

# 6

# STEPS TO DIGITAL ASSET MANAGEMENT METADATA SUCCESS

## A GUIDE TO GETTING IT RIGHT

By Cathy McKnight

A DCG TOOL

Sponsored by



# DIGITAL ASSET MANAGEMENT METADATA SUCCESS

This Guide is for all team members involved in the process of digital asset management (DAM). Whether you are a DAM system administrator responsible for setting up the platform or a marketing director tasked with overseeing digital assets and their management within the organization, this guide will provide you with the information, tips, and checklists for creating and maintaining an effective digital asset metadata strategy and schema.

# WHAT IS DAM METADATA AND WHY SHOULD I CARE?

## WHY BOTHER? THE BENEFITS OF METADATA

You may be thinking: we have gotten this far paying almost no attention to metadata; is it really THAT important? In a word, absolutely! Not having a proper metadata schema and strategy that have been specifically constructed for your organization and its digital assets can be costly in terms of time and misused/unused assets.

Here are just some benefits of even a simple metadata schema:

- **Increased findability:** Tagging digital assets with even just a few basic metadata fields such as title, keywords, and licensing information can mean the difference between looking for a needle in a haystack and finding the asset and picking it up off a library shelf.
- **Brand consistency:** Metadata helps enforce brand standards by making the most relevant and recent brand assets easily accessible.
- **Reduced risk:** Maintaining administrative metadata enables the tracking and enforcement of assets' rights management and lets people know how and where the file can be used.

Combined, these benefits can add up to large financial savings through gained efficiencies and fewer licensing infractions (read: litigation and financial penalties).

## METADATA

Noun; medə,dādə, 'medə,dədə/

A set of data that describes and gives information about other data. In the case of digital asset management (DAM), metadata provides context and information about your digital assets like images, videos, sales collateral, etc.

A defined metadata schema may include standards and models, as well as tactical elements such as controlled vocabularies and taxonomies.

# TYPES OF METADATA

There are many types of metadata that can be tracked. Here are some examples:

- **Descriptive metadata** includes fields that support the findability of assets such as keywords, title, file type, etc.
- **Administrative metadata** typically tracks assets' usage and rights restrictions of the intellectual property such as licensing details, expiration dates, geographic parameters, etc.
- **Technical metadata** tracks the internal contents of the digital file.
- **Process metadata** aligns with the workflow and/or status of the project/job associated with the development of the asset.

Which of these types to use and how much metadata is managed depends on many factors including available time, resources, and DAM system capabilities. Starting with a small, focused set of fields and then evolving to a more complex schema is a great way to instill best practices and good metadata habits.

## Examples of metadata fields by metadata type

Descriptive	
Subject	...
Title	...
Description	...

Administrative	
Date created	Publication status
File type	...
Review date	...

Technical	
Database	...
Glossary referenced	...
Table name	...

Process	
Approver	Project number
Status	...
Project name	...

# 01

## DAM METADATA: HOW TO SET UP YOUR STRATEGY FOR SUCCESS

### STRATEGY FOR SUCCESS

Like most things, setting a path forward with measured steps and checkpoints can help you reach a destination successfully. Configuring your DAM system's metadata is no different.

1

**Determine your DAM business goals and then consider what metadata you will need to reach those goals.**

How you set up your organization's metadata strategy will be different if your focus is simplifying access to digital assets compared with facilitating collaboration between teams producing creative and marketing materials. Identifying use cases can help define and articulate the business goals.

2

**Understand your DAM users' information needs, and how they access assets.**

What information is necessary or important based on the identified use cases? How do users typically find or search for the assets they need: File name? File type? Creator?

3

**Identify DAM stakeholders.**

Who will be involved in creating and maintaining the metadata, and who will be relying on it? Consider both internal (marketing, sales, etc.) and external (agencies, partners, channel) resources who contribute to and/or use the assets.

4

**Understand the metadata process.**

Document the "who, when, and how" of metadata creation and maintenance. Consider how people manage assets and metadata today and, where possible, build on existing positive behaviors and processes.

5

**What metadata do you need?**

Define the necessary fields and how they should be used. There should be a core set of required fields and a set of optional fields for all assets.

## NAMING CONVENTIONS

Consistency is one of the keys to a successful metadata strategy. Along with documenting common language, setting a standard for how files are labeled and described can exponentially improve the findability and usability of your digital assets by making them easier to identify and evaluate in search results. Typically, both File Name and Description metadata field names are free text entry fields, making it even more important that there be standards for users to follow.

The following is an example of what the naming convention for a campaign asset might look like:

### Description

Naming convention	Campaign Name, Creative, Asset Type, Asset Size, Language
Metadata entered	Reach for the Stars and Win, Starburst, Digital Banner, 468x80, US English

### File Name

Naming convention	CampaignNameAbbreviation_Creative_AssetType_Size_Language
Metadata entered	ReachToWin_Starburst_DigBan_468x80_US-EN

## METADATA SET-UP CHECKLIST

DAM business goals align with/support at least one organizational goal.

Consider current and potential DAM users to be included in the discovery process.

Consider current and potential DAM users to be included in the discovery process.

DAM metadata processes are as simple as they can be.

Metadata requirements are identified as must-have, good-to-have, or nice-to-have.

Naming conventions are defined for file name and description fields.

# 02

## SOURCING THE DATA

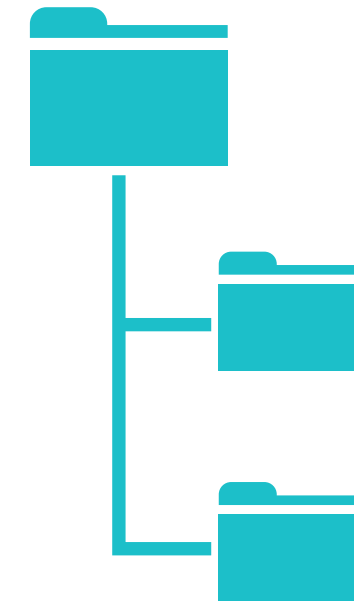
Much of the metadata you will want and need may already exist.



**Embedded standards** such as XMP or IPTC can be extracted via specialized readers or photo editing software systems.



**Integrate** with other solutions like content management systems (CMS), product information management (PIM) systems, or other DAMs, to leverage the metadata already in use.



Examine the **folder structure** in other repositories or network drives for insights into how digital assets are currently organized.



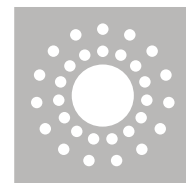
Also, consider the **types of assets** to be managed by the DAM system, and how they are used. Different teams may have the information, so ask around and gather what you can to save time and effort.

## MORE ON STANDARDS



### IPTC

The International Press and Telecommunications Council (IPTC) created the most widely used photo metadata standard available. Universally accepted among photographers, distributors, news organizations, archivists, and developers, this schema defines metadata structure, properties, and fields, so that images are optimally described and easily accessed later.



### Dublin Core

Also known as the Dublin Core Metadata Initiative or DCMI, was created in 1995, and is made up of 15 metadata elements that give structure to digital based resources/assets to make them more findable.



### XMP

XMP is a common metadata framework that standardizes the creation, processing, and interchange of digital asset metadata across publishing workflows. Originally created by Adobe in 2001, it is XML compatible and aligns with the W3 standards.

## GATHERING DATA CHECKLIST

---

Establish which, if any, embedded standards exist with current digital assets.

---

Pinpoint all official and non-official digital asset repositories.

---

Identify common attributes (metadata, folder structure, file types, etc.) from existing repositories.

---

Consider digital assets managed by non-marketing teams.

---

Determine if metadata templates already exist.



# 03

## POPULATING THE DAM WITH METADATA

Once you know what metadata you want and where it will come from, you then need to get it organized and into the DAM system. There are several tools (many free) that can help with the part of the endeavor. Metadata creation falls into several categories:



### Templates

are structured forms that allow users to enter the metadata values into pre-set fields that match the element set being used within the DAM system. The template then generates a formatted set of the element attributes and their corresponding values.



### Mark-up tools

structure the metadata attributes and values into the specified schema language. Most of these tools generate XML or SGML Document Type Definitions (DTD).



### Extraction tools

automatically create metadata from an analysis of the digital asset. These tools are generally limited to textual resources.

It is important to keep in mind that the quality of the metadata extracted from other systems can vary significantly based on the tools used, as well as the content and structure of the source text. Any metadata automatically entered via a tool should be reviewed and edited for accuracy and compliance defined metadata standards.



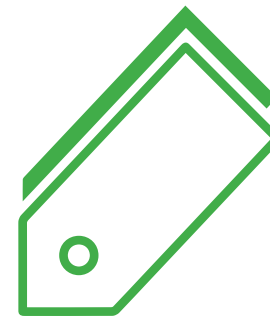
### Conversion tools

translate one metadata format to another. The similarity of elements in the source and target formats will affect how much additional editing and/or manual input of metadata may be required.



### Manual entry of metadata

is almost always required to some degree. Limiting these fields to controlled vocabulary (drop down list, check boxes, etc.) will significantly improve the consistency and accuracy of the metadata entered.



### Smart tags

use machine-learning algorithms to automatically add metadata to digital asset files. Image-recognition algorithms can automatically tag images with keywords based on photo type, certain emotions, animals, popular locations, primary colors, and more.

## ENTERING METADATA CHECKLIST

---

Determine which fields can/will be automatically populated vs. manually entered.

---

Research, identify, and map which tools (if any) will be used to extract or convert existing metadata from other systems.

---

Create templates that align with the metadata schema and asset types for ease of manual entry.

# 04

## SETTING UP THE DATA

After reviewing what metadata is already available, documenting your use cases and stakeholders, and understanding the available fields and functionality within your DAM solution you can then define your metadata schema.

Once common fields have been identified (i.e., file name, keywords, description), then consider the unique aspects of the various file types that the DAM will support. Table 1 shows some of the more frequently used metadata fields by asset type. Each supports the findability, consistency, and clarity of an organization's digital assets.

Table 1: Commonly used metadata fields by asset type

Metadata Field	Asset Type:	Images	Videos	Brand Collateral
<b>Title</b>		✓	✓	✓
<b>Description / Abstract</b>		✓	✓	✓
<b>Source:</b> creator, producer, photographer, designer, outlet, etc.		✓	✓	✓
<b>Keywords</b>		✓	✓	✓
<b>Rights:</b> licensing, etc.		✓	✓	✓
<b>Recommended use</b>				✓
<b>Run time</b>			✓	
<b>Copyright</b>		✓	✓	✓
<b>Format</b>		✓	✓	✓

Look to existing standards such as Dublin Core and other industry or topic related standards for guidance and suggestions on which fields to choose for your metadata schema.

Your metadata schema will outline whether fields are mandatory, recommended, or optional. Have the information populated automatically – file type, creation date, etc. – when the file is added to the DAM system. Then, define fields with controlled vocabulary via checkboxes or dropdown menu pick lists whenever possible. This will facilitate the process for users as well as ensure consistency in the data being entered.

## A WORD OR TWO ON LANGUAGE

Common language: Not everyone using the DAM system will speak the same language, literally or figuratively. Where a Publisher might refer to an asset shot with a camera an “image” a marketer might call it a “photo”. To overcome these potential conflicts, a corporate lexicon should be developed that identifies the formal term, as well as lists commonly used slang, acronyms, departmental terms, and abbreviations. These should then be captured in a glossary that is shared and accessible to all users.

## SETTING UP DATA CHECKLIST

---

Review existing metadata.

---

Identify fields by file type.

---

Identify common fields across file types (rename where it makes sense to align values).

---

Develop a corporate lexicon.



# 05

## DEFINING A METADATA SCHEMA

A schema defines the layout and relationship of, in this case, the metadata; properties such as title, description, keywords, etc. A schema helps to organize and interpret the information it is representing. It is the structure, or list of fields, that your DAM catalogue will contain. The metadata schema pulls out and identifies what is the most important information needed for the asset to be easily found and used properly.

There will be potentially hundreds of criteria available, so grouping the potential fields into three core buckets can help prioritize what to include in the schema.



### Mandatory

This is the must-have information about your assets. These fields must be completed before assets can be catalogued into the DAM. What is required may vary by asset type.

---

Identifier

---

Creator

---

Title

---

Publisher

---

Publication Year



### Recommended

These good-to-have details would be beneficial to associate with the file, but are not essential to finding or using the file.

---

Subject

---

Contributor

---

Date

---

Resource Type

---

Related Identifier

---

Description

---

GeoLocation



### Optional

This is nice-to-have information that is not crucial, but it wouldn't hurt to include it.

---

Language

---

Alternate ID

---

Version

---

Rights

Not all metadata fields will be applicable to all digital asset types. Ensure that the required and optional fields are relevant for the asset type they represent. Controlled vocabulary within required fields will significantly improve asset findability.

Once the schema is defined, the values for the fields can be defined using a taxonomy (pre-determined terms) or hybrid vocabulary (blend of pre-determined terms and open text). Fields can also be open to user entry, but this should be restricted to optional elements where consistency has less impact on the integrity of the metadata.

**Figure 1: Example of a simple metadata schema.**

See Appendix B for more detail.

Field Name	Description	Entry Type	Priority	Single/Multiple	Vocabulary	Values
File Name	File name	Automatic	Required	Single	Open	
Keywords	Key search terms	Text	Required	Multiple	Open	
Description	SW of file	Text block	Required	Single	Open	
Expiration Date	Valid to us until <date>	Date/Time	Required	Single	Open	
Owner	File owner	Text	Recommended	Multiple	LDAP link	
Brand Use	Allowed for use with identified brands	Text	Required	Multiple	Restricted	Brand A, Brand B, Brand C, Brand D
Rating	Rating from 1 to 5 (worst to best)	Number	Optional	Single	Restricted	1,2,3,4,5

## DEFINING DATA CHECKLIST

Categorized metadata fields as either Required, Recommended, or Optional.

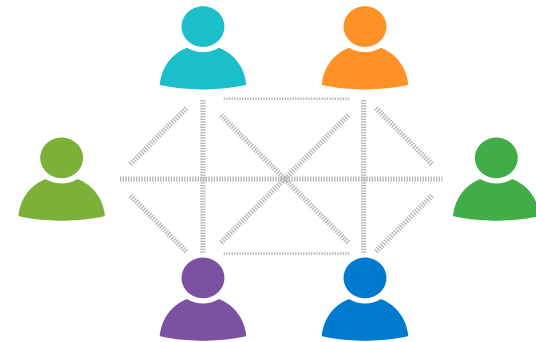
Define values for Required fields.

Create a metadata schema.

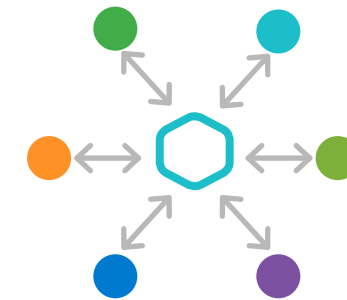
# 06

## MAKING THE MOST OF METADATA

### SHARING METADATA BEYOND THE DAM



Describing a digital asset with metadata allows it to be understood by all users – human and machine. As mentioned earlier, metadata needs for stakeholders across the organizational landscape should be considered, as should the metadata needs and capabilities of other systems. Understanding where else in the organization metadata is used, and how to optimize an organizational-wide metadata strategy via interoperability between relevant systems increases the overall benefits of the effort.



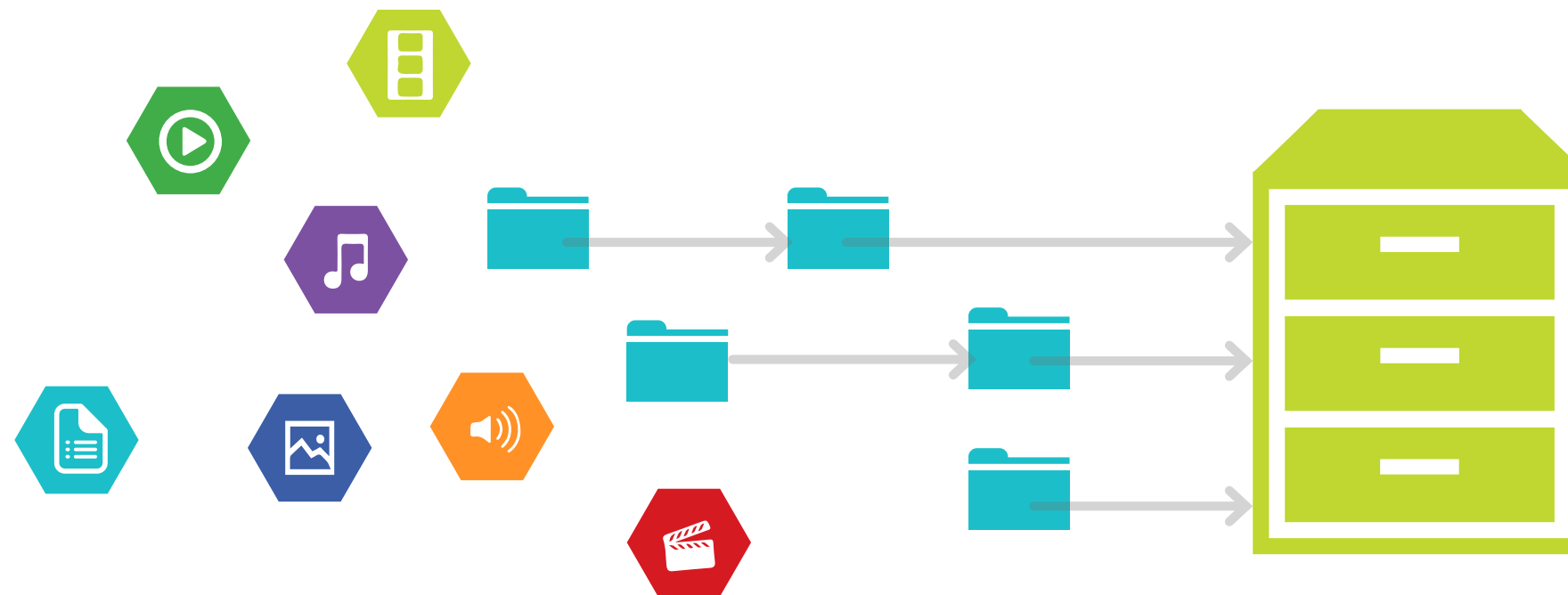
Having interoperable metadata based on accepted standards, such as the XMP framework, allows multiple systems to work with the same set of data and metadata. Efficient and consistent, this exchange of information is done behind the scenes. A shared baseline of metadata helps ensure records associated with one resource can be accessed, accurately interpreted and subsequently used by a system or integrated with metadata records associated with other resources. Interoperable metadata allows Business systems such as DAMs, CMSs, PIMs, etc. to easily and accurately import shared data.



Having a defined organizational lexicon, such as a dictionary, glossary, and/or thesauri help in the development of interoperable metadata.

## ARCHIVING ASSETS

Most metadata efforts center around the making recently created resources more accessible. But metadata is also the key to ensuring that resources will survive through systems and format evolution, and continue to be accessible into the future. Archiving and preservation require special elements to track the history of a digital asset (where it came from and how it has changed over time), as well as detail its physical characteristics, and to document its behavior to emulate it on future technologies. So be sure to consider these elements when developing your metadata schema.



## OPTIMIZING METADATA CHECKLIST

---

Identify systems (other than the DAM) that maintain relevant metadata.

---

Map common metadata fields between systems.

---

Rename common metadata fields to the name field name across systems where possible.

---

Capture approved company lexicon in a corporate glossary/dictionary.

---

Consider the historical information of assets in the metadata schema.



# BEST PRACTICES

It takes time and consideration to develop a well-organized and logical DAM metadata schema and strategy. Here are a few tips to keep all that hard work paying off.

- Add metadata to the asset when the file is being uploaded.
- Use predefined drop-down menus for commonly used data to prevent inconsistencies.
- Apply standard naming conventions for file names and asset descriptions.
- Do not overburden users by requiring them to complete too many metadata fields. Automate field completion when you can and where it makes sense.
- Include asset ownership and/or credit information for identification outside of your DAM.
- Maintain copyright and usage terms for rights-managed assets to prevent any misuse.
- Educate contributors and administrators responsible for adding metadata about your organization's metadata strategy.
- Communicate your metadata requirements to any external vendors; i.e., "Photos must be submitted with the usage terms, credit, and location metadata already added."
- Conduct regular audits to ensure metadata is being added properly.
- Hire metadata experts to help get the strategy and schema correct the first time.
- Remember that consistency is the key to metadata success.

## KEY TASK LIST

---

Consult with current and potential DAM system stakeholders, including external resources.

---

Define a corporate lexicon, taxonomy, folksonomy that is brand aligned and reflected in the controlled vocabulary of the metadata fields.

---

Share the metadata strategy with others that manage related and/or affected systems (i.e.: content management system).

---

Simplify and automate the execution of the metadata strategy where possible and makes sense.

---

Enact a governance structure to enforce and improve upon the metadata strategy's execution.

# APPENDIX

## APPENDIX A: DUBLIN CORE METADATA ELEMENTS

1. **Title:** The name given to the resource.
2. **Creator:** The person or organization responsible for the content.
3. **Subject:** The topic covered.
4. **Description:** A textual outline of the content.
5. **Publisher:** Those responsible for making the resource available.
6. **Contributor:** Those who added to the content.
7. **Date:** When the resource was made available.
8. **Type:** A category for the content.
9. **Format:** How the resource is presented.
10. **Identifier:** Numerical identifier for the content such as a URL.
11. **Source:** Where the content originally derived from.
12. **Language:** In what language the content is written.
13. **Relation:** How the content relates to other resources; for instance, if it is a chapter in a book.
14. **Coverage:** Where the resource is physically located.
15. **Rights:** Copyright information.

### Many standards available

There are many other standards (industry and topic based) that can help expand beyond the Dublin Core. The following are examples of general standards:

- Metadata Encoding and Transmission Standards (METS)
- NISO MIX for technical metadata on still images
- Digital Object Identifier (DOI) for networked resources
- Resource Descriptive Framework (RDF) used for conceptual descriptions or modeling of web resources
- Global Information Locator Services (GILS)

# APPENDIX B: SAMPLE METADATA SCHEMA WORKSHEET

Field Name	Description	Entry Type	Priority	Single/Multiple	Vocabulary	Values
<b>Example:</b> File Name	Widget1 Sales Sheet NA-English (Product Name – Asset Type – Language)	Text	Required	Single	Open	

**Field Name:** The name of the area/field within the DAM system where the information will be entered.

**Description:** Leverages the same information in the file name but presents it in plain English in accordance with the predetermined naming convention.

**Entry Type:** Describes how the data will be entered (text, numbers, text block, imported, etc.)

**Priority:** Identifies whether the field will be required for the asset to be catalogued into the DAM system, or if it is recommended or options (not required for the asset to be saved).

**Single/Multiple:** Indicates whether only one value or multiple values can be entered. This can also include details of any character limitations.

**Vocabulary:** Dictates if the fields will be open entry or if users will select from a controlled vocabulary via pre-defined options presented via a drop-down menu, pick lists, etc.

**Values:** This field details the options that will be presented when a controlled vocabulary is being used.

# ABOUT DIGITAL CLARITY GROUP

Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies.

## Contact Us

Email:  
[info@digitalclaritygroup.com](mailto:info@digitalclaritygroup.com)

Twitter:  
[@just\\_clarity](https://twitter.com/just_clarity)

Web:  
[www.digitalclaritygroup.com](http://www.digitalclaritygroup.com)

