openasset

GETTING STARTED WITH DAM

IN

AEC &
Real Estate

OpenAsset Customer Success Journey

In this whitepaper, you'll learn about each step in the DAM project

Introduction
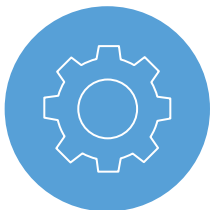
✓ What is DAM
✓ Why DAM matters
✓ Basic DAM features

Discovery

✓ Assess your DAM needs
✓ Cloud v. On-Premise DAM deployments
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Evaluate + Purchase

✓ Evaluate DAM vendors
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✓ Expand user base
✓ Encourage adoption
✓ Expand functionality

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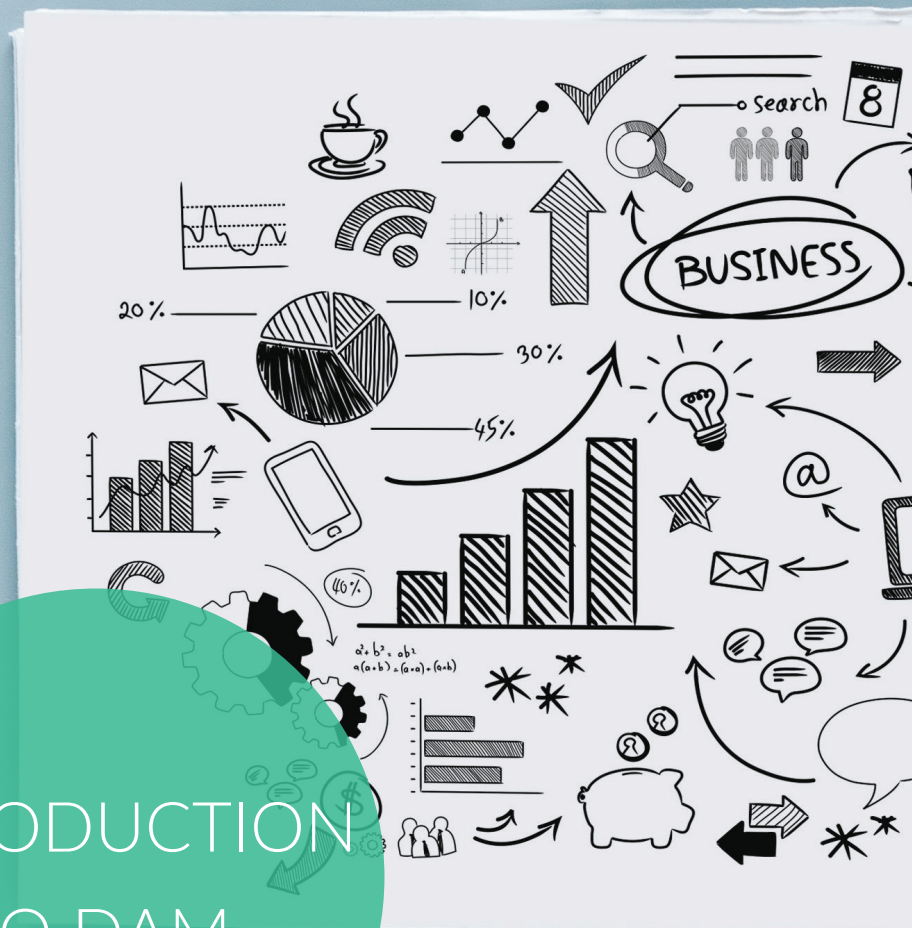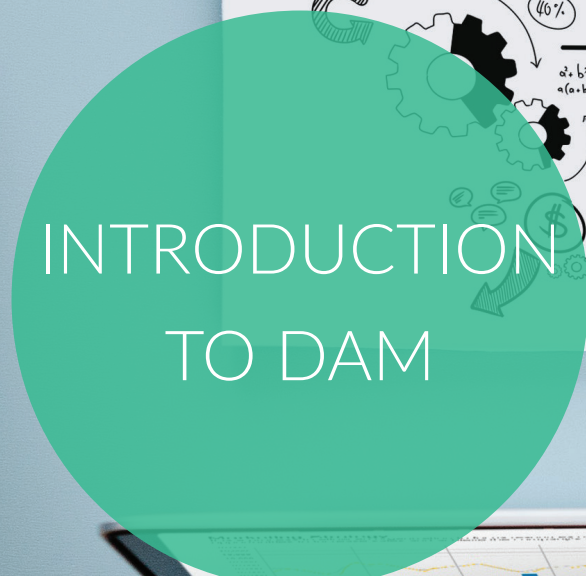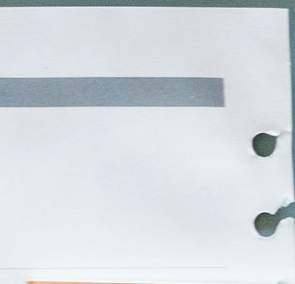# TO DAM

AEC and real estate firms have more digital image assets and more opportunities for sharing them than ever before.

The growing need for high quality photos and the increasing ease in obataining them means that AEC and real esate photo libraries are growing rapidly, and could be taking a toll on your teams' efficiency. If you're not considering a photo management solution, you may be missing something that your competitors aren't.

Common photo management problems
- Image assets are saved to multiple locations
- It's unclear which images are approved for external use
- Large, high-resolution files are becoming a burden on IT resources

How fast are image libraries growing?

Looking ahead, most marketers believe the growth of the digital asset landscape will only continue to escalate—56% say their firms will create more or a lot more images this year than last year.

52%

OF FIRMS HAVE IMAGE LIBRARIES SIZED WELL OVER 20K ASSETS

Why are image libraries growing so quickly?

More Devices = More Images
Better technology means it's much easier to obtain high-quality photographs for marketing purposes

High Quality Marketing
To remain competitive, companies require high quality photos for proposals and presentation
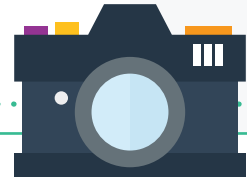
Social Media Content
Marketers are in need of engaging visual and multimedia content to share on social media

Websites
Strengthened focus on creating dynamic website and mobile experiences that showcase your company's project experience

eBOOK

State of DAM in AEC

We surveyed over 150 companies to determine the state of digital asset management in AEC. In this eBook, we explain our findings as well as 5 steps to kick-start your DAM project.

Read eBook

What is DAM?

DAM systems provide two essential functions to help manage media assets: controlled creation and capture of asset metadata, and tools to improve image workflows.

Basic DAM features

Create and capture metadata

- Tag images with metadata like client name, services rendered, discipline, location, and other key data

- Extract metadata from existing data repositories like Deltek Vision, Union Square, Salesforce, or Microsoft Dynamics

- Store copyright and photographer information alongside image assets

- Easily find images with advanced metadata search options

Asset workflows

- Integrate with your SharePoint intranet or CMS system to push DAM content to end users

- Speed document creation by connecting with desktop publishing systems like InDesign and PowerPoint

- Control which images certain users have permission to view, download, or edit

- Be a centralized image resource for your whole team—across offices, worldwide

56%

SAY THEIR FIRMS WILL CREATE MORE OR A LOT MORE IMAGES THIS YEAR THAN LAST YEAR

BLOG ARTICLE

5 Reactions to Photo Management Issues

You know you have amazing project photos, but where are they? We run through the top 5 problems and reactions you are likely facing on the daily without a DAM in place.

Read Article

DISCOVERY

> **If you think that your organization can benefit from DAM, the next step in your journey will be to evaluate your business needs.**

Assess your image challenges and business needs.

It's easy to underestimate how much time marketing, graphics, and communications staff spend managing and working with images. Without the right tools, finding, resizing, and using images takes up a tremendous amount of time.

If you don't know how much time is spent managin images, the problem will often continue to be overlooked. Such an oversight could be costly. Firms that have DAM solutions iin place are likely to enjoy greater makreting producitivity and process efficiencies.

In this chapter, you'll learn some steps you can take to see the big picture, and determine and state og digital asset management within your organization.
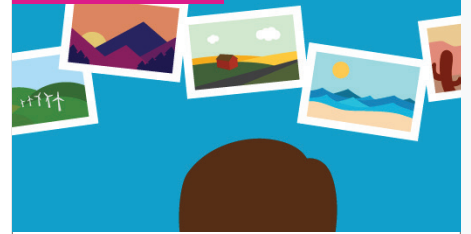
Understand the size of your image library, and how quickly it's growing.

Marketers and executives rarely see eye to eye when it comes to understanding their image assets. Specifically, executives often estimate that the firm has fewer assets than marketers think.

> To get a truer picture of your firm's digital asset library, start by talking to the marketing, graphics, and communications staff.

Beyond these functions, the project teams and HR are also heavy users of images within an Architecture, Engineering, and Construction company, so it's important to approach them about their photo management needs as well.

	Description	Typically Managed By
Project Photography	Marketing images of your company's completed projects	Marketing
Renderings	Renderings from throughout the project's design lifecycle	Project and Design teams
Reference & Precedent Images	Images that are not owned by the firm, but are used to communicate design to clients during the planning phase of the project	Project and Design teams
Staff Photos	Professional staff headshots for the website, photos from social events for recruitment purposes	HR, Marketing
Stock Images	Images purchased from photographers or other sources	Communications, Graphics, Marketing
Model Catalog	Images of physical architectural models for archive and reference purposes	Model Shop
Events	Photographs from trade shows, educational lecture series, company social events, or speaking engagements	HR, Marketing
Branding & Logos	Variations of the firm's logo, client logos, or branded illustrations and icons	Communications, Graphics, PR
Site Progress/ WIP	Site/Construction photos, or site progress visualizations	Site Managers, Project and Design Teams
Textures	Textures for 3d artists	Visualization
Firm Expertise	Photos that are not owned by the firm, but are used to represent your staff's experience prior to joining the company	HR, Marketing

Interview internal teams

Once you've got an idea of the kinds of images you've got around your company, it's helpful to interview your colleagues to determine what their top DAM concerns are.

- How many of these images do you have?
- What kinds of files are these? (.jpg, TIFF, PDF, etc.)
- Where are these images stored?
- Who has access to them?
- What are your top concerns?

It take time to manage image assets

Once you identify the teams with the biggest photo management concerns, your next step should be to determine how much time people are spending on photo workflows—this includes time spent fielding requests from other teams, searching for images, resizing images, using images in design programs, etc.

Diagnosing When It's Time for a DAM

If people in your company find image access to be a problem, a DAM could be the answer. The top benefits realized by AEC and real estate companies with DAM systems are that images become much easier to find and that the entire firm has access to marketing-approved images. This frees up marketing as a bottleneck in sourcing images across the firm, and can improve overall marketing productivity. Most companies find it easier to **maintain a unified brand image** with company-wide, controlled access to high quality graphics.

Ask your team members to track their image management activities for at least one week—although the more data you can gather, the better.

## Image management activities

Image Search

- Searching through folders for an asset

- Asking colleague where to find an image or whether an image exist

- Waiting for a colleague to share an image

- Looking for copyright information or photo rights usage information

Image sharing & utilization

- Creating duplicate image sizes from a single high-resolution file for different purposes

- Downloading and resizing images for use in InDesign or PowerPoint

- Packaging images, or uploading images to dropbox or other file sharing service to send to clients or to press contacts

- Emailing images to collaborate on proposals or other marketing documents
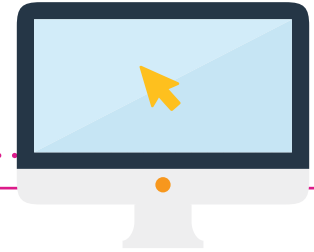
89%

OF FIRMS HAVE MARKETING SPENDING BETWEEN A HALF DAY TO A FULL DAY EACH WEEK MANAGING IMAGES

Calculate the ROI of DAM at Your Company

WITH OVER 600 DAM CLIENTS IN AEC AND REAL ESTATE, WE'RE DAM EXPERTS. CONTACT US TO CALCULATE THE ROI OF A DAM SYSTEM AT YOUR ORGANIZATION.

Contact OpenAsset

Determine IT Needs and Cloud v. On-Premise Deployment

While you're in the Discovery phase of your DAM project, you'll want to work with your IT team to determine whether you want to host your system in the Cloud or On-Premise. The decision to host your DAM system in the Cloud On-Premise truly does depend on your business needs and analysis of the total cost of ownership (TCO).

The TCO is more than just software + hardware. In addition to the annual subscription of your DAM, On-Premise configurations usually require you to pay a one-time installation fee on top of all costs of purchasing and maintaining hardware (servers, office space, electricity, IT staff support, etc.).

Trending Towards Saas

ACCORDING TO GARTNER RESEARCH, BY 2020 A CORPORATE "NO CLOUD" POLICY WILL BE AS RARE AS A "NO INTERNET" POLICY IS TODAY

Reasons to consider Cloud DAM

- Totally worry-free data backup
- Less burden on IT resources, and de-creased IT infrastructure costs
- Flexible, usage-based storage costs
- Global access and mobility

Reasons to consider On-Premise DAM

- Total control over data security
- Yoyu only have a single office location with a poor internetconnection
- LAN access is required
- Total control over installation of software upgrades

EVALUATION
& PURCHASE

If you've determined that you're ready to move forward with DAM, then it's time to decide which DAM is right for you.

Now that you've taken the time to assess your current photomanagement situation, you should discuss your image management needs with potential vendors.

How many people will need access to your DAM?

Are your team members located in multiple offices?

How many images do you have and where are they stored currently?

What kinds of assets do you need to manage? (.jpg, PDF, etc.)

What other systems does the DAM need to be compatible with?

Do you want to deploy in the Cloud or On-Premise?

Will you need the DAM to be accessible via mobile devices?

What is your budget and who will signing off on budgetary approval?

What is your desired timeframe for deployment?

Evaluate Vendors

When considering a DAM vendor, there are three main areas of evaluation that you should consider: Technology and functionality, Company and industry fit, and Value.

DAM Technology and Functionality

Of course, you'll want to make sure the DAMs you are considering have the basic features to meet your needs, such as project-based tagging, a fast file uploader, multiple image search options, and controls for who can and can't access images. While it's unlikely that any vendor will meet 100% of your requirements, it's useful to determine which vendor meets the most critical needs. Ask your vendor to explain some of the various use cases and workflows that are relevant to your business. You should also take time to consider the product's development roadmap, and whether certain functionality will be delivered in the future.

- Does the vendor have a trial system to test functionality?
- Is the DAM installed on-premise or is it available in the cloud?
- Is the DAM application or browser based?
- Is the DAM accessible via mobile devices like iPads, etc.?
- Does the DAM integrate with your Intranet, project database, CMS, etc?
- Does the product roadmap address any missing functionality?

Industry and company fit

During the beginning phases of a DAM implementation, you should be especially confident in your vendor's expertise. If your vendor has a deep understanding of your industry, they'll be more likely to provide reliable advice and best practices for a successful implementation. Evaluate your vendors on how clkosely you can partner with them through implementation and beyond.

- Can your vendor provide references that match your company's industry and size?

- Does the vendor's development methodology and road map align with your business objectives?

Value

Beyond the obvious software costs, there are other costs to consider when starting a DAM project. In fact, with some DAM systems, it's likely that you will spend more on services than you do on the software itself. Be sure to evaluate your own needs and ask your vendor to clarify their service charges.

Basic software costs

- Software license
- Costs of technical infrastructure (for on-premise installations)
- Data charges (for Cloud deployments)

Services costs

- Installation and configuration
- Costs for bespoke development and customization
- Integration configurations
- Costs for data migration services
- Product training
- Access to support
- Project management

BLOG ARTICLE

OpenAsset the No.1 DAM in AEC.

With over 60,000 users and 55% of AJ 100 firms using us we're leading the way in how the AEC industry manages and uses DAM systems.

Read Article

ONBOARDING

When you decide on a DAM vendor, they will guide you through the onboarding process.

The four phases of the DAM Onboarding process:

Upload content	Configuration	Integration	Document Creation
Add content to your DAM	Create a keyword structure and user permissions	Connect your DAM with project database, CMS, CRM, or intranet	Develop templates to automate document creation
Locate Files	Metadata	Project database (Deltek Vision, etc.)	InDesign
Create projects	System Settings	Website/CMS	PowerPoint
Import files and metadata	Security	SharePoint	Word
			Keynote

Upload content

1 Getting content into your DAM is the most important part of your DAM project. Most vendors offer a Data Migration service to help you get content uploaded and tagged quickly. This is where you should take advtange of your vendor's expertise.

With a Data Migration, the vendor scans your existing files extract metadata from folder paths and filenames. That information is exported into a spreadsheet that will create the framework for your photo library's keyword structure.

Upload important files first

You don't have to include all files in the initial Data Migration or manual upload. In fact, many clients don't. We recommend that you take a phased approach to prioritize the important files and avoid getting bogged down by older images that aren't used very often. Shifting focus to the most important files will help you maintain momentum in the project and allow core users to get started with your DAM quickly.

It is not uncommon to pick the most important 50 or 100 projects for a Data Migration project, with the option to start another Data Migration project to upload less important images at a later date.

Migrating content from another DAM

Your vendor should work with you to review data in the existing DAM and recommend a plan for moving it into the new DAM. The uploading process will be similar to the migration from folders, but with more of an emphasis on exporting and re-purposing data with the new DAM.

OpenAsset Data Migrations

We've performed hundredsof Data Migrations over the years, and have built some great tools to help clients get their content uploaded and tagged quickly.

Locate the files you're migrating: Are they in a DAM or Folders?

Create projects in OpenAsset

Import files and metadata

OpenAsset Data Migration Service

Learn how OpenAsset's project management team can help bulk-load thousands of images to get your DAM project started quickly.

Read Article

Adding content manually

A Data Migration Service is a great way to get the initial batch of most important files into OpenAsset, but if you choose to manually upload images, be realistic about the resources you have available to add content to the DAM. Even when uploading content manually, we still recommend a phased approach to uploading to maintain momentum and get important images into the DAM first.

Configuration

2 Now that you've got content uploaded into your DAM, it's time to configure

the DAM metadata, system settings, and security.

Metadata

Keywords

After you've uploaded your images to your DAM, it's time to work on your keyword strategy. Less is more when it comes to keyword management, especially when you're just getting started with DAM. When you perform a search in your DAM, the results will be returned as image thumbnails. For this reason, we encourage our users to focus on only keywords that return a "manageable view" of thumbnails from which to perform a visual search to find a suitable image for their needs. Keywords that might only apply to one or a handful of images are probably not worth creating and managing.

Remember, the more keywords you create, the more tagging you'll have to do. So design a file keyword structure that is manageable based on the time you can allocate to tagging images. Again, consult with your vendors or even reach out to industry peers for advice on tagging the library to suit your business.

Keywords are the backbone of search within your DAM, so consult with your colleagues to determine how they would want to be able to find images. For example, a principal who does many educational presentations may want to be able to find images that are descriptive of certain structural techniques.

Custom Fields

Keywords are best for situations where you have a finite number of choices to describe an aspect of the project or file. Things like location, market sector, project type work well as keywords. When mapping information from a project database like Deltek Vision, picklist fields are typically applied as keywords.

While keywords are great for enabling search, fields come in handy when configuring document templates. Fields are best for data sets that are specific to the file or project. For example, information about square footage, completion date, project descriptions, captions, and cost work much better as fields. OpenAsset allows you to create a range of custom fields to describe your images.

BLOG ARTICLE

Why Metadata Matters

Learn about the types of metadata that make DAM content searchable, secure, and can even facilitate document creation.

Read Article

OpenAsset Keyword Structure

OpenAsset is a project-based DAM, which means that it allows users to tag images with project-level and image-level information.

Project Keywords

Metadata that describes City, Country, and Market Sector is assigned to the project. When an image is uploaded to a project, it will automatically be tagged with the project-level metadata.

File keywords

Metadata that describes the content of the image are applied as file keywords. This includes attributes like Building Elements, Materials and Type of Asset.

Keywords and Fields

FInd out the difference between keywords and fields and how with the right application they optimise your DAM.

Read Article

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File Keywords

Exterior

Outdoor

Environment

Project Keywords

Location: City	Colorado
Location: Country	USA
Sector:	Enviro
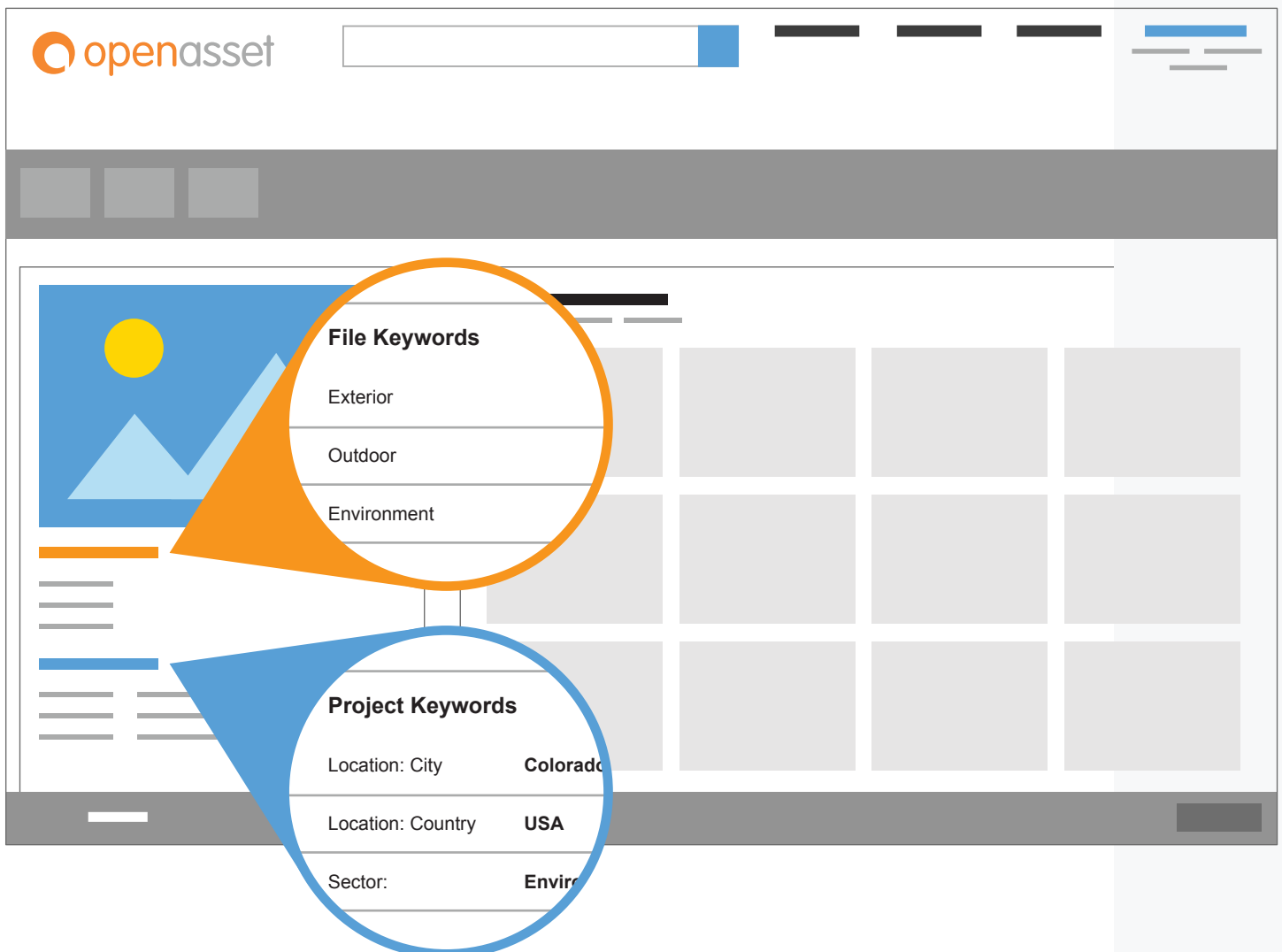
System Settings

File Sizes

One of the core features of any DAM is the ability to convert and resize images. Once you upload the highest-resolution image, the DAM will do the rest. This comes in particularly handy for users who aren't savvy with photo editing software. They can easily request a manageable image size for print, web, or presentations directly from the high-resolution original.

Create custom sizes in your DAM to indicate image format (jpg, png, tif), colorspace (RGB, GRAY, CMYK), height and width, and DPI. For example, you might create an image size specific to web:

- Format: .jpg
- Colorspace: RGB
- Resolution: 72dpi

Home page and branding

Customize the home page of your DAM so that relevant information, like top keyword searches, albums, and favorite projects are displayed prominently. Adding your company's logo and updating the system colors to match your branding can help users feel like they're using a polished system.
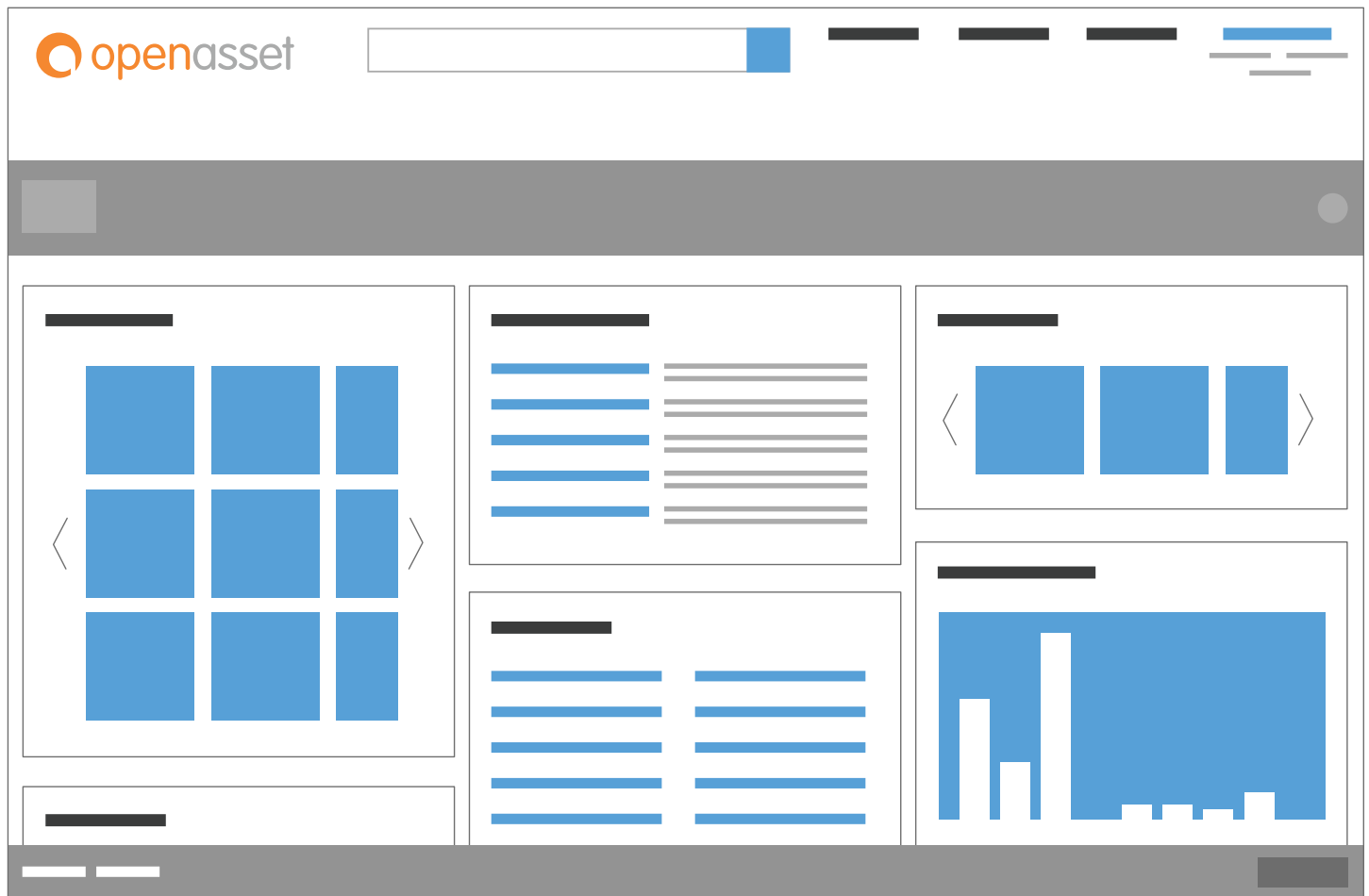
Security

For an On-Premise installation of a DAM system, internal IT teams will be responsible for network-level security and data backups, whereas in a Cloud-based DAM, the vendor will be responsible for data security and backup. In either scenario, you'll still need to configure the security settings for users. There are three main access settings that you'll want to configure before launching your DAM system: System access, user permissions, and image-level security.

System Access

If you're using Single Sign-On, your users will be created and managed via Active Directory. However, if you aren't using Single Sign-On, your system administrator will need to create users manually. Enabling Single Sign-On allows your users to seamlessly log into the DAM without having to enter a user name or password. This can make a big difference in user experience for employees who are moving between multiple applications on a daily basis. Single Sign-On also automates the creation of users, removing the burden from system administrators.

KNOWLEDGE BASE ARTICLE

LDAP / Active Directory and Single Sign-On

OpenAsset implements single sign-on using Microsoft's NTLM technology.

Read Article

User Permissions

Users have the ability to customize preferences like the information displayed on image thumbnails, the display order of search results, and the information they see on their home page.

Users can be organized into Groups, where administrators can assign security permissions that dictate whether they can upload, edit, or delete content. Administrators can even indicate which permissions that each group has within each of the categories you've created in your system. For example, the HR group may be able to upload and delete content in the Staff category, but the Marketing Group might only have access to view this content.

Categories: An easy way to give different business units access to OpenAsset

Create categories, with unique sets of project and file keywords, to tailor OpenAsset to different workflows.

Read Article

Category Permissions for User Groups												
	Do Not Use				Internal Use				External Use			
Category	View	Upload	Edit	Delete	View	Upload	Edit	Delete	View	Upload	Edit	Delete
All categories	✓✓	✓	✓	✓	✓✓	✓	✓	✓	✓✓	✓	✓	✓
Projects	✓✓	✓	✓	✓	✓✓	✓	✓	✓	✓✓	✓	✓	✓
Reference	✓✓	✓	✓	✓	✓✓	✓	✓	✓	✓✓	✓	✓	✓
Staff	✓✓	✓	✓	✓	✓✓	✓	✓	✓	✓✓	✓	✓	✓

✓ HR User Group   ✓ Marketing User Group

Image-level Security

While you want your DAM to be a single resource of image assets in your organization, not all images will be approved for use in things like presentations or proposals. For this reason, an important component of your DAM system will be to set up image-level security.

OpenAsset uses a traffic light system with green, orange, or red indicators. While you can change the names of these indicators, they're typically used to label images suitable for external use or internal use, or images that are not to be used at all. Using group permissions, administrators can restrict access to access levels. For example, you may want to hide images with the red access level, and only allow marketing users to see images with green or yellow access levels, indicating that they're approved for internal or external use.

Integration

3 Automatically pull metadata into the DAM and push DAM content directly to your intranet or website via integrations.

Pull metadata and assets into your DAM

Integration can enable your DAM to pull information from project databases and other data repositories, saving you loads of time on data entry as you're re-using existing data.

Deltek Vision
By connecting Deltek Vision with DAM, you can connect project data with images to create a searchable photo library that leverages Deltek Vision as the single source of project information.

Other CRMs or Project-Based Systems
Leverage your vendor's APIs to connect your DAM with systems like SalesForce, UnionSquare Workspace, or Microsoft Dynamics.

Folders
Some clients may want to automate the upload process by leveraging APIs to take images from folders and automatically upload to the DAM with pre-determined keywords and image permissions.

Why integration?

Avoid double data-entry

Syncing data to your DAM saves time, ensures data is up-to-date, and reduces mistakes in data entry

Improve data quality

Re-using information strengthens the source repository as the 'database of truth'

Encourage DAM adoption

Put your DAM content front and centre on your intranet or website

Boost website SEO

DAM metadata is SEO gold

Push Dam content to other systems

Pushing your DAM content directly into the systems that your colleagues use every day is an easy way to increase user adoption by putting your DAM content front and center.

Website

Push images, videos, PDFs, and text from the DAM to the public facing website or intranet. Pushing DAM keywords, photographer and project data to your website can be great for SEO.

Intranet

Folks in AEC and real estate are extremely visual people. Sharing DAM content on your company intranet is a really powerful way of sharing the projects that your company is working on throughout the firm.

iPad

For colleagues who are often on the road, syncing DAM content to mobile devices like iPads is a really useful way for them to interact with your company's content from anywhere.

BLOG ARTICLE

Deltek Vision + **openasset**
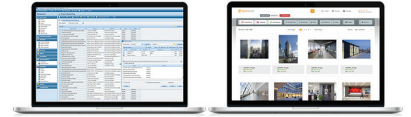
OpenAsset Deltek Vision Connector

OpenAsset is the only DAM with out-of-the-box integration with Deltek Vision. With the OpenAsset Deltek Vision Connector, there is no development work needed on the client's end to sync data from Deltek Vision to your DAM as searchable keywords.

Read Article

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Project Knowledge

Project Photos

Intranet

Design Programs

CMS/Website

iPad

Your vendor may have out-of-the-box integrations with some systems, but there are seemingly endless possibilities for integration with APIs.

Read more about OpenAsset's REST API here.

Document Creation

4 One of the greatest benefits of DAM is the improvement to document creation workflows. A good DAM system will interface with the design programs used by marketers and designers on a daily basis.

To take your DAM a step further, consider implementing automatic document templates.

Templates for InDesign or PowerPoint:

- Re-sized images and project information are sourced directly from your DAM and placed into a branded PowerPoint or InDesign document

- Ensure brand consistency, as users are instantly creating documents that utilize marketing-approved templates

- Quickly react to re-branding projects by simply updating core templates

- Eliminate marketing as a bottleneck by allowing self-service document creationtemplates

ONGOING DAM SUCCESS

Getting content into your DAM is important, but so is creating a process for maintaining your library moving forward.

After you've successfully completed the Onboarding process, you'll want to make sure you have a plan to grow and maintain the lkibrary as well as increase usage and adoption. The OpenAsset Customer Success team has helped hundreds of clients launch and maintain their DAM, so here are our top pieces of advice for ongoing DAM success.

Keep your content current

Getting content into the DAM in a timely fashion is important for user adoption. Users should feel confident that thjey will always find the content they need within the DAM.

Don't maintain two libraries

Archive your old folder structure. This will push people to adopt a new workflow of adding content to the DAM. Not only will this increase usage, but will ultimately end up saving loads of storage space.

We often recommend that clients start off by making the old folder structure "read only" for a period of time before archiving it completely.

Keep an eye out for rogue assets

Our Customer Success team's collective experience shows that a DAM implementation is most successful when the DAM is the only source for your digital assets.

We're very happy to have clients that have been with us for many years. Over the years, staff members may have developed their own personal collections of content. Most often, this happens because they may not realize that this content is suitable for storing, sharing and re-purposing via the DAM. If this is the case, consider a Data Migration to get images into the DAM with minimal effort.

Open your DAM company-wide

The more active users you have, the more you will get out of your investment in DAM. Whether it's sharing albums of images with colleagues, integrating with your company intranet, creating InDesign and PowerPoint documents, or housing images of company events that everyone can access, there are plenty of ways that users throughout the company can take advantage of your image library.

To get the most out of your investment, make sure users know how to use your DAM and highlight the prominent features that are relevant to their workflows. It's helpful to conduct training with different groups of users to tailor training sessions to their unique workflows. Keeping in touch with users and gathering feedback is an important part of managing your DAM.

Consult with your vendor regularly

This is probably our most important tip for ongoing success. Your business and DAM technology are constantly evolving, so it's important to maintain alignment. Take advantage of your vendor's expertise for regular health checks to see if there are areas where you can improve the user experience or take advantage of new DAM features.

Publicize Successes
Implementing DAM software is no small achievement, so share the results with colleagues

1,285 PROJECTS

410 KEYWORDS

783 USERS

37,799 IMAGES

38

CONCLUSION

We can't claim to be unbiased when we say that the benefits of DAM are significant.

Image management has evolved tremendously over the past 15 years and DAM is the logical end point when it comes to getting on top of your ever expanding content.

Different firms have different requirements. Before embarking on a DAM journey, it's worth assessing your internal challenges and needs. Evaluating Cloud or On-Premise and researching different DAM vendors. But if you commit and successfully roll a DAM out firm wide then the benefits will be felt not just in your marketing and creative teams but across your organization.

About OpenAsset

OpenAsset is the number one digital asset management (DAM) solution for architecture, engineering, construction, and property services companies. It is delivered and supported by Axomic, which has a global presence with staff based in London and New York and clients ranging in size from 5 to 50,000 employees.

OpenAsset is specifically tailored to solve the image management needs of companies working in the built environment. Its development road map is guided by our client base of over 600 of

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