



BEST PRACTICES SERIES

CREATIVE OPERATIONS:

DIGITAL ASSET MANAGEMENT
WITH INDESIGN

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While you read, watch for these icons...



TIPS & TRICKS

Learn tips and tricks to help you and your team avoid common challenges.



BEST PRACTICES

Discover creative operations best practices that you can deploy today.



PRACTICES IN ACTION

Follow along with a fictional creative team as they implement best practices to improve their processes and operations.



DEFINITIONS

Understand key terminology used throughout the guide.



Behind the glossy catalog is a messy process.

An outdoor lifestyle brand is working to produce their seasonal print catalog. The catalog combines images from the marketing team, technical product specifications from a Product Information Management (PIM) system, pricing from an eCommerce system, and approved content from the branding team, together into beautiful pages generated by the layout design team.

It's a big job to bring this popular catalog to life, and with so many people from different departments working together, it's important that the process be as smooth as possible.

As the director of the layout design team, Brian is noticing that there are areas in the process where collaboration could be better, and where his team wastes precious time performing manual tasks that he knows could be automated. He also notices that as other teams continue to evolve the imagery, descriptions, and specifications, it becomes easier for errors to find their way into production.

The layout designers, being downstream to these changes, need a way to stay informed and prevent incorrect information from making its way into the final catalog. They are also working with thousands of images, descriptions, and detailed specs, so they need to be able to easily find the right assets when they need them.





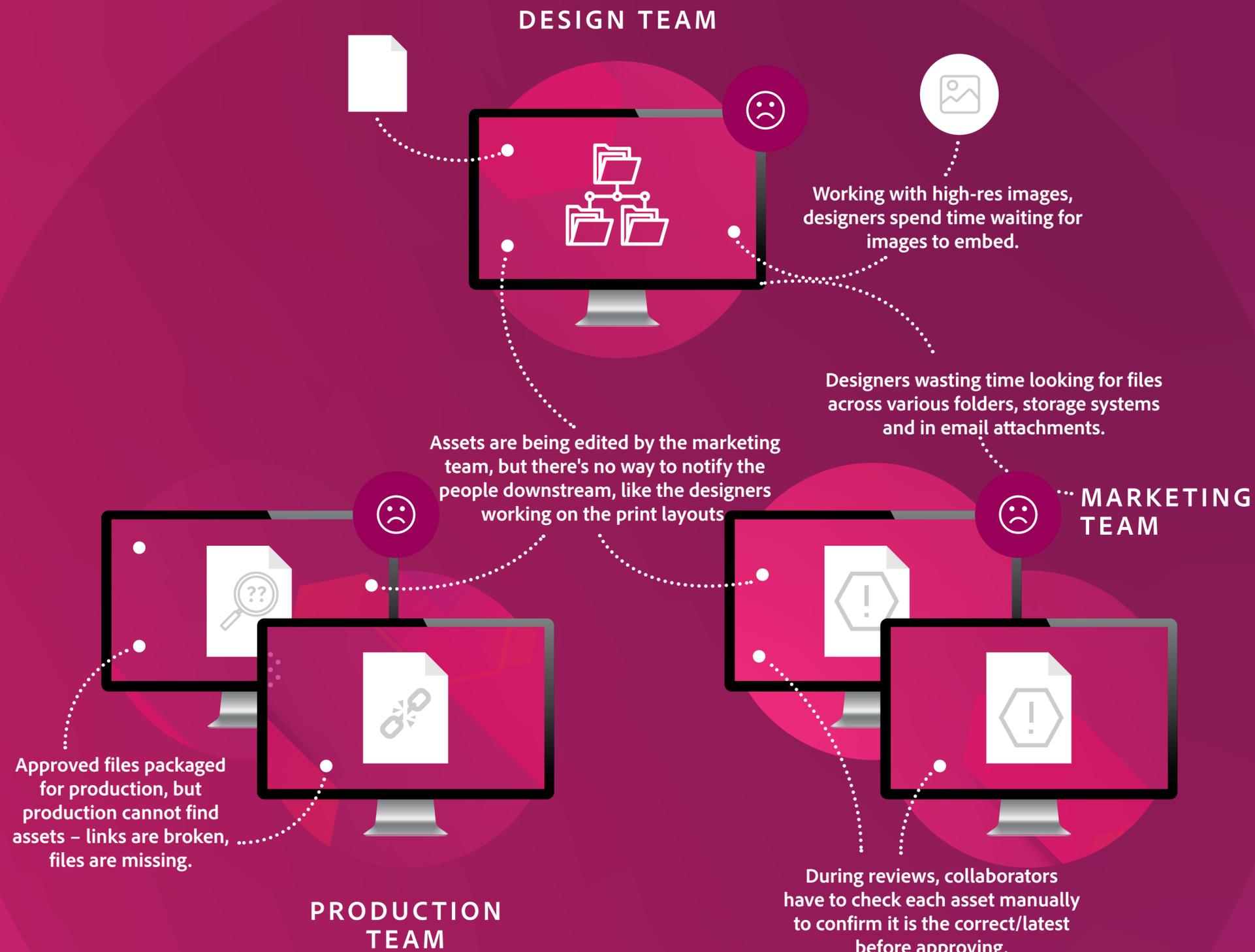
PRACTICES IN ACTION

Put a new process into production.

Having produced multiple catalogs for the company, Brian knows that the process can be improved. Currently there are images and content stored in multiple folders, across multiple storage systems, with email threads being used for updates and approvals.

The layout designers understand that changes will be made to assets right up until the production deadline, but they wish there was a way to be automatically notified to the changes instead of hoping that the updates are caught during reviews. They would also like to gain back some of the time they spend waiting for high-res images to embed and hunting for new links when assets are moved.

Brian and his team are seeking to improve the overall process and make building the catalog as smooth as possible for everyone involved.



Building a seasonal catalog requires bringing together images from the marketing team, technical product specifications and pricing from the product team, approved content from the branding team and more in order to generate the glossy pages of the final product.

With last-minute changes likely to happen and thousands of assets involved, layout design is often filled with pain points. These pain points can be resolved through improved collaboration, smoother processes, and better use of tools and technologies that have been designed to help keep teams organized.

COMMON PAIN POINTS IN THE LAYOUT DESIGN PROCESS:



Large files load slowly wasting design time



Time wasted searching for assets



Staying up-to-date with asset changes



Missing files and broken links when packaging for production

Stages of the Layout Design Process

The layout design process varies greatly between companies, depending on the type of publication being produced, the size of the design team, the products and content being included, and the timelines provided, but the stages and milestones outlined below illustrate a common workflow when creating a print layout and preparing that layout for production.



PREPARATION OUTCOMES:

- Approved assets in the DAM, grouped into collections of assets with metadata applied.
- Workflows enabled to support execution, such as FPO thumbnails, etc.

EXECUTION OUTCOMES:

- Approved layouts containing content and FPO images, ready for the placement of high-res images and final approvals.

DELIVERY OUTCOMES:

- Completed, approved layouts with high-res images.
- Packaged files that are sent to production and can be used by other teams downstream.

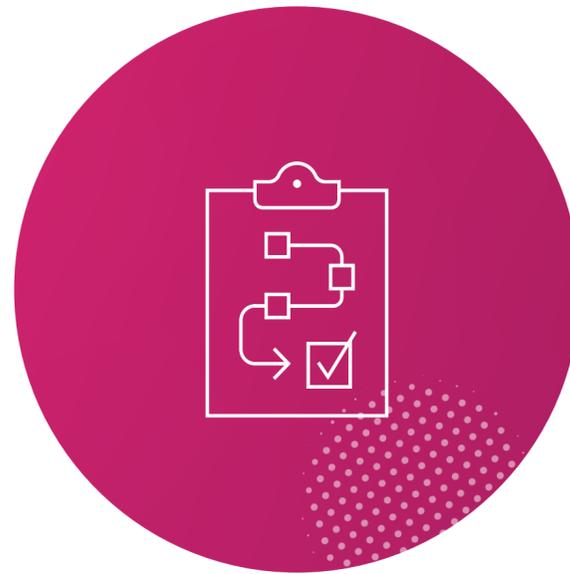
Key Elements: People, Processes, Technology

The layout design process relies on three key elements working together every step of the way in order to successfully get a print layout into production: People, Processes, and Technology.



PEOPLE

From the asset managers and designers to the production team starting the printing process in motion, there can be hundreds or even thousands of people involved in the process of bringing a print layout to life.



PROCESSES

Thoughtful processes ensure assets are properly stored, designers are supported, and approvals and collaboration between teams are as effortless as they can be, especially as the final layout goes into production.



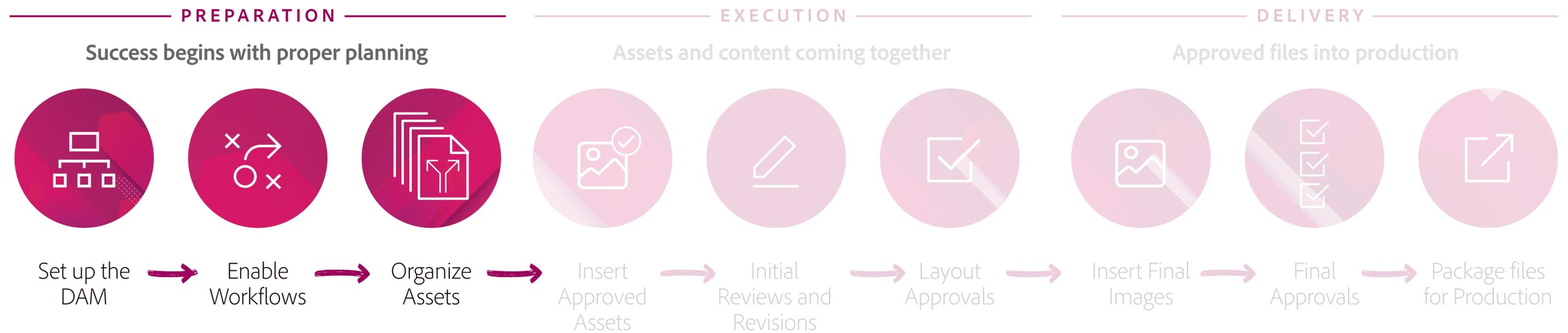
TECHNOLOGY

Multiple technologies, ranging from asset management and design tools to product information systems and print production software are required throughout the layout design process.

Preparation

The layout design process begins with an important first stage: Preparation. Taking the time to properly prepare at the beginning of the project can mean the difference between a successful delivery and a missed deadline. In the preparation stage, the role of asset manager is pivotal – working with the marketing, product, and branding teams to ensure assets are properly stored and labeled, making them easy for designers to find when needed.

This is also the time when automated workflows are established that will make delivering a final layout for production simpler and more streamlined. These workflows could include things like automatically applying metadata and tags to assets, adding assets to collections, or generating low-res placeholders whenever high-res assets are uploaded. Automated workflows mean less manual work later and increased efficiency for the project as a whole.



People

- Asset Manager
- Marketing Team
- Product Team
- Branding Team
- Layout Design Team

Processes

- Multiple teams. Centralized assets.
- Save time with automated workflows

Technology

- Digital Asset Management (DAM) Software
- Adobe Creative Cloud for enterprise
- Product Information Management (PIM) system
- eCommerce system



DEFINITIONS

Digital Asset Management (DAM)

Users across an organization can store, manage, and access digital assets such as images, graphics, audio, video, and documents through a shared web interface providing a single source of truth.

Adobe Creative Cloud for enterprise

Creative Cloud is a set of applications and services that gives subscribers access to a collection of software used for graphic design, video editing, web development, and photography, including mobile applications and cloud services.



Best Practice: Multiple teams. Centralized assets.

When assets are being shared between multiple teams, keeping everything organized is more important than ever. One recommendation is to find a digital asset management (DAM) software that will not only store digital assets but allows the assets to be tagged with metadata to make them easy to find again later when they are needed. In addition to a DAM, appointing a digital asset manager ensures that assets stay organized and that files that are no longer needed are being archived appropriately.

Using the DAM, assets can be assigned to folders and into collections (such as 'Holiday Catalog') with specific users given permissions to view and edit only the folders they need access to. By using consistent and appropriate file and folder naming strategies, along with good metadata practice, digital asset collections ensure that the right files are where they need to be whenever they are needed.

Here are some helpful tips for organizing your digital assets:

Organize files and folders based on metadata. Examples of metadata include file usage (web, catalog), season (spring, winter), file type (jpg, png, ai, mp4), etc.

Standardize policies around file names and folder structures across departments. This will ensure assets are easy to find, now and in the future.

Create an archive policy to ensure that all assets are regularly reviewed, and that folders and files are being archived properly.

Create a directory of folders that anticipates potential future needs. It's safe to assume that the number of digital assets will grow over time.

TIPS & TRICKS

Assign an Asset Manager to ensure files within the DAM are properly organized, reviewed periodically, and maintained regularly.



DEFINITIONS

Digital Asset

A digital asset, or simply an "asset", is any type of file (image, vector graphic, pattern, blog post, etc) that includes the metadata related to its creation and usage rights. In other words: a file + metadata = an asset.

Metadata

In the case of digital asset management (DAM), metadata is data used to provide context and information about digital assets like images, videos, sales collateral, etc. Metadata is a prerequisite for digital asset governance and discoverability.



 BEST PRACTICE

Best Practice: Save time with automated workflows

The right centralized DAM not only stores assets, it allows you to easily create automated workflows that can save time and effort for performing repeated tasks. Here are some examples of popular workflows that organizations are using to improve efficiency:

Smart Tagging

A smart tagging workflow can be enabled on folders within AEM to automatically tag any image asset uploaded to the folder. As new images are added, smart tags are automatically added and shown on the Properties page for each asset. When searching for images, search by any of the smart tags to improve the ease with which your team can locate the assets they need.

Project Approval

Using a project approval workflow, you can assign content to a user, review the content, and then approve. This workflow allows you to assign a task to a person or group of people (for example, "Editors" for the project) that then appears in the Tasks tile. This helps to inform team members when content is ready for reviews and approvals, helping to automate and expedite the approval process.

FPO Renditions

When working on large layout projects containing thousands of assets, loading high-res images can be time consuming and make file sharing difficult. This can be avoided by using an FPO Rendition workflow to automatically generate a smaller FPO rendition of each image asset as it is uploaded into the DAM.



DEFINITIONS

Workflows

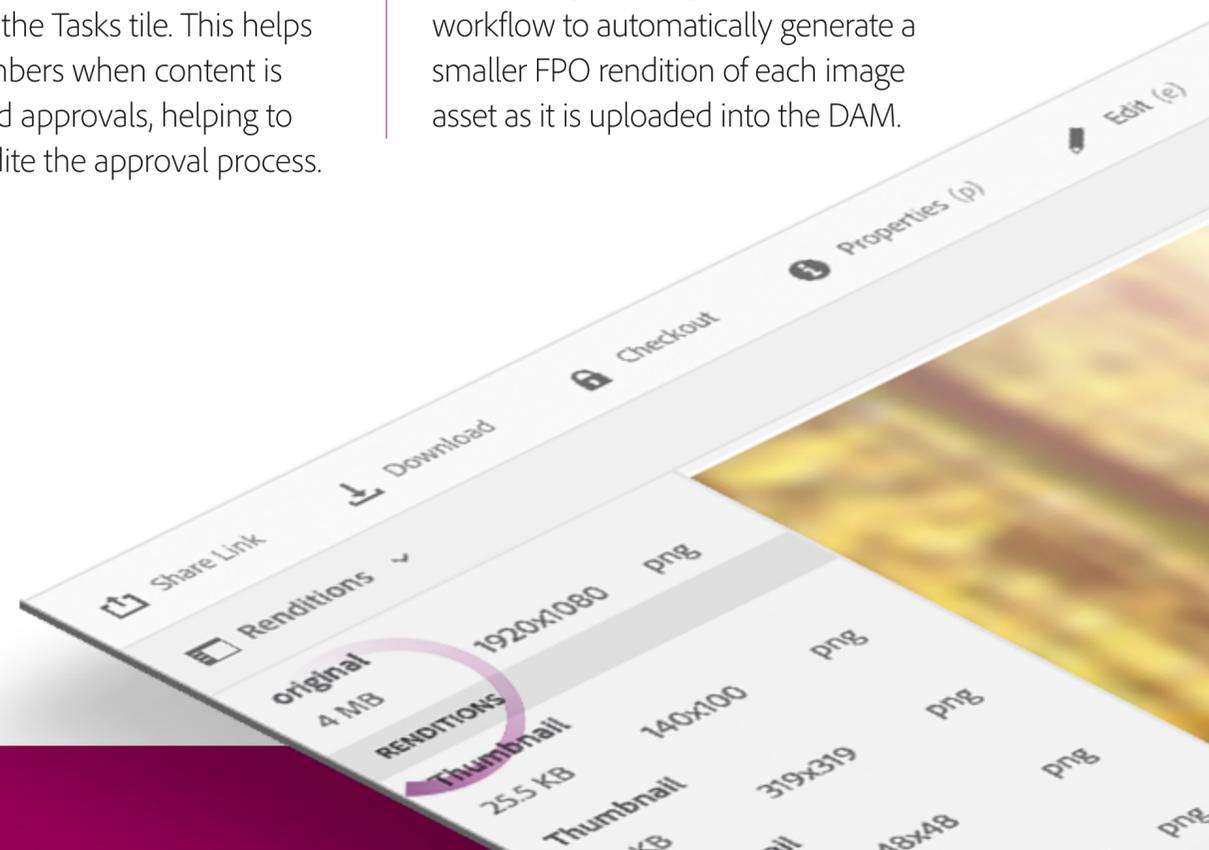
AEM Assets includes a set of default workflows to help with asset processing, or it enables you to build your own. A workflow defines general tasks to be executed on an asset, such as thumbnail generation or metadata extraction.

FPO Images

In graphic design, FPO is an acronym indicating "for position only" or "for placement only." An image marked FPO is a placeholder or a temporary low resolution image placed in the correct final location and size to indicate where a high resolution image will be placed.

 TIPS & TRICKS

Find DAM software with the ability to automate workflows such as the application of metadata to groups of files.





PRACTICES IN ACTION

Centralized + Automated = Organized.

Brian's organization has selected AEM Assets as their DAM because it integrates tightly with Adobe Creative Cloud, the preferred software of the designers throughout his company, and makes it easy for metadata to be applied automatically to assets as they are added.

Through AEM Assets, the branding and product teams are able to save text content into the DAM as well, and AEM Assets includes the ability to build integrations directly into other departmental software, such as the PIM and eCommerce systems for product specs and pricing, in order to keep everything up to date.

Now that AEM Assets has been set up, the designers are eager to start using Adobe Asset Link to begin working directly with assets in the DAM from within InDesign. This makes Brian happy because his team can now spend their time working in the design tools they know best, while getting the full benefits of the newly organized DAM.



TIPS & TRICKS

From within AEM Assets, easily see where files are being used and what dependencies they have. Simply click on an asset and look at the Properties section.



DEFINITIONS

Adobe Experience Manager (AEM)

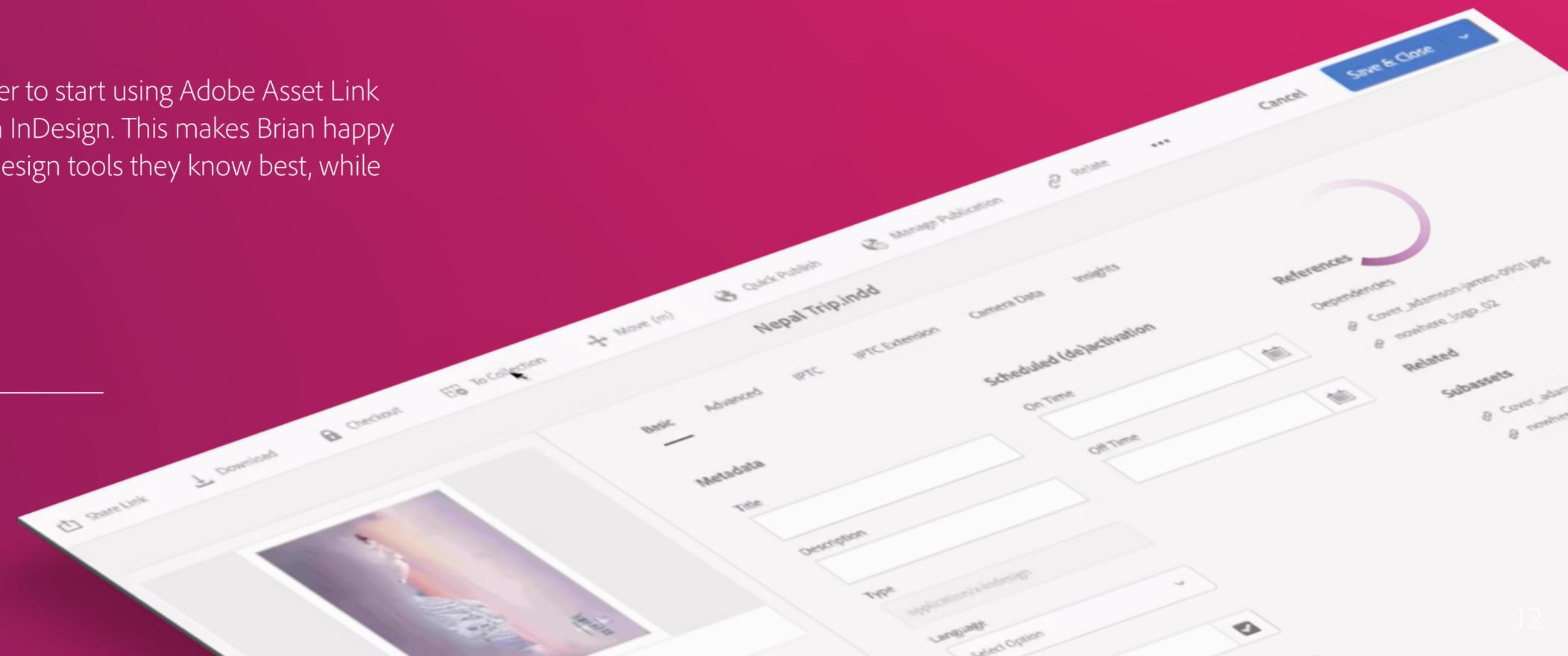
Assets Designed and built for modern marketers, AEM Assets is an enterprise DAM that enables organizations to locate, edit, manage, and deliver assets effortlessly in a single platform. AEM Assets facilitates collaboration between cross-functional teams, ensures assets are compatible and compliant, integrates tightly with Adobe Creative Cloud, and supports multilingual asset management as well as artificial intelligence.

Adobe Asset Link

Transform the way creatives work by speeding up content creation. Asset Link allows teams to search, browse, and checkin/out AEM Assets directly in Adobe InDesign.

Adobe InDesign

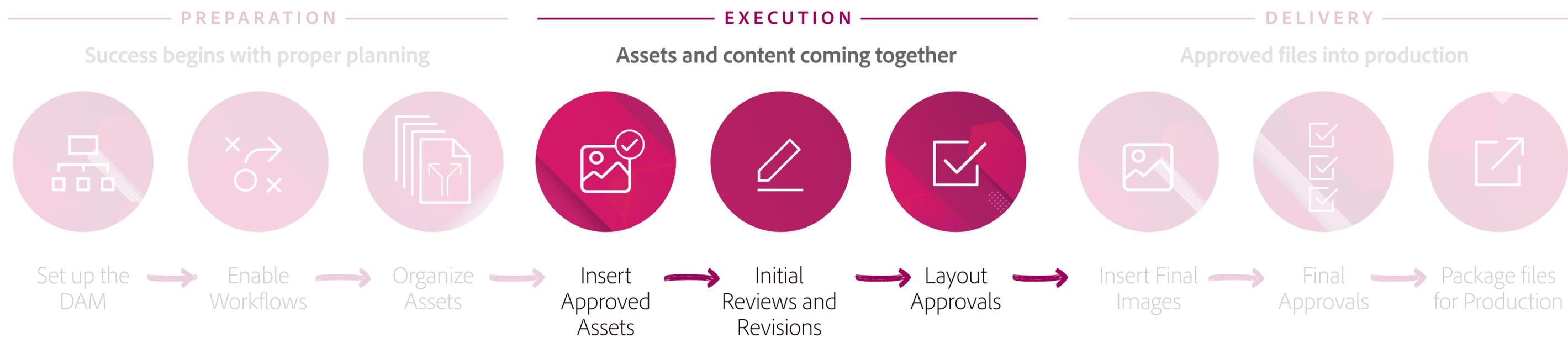
is the industry-leading layout and page design software for print and digital media. InDesign has everything you need to create beautiful graphic designs with typography enabling you to publish books, catalogs, digital magazines, eBooks, posters, layouts, interactive PDFs, and more.



Execution

The DAM has been set up and the assets are organized, it is now time for the designers to start incorporating the images, descriptions, and specifications into the catalog layout. The designers do this via Adobe Asset Link, which allows them to access all of the assets in the DAM without leaving their favorite Adobe Creative Cloud for enterprise applications.

Once the layouts are ready for review, files can be shared via Creative Cloud and approved without worrying about versioning problems or large files that are too big to be shared via email. And if assets are changed during the layout process, the designers are notified immediately, allowing them to easily bring in the new file from AEM Assets.



People

- Director of Layout Design
- Asset Manager
- Design Lead
- Designers
- Key stakeholders required for approvals

Processes

- Making the design process more efficient

Technology

- AEM Assets
- Adobe InDesign
- Adobe Asset Link
- Product Information Management (PIM) system
- eCommerce system





BEST PRACTICE

Best Practice: Making the design process more efficient

Designers working in InDesign can take advantage of the tight integration between Asset Link and AEM Assets to make creating layouts simpler and more efficient than ever before. Here are just a few of the ways Asset Link can improve your regular design workflows:

1. The Asset Link panel includes search functionality, allowing you to easily search for an image in the DAM and find just the right asset.
2. Once a file has been found, simply check-out the asset to begin working with the image. A lock icon will appear notifying other users that the image is being worked on by someone, preventing overlapping edits to the same file. When edits are complete, use check-in to save the revised asset and 'unlock' it for other users.
3. When opening a file in the Asset Link panel, click on File Details to see important asset information at your fingertips, such as the last modified date, photo dimensions, format, all previous versions of the asset, and the path to access the asset in the DAM, all without leaving InDesign.
4. Icons within InDesign show if an asset is high-res, FPO, missing, modified, and more. (For details on icons in InDesign, see the following page.)
5. When an asset is modified or moved, a few simple clicks can update the files or replace with a new image.
6. Use Asset Link to easily swap out FPO placeholders for print-ready images with just a few clicks.
7. There are multiple ways to place images into a layout. Use 'Place Copy' to embed an asset or 'Place Linked' to use a linking flow.



TIPS & TRICKS

Knowing what different icons mean when working with assets can save you time and energy. See the cheat sheet on the next page for commonly seen icons in InDesign.

You can access file details for assets in AEM Assets, for example thumbnail, basic metadata, and versions from within the panel.

 TIPS & TRICKS

InDesign Icons: Understanding asset-related icons

Easily know the status of your assets by understanding the icons that appear in InDesign. Here are some of the most common icons and what they mean. For more information, see the guide for [managing assets using Adobe Asset Link](#).



Creative Cloud Library Asset



Linked Asset



Linked Asset Offline



Linked Asset FPO



Linked Asset FPO Offline



Creative Cloud Library Asset Missing



Linked Asset Missing



Linked Asset Relink



Linked Asset FPO Missing



Linked Asset FPO Synced



Creative Cloud Library Asset Modified



Linked Asset Modified



Linked Asset FPO Modified



Linked Asset FPO Syncing

DID YOU KNOW? ---

Adobe Asset Link enables you to reference assets from AEM Assets in InDesign files using an out-of-the-box feature called direct linking.

With InDesign direct linking support, you can now place assets into InDesign from AEM Assets via the Adobe Asset Link panel.

Referencing assets lets you collaborate with other users and incorporate any updates made to the original asset in AEM Assets.

To reference an asset from AEM Assets, use the Place Linked option in the context menu.



Increased efficiencies for the design team

The designers set to work building layouts, using the Asset Link panel in InDesign to access assets in the DAM. With the simple search functionality, finding the right collections and images is no longer a lengthy process, and thanks to the FPO workflow set up in AEM Assets, the designers can add low-res placeholder images to the layout which takes a fraction of the time that loading high-res images used to.

As assets are modified, the designers are notified and can easily click to relink to the most up-to-date asset. If a file is missing, moved, or deleted, designers can immediately replace the image, meaning there are no more surprises when it comes time to package the files for production.

Now that the designers no longer need to search through email threads and multiple storage systems for assets, the layout process is going much faster and being able to collaborate directly within InDesign means it's easier to share layouts and gain approvals.

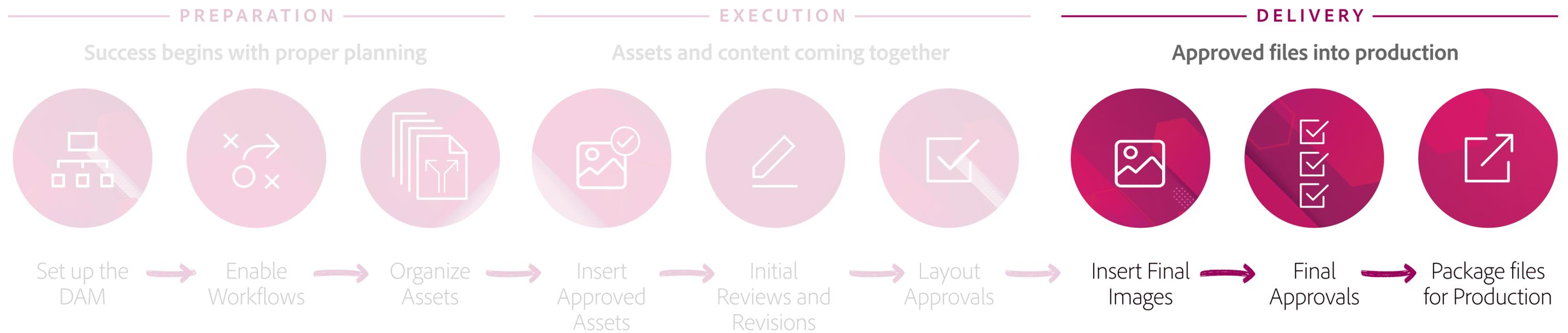
Working with FPO images has made the layout process faster than ever before, and now that the designers are automatically notified when assets have changed, there's no longer a worry that incorrect images or descriptions will make their way into production. Brian and his team are feeling confident that they will be able to deliver the catalog on time, even with last minute asset changes that may arise.



Delivery

The layouts have been approved and now the designers begin to insert the high-res images in preparation for final layout approvals. Last minute changes can be accounted for easily as notifications tell the designers when assets within the DAM have been changed. Once the layouts have gone through a final review and sign-off process, they are ready to be packaged and sent to production.

Using Asset Link and AEM Assets notifies the designers if any assets are missing from the final package and links can be updated before the catalog goes into production.



People

- Director of Design
 - Asset Manager
 - Designers
 - Print Production Team
-

Processes

- Packaged and ready for production
-

Technology

- AEM Assets
- Adobe InDesign
- Adobe Asset Link
- Product Information Management (PIM) system
- eCommerce system
- Print production software





BEST PRACTICE

Best Practice: Packaged and ready for production

With the print-ready layouts completed, it's time to package the files for downstream production. Before printing or handing-off the document, you can use the Asset Link panel to identify missing files or fonts and re-link them with just a few clicks. You can also diagnose these and other problems with the files before packaging (a process called preflighting) by using the Preflight panel and live preflight capabilities in InDesign.

Once all elements are properly linked, you can proceed to package the file. When you package a file, you create a folder that contains the InDesign document, any necessary fonts, linked graphics, text files, and a print report. The report, which is saved as a text file, includes special instructions for printing as well as a list of all used fonts, links, and inks required to print the document.

With Asset Link helping to ensure that all files are properly linked before packaging, you can feel confident knowing that every image, bit of text, and piece of product information that should be in the catalog is going to make its way into the final product.



 TIPS & TRICKS

InDesign Server: Automating InDesign Workflows

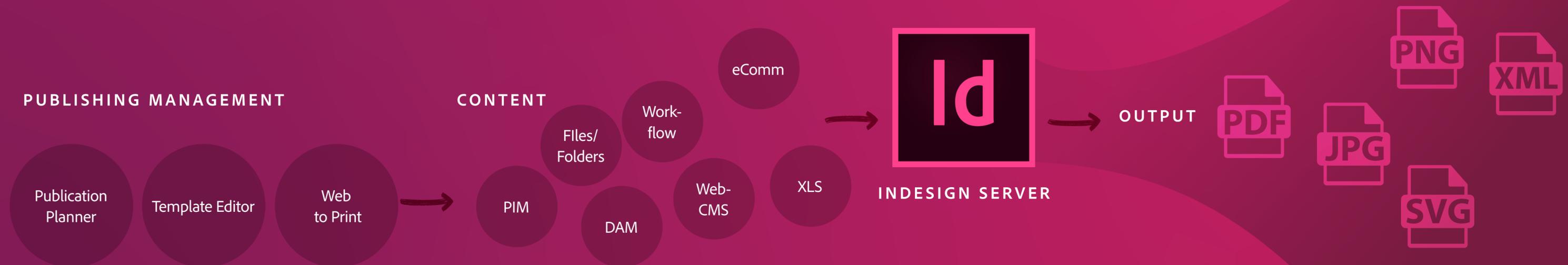
Have you heard about InDesign Server? InDesign Server is a companion tool that can be used to automate InDesign workflows. It is a server built on the same codebase as desktop InDesign and released in tandem with InDesign releases. It can be configured to enable non-designers to create and update InDesign files without having to open InDesign and can be triggered by workflow events.

For example, an organization can build sophisticated and flexible catalog templates using Adobe InDesign software and then automate production using a data source and business logic. The template can include images and text in AEM Assets, product details from a Product Information Management (PIM) system, or catalog management system.

Through plugins and scripts, the catalog could be laid out automatically and output to a print-ready PDF or brought back into InDesign for further design work. Overall, InDesign Server enables you to dramatically decrease the time needed to produce professionally designed catalogs, without requiring additional creative resources.

 **IMPORTANT**

InDesign Server is not available out-of-the-box and requires configuration and custom development in order to work for your specific workflows and use cases. Please contact your Adobe account executive for further information.



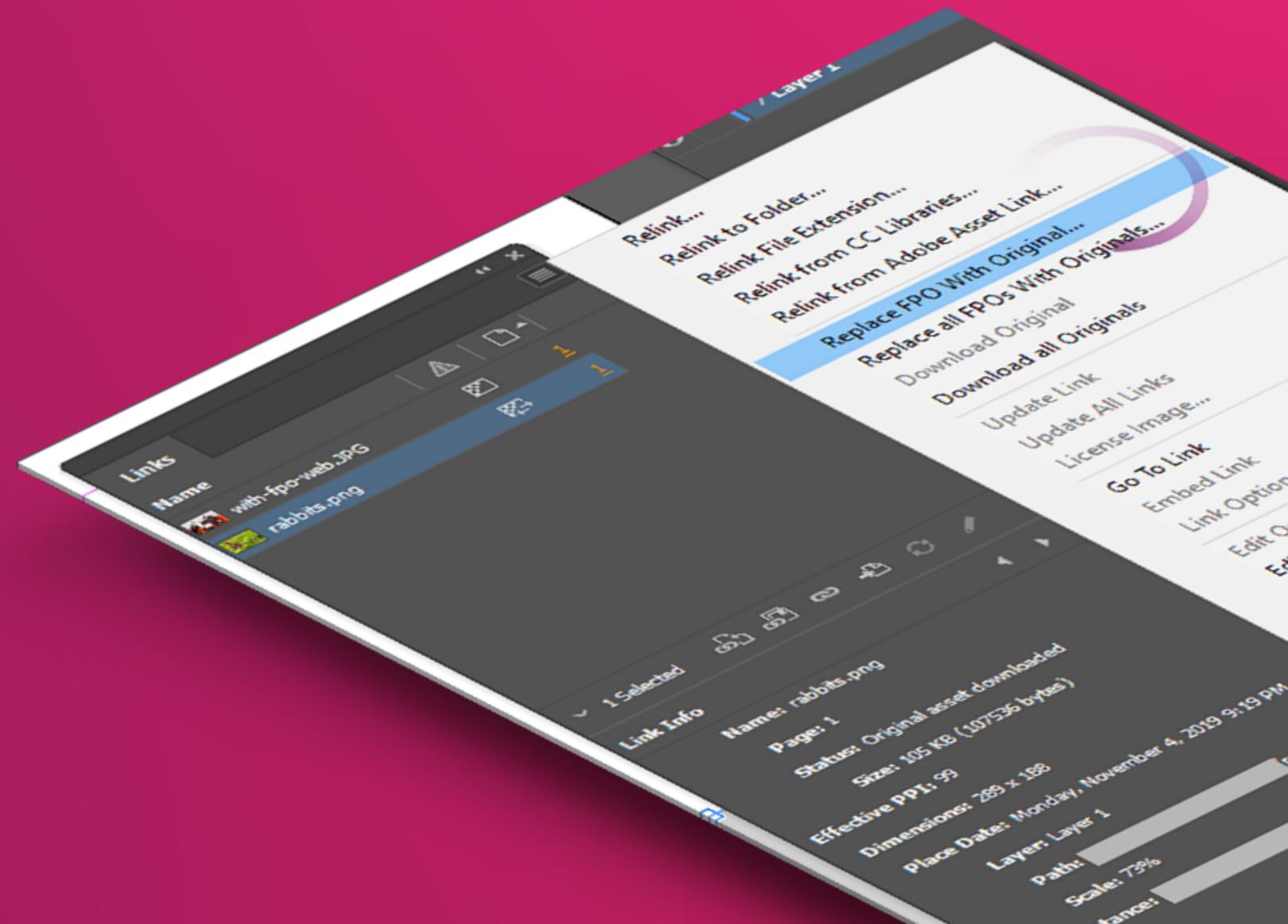


Crossing the finish line.

Once initial approvals have been given, the designers set to work replacing FPO images with high-res, print-ready assets. As the final layouts are completed, the team collaborates once again using Creative Cloud for enterprise to review the InDesign files and get final sign-off and approvals from all stakeholders.

Brian's team is now ready to package the final layouts for production. As they start the packaging process, the team receives notifications that some assets are missing, but thanks to Asset Link, re-linking the images requires only a few clicks. With Asset Link and AEM Assets, the packaging process goes very smoothly, with much less panicking and scrambling than previous catalogs.

When it comes time to send the final files to the printer, Brian and his team are proud of the fact that the new processes they've put in place are almost as beautiful as the catalog they designed.





PRACTICES IN ACTION

Working better together.

Collaborating with multiple teams to bring the catalog to life is now much more streamlined, thanks to Adobe Asset Link and AEM Assets. Now, all teams are storing and accessing assets in the centralized repository, applying metadata that makes assets easy to find when needed. From there, two-way collaboration makes it easy for designers to find the right files, work with them without leaving their Creative Cloud for enterprise software, and save the revised files back into the DAM where other teams can access them.

The designers can even save InDesign files into AEM Assets for easy access and storage. AEM Assets also allows everyone to see which assets are reference by which InDesign files.

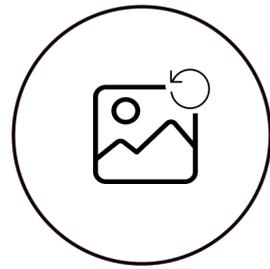


Beautiful processes become beautiful final products.



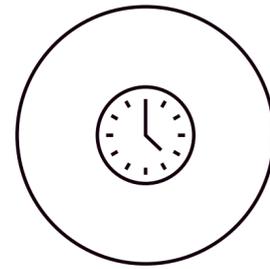
Stop seeking, Start finding.

Using Asset Link, designers can search, check-out/in, and edit assets in AEM Assets without leaving their favorite Creative Cloud for enterprise apps.



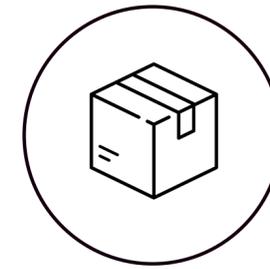
Keep up-to-date on updates.

Designers are notified when an asset has been modified or moved inside AEM Assets and can easily click and re-link from within the InDesign Asset Link panel with a few clicks.



Lose "wait", Feel great.

Automatic workflows that generate FPO placeholders mean less time waiting on high-res images to load and more time building layouts.



Packaged up & ready to go.

Using Asset Link, you'll know if assets are missing before you package them, allowing you to feel confident sending your files off to production.

Click to learn more about the features and solutions discussed in this whitepaper:



MAKE IT AN EXPERIENCE