

Ex Libris Knowledgebases: Content Submission Guide

Whether you are new to working with ProQuest and Ex Libris or have a long-standing relationship with us, thank you for your interest in submitting data about your products to the **Ex Libris knowledgebases: Alma, 360 KB, and SFX**. Complete and accurate metadata in vendors' knowledgebases (KBs) creates a seamless experience for our mutual customers – libraries and their users – between their library's catalog, discovery systems, OpenURL, and your site. This way, librarians can easily manage their online collections and see their return on investment in your content. If you are reaching out to us about ingestion in any one of the knowledgebases on behalf of our mutual clients, we will ensure your content is represented in all of the KBs.

If you have any questions about your content in the Ex Libris KBs, or if you'd like to get started working with us, **please contact Ex Libris Provider Relations** (Provider.Relations@Exlibrisgroup.com). We look forward to working with you to create a great experience for our mutual customers.

About Knowledgebases

KBs, like library catalogs, keep track of what a library has in their electronic collections and help to connect a library user with the information they seek. Since most institutions spend more on their online resources than print, knowledgebases are crucial to day-to-day e-resource lifecycle management operations and for getting users from the library's discovery methods to your content. KBs are driven by quality data supplied from organizations like yours to KB vendors.

The Ex Libris KBs contain information for more than 7,000 content providers, aggregators, publishers and portals, with over 15,000 collections or packages, which in Alma and SFX are known as "targets" and in 360 KB are called "databases". Targets/databases represent a selection (or all) of the titles available from a content provider. Librarians look for targets/databases that match the product(s), or individual titles that they have licensed from you, and select these as part of their collection. Information about the titles in those databases then allows a librarian to track usage, cost and licensing, receive an authoritative MARC record for their catalog, provides the opportunity for web scale discovery, OpenURL linking, and allows a user to search just their library's collection for the perfect source for their research and link to your platform for seamless access.

Ex Libris KBs contain information about text-based sources such as books, academic journals, newspapers, reports, conference proceedings, magazines, etc., and some support for streaming video content, too. If you have any question about whether your content would be a good fit for the KB, please [contact us](#).

Data & Content Specifics

Ex Libris prefers that data submitted to the KB meet the [KBART Recommended Practice](#) guidelines. KBART (Knowledge Bases And Related Tools) is a cross-industry group of content providers, knowledgebase vendors, and librarians who have created best practices for transmitting title list data for use by vendors and librarians.

File Format and Naming

KBART recommends tab-delimited, UTF-8 encoded text (.txt) files for the best compatibility across vendors and ease of use for librarians who may want the information in your files (section 6.4 of the KBART Recommended Practice). Ex Libris can also accept Excel (.xls/.xlsx), CSV, MARC records (for books only), and some types of XML data (depending on schema

used and data elements available).

Separate files should be created for each package or collection (target/database) that contains multiple titles that is sold/licensed to libraries, and one file that contains all titles to allow for libraries to select individual titles that they may have access to outside of a target/database.

Each file delivered should always contain the full contents of that target/database, which will completely overwrite the previous content delivered.

File names, if not conforming to KBART's recommendations (section 6.5), should describe the target/database for which it is intended. The file name should be stable to allow for automation (date stamps are OK).

Data Elements/Fields

KBART recommends 25 static fields (section 6.6) in a specific order, and can accommodate any other optional, uncontrolled fields following those 25. We highly recommend following the KBART recommendation which says all these fields should be included to avoid any misunderstanding. If this is not possible, or you already have a title list following a different format, here are the most important fields to include:

Required Fields

Note

- According to the standard, multiple coverages must be represented with a separate row in the KBART for each coverage range per title. This also applies for succeeding journals - the URL can be the same if eventually it leads to the same title page.
 - In cases where there are multiple rows with the same URL/title ID but different ISSNs, Ex Libris will set the title's unique ID as a combination of title ID + ISSN to ensure uniqueness
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Field Name	KBART field	Type	Additional info
Title	publication_title	All	
Identifier (print)	print_identifier	All	ISSN for serials, ISBN for books/monographs/videos
Identifier (online/ electronic)	online_identifier	All	
Date of first issue available online (start date)	date_first_issue_ online	Serials	
Number of first volume available online	num_first_vol_ online	Serials	
Number of first issue available online	num_first_issue_ online	Serials	
Date of last issue available online (end date)	date_last_issue_ online	Serials	For publications with ongoing coverage and availability, leave blank
Number of last volume available online	num_last_vol_ online	Serials	For publications with ongoing coverage and availability, leave blank
Number of last issue available online	num_last_issue_ online	Serials	For publications with ongoing coverage and availability, leave blank
URL	title_url	All	URLs should resolve without error and lead users to a list of issues or TOC.
Coverage (Fulltext/ abstracts)	coverage_depth	All	You must supply full text records. Abstract records may be included, but abstract-only files are not requested.
Content Type	publication_type	All	Either as field in the file (per KBART) or by package name.
Date Published (Print)	date_monograph_ published_print	Books	

Date Published (Online)	date_monograph_published_online	Books	
Embargo	embargo_info	Serials	Either include embargo information separately, or change dates of affected serials every delivery to reflect "moving wall" availability.

Recommended Fields

Field Name	KBART field	Type	Additional info
Author	first_author	Books	
Title ID	title_id	All	Your own internal identifier for the title.
Publisher	publisher_name	All	
Volume	monograph_volume	Books	
Edition	monograph_edition	Books	
Editor	first_editor	Books	
Parent Publication Title ID	parent_publication_title_id	Books	
Access Type (paid or free)	access_type	All	

Linking Information

Information about linking to the content on your platform is very important.

If your platform supports a persistent/stable linking syntax to the article, issue, and/or title level, please communicate that linking syntax to us and provide us with some examples using the syntax.

If the platform supports OpenURL, please let us know which elements are required for successful linking. Examples are useful here, too.

Please note that we will not load titles with linking errors, including DOIs that do not resolve.

The content should be live on the platform, not just a landing page for "Coming Soon".

Delivery Details

Delivery Methods

Files must be delivered by one of the following methods:

Supported File Delivery Methods	Description
Provider-hosted files publicly accessible via website (KBART preferred method)	<p>Files on your website must not be behind any authentication and publicly accessible for Ex Libris use as well as use by librarians and other vendors.</p> <p>You (the provider) can provide a stable URL or webpage from which Ex Libris can use regularly to harvest your title list. This location should be updated consistently with the latest file.</p>
Ex Libris-hosted FTP Site (FTP push)	<p>Ex Libris will provide a secure login and site details.</p> <p>You (the provider) can use Ex Libris secure FTP platform to upload your title list file. If you choose this option, Ex Libris will assist you in the setup process and provide clear instructions. You would simply need to deliver the file to the designated location whenever there are updates to the title list.</p>
Provider-hosted FTP Site (FTP pull)	<p>An FTP site hosted on the content provider's domain.</p> <p>Please provide a secure login.</p> <p>Ex Libris retrieve title list files directly from the provider's FTP platform. You, the provider, upload the files to a designated FTP location, from which Ex Libris regularly access and download them to ensure the collections are kept up to date.</p>

Update Frequency

Updated files should be provided according to the frequency of content changes on your site. For example, if you release all your content quarterly, then we only need updates quarterly; but if you release many titles every week, then a weekly or biweekly update may be more appropriate. Files for new collections should be delivered simultaneously with updated files.

Please keep us informed of upcoming changes to your product offerings (such as platform changes and new or retiring old collections/packages/databases) by notifying your KB team contact or [Ex Libris Provider Relations](#). This will create the best possible experience for our mutual customers by providing them with a seamless transition to content changes on your platform.

File Listing / Manifest

Although not required, developing a comprehensive guide to the files that you supply to KB vendors is a convenient way to provide context and details to the files that are otherwise absent. Including a list of the collections' names and the file name used for each is very helpful.

A date that the collection/file was initially created will let the KB vendor know whether something is new or not (although it is still very helpful to notify us directly of new collections added).

Internal collection identifiers, dates that the files last had changes/updates, collection-level URLs, descriptions of the collections, business models used (such as DDA or EBA, perpetual access, etc.), and more, are all helpful if these are something that you can provide.

If you have additional collection-level information or information about your files that you think may be useful, please let us know. **If you will be providing us with a file list or manifest, please notify us.** Typically, we will want these to be delivered along with the files you deliver on the site/FTP as detailed above.

Please send Ex Libris information about the collection/s (packages/s) according to this template file: [New collections Template - Ex Libris.xlsx](#) - instructions for populating the template can be found below:

Cell # in the collection template file	A	B	C	D	E	F	G
Column name	CollectionName	CollectionID	CollectionURL	CollectionType	FileName	FileLocation	RecordCount
Column explanation	The name of the collection as identified by the provider in their system	The ID of the collection as recognized by the provider internal system - this ID must be unique and should not repeat in other	AKA "Level URL" - the URL used to access the content of collection as seen by the end user	Possible values that are under the NISO standard: <ul style="list-style-type: none"> • Full-text • Upcoming Full-Text • Discovery-only 	The name of the file that holds the title list (KBART/MARC)	This path is relevant for the following 3 use cases: <ul style="list-style-type: none"> • When the file is located on the provider's server <ul style="list-style-type: none"> ◦ Example: ftp://providersftp.com/DirectoryPath • When the file is placed on Ex Libris server by the provider <ul style="list-style-type: none"> ◦ Example: sftp://providers-dc03.hosted.exlibris.com/DirectoryPath • When there is a website for Ex Libris to retrieve the files from <ul style="list-style-type: none"> ◦ Example: https://providename.com/files/ 	Number of titles within the collection

Communication and Contacts

Provide us with a preferred contact at your organization who is knowledgeable in your products and the data submitted to us, so that we can discuss any possible problems with data feeds, customer issues with the data, and troubleshooting.

Our Process

What you can expect:

1. Content gap is identified by a customer or provider.
2. Customers requesting data for content providers may be referred to the [Idea Exchange](#), where customers vote on content. This helps us gauge interest in the content, prioritize it, and schedule the work to add it.
3. Ex Libris KB and Provider Relations team establish a relationship with the provider, and preferred contact information is exchanged.
4. Provider submits sample data to Ex Libris.
5. Sample is reviewed; feedback given and changes made if necessary.
6. File delivery location and frequency are established.
7. KB team configures the content for compatibility and performs the initial data load.
8. Periodic reviews are made of content to improve the customer experience.
9. Ex Libris and the provider will contact one another to communicate issues that affect customers, and/or Ex Libris' ability to obtain and load data.

Additional Resources

Best Practices and Standards

- [NISO – KBART Standing Committee](#)
- [ISO 8601](#) (used in KBART date formats)
- Library of Congress MARC standards <https://www.loc.gov/marc/bibliographic/>
- OCLC MARC overview: <https://www.oclc.org/bibformats/en/home.html>

Ex Libris Product Information

- [Alma](#)
 - [Alma Community Zone](#) (CZ) - the KB portion of Alma
- [360 KB Documentation](#)
 - [360 Management Services](#)
 - [360 Link](#)
 - [Intota Assessment](#)
 - [Summon](#)
- [SFX](#)
 - [Primo](#)
- [Idea Exchange](#)

ProQuest Technical Product Support

- Customers should submit a case via the Support Portal for any issue with product functionality or data issues that

they have in any Ex Libris product.

- Support Portal is accessible from:
 - The **More Sites** menu at the top of the [Knowledge Center](#) (the site you are currently on).
 - Support Portal's direct URL, which is <http://exlidp.exlibrisgroup.com/>.

If you have any questions about your content in Ex Libris products, please contact Ex Libris Provider Relations at: Provider.Relations@Exlibrisgroup.com.

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