Getting Started with Metadata, 7 Quick Tips for Adobe Experience Manager Assets

A Best Practices Guide

June 2017
TABLE OF CONTENTS

3  Let’s Get Started
4   Step 1: Organize your files and create a logical folder structure
5   Step 2: Align your metadata strategy
6   Step 3: Plan the sourcing and population of metadata
7   Step 4: Define your metadata structure
8   Step 5: Get started with search
9   Step 6: Use collections and smart collections to group related assets
10  Step 7: Turn on Smart Tags to make assets more discoverable
11  Summary
Let’s Get Started

One of the most important steps you can take when using Adobe Experience Manager Assets is to make sure your content is easily discoverable. If users can’t quickly find the assets they need from anywhere in the system, your organization can suffer from slower time-to-market for your products, brand inconsistency, misused or unused assets, and other significant financial impacts.

How do you make your digital assets discoverable? Metadata and search. Taking the time to set up a clear metadata strategy upfront will pay huge dividends later. In this guide, you’ll learn some quick tips to get started with metadata and search in Experience Manager Assets, so you can realize the most value from your organization’s digital assets.

Let’s get started!
Step 1: Organize your files and create a logical folder structure

How files are organized and tagged with metadata in Experience Manager Assets is just as important as creating and adhering to a file-naming convention. For example, the same filename (e.g., banner.jpg) may exist in multiple locations in Experience Manager. It can be discovered by browsing the folder structure or search—it just won’t be very easy or quick.

Because users rarely retroactively add metadata to assets, the more you can capture upfront, the better. You’ll want to balance this folder structure against potential metadata schemas and processing profiles that can be applied at the folder level. And remember, your folder structure also has implications on SEO and URL structure (aka the “context of content”).

Appendix 1: Sample folder structure

- Corporate
  - Stationery
  - Presentations
  - Brand assets
- Video
  - Marketing
  - Client-specific folders
  - Commerce
  - Product-specific folders
- Marketing
  - Clients
    - Dell
      - Home Depot
        - 2017
          - January
            - Email
            - Web
            - Direct mail
          - February
          - March
        - 2016
        - 2015
        - US Food
      - Shared creative
        - Logos
        - Colors
        - Fonts
        - Templates
      - Archive

- Commerce
  - Assortments
  - Products
    - Accessories
    - Apparel
    - Bottoms
    - Top
      - Jacket
      - Tank
      - Bikini
      - Warm-up
        - 1
        - 128
        - 129
          - 1280754
            - Colorways
            - Main
          - 1288450
            - Long Sleeve
            - Short Sleeve
            - Vest
  - Bras
  - Sets
  - One Pieces
  - Footwear
  - Electronics
  - Suppliers/Brands
    - Apple
    - Reebok
    - (Vendors who supply products and photography)

**BEST PRACTICE TIP #1:**
Create a logical folder structure—it has an essential role in assigning permissions to users and is important for browsing navigation. Remember to follow common-sense guidelines for naming files so there aren’t any duplicates. You don’t want end up with hundreds of files named “banner.jpg”.

June 2017 | 7 Quick Tips to Getting Started with Metadata with Adobe Experience Manager Assets
Step 2: Align your metadata strategy

Once you have determined your folder structure and settled on filenaming guidelines, you’ll want to align your metadata strategy with the tools and technologies available in Experience Manager. First, you’ll want to survey or interview different stakeholder groups and look through internal site search logs. You’ll also want to make sure that you take into account your other systems (for example, web content management, marketing resource management, and product content) that need to interact with Experience Manager Assets to ensure interoperability.

While it’s unreasonable to expect an entire organization to settle on one universal vocabulary, you can eliminate redundant terms and values and determine high-value and missing properties.

BEST PRACTICE TIP #1:
Make sure you have a well-defined taxonomy before you start adding metadata and tagging assets. Here are a few sites to help you chart a plan of attack:

- To get a good handle on how to administer Experience Manager Assets, check out Administering Assets.
- For items to consider when setting up your taxonomy, read Best Practices for Developing a Taxonomy with Adobe Experience Manager.
- For some basic tips about using and managing tags, read Metadata Profiles.

BEST PRACTICE TIP #2:
If you’re planning a global implementation, make sure to validate the taxonomy based on the different regional variations to ensure one-to-one equivalency.
Step 3: Plan the sourcing and population of metadata

Populate Experience Manager with metadata either by reading the data from the image itself on upload or by manually adding data to the asset after upload. Other popular sources of metadata include product information, your enterprise resource planning (ERP) system, other digital asset management (DAM) systems, and so on. Where and when to add the data depends on the workflow, but here are a couple of tips that can speed the process:

**BEST PRACTICE TIP #1:**
Populate your images and content with metadata upon asset creation using the IPTC tabs within Adobe Photoshop, Illustrator, or InDesign. Automatic extraction of XMP metadata will occur on upload into Experience Manager. (Note: If the content comes from a third party or an external vendor, it may be practical to add this information after upload.)

**BEST PRACTICE TIP #2:**
Use metadata profiles to automatically tag assets when they are added to a particular folder. If you use processing profiles with your creative teams and agencies as a part of your everyday asset ingestion workflow, newly created assets are automatically populated with some useful data if you upload them to the correct folder.

For additional tips about populating your content with metadata, read Using Tags.
Step 4: Define your metadata structure

Any metadata present on an asset can be stored and used by Experience Manager Assets. However, not all data may be visible by default. The Metadata Schemas feature allows you to add existing fields to the Properties page for each asset. This means you can group and organize different types of metadata—for example, basic, advanced, and product data—in different tabs for easy viewing and management using the Metadata Schema editor.

Since different asset types—images, video, documents, and other brand collateral—require different metadata, you should implement a different schema for each asset type. Also, various groups within your organization may have different requirements and needs, so you may want to set up different schemas in each folder to meet the needs of each group.

**BEST PRACTICE TIP #1:**
Add custom metadata fields that are specific to your business to make your assets even more easily discoverable. Determine what’s important enough to expose in a schema vs. what should be stored on the asset’s node for discoverability. Avoiding noise is just as important as exposing information!

**BEST PRACTICE TIP #2:**
Use the metadata schemas to enforce required metadata standards. One image content type may require digital rights management (DRM) properties for liability purposes while another may not, but schemas are an excellent way of enforcing data integrity and capturing the key properties that facilitate discoverability and governance. When defining the structure, think of how it could be leveraged within search facets, in asset libraries, and in publishing environments—what will be exposed to users, in what context, and for what ultimate purpose?
Step 5: Get started with search

Now that you’ve populated your assets with tags and meaningful metadata, it’s time to take advantage of the data by configuring search to show these new fields and options. You can find complete instructions for customizing search in Adobe Experience Manager Help. Here are a few simple tips to get started:

**BEST PRACTICE TIP #1:**
Create a simple search experience for your users. Modify the default search form to remove unwanted search fields and only use the fields that are relevant to your business. You’ll want to identify some of the key properties and content types that surfaced during your research and look at the combination of terms (and/or operators) that may be meaningful across different properties. Then, validate the search facets against the use cases described by the users. For example, determine which ones require a filter set and which ones need a free-form text query.

**BEST PRACTICE TIP #2:**
Any particular property or search term can be “boosted” either at indexing time or at runtime. However, unless you’re a media company with an abundance of assets, it’s best not to try boosting values until you have a baseline measurement of how you’re applying metadata and how users are successfully using search.
Step 6: Use collections and smart collections to group related assets

Collections are a great way to save and share groups of related digital assets. Collections can be based on dynamically updating search results, or created manually. The difference is very similar to "normal playlists" in Apple iTunes and "smart playlists." Normal playlists never change by themselves—you must edit them manually—while smart playlists automatically update based on some specific criterion/criteria, such as "all songs newer than three months." You can read the full documentation of this powerful and flexible feature in Experience Manager Help. Here are some useful tips to get started:

**BEST PRACTICE TIP #1:**
Make your collections visible in the user interface by using the Add to Collection button.

**BEST PRACTICE TIP #2:**
Once visible, you can share your collections with others in your organization. In Experience Manager, click the View Settings button, and then add the users to give them access to your collections.

**BEST PRACTICE TIP #3:**
If you want to make the data in your collection update automatically, change your collection to a Smart Collection in the Filters & Options panel.
Step 7: Turn on Smart Tags to make assets more discoverable

Smart Tags, powered by Adobe Sensei, uses machine-learning algorithms to help with the onerous task of adding metadata tags to assets, making previously unusable assets discoverable. Think of it as instant ROI for your forgotten images and other content!

Adobe’s Smart Tags technology can automatically tag images—on demand or when you choose—with keywords based on the photo type (like macro and portrait), popular activities (like running, skiing, and hiking), certain emotions (like smiling and crying), popular objects (like cars, roads, and people), animals, popular locations, primary colors, and more. You can also moderate Smart Tags in case of an error, unwanted, or mistaken tag.

BEST PRACTICE TIP:
Run your drives and folders of mystery content through Smart Tags to automatically populate them with useful metadata. Smart Tags can also help with images already in Experience Manager by adding tags that you didn’t originally think of to previously tagged images, making them more discoverable too, thereby increasing their value across your organization.
Summary

Making sure your content is easily discoverable is the foundation of brand consistency, faster time-to-market, more effective use of assets, and return on investment. By leveraging the Adobe Experience Manager Assets tools and technologies described in this best practices guide, you can create a clear metadata strategy that enables your organization to gain maximum value from its digital assets.

For more information about how to use AEM Assets, go to https://docs.adobe.com/content/docs/en/aem/6-3.html.

ABOUT ADOBE EXPERIENCE MANAGER

Adobe Experience Manager allows marketers and developers to create, manage, and deliver customer-facing digital experiences across every channel—web, mobile, social, video, in-store, and the Internet of Things (IoT). The solution spans digital experience management including web and mobile, digital asset management, social communities, forms, and documents. Adobe Experience Manager integrates with other Adobe solutions, allowing businesses to use data insights to deliver targeted content to identified segments and transform content into engaging, personalized experiences—optimizing customer engagement, lead generation, and accelerating revenue.