

# Webdam

## Onboarding Workbook



webdam

  
Imagine. Achieve.

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# Using the Workbook

We've designed this onboarding workbook to help you get off to a great start. It should be used early in your Webdam implementation and can serve as an ongoing resource.

Your Webdam onboarding team will work with you throughout the implementation to ensure your success. Along with your training sessions, you can use this guide to capture your goals, track your setup checklist and find Webdam resources.

This workbook takes you through four steps:

## Step 1: Prepare for Success

Pick key players, business objectives, success metrics and more.

## Step 2: Your DAM Strategy

Focus on assets, permissions, folders, metadata and keyword decisions.

## Step 3: Build your DAM

Put your plans into action and build out your structures.

## Step 4: Launch Planning

Train, support, motivate and engage your users to drive business outcomes.

### Want to customize your DAM?

Please complete the [Account Configuration Form](#) and we'll help.  
Password: d@msuccess

**Build on your onboarding success:** Visit [Webdamsuccess.com](http://Webdamsuccess.com) for best practices, helpful articles and conversation with the Webdam customer community. There's lots of information here and it's frequently updated to help you explore new features and master your DAM.

## Your Webdam Team

**Onboarding Resource:** Typically a Webdam Implementation Consultant (IC). They'll help you get up and running, manage your training sessions and assist you throughout the onboarding process.

**Customer Success Manager (CSM):** The primary point of contact post-onboarding. They will provide ongoing support and are able to assist with any questions about the product. The CSM's contact information can be found in the Webdam kickoff presentation.

**Customer Support Team:** Webdam has a helpful team of customer support professionals ready to make your life easier.

- **Support request:** Open a new support request in to [webdamsuccess.com](http://webdamsuccess.com)
- **Phone:** 877.408.4888 ext. 2
- **Find your support plan hours in the table below:**

Silver Support Plan	Gold Support Plan	Platinum Support Plan
Monday-Friday, 6am-5pm Pacific Time	Monday-Friday, 6am-9pm Pacific Time	24/7



# Step 1: Prepare for Success

## Pick Your Key Onboarding Players

Use the definitions below to identify the users who will be a part of the onboarding team. The team will work together during onboarding and determine how key tasks will be executed during the initial launch and throughout the life of the DAM. Individuals can wear a lot of different hats.

**Executive Sponsor:** Responsible for the overall vision and success of the project. Can be an escalation point for the project team, if necessary. They are the captain of the ship.

**Project Manager:** Works with the Webdam team to facilitate exchange of information and track the progress of the implementation. Serves as the first point of contact for all onboarding related decisions. They keep the trains running on time.

**Administrators:** Responsible for Webdam administration and ongoing management of the site including permissions, system preferences and metadata management. They are key to getting your taxonomy dialed.

**Technical Subject Matter Expert (SME):** Assists with the authentication integration setup, custom projects, or any other technical questions, as needed.

Role in Webdam	User(s)
<b>Executive Sponsor</b>	Rebecca Gounaris / Steve Schoffstall
<b>Project Manager</b>	Micki Maynard / Sharon Downing
<b>Webdam Administrator</b>	Micki Maynard / Sharon Downing
<b>Technical SME</b>	Michael Lucht

## Business Objectives

Before getting started, the onboarding team should clearly define the DAM goals so everyone's efforts are well-aligned. Creating a clear purpose for your DAM will improve your organization's workflow.

### Sample Webdam Goals

- Build and maintain a centralized location for our creative assets while avoiding asset duplication, redundancies and uncontrolled distribution.
- Create a well-defined metadata schema to ensure assets are easily searchable.
- Ensure all teams, including sales, account managers and our external agency, access the assets they need from the DAM. This will remove the need for users to email requests to the marketing teams, which will free their time to focus on asset creation.
- Better manage and control appropriate use of our assets to avoid copyright infringement.

### My Webdam Goals

- **Build and maintain a centralized location for our creative assets while avoiding asset duplication, redundancies and uncontrolled distribution.**
- **Create a well-defined metadata schema to ensure assets are easily searchable.**
- **Ensure all teams, including sales, account managers and our external agency, access the assets they need from the DAM. This will remove the need for users to email requests to the marketing teams, which will free their time to focus on asset creation.**

## Success Metrics

It's important to define the success metrics that matter most. Good metrics should be measurable and actionable so they drive behavior that leads to the results you want.

OBJECTIVES	KEY RESULTS	LOOKBACK
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### Sample Goal

What will you achieve?	How will you succeed?	When will you finish?	Goal Check
To build & maintain one centralized location for our creative assets. To avoid asset duplication & uncontrolled distribution.	300 GB of creative assets will be moved into Webdam, all duplicates removed, unauthorized distribution reduced by 50%.	By December of this year	Exceeded goals; found 50 GB of additional assets to move into Webdam with the 300 GB estimated, all duplicates removed, unauthorized distribution reduced by 80%.

### GOAL #1

What will you achieve?	How will you succeed?	When will you finish?	Goal Check
To build & maintain one centralized location for our creative assets. To avoid asset duplication & uncontrolled distribution.			

### GOAL #2

What will you achieve?	How will you succeed?	When will you finish?	Goal Check
Create a well-defined metadata schema to ensure assets are easily searchable.			

### GOAL #3

What will you achieve?	How will you succeed?	When will you finish?	Goal Check
Ensure all teams, including sales, account managers and our external agency, access the assets they need from the DAM.			

## Data Migration

To prepare for your data migration, gather your assets in a central location and organize them in your desired folder structure, which will be preserved during the import. (See [Step 2: Your DAM Strategy](#) for best practices on organizing your assets). As this can be time consuming, depending on the current location of your assets, we recommend starting this process early in the onboarding. This will ensure your assets are migrated as soon as possible for a smooth and successful launch.

You have three options for importing assets and folders in bulk (over 250 GB) using our data import services:

- **Hard Drive Import** (for data between 250 GB-20 TB)
- **Amazon S3 Transfer** (for data in excess of 250 GB)
- **Amazon Snowball** (for data in excess of 20 TB)

For data under 250 GB, you may import assets using one of these choices:

- **Manual Upload**
- **FTP**
- **Box**
- **Dropbox**



# Step 2: Your DAM Strategy

## Metadata Strategy

A well-planned metadata strategy will add value across your organization. It's important to add metadata that will improve the quality of your assets.

**What is metadata?** Textfile historian Jason Scott says, "Metadata is a love note to the future." Metadata is data that describes other data. Use it to find things faster, stay organized and add important context to assets.

**Why does metadata matter?** Metadata plays two important roles in Webdam:

- **Searchability:** Most importantly, metadata is added to assets to allow users to search and discover assets.
- **Convey important information:** Metadata can be used to convey important information to users, like copyright information and licensing.

**Who uses metadata?** Everybody does. Metadata helps refine searches to ensure you find the right asset every time.

**What types of metadata are there?** There are two types of editable metadata in Webdam: metadata fields and [keywords](#).

### Metadata fields:

- Webdam supports IPTC Core and XMP metadata standards. The metadata fields in Webdam map to these standards, e.g., Rights Usage, Date Created, Photographer.
- Custom metadata fields can be created for metadata that is outside the standard metadata fields, e.g, product name, campaign or department.
- Picklists or multi-selects can be created to allow for consistency in the values added and spelling, e.g., the metadata field "Product Name" has the following picklist values: Webdam, Brand Connect, Workstream, Webdam Connector or Dynamic Templates.

**Example 1:** Designers producing a sales sheet for a new product may search by product name, product category, campaign, color or brand. These are ideal as metadata.

**Example 2:** The marketing team may want to reference previous marketing materials to give the design team direction on what the collateral should look like. Helpful metadata for searching could be event name, campaign, product name, year and collateral type.

## Metadata Management

The questions below will help you identify the people involved on the administrative side and the consumer side (the end users) of your metadata.

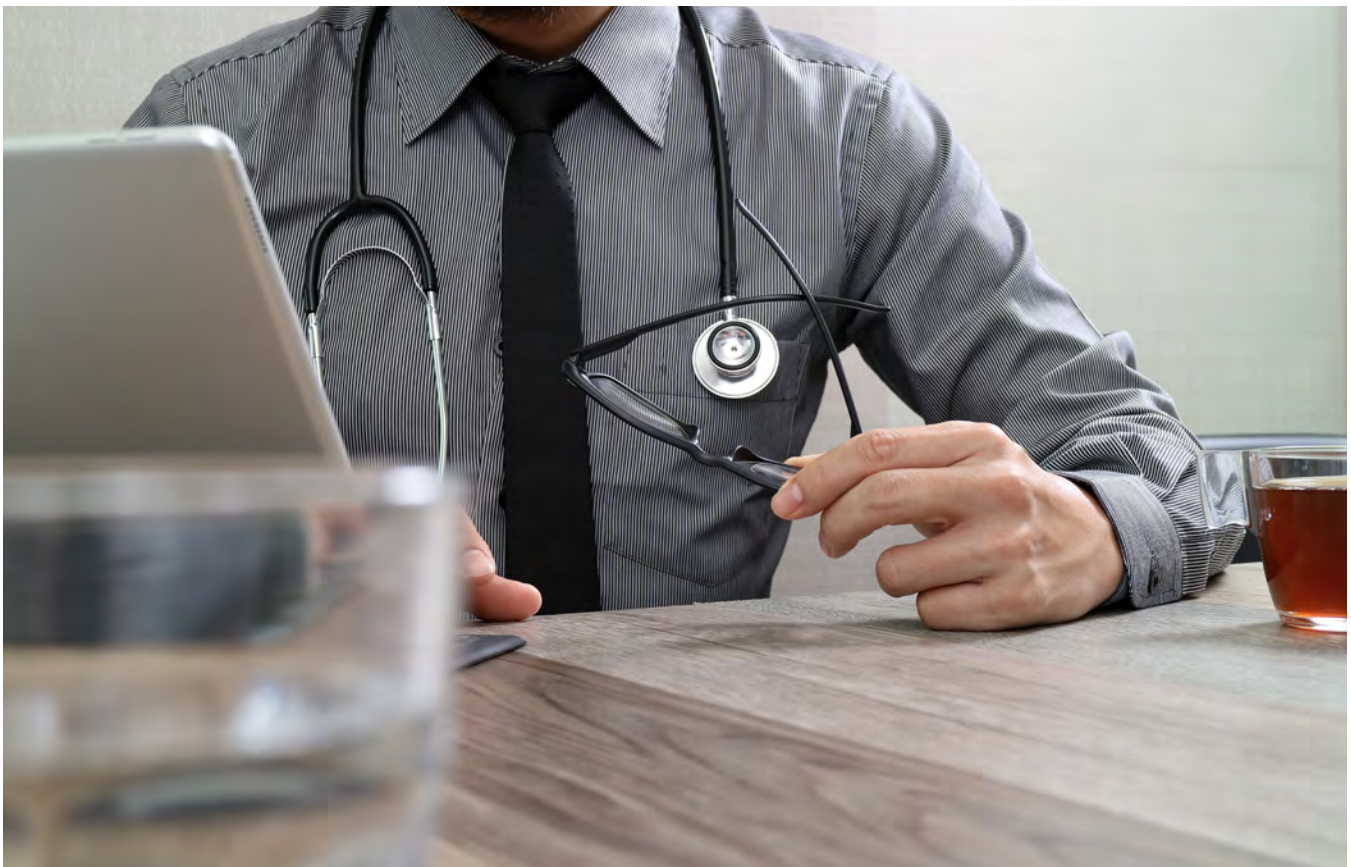
Question	Answer
<p>Who will manage and maintain the metadata strategy? For example, if a new product is added, who will be responsible for adding it to the product metadata field picklist?</p> <p><b>Note:</b> <i>This user will need to be an administrator.</i></p>	Sr Webdam Admin & Backup & DigOps Mgr?
<p>Who creates the assets? For example, internal graphic designers, freelance photographers, external agencies, etc.</p>	Graphic Design Teams & external agencies
<p>Will the creators also upload the assets? If not, who is responsible for uploading?</p> <p><b>Note:</b> <i>This user or users will need to be a contributor.</i></p>	Graphic Design Teams
<p>Who will add metadata to the assets? Will it be the uploader or another user that is responsible for adding the metadata?</p> <p><b>Note:</b> <i>This user or users will need to be a contributor.</i></p>	Graphic Design Teams (at time of uploading)
<p>Will any metadata be added to assets prior to importing in the DAM, like in Bridge or Lightroom?</p>	If we don't, how do we add it later? Manually? Can it be part of an xls import?
<p>Will there be a QA or approval process for assets before they are made available to your end users?</p>	Graphic Design Team currently doing this

## Metadata Health Checks

Webdam recommends regular health checks as a best practice to ensure contributors are adding metadata consistently.

### Pro tips:

- As new assets are uploaded to your DAM, metadata may need to be added to them.
- At least one user should be responsible for checking on the health of your metadata.
- **Decide how often health checks will be needed. Monthly, bi-monthly, quarterly?**
- Regularly scheduled health checks will prevent symptoms like metadata confusion and file loss.



## Keywords

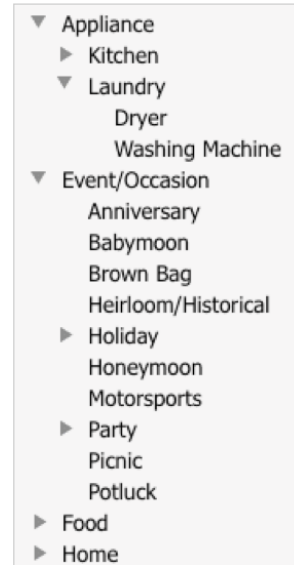
Keywords are metadata, typically more descriptive in nature, that display in Webdam as clickable links for quick searches. If a user finds one asset they like, they can run a search for similar assets by selecting any keyword tagged on that asset. It's like magic.

In addition to typing in relevant keywords, you can create a [keyword taxonomy](#) (or list), which is a library of predefined keywords admins and contributors can choose from when adding keywords to assets. This will improve the consistency of keywords added to assets and decrease spelling mistakes.

Admins can enforce the keyword taxonomy, further increasing consistency of keywords that are added to assets. Consistency will make everyone happier.

### Additional keywords options:

[Suggested keywords](#) can be used to expedite tagging in Webdam and help standardize the keywords used across your organization. Suggested keywords utilizes machine learning to scan your images and return a set of recommended words to use as tags for images you've uploaded.



*Keyword Taxonomy Sample*

### Questions to consider:

Question	Answer
Will you use plurals, singulars or both?	
Do you use abbreviations in any instances? If so, when?	
Do you use acronyms? When are acronyms appropriate?	
Will your users be searching for assets in any languages besides English? Which ones?	

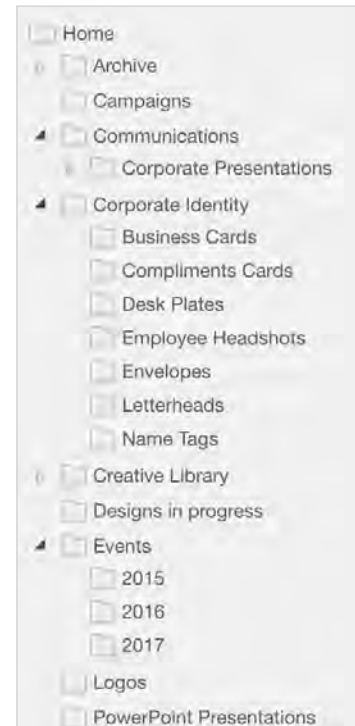
## Folder Structure

A good folder structure plays two important roles in Webdam:

- **Permissions:** Most importantly, Webdam manages permissions at a group and folder level. This ensures the appropriate groups have permission to view the appropriate folders. See more about [permissions](#) below.
- **Browsability:** Users are accustomed to browsing through a folder tree. Because of this, we want to build a system that allows for easy navigation.

### Pro tips:

- If you have a folder structure that works well for your team, we don't necessarily want to completely restructure it. *Why fix what's not broken?*
- How many folders will a user need to click through to view the asset? Whenever possible, reduce the number of clicks.
- Which user groups (internal and external) will have view, download and/or upload permissions to this folder? If certain assets in the folder have different view permissions, they will need to be in different folders.



Folder Structure Sample

## Permissions

Webdam manages permissions at a group and folder level. The permissions you set for the various groups determine who can access the system, which folders they can access and which actions (e.g., download, upload, edit, etc.) they can perform. As an administrator, you define the permissions for each user group, so you're kind of a big deal.

There are two default groups all users belong to, Guest and Logged In.

[Learn more](#) about these two groups.

The table below outlines the Webdam role types:

Role Type	Webdam Core	Brand Connect	View & Download	Collaborate	Asset/Folder Upload, Edit, Move, Delete	Edit Permissions, Configure Metadata
Brand Portal		✓	✓	✓		
Regular User	✓	✓	✓	✓		
Contributor	✓	✓	✓	✓	✓	
Admin	✓	✓	✓	✓	✓	✓

### Start defining your group permissions using the chart below:

- **Group Name:** The group of users who will be accessing the DAM. Please be as specific as possible and add all groups you think will need access.
- **Download Access:** The types of assets and/or folders that each group will have download permission to. If a group will need to request access to download certain assets or from certain folders, include those specifics.
- **Upload Access:** The types of assets the group will upload and/or the folders each group may upload assets into. Not all groups will have upload permissions.



## Brand Connect

Brand Connect is the end-user facing side of Webdam. It is a customizable portal where your company's brand guidelines, custom pages and assets will be made available to end users.



*Custom Pages Navigation Bar Sample*

Review the questions below to determine your Brand Connect needs:

Question	Answer
Who will manage your brand guidelines?	I think Gina's team is closest to the most current guidelines and would be able to keep this area current.
Would you like to create custom pages in Brand Connect? Custom pages can include FAQs, Contact Us, User Guides, Copyright Info.	Has EWS need been defined here, RG? Does BCS already have any of this?
What would you like displayed as your Brand Connect portal title? This is what will be displayed on the browser tab.	Is this the URL structure? Need to include Bynder team, EWS & Central Marketing
Which groups should be able to view this portal?	TBD - need to figure out the groups
Any additional notes about your Brand Connect needs?	

- Explore your configuration options in our [Brand Connect Admin Guide](#).

## Step 3: Build your DAM

Now that you've got your plan, your onboarding resource will work with you to customize the configuration of your DAM and import your assets.

- You'll see your DAM coming together as you configure your system preferences for asset uploading, downloading options and more.
- Users and groups will have access based on registration settings and permissions. You'll build your folder structure and fill them with assets.
- Finally, you'll configure your metadata schema, keyword taxonomy and put in the finishing touches to make the DAM unique.

Use the checklists on the following pages to keep track of all of the milestones accomplished as you go through the implementation and trainings. Checking things off this list is deeply satisfying.



## Webdam Onboarding Checklist

System preferences updated and finalized

Data migrated

Metadata schema configured

Folder structure finalized

Groups and permissions configured

Brand Connect configured

Administrator training finished

Metadata training completed

Brand Connect training completed

User training session finished

Users added

### Onboarding Notes

## Administrator Training

Webdam administrators will receive training on the configuration of the system preferences, user and group permissions and other admin functionality.

### Admin Training Date/Time:

---

### After this training you should be able to:

- Configure users and groups
  - › Create users
  - › Create groups
  - › Configure group permissions
  - › Edit group permissions
  - › Assign users to groups
- Configure system preferences
  - › Create image and video download presets

### Admin Training Notes:

## Metadata Training

The metadata training session is a hybrid of consultation and training. We will review metadata best practices and help you define your metadata strategy process. You will also receive training on editing metadata, configuring the metadata schema and metadata templates.

### Metadata Consultation Date/Time:

---

#### After this session you should be able to:

- Configure and update the metadata fields
  - › Activate and deactivate metadata fields
  - › Rename metadata fields
  - › Create picklists and multi-selects
  - › Rearrange metadata fields
- Create and edit the keyword taxonomy
- Add and remove facets
- Create and edit metadata templates
- Edit metadata
  - › For a single asset
  - › For a group of assets

#### Metadata Consultation Notes:

## Brand Connect Configuration Training

Administrators and Brand Managers will receive training on how to create and edit custom pages, update the navigation, configure the settings, customize the Brand Connect appearance and build or translate your brand guidelines into Brand Connect.

### Brand Connect Configuration Date/Time:

---

#### After this session you should be able to:

- Build your brand guidelines
- Create custom pages
- Edit the navigation
- Configure the settings
- Customize the appearance
  - › Header
  - › Footer
  - › Login page
  - › Homepage

#### Brand Connect Configuration Notes:

## User Training

You (or your users) will receive training on the features available to each user type.

### User Training Date/Time:

---

#### After this session you should be able to:

- Search
- Download assets
  - › Convert
  - › Crop
- Upload assets
- Edit assets
  - › Edit metadata
  - › Rename assets
  - › Apply expiration dates
  - › Upload new versions
- Utilize lightboxes
- Configure the notifications

#### User Training Notes:

# Step 4: Launch Planning

## Organizational Roll Out

You're now ready to make a lasting impact on your brand with a powerful and thoughtful DAM. Once you use the resources in this workbook, along with your onboarding resource and CSM, you'll captivate and engage excited users, ultimately driving adoption from day one. Remember that not everything is one-size-fits-all, so be sure to personalize and experiment to see what works best for your organization and culture.

### Pro tips:

- Determine if you will launch to your organization at once or in phases. If in phases, how many and who will be in each phase?
- Develop a tailored method for introducing users to the system.
- Clearly articulate how Webdam will benefit your users.
- Persist and persevere; understanding your organization's unique best practices comes with time. You can do it!



## Drive User Adoption

A DAM is only a good investment if it's being used, so make sure that all the right people are using the DAM. Once you've introduced your organization to Webdam, set up activities and resources for the teams to enjoy. Recruiting Webdam advocates who adopt quickly to new technologies will also help motivate other users to use the DAM.

### Pro tips:

- Send out user feedback surveys (here's a [template](#) to get you started).
- Host "Lunch & Learns" to stimulate employee engagement.
- Run educational webinars to demonstrate Webdam functionality.
- Plan "scavenger hunts" to get users familiar with the system (with prizes).
- Establish a learning community on your intranet.

For more user adoption ideas, check out [User Adoption: 7 Steps to Success](#).

## Keep in touch with us



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### ABOUT WEBDAM

Webdam, a Shutterstock company, is a leader in digital asset management, changing the way marketing and creative teams manage the world's brands. Founded in, 2005, the Webdam cloud-based platform connects the visual content that drives impactful brand experiences and allows brand-building activities to scale across the enterprise and consumer touchpoints. Over 500 of the world's leading brands rely on Webdam to accelerate their marketing operations. For more information, please visit [Webdam.com](#) and follow Webdam on [Twitter](#) or [Facebook](#).