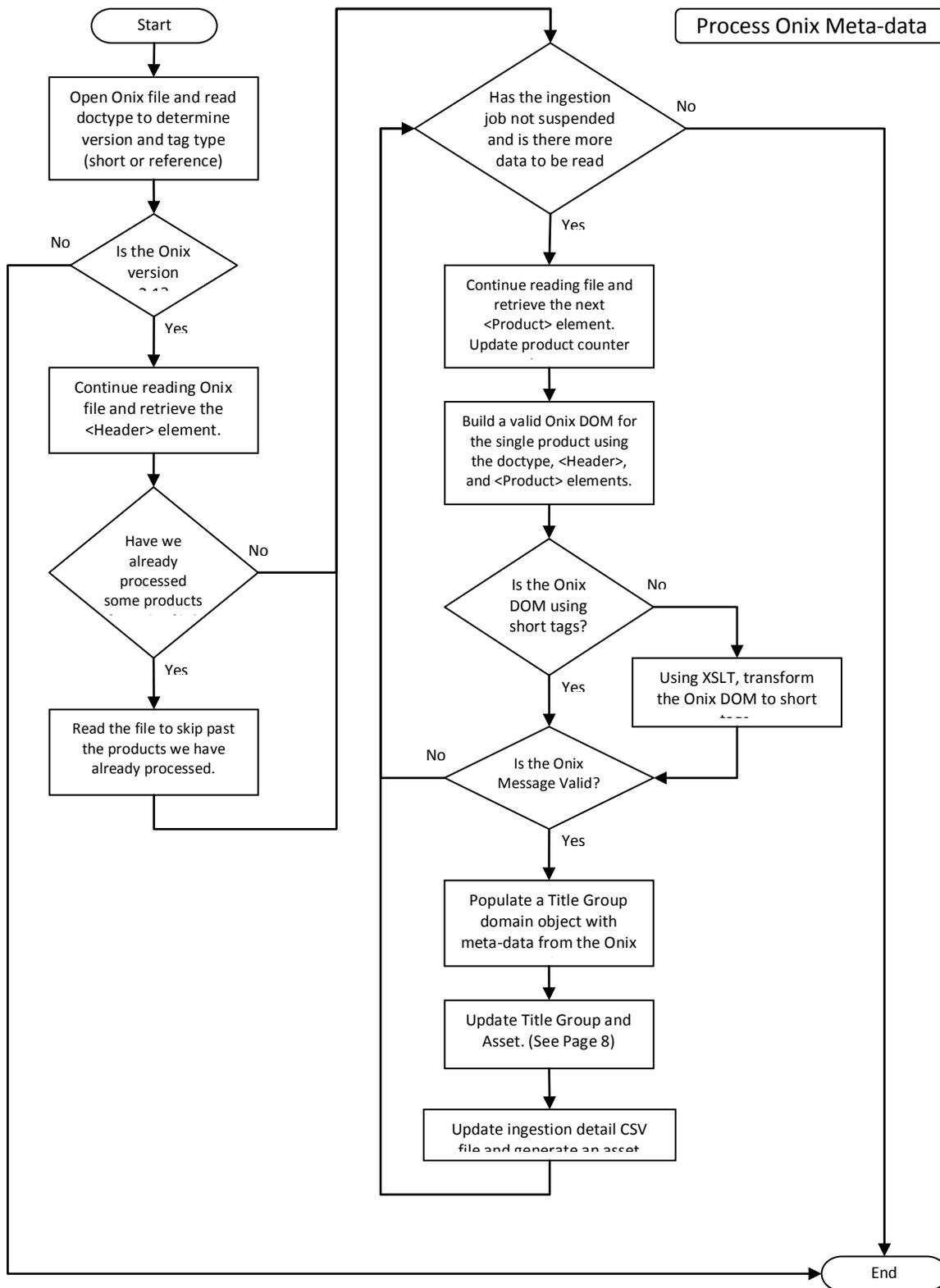
See attached document titled ONIX Ingestion Rules

Appendix F: CoreSource Sample ONIX File

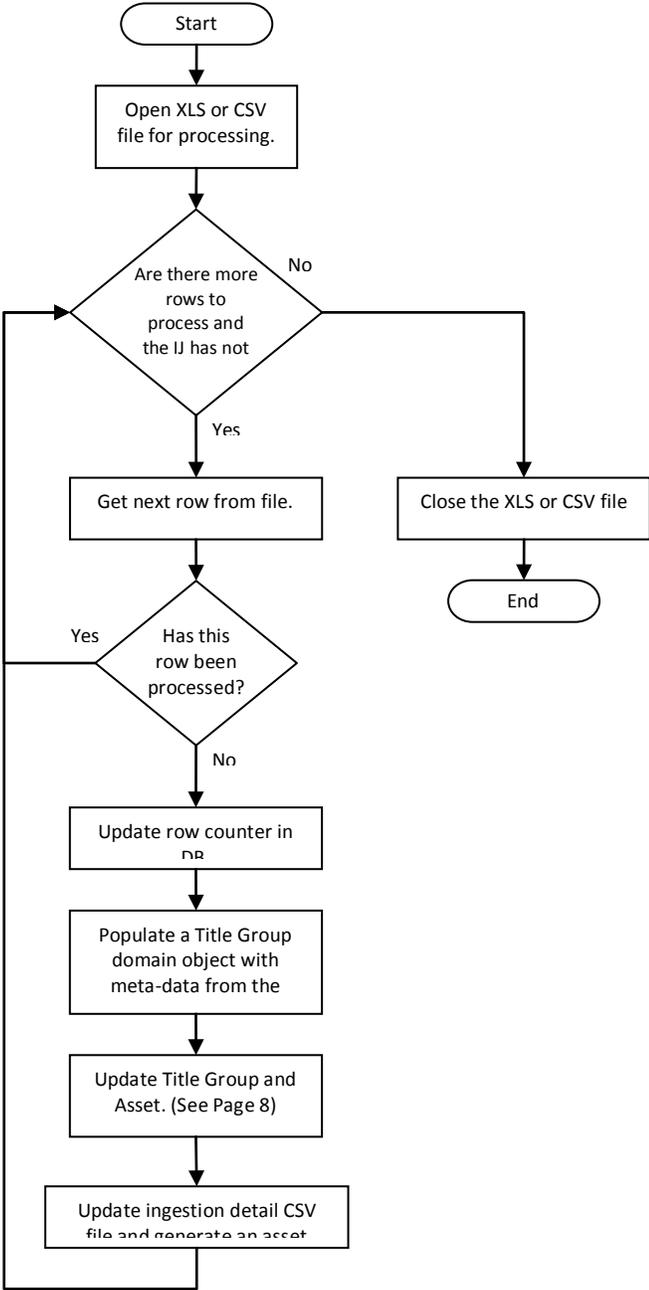
See attached document titled ONIX Sample

Appendix G: Ingestion Process Flow Charts

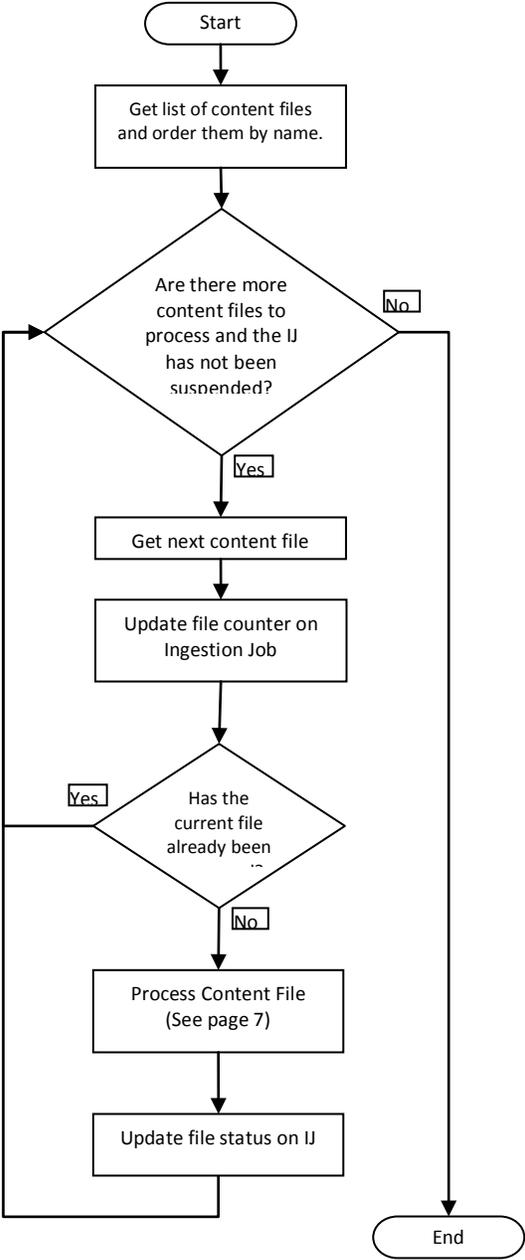




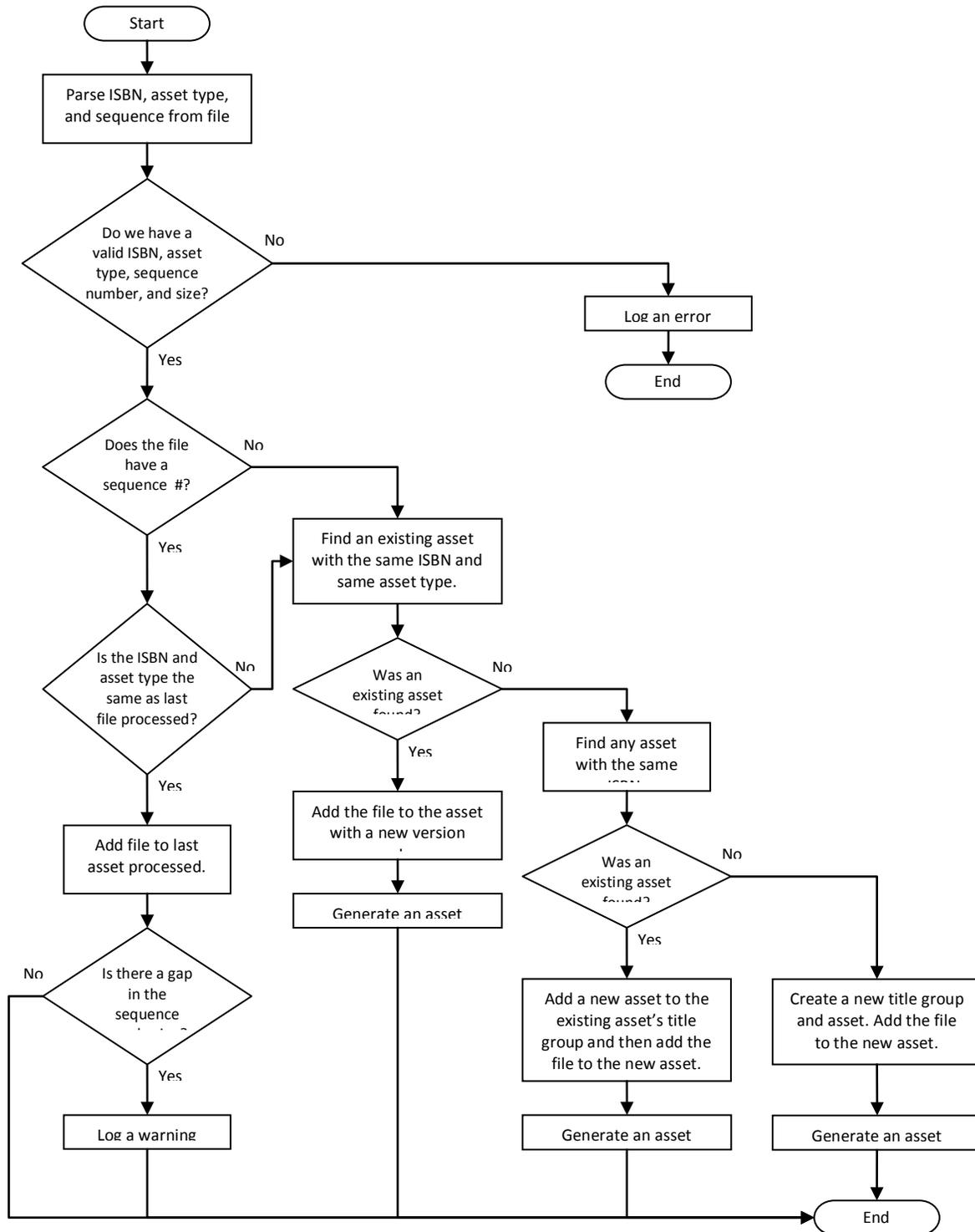
Process XLS or CSV
Meta-data File

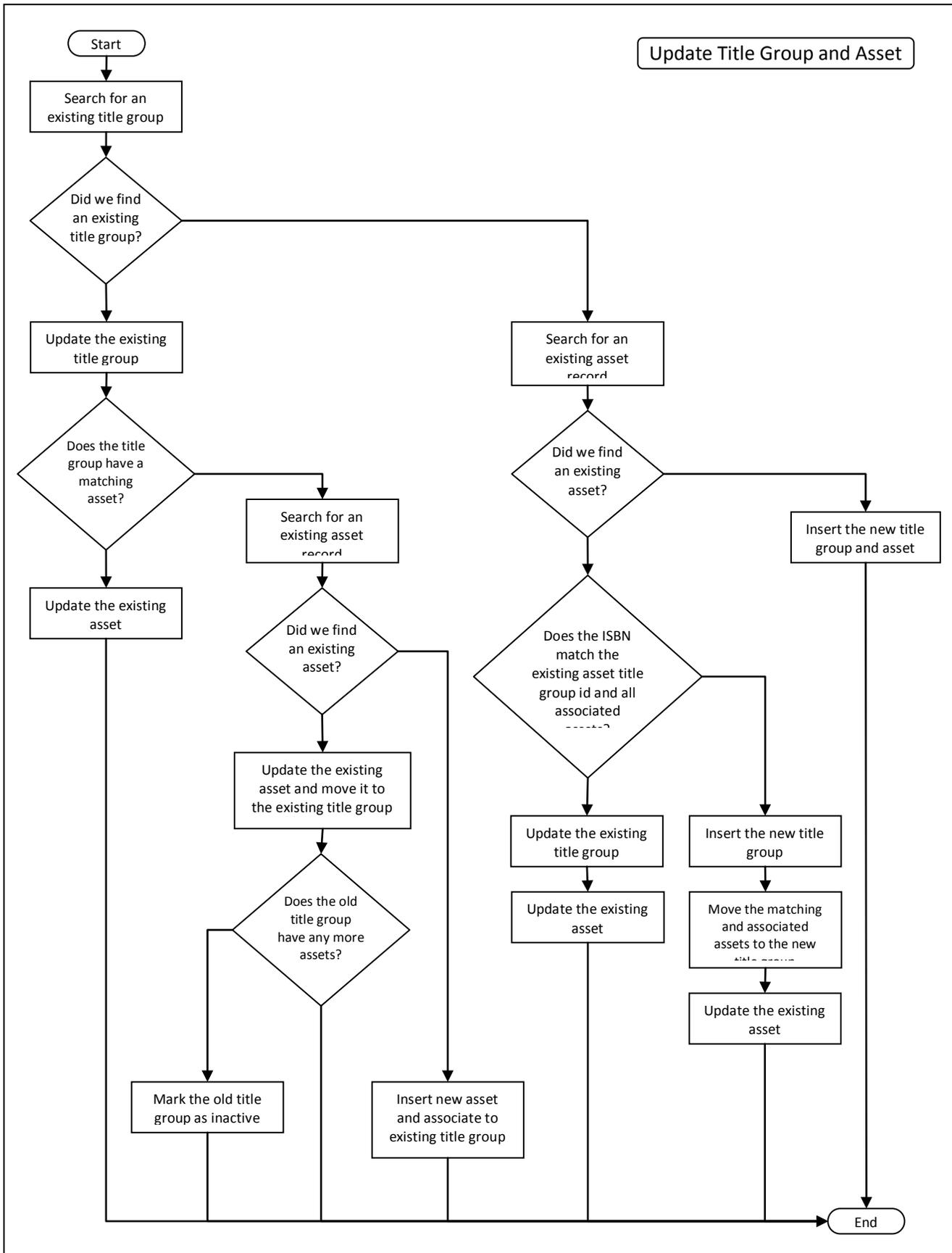


Process Content Files



Process Content File





Appendix H: Checklist Integration Timeline

Project Phase	Task Name	Assigned To
Preliminary	Integration Specialist sends integration packet to publisher	
Preliminary	Publisher to complete new publisher form located in the packet	
Preliminary	Set up conference call to discuss integration packet and integration process	
Preliminary	Set time for CoreSource demo, focusing on any areas publisher has questions on	
Preliminary	Determine Title Group ID	
Preliminary	Discuss discount codes	
Preliminary	Publisher to send metadata sample for verification of all required data	
Preliminary	Discuss how metadata requirements can be different for each distribution partner	
Preliminary	Receive verification of complete metadata from team	
Preliminary	Ask publisher for spreadsheet containing where assets have been distributed outside of CS	
Preliminary	Preliminary Phase Complete	
Development	Publisher to upload first set of files and metadata to supplied SFTP	
Development	Establish QA instance. Setup publishers and imprints	
Development	Establish Production instance. Setup publishers and imprints	
Development	Add publisher logo to CoreSource	
Development	Establish QA instance. Setup notifications	
Development	Establish QA instance. Setup CS PLUS distribution partners	
Development	Establish QA instance. Setup direct distribution partners	
Development	Establish Production instance. Setup external notifications	
Development	Establish Production instance. Setup CS PLUS distribution partners	
Development	Establish Production instance. Setup direct distribution partners	
Development	Insert Pre-CS asset history	
Development	Development Phase Complete	
Testing	Ingest metadata into QA	
Testing	Address any failures that occurred with publisher	
Testing	Ingest assets into QA	
Testing	Address any failures that occurred with publisher	
Testing	Verify that content matches metadata	
Testing	Validate distribution partners	

Testing	Testing Phase Complete
Implementation	Ingest metadata and assets from SFTP into Production
Implementation	Setup first user with access to CoreSource and provide instructions on how to add additional users
Implementation	Training session covering administration, notifications, and jobs
Implementation	Have publisher set up internal notifications
Implementation	Turn on automatic ingestion from SFTP
Implementation	Setup training session covering ingestion, failures, and metadata
Implementation	Have publisher verify all channel setups
Implementation	Notify partners of upcoming CoreSource deliveries
Implementation	Training session covering distribution channels, and distribute small set of titles to each distribution channel during training
Implementation	Validate distribution failures with publisher and fix
Implementation	Redistribute any failed distributions with publisher
Implementation	Follow up with all distribution partners to ensure proper delivery
Implementation	Implementation Phase Complete
Implementation	Turn on automatic distribution

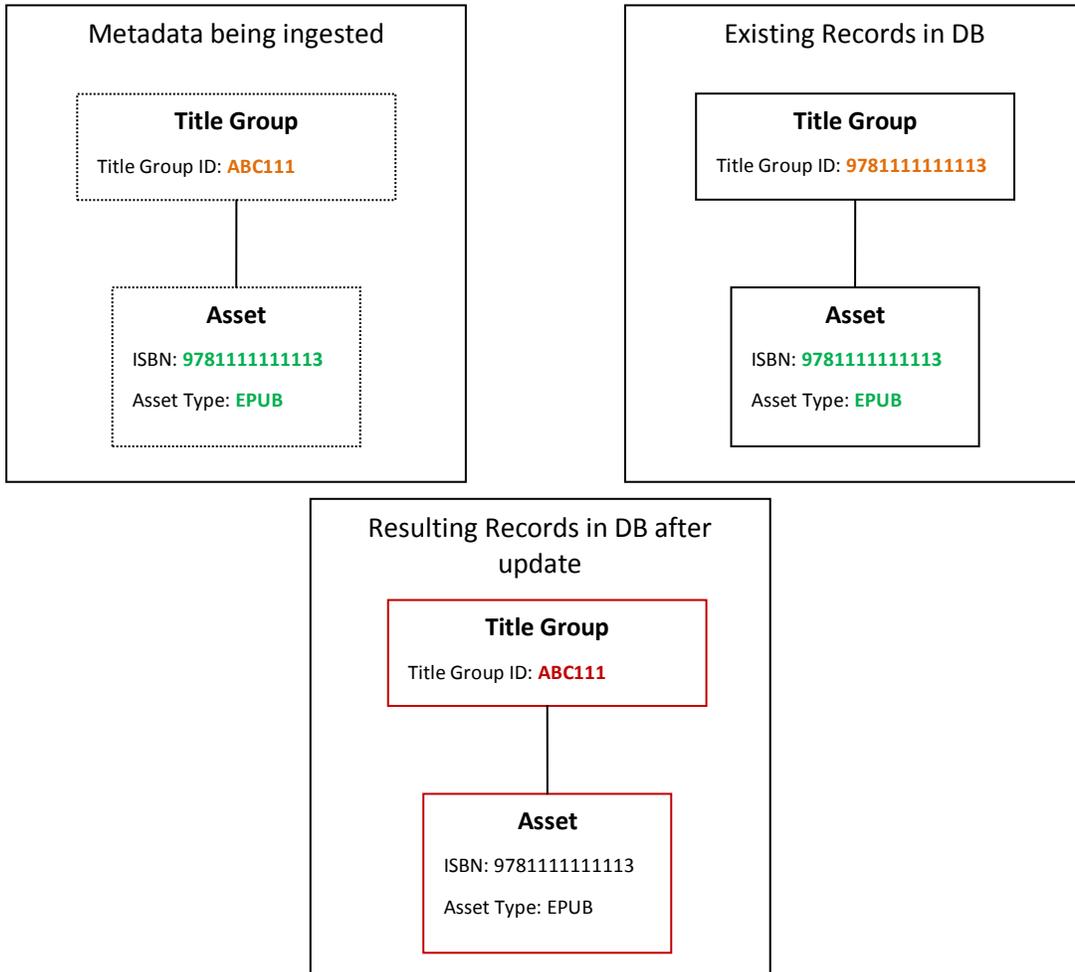
Appendix I: CoreSource Ingestion Scenarios

Established Characteristics and Behaviors:

- Assets with identical ISBNs may not span multiple Title Group ID's.
- CoreSource will recognize identical ISBN's and automatically place the matching ISBN under a Title Group with the matching ISBN.
- Title Groups may be composed of Assets with differing ISBNs.
- When content files are ingested for which no matching metadata is available, a Title Group ID is created using the ISBN from the content file as the Title Group ID.
- CoreSource encourages publishers to provide explicit Title Group assignments before or soon after content arrival to prevent 'inflated' Title Group counts around the billing cycle.
- The Asset will be moved to the appropriate Title Group ID in CoreSource once metadata is received.
- Title Groups may contain multiple Assets of the same type, provided the Asset's ISBN's are different.
- A metadata record is not required for an Asset to be associated with the proper Title Group, however Asset level metadata is never 'copied' from other Assets.

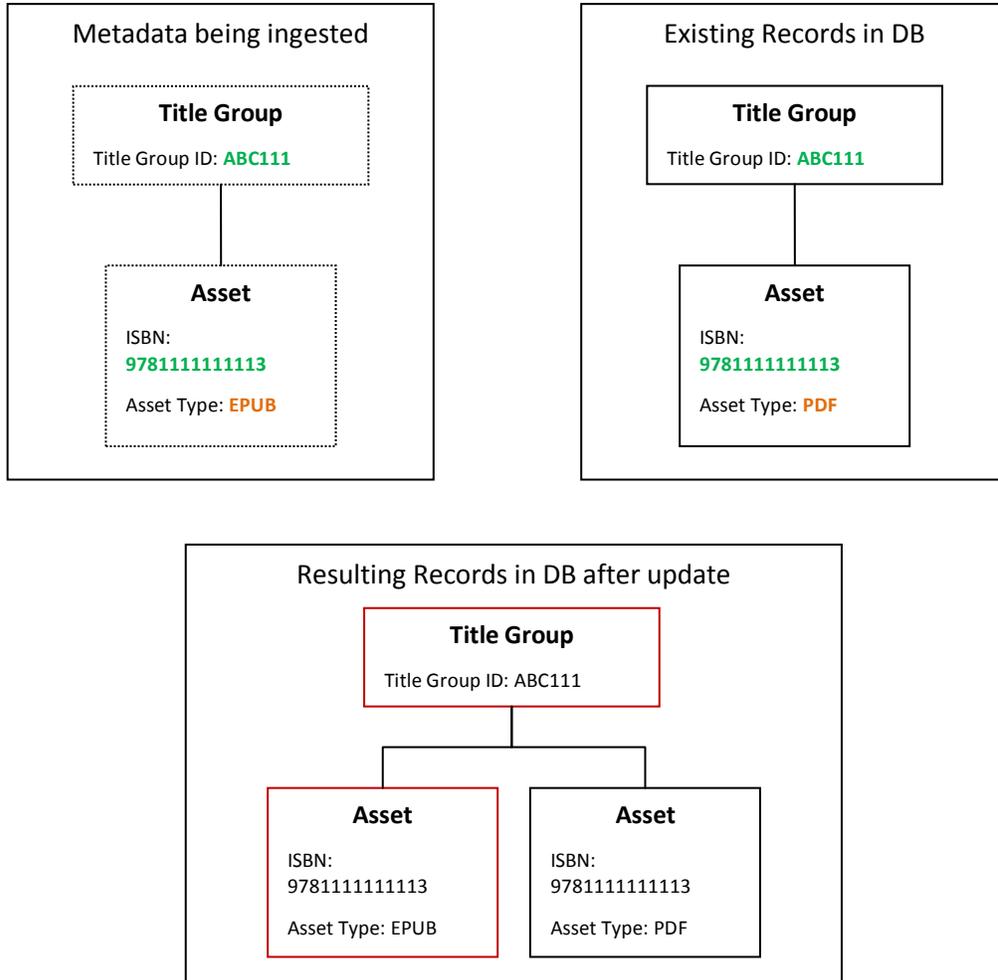
Scenario 1: Matching asset with matching or non-matching title group ID.

The metadata including the new title group ID will be applied to the existing title group and asset record. No new records will be created. This scenario is representative of a content file ingestion followed by metadata. The title group id would have been set to the ISBN of the content file upon ingestion.



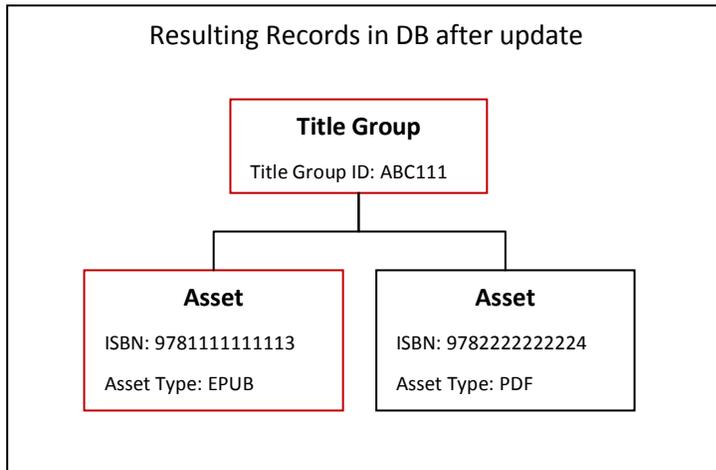
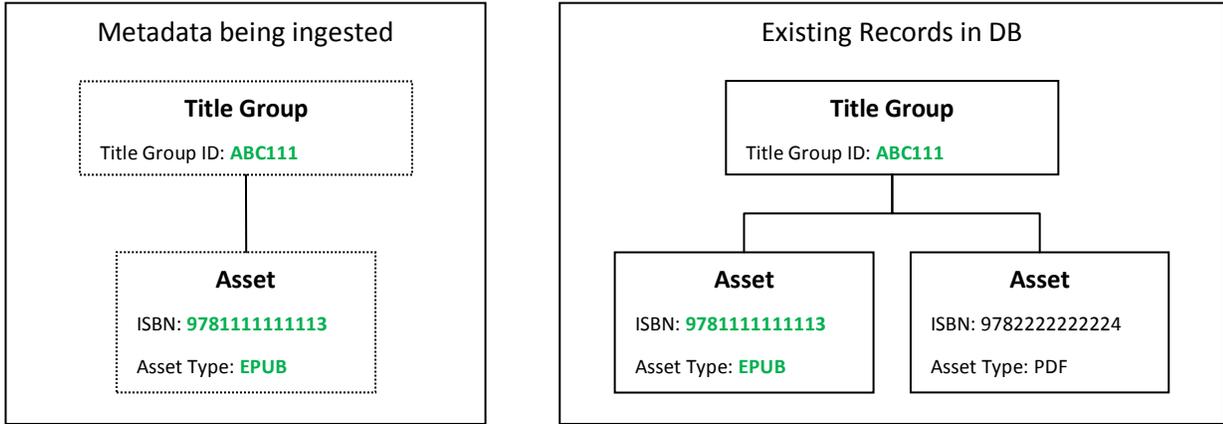
Scenario 2: Non-matching asset with matching title group ID.

The metadata will be applied to the existing title group and a new asset record will be created for the incoming asset.



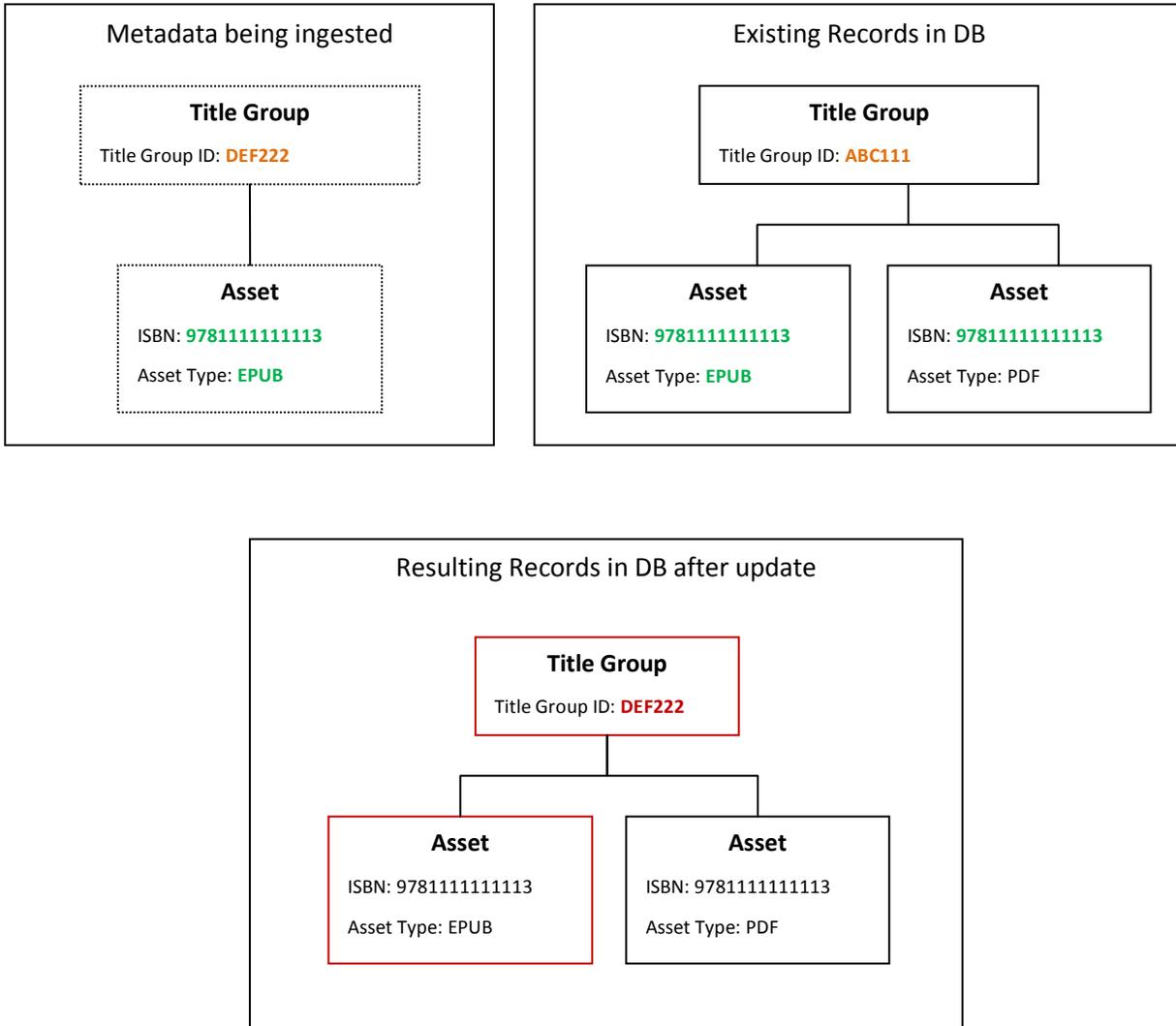
Scenario 3: Matching asset and matching title group ID that has multiple assets.

Metadata will be applied to the existing title group asset records. No new records are created

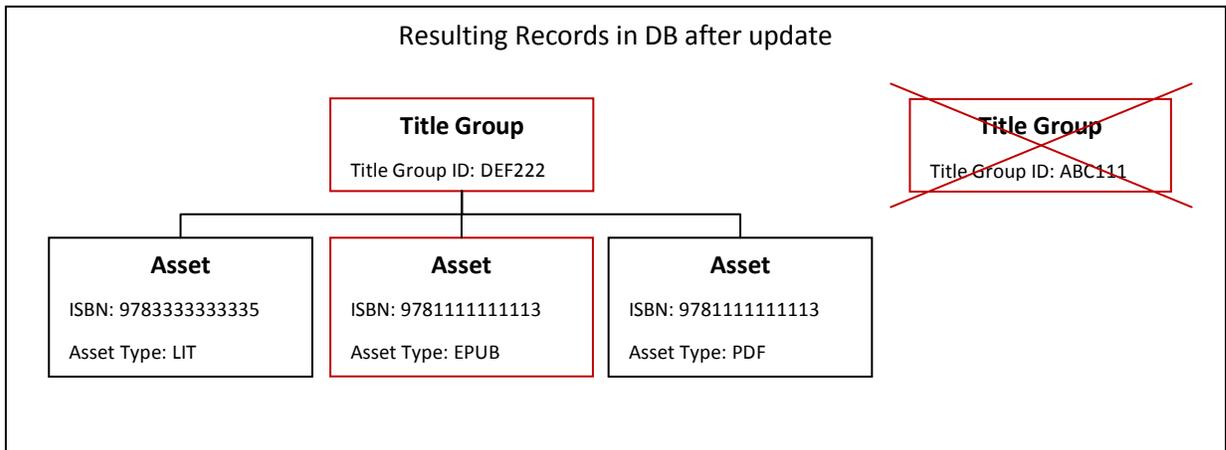
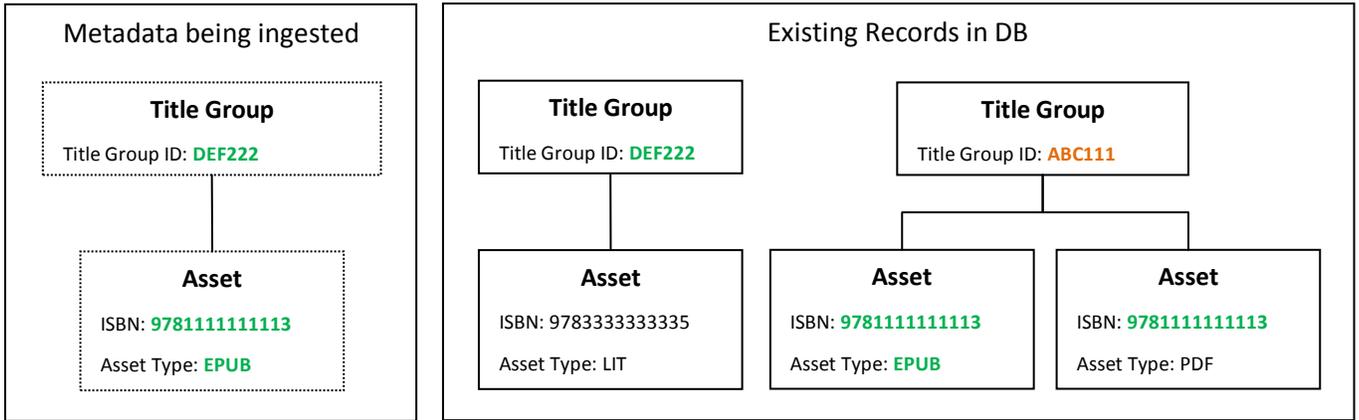


Scenario 4: Matching asset with non-matching title group ID that has multiple assets

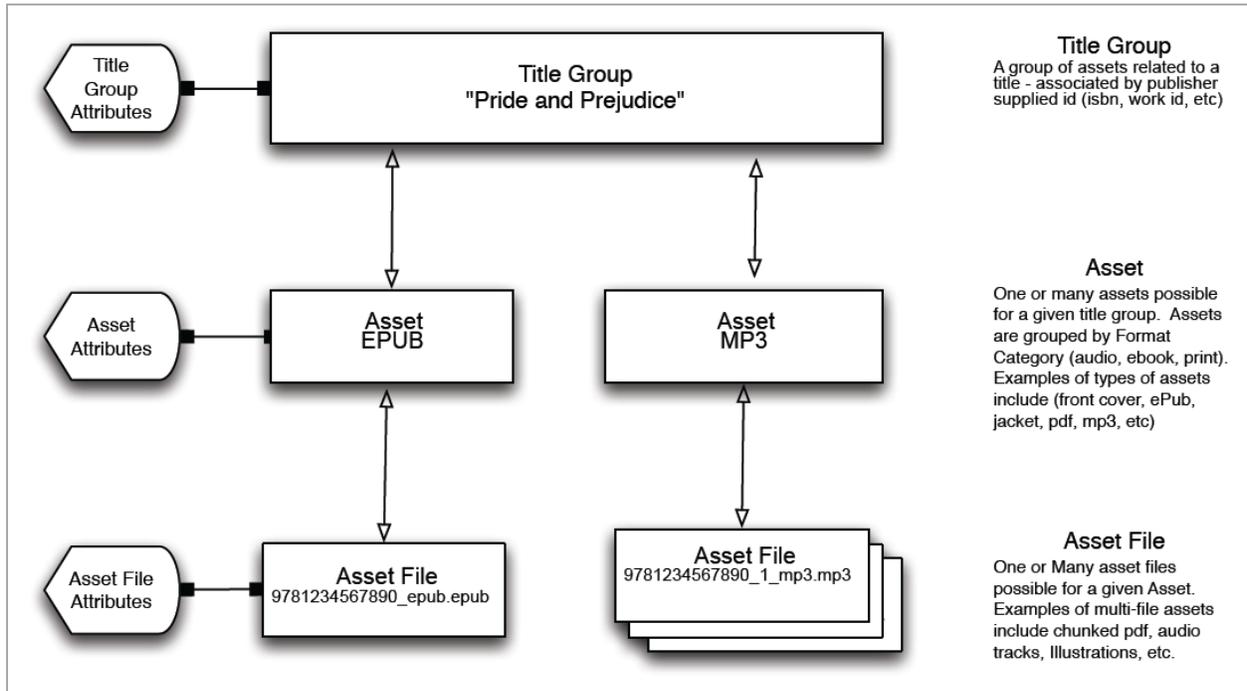
The existing title group's id and metadata are updated from the incoming title group. The matching existing asset's metadata is updated from the incoming asset. The non-matching existing asset remains untouched.



Scenario 5: Matching single asset with non-matching title group ID and another existing title group with matching title group ID. All existing assets with the same ISBN as the incoming asset are moved to the matching title group record. Metadata is applied to the matching title group and to the matching asset. The non-matching title group is marked defunct as it is no longer associated with any assets.



Appendix J: CoreSource Asset Model Example



Policy

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