

IngramSpark Metadata Workbook

Plan your book details, descriptions, subjects, keywords and final metadata check - one decision at a time.

☐ TITLE

☐ SUBJECTS

☐ KEYWORDS

Companion to the guide [How to Fill In Your IngramSpark Metadata Without Guessing](#)

This workbook belongs to:

Book:

Started:

Last verified: 17 September 2026

How to use this workbook

This workbook goes with the SimpleLifeCalc IngramSpark Metadata Guide. The guide explains why each field matters; this workbook is where you make and record your decisions.

- Work through it for one book at a time, in order.
- When a decision feels unclear, read that section of the guide, then come back.
- Fields and guidance change. Where a page says check current setup, confirm it in your own IngramSpark account before you rely on it.
- The examples come from two made-up books. They show how to fill in a page - they are not recommended metadata for your book.

FICTIONAL EXAMPLES

The Balcony Kitchen Garden by Marisol Hartwell (Juniper Row Press) - adult nonfiction, paperback and ebook.
Hazel and the Hidden Path by Ada Lindqvist, Illustrated by Jun Okafor (Cinderlark Books) - picture book, book one of the Wrenwater Walks series.

My book at a glance

Working title

Format(s)

Author / public name

Imprint

ISBN(s)

Publication date

Main audience

Locked Details Sheet

The details IngramSpark says shouldn't change once your book is published. Write down the version you're willing to live with.

FICTIONAL EXAMPLE - BOOK A

Title: The Balcony Kitchen Garden | Author: Marisol Hartwell | Imprint: Juniper Row Press | Formats: paperback + ebook, one ISBN each | Language: English | Audience: adult/general

Detail	My answer	Confirmed?
Title		
Subtitle		
Public contributor name(s)		
Pen name decision		
Imprint		
Format(s)		
ISBN for each format		
Publication date		
Content language		
Audience		

- ☐ My title, subtitle and public contributor names match the cover and title page.
- ☐ The remaining details match the publishing decisions I intend to use.
- ☐ Each format has its own ISBN.
- ☐ I am comfortable treating these details as final.

Easy mistake to make
Entering a placeholder title or a half-decided pen name, planning to tidy it up later.

Contributor and Bio Planner

Part A: who is credited - and why.

Copyediting, proofreading and cover design are not contributor credits on their own. Nobody is listed merely for doing that work. The useful question is whether the person has a content role on this book.

FICTIONAL EXAMPLE - BOOK B

Ada Lindqvist - Author - wrote the story. Jun Okafor - Illustrator - drew every spread. The cover designer and copyeditor are not listed because their work on this book was production.

Person	Public name	Role	Why they belong	Final?

Write this down

Use the exact spelling, spacing and initials from your cover. Keep that same public name form across formats and future books in the series.

If AI produced your translation, IngramSpark asks you to credit "Artificial Intelligence" as the translator.

- ☐ Every name matches the cover exactly.
- ☐ Everyone listed has a content role on this book.
- ☐ Nobody is listed only for production work.

Bio Builder

Part B: write a bio that is specific now and still accurate later.
1. What do you do?

2. What experience or background matters to this book?

3. Why does that help the reader?

4. What detail makes you memorable?

MY BIO DRAFT

Stale-word check

Circle anything tied to a moment in time - words like latest, currently, this year, this spring, forthcoming - and any other phrase that will be wrong in a year.

FICTIONAL EXAMPLE - BOOK A

Before: Marisol Hartwell is a community garden coordinator. Her latest book grew out of a workshop she is running this spring.

After: Marisol Hartwell coordinates a community garden and teaches small-space growing workshops.

Why: "latest" and "this spring" expire. What remains stays true.

- ☐ No active links.
- ☐ Nothing that expires.
- ☐ Still accurate if nobody updates it for three years.

What you are deciding: what your book is, who it is for, and why someone should pick it up. Build it in pieces, then read them together.

Headline: A practical guide to growing real food in pots, planters and railing boxes - no garden required.

Short Description

Part B: write a short version that works on its own.

If someone saw only this paragraph, would it still make sense?

FICTIONAL EXAMPLE - BOOK B

Before: A charming new story that children everywhere will love.
After: When Hazel follows a half-hidden path into the woods, one wrong turn turns into a long way home. A picture book for ages 4 to 6.
Why: the first could describe almost any children's book. The second gives the story, format and reader.

DRAFT 1

TIGHTER DRAFT

SMALL CHECK

- ☐ It makes sense with nothing around it.
- ☐ It describes the same book as my full description.
- ☐ It does not simply repeat my headline word for word.
- ☐ It fits the current short-description limit in my IngramSpark setup.

Subject Shortlist

Part A: BISAC candidates - test each heading against the whole book.

IngramSpark lets you add up to three. Use fewer when fewer fully describe the book, and do not add a weaker subject just to fill the third slot. Look candidates up in BISG's current list as you go.

FICTIONAL EXAMPLE - BOOK A

Kept GARDENING / Garden Types / Container & Raised Bed as its first subject; dropped GARDENING / General as too broad, and a cooking heading that only fit one chapter.

CANDIDATE 1

Heading:

☐ whole book ☐ specific enough ☐ correct audience KEEP / DROP Priority:

CANDIDATE 2

Heading:

☐ whole book ☐ specific enough ☐ correct audience KEEP / DROP Priority:

CANDIDATE 3

Heading:

☐ whole book ☐ specific enough ☐ correct audience KEEP / DROP Priority:

CANDIDATE 4

Heading:

☐ whole book ☐ specific enough ☐ correct audience KEEP / DROP Priority:

CANDIDATE 5

Heading:

☐ whole book ☐ specific enough ☐ correct audience KEEP / DROP Priority:

CANDIDATE 6

Heading:

☐ whole book ☐ specific enough ☐ correct audience KEEP / DROP Priority:

MY FINAL SHORTLIST

1.

2.

3.

Regional Subject and Thema

Part B: decide whether place belongs in the metadata, then record Thema choices to verify.

Regional subject: Is a real place central to what the book is about - not where you live or where you wrote it?

- ☐ No - leave it blank.
- ☐ Yes - fill in below.

Place or region

Why it matters to the content

Thema: an international subject system with subjects and qualifiers. Qualifiers can refine place, language, audience and time period.
Candidate subject

Qualifier(s)

Why each qualifier applies

Before you continue

Check current Thema codes in the live Thema browser before you submit. Codes are revised periodically; this page records your decisions, not a code list.

FICTIONAL EXAMPLE - BOOK B

The story is set in the Appalachian Mountains, so the publisher records the broader region and notes two qualifiers to look up: interest age for its 4-to-6 readership and place.

Audience and Age Range Check

What you are deciding: who your book is officially for. If it is not aimed at a particular age group, adult/general is the normal choice.
Primary audience

Why

Subject family I chose in W4

- ☐ Matches the audience
- ☐ Needs another look

For children's and teen titles - adult-title authors can skip to the consistency check.

Intended age range

Intended grade range

Why this span fits this actual book

FICTIONAL EXAMPLE - BOOK B

Ages 4-6 / preschool-grade 1. This is the fictional publisher's intended audience. It is not an IngramSpark rule, a maximum, or the right range for every picture book.

Consistency check: Read these three together - audience, subject section, age or grade range. Do they tell the same story?

- ☐ Yes
- ☐ Not yet - what I will change:

Write this down
Keep a sentence explaining why you chose the audience. It is one of the details IngramSpark says should not change after publication.

Keyword Phrase Planner

Part A: brainstorm by angle so the list is not one idea said seven ways.
There is no volume data here, and none is needed. What matters is whether a phrase truly describes your book.

FICTIONAL EXAMPLES

Book A: balcony vegetable growing, apartment balcony garden. Book B: read aloud for preschoolers, gentle bedtime picture book.

Phrase angle	My ideas
Topic or activity	
Who it is for	
Setting or season	
Problem it solves	
Tone or style	
Related terms readers use	

Clean and Prioritise

Part B: decide which phrases earn their place and assemble the field.

FICTIONAL EXAMPLE - BOOK A
Before: "gardening", "GARDENING / Garden Types / Container & Raised Bed", balcony garden; small space gardening
After: balcony vegetable growing;container gardening for beginners;growing herbs in pots;small space food garden

PHRASE 1
Phrase:
☐ repeats subject ☐ describes book ☐ useful alternate Priority: KEEP / DROP

PHRASE 2
Phrase:
☐ repeats subject ☐ describes book ☐ useful alternate Priority: KEEP / DROP

PHRASE 3
Phrase:
☐ repeats subject ☐ describes book ☐ useful alternate Priority: KEEP / DROP

PHRASE 4
Phrase:
☐ repeats subject ☐ describes book ☐ useful alternate Priority: KEEP / DROP

PHRASE 5
Phrase:
☐ repeats subject ☐ describes book ☐ useful alternate Priority: KEEP / DROP

PHRASE 6
Phrase:
☐ repeats subject ☐ describes book ☐ useful alternate Priority: KEEP / DROP

MY FINAL PHRASES, IN PRIORITY ORDER
Continue on another line or page if you need more. These eight lines are workspace, not an IngramSpark maximum.

1.

2.

3.

4.

5.

6.

7.

8.

THE FIELD AS I WILL ENTER IT

- ☐ Semicolons used ☐ Current spacing guidance ☐ No quotation marks
☐ Most useful first ☐ Within current limit

Review Quote Log

No reviews yet? That is completely normal. Leave this page blank and come back when something arrives - review quotes are meant to be added over time.

QUOTE 1

Quote

Source or publication

Where / when it appeared

Attribution as I will enter it

☐ wording checked against original

☐ added to IngramSpark

Date: _____

QUOTE 2

Quote

Source or publication

Where / when it appeared

Attribution as I will enter it

☐ wording checked against original

☐ added to IngramSpark

Date: _____

QUOTE 3

Quote

Source or publication

Where / when it appeared

Attribution as I will enter it

☐ wording checked against original

☐ added to IngramSpark

Date: _____

Easy mistake to make

Do not trim a quote until it says something the reviewer did not. Check the final wording against the original before using it. Reprint this page if you need more quote blocks.

Assist Suggestion Review

Last checked: 17 September 2026

Assist recommends; you decide. Check what it needs and what it offers in your current setup because this feature changes faster than the rest of setup.

SUGGESTION 1

Field:

Assist suggested:

MY DECISION:

☐ ACCEPT

☐ EDIT

☐ REJECT

My final version

Why

SUGGESTION 2

Field:

Assist suggested:

MY DECISION:

☐ ACCEPT

☐ EDIT

☐ REJECT

My final version

Why

CHECK EACH SUGGESTION

- ☐ Describes the whole book
- ☐ Does not just repeat subject choices
- ☐ I checked any subject/code myself
- ☐ Matches my audience
- ☐ Sounds like my book

FICTIONAL EXAMPLE - BOOK A

EDIT a useful keyword list that repeats one phrase; ACCEPT an accurate short summary; REJECT a subject suggestion that fits one chapter instead of the whole book.

If a suggestion looks strange, check your description first - but the suggestion itself may simply be a poor fit. Reprint this page for more suggestions.

Pre-Distribution Metadata Review

Passes 1 and 2: does it match the book, and is shared metadata consistent?

PASS 1 - DOES IT MATCH THE BOOK?

- ☐ Title and subtitle match the cover and title page.
- ☐ Contributor names match the cover.
- ☐ Imprint is right.
- ☐ Every description claim is true of the book.
- ☐ Subjects describe the whole book.
- ☐ Audience matches the subjects.

NOTICED SOMETHING

PASS 2 - IS SHARED METADATA CONSISTENT ACROSS FORMATS?

- ☐ Cover and title page agree.
- ☐ Shared metadata is consistent across formats where the same field applies.
- ☐ Subjects and description are consistent where those fields apply.
- ☐ Nothing from an earlier draft is stranded on one format.

NOTICED SOMETHING

Ebook setup can differ, so follow the prompts shown for that format rather than expecting every field to match print.

Before you continue

Open the cover, title page and setup screen side by side. That is how accidental mismatches become obvious.

Pre-Distribution Metadata Review

Pass 3: complete the check, then write down what still needs fixing.

- ☐ Every required field in setup is filled.
- ☐ Optional fields considered: subtitle, series, keywords, Thema, review quotes, table of contents.
- ☐ Text pasted as plain text, with no stray formatting.
- ☐ The details on my W1 sheet are the ones I want to treat as final.

Things I need to fix before continuing

-
-
-
-

Before you enable distribution

Treat the details from W1 as final. If something feels unresolved, resolve it now. Taking a little more time now is usually easier than rebuilding the record later.

Date of this review

Metadata Refresh Log

Use this when something changes: a new BISAC edition, a Thema update, a review or award, a bio change, better reader wording, or a pricing/discount review.

REFRESH ENTRY 1

Date

What triggered this review?

Field(s) reviewed

What changed?

Why?

Where I checked / verified it

Next review trigger

REFRESH ENTRY 2

Date

What triggered this review?

Field(s) reviewed

What changed?

Why?

Where I checked / verified it

Next review trigger

Leave-alone reminder

W1 details are not routine refresh fields. If one is genuinely wrong, check IngramSpark's current guidance before changing it; some changes can require a new setup. A title change is one example that can require a new ISBN and cover.

My Final Metadata Snapshot

Part 1: identity and classification

Your own reference copy of what you decided. Fields and guidance can change, so check your current setup screen before relying on any line here.

Title
Subtitle
Series and number
Edition, if any
Contributors and roles
Imprint
ISBN by format
Publication date
Audience
Age / grade range
BISAC subjects, in order
Regional subject
Thema subjects and qualifiers

My Final Metadata Snapshot

Part 2: selling copy and maintenance

☐ Full description complete

Where saved: _____

SHORT DESCRIPTION

FINAL KEYWORD PHRASES

☐ Review quotes: none yet

☐ Review quotes added

How many: ____

☐ Assist reviewed

☐ Assist not used

Last metadata review

NOTES / CURRENT SETUP DIFFERENCES

When you need the why, use the guide

How to Fill In Your IngramSpark Metadata Without Guessing is the companion guide. It explains each decision with worked examples from the same two fictional books.

QUICK REMINDERS

- W1 details are not routine refresh fields.
- Subjects describe the whole book; most specific first; fewer is fine.
- Keywords complement your subjects instead of repeating them.
- Assist recommends. You decide.
- Where this workbook says "check current setup," confirm the current IngramSpark screen or help documentation.

FROM SIMPLELIFECALC

- [IngramSpark Seller Hub](#)
- [IngramSpark Publishing Checklist](#)
- [ISBN Decision Guide](#)
- [Publishing with IngramSpark \(course\)](#)

Keep this workbook current
Platform fields and guidance can change. Recheck any item marked "check current setup," and update the dated Assist page when IngramSpark changes the feature.

NOTES