



DIGITAL ASSET MANAGEMENT

Best Practices Guide

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What is Digital Asset Management?

Digital Asset Management (DAM) is the effective management and distribution of digital assets such as images, documents, creative files, audio and video clips. DAM solutions allow organizations to centrally catalog, store, retrieve and distribute large collections of valuable digital assets.

There are many benefits that a DAM solution can provide your organization:

- *A central location to store and protect digital assets*
- *Improved collaboration and communication*
- *A location to help maintain consistent branding*
- *The dynamic distribution of your assets to internal and external teams*
- *A place to quickly find and retrieve assets*
- *Improved workflow efficiency and reduction in time and cost of content production*
- *The leveraging of existing digital content*
- *A reduction in organizational costs*
- *The ability to bring new products and services to market faster*

This guide covers general digital asset management best practices that will help you determine how a DAM solution can be most effectively implemented in your organization.

Identify stakeholders

Before implementing any DAM solution, you must first identify the people in your organization who can be directly affected. Your colleagues, managers, partners and other people can all benefit from implementing a DAM solution, and will play an important role in how the solution is received. People will respond positively if they feel they're part of the solution, not the problem. We suggest that you involve all stakeholders to:

- *Gather data about current processes*
- *Identify pains and bottlenecks in current processes*
- *Address business issues*
- *Share logic behind how assets are managed, so that people can understand*

There are two ways to achieve cooperation: top down or bottom up. Top down will be usually mandated by a high-level manager. A bottom up approach has its roots in the end users themselves, who need a solution to solve their problems. Each approach has its pros and cons, and in both of them, it's very beneficial that people collaborate and understand the business reason for implementing a DAM solution, as well as the benefits at each level of your organization.

This guide covers very general digital asset management strategies. For detailed information about how the Extensis Portfolio range of products can help in your workflow, see the Extensis website: <http://www.extensis.com/portfolio>

Analyze your current state

One of the biggest fears people face when looking at a DAM solution is that they don't know how to get started, or they're afraid they're going to "get it wrong". Successful DAM implementations start by understanding your current processes and needs:

- *What are your current business processes*
- *What is your existing organizational structure – how are assets routed? Who is involved? How are responsibilities divided up?*
- *What software and hardware do you already have?*
- *Where are the current pain points and bottlenecks?*

Examining your current processes can help you better understand where a DAM system can improve processes, and even replace some time-consuming procedures. For example, you may discover that it currently takes you two weeks to process images and videos taken at events before they are available to others. This delay may not ideal for your organization, and could likely be improved by the inclusion of a DAM system.

Sometimes, you need an independent third party to help you through this. Experts can help you assess your current practices and strategies to get you started.

Extensis Integration and Consulting Services can help you analyze your current processes and propose ways that the Extensis Portfolio line of products could help in your workflow. Contact an [Extensis Sales Representative](#) for details.

Define an efficient workflow

Once you understand how your existing processes work, you can start thinking about your desired workflow and the specific tasks performed by various individuals. An efficient workflow is imperative to keeping track of your assets. Your digital asset management solution should be configured to help you organize, track and share assets. It should be powerful and flexible enough so that you aren't pigeonholed into a limited workflow.

You can approach asset management from many different angles, yet deciding the best way for your situation can be challenging.

Most workflows follow a fairly standard path:

1. Obtain files to catalog.
2. Catalog files.
3. Apply information to your files (metadata)
4. Rename, edit or modify originals
5. Organize files in different folders or galleries
6. Share files with other users.
7. Archive files.

Setting the parameters

When defining your workflow, consider the following:

- *Define goals that are agreed upon by all stakeholders. Obtain consensus on the needs that you would like to address.*
- *Identify and prioritize tasks that need to be performed. This allows you to implement a DAM system gradually, and measure your success in each step of the process.*
- *Create role-based responsibilities.*
- *Assign roles to individuals*
- *Define your new workflow, with the understanding that as new processes are implemented, new needs may arise.*
- *Adapt your workflow to meet your needs as circumstances change.*

There are many questions that you should think about before you set up a workflow. Developing standards based on your needs up front will keep your workflow tight and efficient.

Cataloging - Will you create multiple catalogs for assets that are in different stages of the workflow?

Keywording - What are the most commonly used words used to describe the assets you catalog?

Progress tracking - What types of custom fields will you create? Perhaps create a custom field called "status" and use a predefined list of your stages of production.

User access - Will users obtain files from a published web page or have direct access to the catalog through Portfolio? How many users will access your catalogs? What level of access will each user have? Which users will need Web access to upload, edit images and apply metadata?

Sharing - How do you plan to share files with multiple users? Will you publish web sites for users to download files, or will they have direct access to the catalog through the asset manager? Will you email files?

Routing files - How will files be routed between users? Will you use a custom field and a predefined list to mark files routed to each user? Will you create smart galleries to display files tagged with specific metadata?

Metadata recording - How will file metadata be captured, recorded and utilized? Will metadata be extracted when files are cataloged? Will information be recorded into custom fields?

Consider including a librarian

In a workgroup environment where there are many users of an asset management system, consistency is of the utmost importance. Someone who carelessly catalogs and keywords assets in a large shared system can wreak havoc on the system. Key information may be omitted or misspelled, thus preventing easy access to the information in the future. Having one person, or a small number of people, consistently catalog and update information in the database can help minimize file cataloging and keywording errors.

Catalogs

Catalogs are containers for all of your digital assets. When you create a catalog, a good DAM system allows you the flexibility to customize that catalog for your specific needs. Custom fields allow you to track almost any data type, and saved views can be created to view that data however you wish.

You can maximize your productivity by only customizing a catalog once, and then reusing that catalog as a template for all future catalogs.

How many catalogs to use?

The number of catalogs that you create will vary depending upon your workflow and the types of data being stored.

It is possible that a single catalog can easily meet your needs. That being said, grouping files into separate catalogs creates a higher level of organization, and can help you have a higher degree of success quickly finding the appropriate asset.

A good DAM system allows you to search multiple catalogs at once, so when an item cannot be found in one catalog, if a broader search is required users can always search multiple catalogs.

There are many strategies for grouping items, but anything that is logical and fits well into your specific needs is acceptable. All of the following methods of organization have been used to help simplify the asset management in various situations.

Grouping items by subject

If you have logically definable subjects that aren't likely to overlap, that can be a good way to divide files into multiple catalogs.

For example, a publisher who prints many different magazines would likely have a unique catalog for each magazine.

A marketing department working on diverse product lines, would likely choose to put digital assets from these categories into separate catalogs..

Grouping items by process

Sometimes there are clearly definable states for files in a workflow. Separating items by their state can help direct users to the asset that is in the correct form.

Let's use a university photographer as an example. He shoots thousands of images and only a select few will be up to his high standards for others in the university to use. After images are no longer relevant, he wants to remove them from his system and archive them to CD, yet still know where to find the original files.

In the previous setting, the photographer could create three catalogs - Processing, Current and Archive. After he shoots all of his images they immediately go into the Processing catalog. When they are ready for use he drags them over to the Current catalog, and when they become irrelevant, he moves them to the Archive catalog from which he burns the original files to CD/DVD.

Grouping by file type

Some organizations may wish to group files into catalogs based on file type.

Some DAM systems include the ability to index and search the text of PDF files. This is handy if you have large numbers of PDF files. Yet, when PDFs are mixed in with other files (images, presentations, etc.), including indexed PDFs, this can slow down searches for the other files. So if you have many indexed PDFs, you could create a catalog to house all of your PDFs and another to house all other files.

Grouping items for security

Protecting confidential information is critical to the livelihood of most businesses. Allowing only authorized users to access Portfolio catalogs can be an effective way to control the distribution of sensitive files.

For example, a marketing group may be rolling out a hot new campaign which will be used to undercut the competition. The campaign must be kept under wraps to keep the competition off guard. All of the partners must have the most current images, copy and web assets to roll out the campaign. The marketing group can utilize the asset manager to serve password-protected catalogs that gives access to those involved.

Organizing files

Organizing files on disk

A recent Gartner report states that by 2013, more than 25% of the content that workers see in a day will be dominated by pictures, video or audio.

How do we organize all these assets? Look for a DAM solution that provide an excellent visual window to your files. Many users are also very concerned about the physical organization of files on disk. Having files organized in a coherent and understandable way on disk can assist in an efficient workflow.

If you have already created a catalog, or know that your files aren't well organized, there's no need to be concerned. You can add all of your messy directories to your asset manager and then organize files and add new directories right in the system. It is ideal, however, to start with your assets already organized in a folder structure.

Creating folder hierarchies

With any large number of files, setting up an effective folder hierarchy is practically a necessity. Files can be organized into one root directory. For example an "images" directory as root directory with as many subdirectories as desired. This can be an important organizational method, especially when catalogs are organized by workgroup.

In general it's best to start with a simplistic folder structure and don't overcomplicate things by creating a hi-level of granularity.

When creating a folder structure, consider how this can expand to accommodate various files that you will create in the future. Be consistent with your usage of your folders structure (as well as a file naming convention) for all of your projects.

A good asset manager can also automatically create keywords directly from a folder path as a file is cataloged. For example, a file that is located in the `//images/cars/hatchback/` folder will automatically have the keywords “images,” “cars,” and “hatchback” added to the metadata within the catalog.

If you have already spread your files across multiple directories, your asset manager should allow you to move files on disk to clean up the locations your original files.

You don't need to try to create a complete structure all at once. Once you've gotten started, keeping things organized will make asset management a much smoother part of your workflow.

Creating and using a naming convention

If you create a specific strategy for how your original files are named — and stick to it — you will be able to more easily identify, locate and share your files.

You may consider including pertinent file information such as client name, project, product number, and date into the file name. Try to keep the file names short for optimum readability, but avoid unclear abbreviations.

The following are examples of easily replicated naming conventions:

Filename	Naming includes
<i>Jones newsletter04-001.jpg</i>	<i>Company name, project and sequential numbering</i>
<i>axle 756452j-002.jpg</i>	<i>Part name, part number, sequential numbering</i>
<i>Smith 040623-066.pdf</i>	<i>Company name, date (YYMMDD) and sequential numbering</i>

For complete network compatibility across Mac, Windows and Unix, it is wise to use file names that are compatible with all platforms. In general, follow these guidelines:

- Use file name extensions that are appropriate for the file type, even on Mac OS X.
- Avoid high-ascii characters when possible. Some systems don't like them.
- Avoid the following characters in file names: ? [] / \ = + < > : ; "
- Format dates in a simple manner. For example the date June 23, 2004 can be represented as 040623. This helps keep the files sorted in order in the Macintosh Finder, Windows Explorer and other file display systems.
- Strongly enforce all users to follow the naming convention.

The importance of metadata

Metadata is basically information about your assets. It helps describe the content of your digital assets. Metadata is extremely important in a digital asset management solution, because it not only helps us describe our assets appropriately, but most importantly, because it helps everyone easily find the assets.

Consider this challenge. If you have millions of assets, and you only have one minute to find a particular asset, which option would you prefer? (1) searching using metadata, or (2) visually flipping through millions of previews until you find the asset you need?

A DAM system is only as good as the metadata you put into it. In other words: garbage in, garbage out. Metadata is the key driver of a DAM system. Consider all users who will be accessing your assets, and ensure that the appropriate metadata is extracted and applied to files in your asset manager.

A good DAM solution will:

- *Catalog the file types required in your digital workflow.*
- *Extract appropriate metadata from your files.*
- *Display and allow manipulation of related metadata.*
- *Allow metadata to be embedded back into your original files so that information is never lost.*

Schema, taxonomy and folksonomy

When talking about databases, a schema is the framework or concept that helps organize and interpret information. It is your structure, the list of fields (such as: date, author, name, subject, etc) that you would like your catalogs to contain. Organizations may have hundreds of criteria, but only a few may be required.

We recommend that you organize information in three buckets:

- **Crucial information** - *Information you need to have about your assets. Make this a mandatory field for anyone cataloging your digital files*
- **Nice to have information** - *Data that you would prefer to have, but not essential in your workflow.*
- **Negligible information** - *Information that you could live without, but it does not hurt to capture.*

Once your catalog structure has been determined, you can focus on the values that make up your criteria, the words we're going to use to populate those fields. You can create criteria using either a taxonomy or a folksonomy.

A taxonomy is a technique of creating classifications using a controlled vocabulary. It is hierarchical in nature, and represents information about your assets or metadata (data about your data).

A folksonomy uses a collaborative method to categorize your metadata where freely chosen keywords are used instead of a controlled vocabulary. Many organizations prefer not to use folksonomy, as it creates inconsistencies in the classification of information (kitty versus cat; product SKU versus product part number).

Logic behind how you manage your assets needs to be practical and consistent, so that it is adopted throughout the organization.

Keywords versus custom fields

Users often wonder when to store information in a custom field, and when keywords are more appropriate. In general, keywords should be used to describe the content of a file, and custom fields for specific properties of the file.

Custom fields are particularly useful for tracking any information about the file that is pertinent to the business model. It would be best to use a custom field to track the following information types: job number, part number, SKU, pricing, any information with a Yes/No option, or any data where predefined variables are possible.

For example, a graphic designer has recently completed a project for a frozen foods packager. The project contains an Adobe Illustrator file and a number of related images. She catalogs the files and uses custom fields to track the client name and job number. Because the project is a pizza box design, she also adds the keywords "pizza," "pepperoni," and "frozen."

Depending upon the DAM solution keywords or custom fields can have a search speed advantage over another be sure to check with your vendor for recommendations.

With Portfolio Server, custom fields are indexed to provide the fastest information retrieval from the Portfolio catalog.

Master keyword list

One of the key strategies to a successful implementation of a digital asset management workflow is to create a master keyword list. Adding keywords to your assets enables you to search and locate your files quickly and accurately, and creating a master keyword list ensures consistency across all users throughout your workflow. A master keyword list is a standard list of keywords that can be created, stored and maintained within an asset manager. There are many applications that take advantage of the ability to create master keyword lists.

When developing a list of master keywords, it is important to consider the end users who will be searching your catalog. Keywords must be acceptable and recognizable by all individuals that may need to locate assets within a digital asset management workflow. Be sure to recruit other individuals that utilize the digital asset management workflow to assist you in creating the master keyword list. Are users more likely to refer to an object as a “car” or an “automobile?” Each word can correctly describe an object, but one may be slightly better for your situation.

Your master keyword list should always be created with your workflow in mind. In addition to any complex keywords, you may want to include practical or informal keyword equivalents for those individuals that might not be as familiar with your detailed terminology.

Consistency is also important with the use of plurals. You don’t want your catalogs filled with multiple and potentially confusing keywords. For example: fly / flies, mouse / mice, or goose / geese. Consistency from the beginning will enable you to develop a clear and concise master keyword list.

Teamwork is essential in coming up with a list of valid and well-defined keywords that will be the key to a successful digital asset management implementation.

A master keyword list should make the process of searching for assets as straightforward and effortless as possible. As a catalog becomes larger, the tendency is to include more and more keywords. Carefully following some guidelines and only using master keywords will help users more accurately catalog and retrieve files.

Sharing files with others

One of the main benefits of having a centralized digital asset management solution, is that you can share your assets in many different ways and to many diverse audiences.

Before you share files with other, consider the need of your users and audiences. For example, someone who needs to have certain administrative privileges may have a different access level or way to interact with your assets than a person who only needs to view or download assets.

A good DAM solution should give you the flexibility to match your workflow.

Look for a solution that allows you to:

- *Publish as many websites as needed*
- *Distribute all assets or a subset of them*
- *Control the distribution of your files*
- *Maintain brand consistency*
- *Create branded portals where users can access assets on-demand 24/7*
- *Have unlimited number of users visit your sites*

DAM distribution examples

- **The World Bank** uses branded websites to distribute assets to internal teams and can now share photography taken at events almost instantaneously (while before taking over 2 days to get them to users).
- **Yale University** uses the distribution mechanism of a DAM system to make assets available to students immediately after each class, improving student literacy and enhancing teaching practices.
- **The National Gallery of London** allows internal teams to have access to a wider range of content and better quality assets to others through the use of branded websites
- A large manufacturer uses DAM as a central database of all assets so that employees know what is available to them and stop purchasing new assets. Employees use the DAM system to search and find all the corporation's collection.
- A communications department uses DAM to distribute images, video and audio files for other colleagues to use in presentations, newsletters, web, blog, etc.

Tracking files through a workflow

Many organizations also need to track files through a process - whether it's an approval process or simply tracking the progress of a file through production.

Through a combination of features, many DAM systems allow you to update and automatically track changes to specific custom fields and keywords, thus allowing users to quickly locate files that are routed to them that have a specific status setting. Limiting each field's setting to a predefined list of settings, allows consistency in workflow tracking and ensures that files aren't misplaced.

For example, you may need to track the licensing status of files in your system, or to whom a file is routed in your workflow. To do so, you could create the following custom fields, and assign predefined lists of values to each field.

Custom Field	Licensing Usage	Routing
Items in the predefined list	<ul style="list-style-type: none"> • <i>Royalty-free</i> • <i>Restricted</i> • <i>Print & Web only</i> • <i>Print only</i> • <i>Web Only</i> • <i>Licensing renewal required</i> • <i>Internal use only</i> 	<ul style="list-style-type: none"> • <i>Copywriter</i> • <i>Art director</i> • <i>Manager</i> • <i>Web designer</i> • <i>Testing</i> • <i>Librarian</i>

Backing up files

Accidents happen. We all have had an occasion when a laptop is dropped, a hard drive fails, or a network connection goes down at the most inopportune moment. This is why a regular backup schedule is essential.

As part of the process of implementing your DAM solution, be sure to plan for an integrated backup plan. Be sure to back up all areas of your DAM, including:

- *All original assets*
- *The DAM database, including any associated SQL databases*
- *Any preview files generated by the DAM system*

Plan to keep a backup of your files onsite, as well as a secondary backup offsite in a secure location.

The Extensis Portfolio Server solution

Portfolio Server Solution is a powerful digital asset and media “dashboard” for demanding creative workflows. It allows organizations to seamlessly deploy multi-channel marketing, control their brand, manage and process rich media, and deliver assets through the Web. Built on open, industry-proven technologies, it easily integrates with your existing infrastructure. Portfolio Server remains the only robust DAM solution that can be deployed in hours (not months) and is user-friendly enough for instant adoption by end users.

Download a 30-day trial copy of Extensis Portfolio Server from the [Extensis website](#).

In addition to Portfolio Server, a number of products extend the abilities of Portfolio Server significantly. Each product is designed to integrate and enhance creative workflows and is available as an add-on to Portfolio Server.

- **Portfolio NetPublish** - Turns Portfolio Server catalogs into self-service web portals for your colleagues, partners and vendors.
- **Portfolio NetMediaMAX** - Enhances file conversion support, enables file processing through scripting, enables you to off-load image processing to external Portfolio Media Engines using MediaRich technology, as well additional file conversion support available to Portfolio NetPublish sites.
- **Portfolio SQL Connect** - Allows the storage of Portfolio catalog data in SQL databases offering greater scalability, enhanced performance and superior integration.
- **Portfolio Web Client** - Enables access to Portfolio catalogs using a web browser.

For technical details about the setup and configuration of all Portfolio Server products, see the [Portfolio Administration Guide](#).

Contact your [Extensis Corporate Sales Representative](#) for pricing and availability.

About Extensis

Extensis is a software developer that allows creative workgroups and professionals to streamline their workflow and securely manage their digital assets and fonts. Extensis' award-winning client/server and desktop products are used by hundreds of Fortune 5000 companies and include Universal Type Server for server-based font management, Suitcase for single-user font management and the Portfolio suite for digital asset management. Extensis was founded in 1993 and is based in Portland, Oregon, and the United Kingdom. Extensis is a division of Celartem Inc., which is wholly owned by Celartem Technology Inc., (Hercules: 4330).

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