



Asset management's need for metadata and its impact on standards for process management, file formats and metadata sources

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Abstract DAM systems are continually impacting production and archiving processes. Post development of taxonomy and metadata schemas, sourcing metadata from various asset types and file formats pre and post ingestion has generated a new impact that is now being realized. There is a growing need to standardize how and more importantly where we source our metadata. Where better than from the actual files ingested to the system?

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EVOLUTION OF THE DAM PARADIGM AND ITS INEVITABLE DOMINO EFFECT

The cornerstone of any DAM system is the metadata that identifies and defines the asset. Metadata is the key information that makes the asset searchable and defines how each asset is useful to the end user as well as how it can or should be re-purposed.

As the paradigm for asset management evolves, we need to search for increased efficiencies in wider aspects of organizational process management as well as the organization's final digital product. While improvements are always implemented to streamline these processes, this new paradigm sharpens our focus on the business documentation that is collected by an organization or enterprise throughout the life of a project. More emphasis is being placed on the proper archival and retrieval of assets such as client briefs, project plans, estimates and purchase orders by clients and their audit teams. Application of new

standards to these assets and their formats is important not only because of their content but also for their embeddable metadata, as it too becomes ingested into the asset management system. As technology drives such innovations as accessing this data and automating its infusion into the system we must also drive standards to develop an efficient means of accessibility to that data.

Historically, very little information has been archived with a final digital asset let alone within the asset itself. Information, documentation or job tickets and worksheets were kept in the job jacket or project folder, which followed the job throughout the production workflow and was then archived as a physical folder with all pertinent documentation. Because of storage limitations, both physical and digital files were typically retained for a contracted number of years and then purged from the archives.

The digital assets themselves were most likely gathered as a complete set by job or project, backed up on disk or tape and stored in an archival room separately from any records

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of pre-production planning, project planning, what it took to produce the asset, what it was used for or how often it was repurposed. To locate an asset, someone needed to track down the project or job number the asset was used for and, if alternates had been created, the correct version. This information was then given to an archivist, who would locate the asset on whichever final media it had been transferred to. Once located, the asset was restored to digital life.

DAM has brought all of this process into a powerfully efficient platform. Unfortunately, this new platform has also created a new facet to the process, the need to source the proper metadata for each asset. This has in turn produced a common stumbling block. Difficulties with acquiring and applying metadata have been issues that anyone implementing a DAM system has had to contend with. Technology is lending a hand by providing a method of accessing information manually embedded in assets and auto-population to pre-assigned metadata fields. This new means of infusing metadata can make re-applying some of this information unnecessary.

Technology has also provided a method of associating related assets not only by grouping but also by assigning direct links to additional documentation, which has led to wider varieties of asset file types. Efficient management of these file formats has become even more essential because of their role in the resulting final digital repository.

The key to taking advantage of these beneficial improvements to DAM systems is still a form of manual entry of that metadata somewhere by one or more persons within the production cycle of that asset. This is where focusing on standards will produce even greater efficiency to an organization's process management.

SOME STANDARDIZATION HAS ALREADY BEEN IN PLACE

Most major applications have included standardized metadata schemas that are embedded in the files they generate. The common Properties or Document Properties functions may provide a series of tabs that can be utilized to embed pertinent information from author details to security and user restrictions. Adobe® and Microsoft® have built more

extensive and well-developed embedded metadata schemas for their suites of products. Although these areas for entering metadata have been available for some time, I think that asset management users have just recently come to realize how valuable they are and to integrate their use to transfer important details as assets are ingested into their systems. This too should drive efforts to further promote standardization of asset types and file formats to be ingested.

HOW WILL THIS STANDARDIZATION EVOLVE FOR ASSET MANAGEMENT?

Considering how swiftly asset management is growing into enterprise asset management, the standardization of documentation and the file formats generated for them has become even more essential for streamlining entry accessibility and validation. Moving forward from an overall perspective, an organization would need to standardize the file formats it uses for business practices and create templates by specific purpose and perhaps by client or other essential criteria. Standard operating procedures would be implemented to ensure that proper details are applied as necessary. Let us take a look at a common project scenario from beginning to end. At the pre-production stage, standardization would need to apply to such documentation as client briefs, creative briefs, project plans, estimates and purchase orders, as well as various other types of project management documentation.

Standardization would continue throughout the production process by its application to documentation files for project details, production specifications, asset specifications and even work in progress collaboration details. It has become more important that all of the above be readily available and accessible for the purposes of accountability and validation.

Upon completion of production all documents would be finalized, gathered and ingested into the DAM system. Any outside documents such as proposals, bids and invoices from vendors would need to be requested in a digital format (such as PDFs) as well so that they too could be ingested into the system.

The ingestion process would also need to be standardized to ensure consistent entry

of assets and their metadata. The key to this process is to determine a primary file that would drive the infusion of information to the defined metadata schema for the overall project. All subsequent assets would associate to the primary file and/or to each other as required. A variety of criteria could be used for the association links — such as the project or job identification number, campaign title and subcategories like media, market, product and target audience.

Each asset type would require its own intrinsic metadata schema in order to provide essential details that pertain to its specific file formats. Standardization of the file formats used in your system will help reduce the variety of schema, further streamlining the ingestion process. These details would come from the production documentation that should accompany the assets at the time of ingestion. If any of this information is applied or embedded in the available file Properties tabs as a standard operating procedure during the production process, the automated extraction and transfer of this metadata could be programmed into the ingestion process. This would enable these details to be applied by the individuals most capable of applying accurate information to the asset at the time they are producing it. This would also reduce the amount of documentation required for each asset format at the time of asset ingestion, further streamlining the system.

The final stages in the process may be routing notification to internal personnel for additional metadata application or even client annotation, validation, approval of metadata, approval of rights management and final release for distribution.

WHAT ABOUT PROCESS STANDARDS?

Government-enforced compliance requirements are causing organizational processes to become heavily reliant on well-managed, monitored and audited standard operating procedures (SOPs). SOPs bring multiple benefits as they stem from process evaluations and refinement and are put in place for compliance, accountability and efficiency. These built-in standards ensure process adoption not only by an enterprise internally but also by external resources and end users. So

with asset, production, project, account, client managers and the client included, the adoption ensures the success of the system. As with any implementation of new and stringent procedures, there will be some hurdles encountered. The most common stumbling block is user shock. Fortunately, as I have witnessed, with proper training and the involvement of the end user in process development, acclimation time can be remarkably short.

EVOLVING PARADIGMS

Asset management systems have been able to integrate new technology to provide more benefits to organizations now than emerging systems had more than five years ago. Integration of these systems is no longer just delivery of a final digital asset to its repository and applying metadata.

DAMs have evolved to encompass the broader scopes of business process management. As an entire enterprise becomes the end user of the system, it needs to consider all of the documentation assets it will utilize in the system. Streamlining is critical in all process in an enterprise. Asset management drives the necessity to streamline disparate process channels into an efficient stream of assets that fill the DAM system. Refinement and standardization of assets will create greater efficiencies and potential to access, utilize and re-purpose what is ingested into a system.

The new paradigm in asset management has created a domino effect. DAMs originally implemented changes in production and asset sources as well as pre-production and delivery processes. The drive for greater development and deeper integration of asset management has also expanded the management scope. The larger scope is impacting the sources of enterprise assets and their processes.

THE NEXT DOMINO

Any DAM implementation will develop efficiency in the process to which it is applied. One of the givens is that there will always be growing pains.

Now the paradigm of organizational process management must shift to become the streamlined and efficient source for the DAM system.

Greatest given? No pain, No gain.