



Taxonomy & Metadata Best Practices

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Taxonomy & Metadata Best Practices

Introduction

At Bynder, we often come across potential clients who are not familiar with what taxonomy and metadata are and how it may help their company, fellow employees, and customers. In fact, one of the most commonly asked questions we get is “What do you mean when you say “Taxonomy”? It’s kind of a scary word to some, but it’s really not as intimidating as it sounds!

In this guide, I’ll introduce you to metadata and taxonomy, tips for applying metadata, common metadata fields seen across industries, metadata standards and resources, rights management best practice and lessons learned.

What is metadata and taxonomy?

Introduction

You may not even realize that some of the applications you use on a daily basis are powered by metadata and taxonomy. Take for instance, [amazon.com](https://www.amazon.com). If you are shopping on Amazon, you will likely begin your search in the large search box and refine your search with the filters on the side bar. These filters on the sidebar are populated by metadata, which describe assets. This descriptive data can then be used to help find assets or to learn additional details about the assets. The order and structure in which the filters appear and how they relate to one another is called taxonomy. Figure 1.1 illustrates taxonomy and metadata using an example from Amazon.

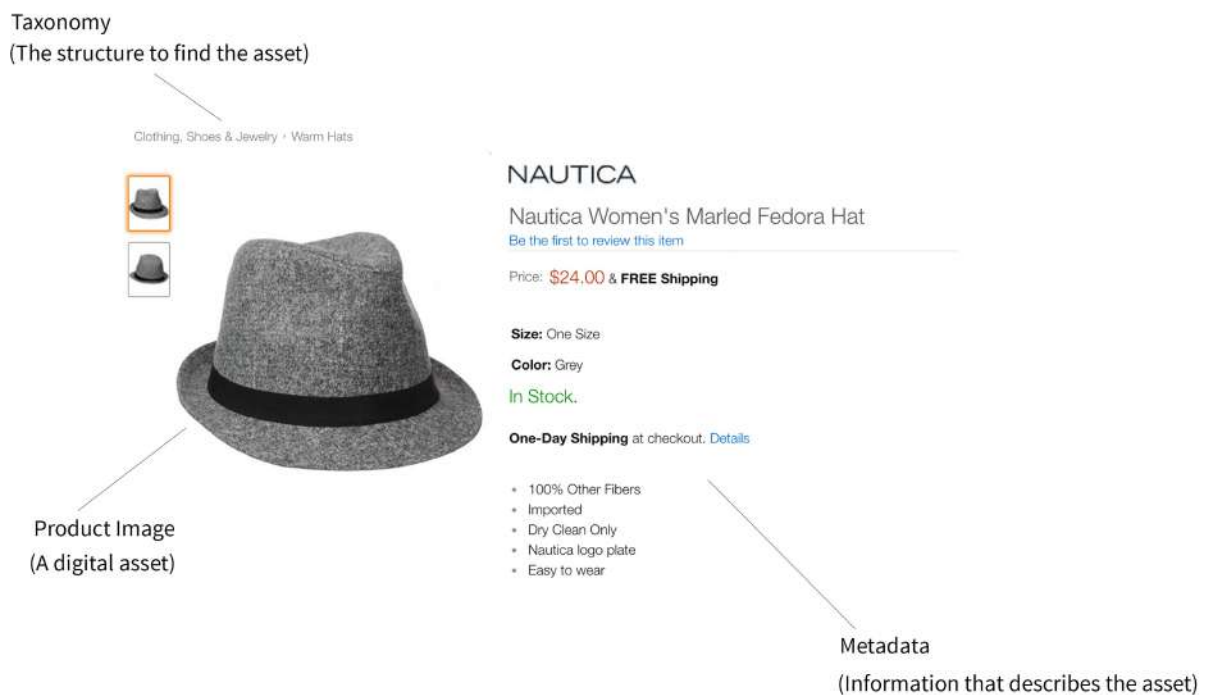


Figure 1.1

Another common and relatable example is Netflix. You may begin your search for something to watch by filtering on different categories, but once you click into a title you are able to see more information about that particular movie or show: things like the duration, what it is rated, and a brief synopsis of what it is about. These are all examples of metadata, while the categories you filter through to find a title can be considered taxonomy.

Metadata and Taxonomy Power the Digital World

Metadata and taxonomies can come in all shapes and sizes and can be found in many places! If you think critically, you could say that metadata and taxonomy are everywhere. Metadata can be inside of files as XMP (eXtensible metadata platform), close-by in a “sidecar” which is known as sidecar metadata (often comes in the form of XML), or in a DAM system. Even the aisles in the grocery store break down products into categories which you navigate through to fill your shopping cart. Without a structure to the grocery store, shopping would be chaotic! Most websites also have taxonomies to support information retrieval in the form of dropdown, links, and navigation panes and search boxes that are powered by metadata.

Let’s Talk Folksonomy

Instagram and Twitter are popular examples of applications that utilize Folksonomy. Folksonomy relies on user-generated tags which can then be used in search. Folksonomies are user-generated and therefore, not standardized and quality-controlled lists.

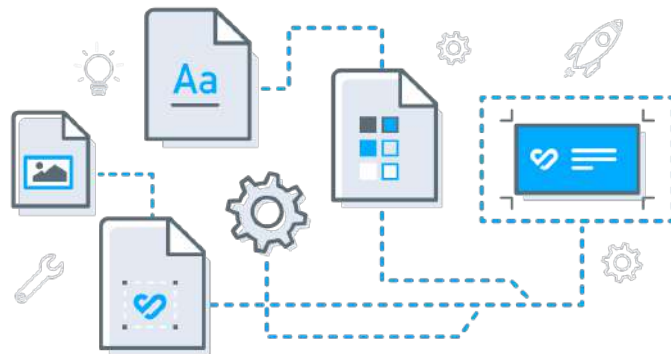


Figure 1.12 User-generated tags on Instagram

8 Tips for Metadata Application

1. Timeliness, Completeness & Quality

Apply metadata as close to the time of asset creation as possible, fill out metadata as completely as possible, and ensure metadata is accurate.



2. How many metadata fields?

There's no perfect number per se, but when starting out start simple! Remember you can always scale up and add more detail. Keep in mind too that each field is an investment of time and money in terms of metadata application, quality and upkeep.

3. Operational Definitions

Use operational definitions and a metadata dictionary for fields and values. Define what the metadata field means as well as each option that way there is clarity for end-users who may wonder, "Does the geography field mean where the asset was created or where I can use it?" Figure 1.13 illustrates what is meant by each option under the metadata field "Type of Asset."

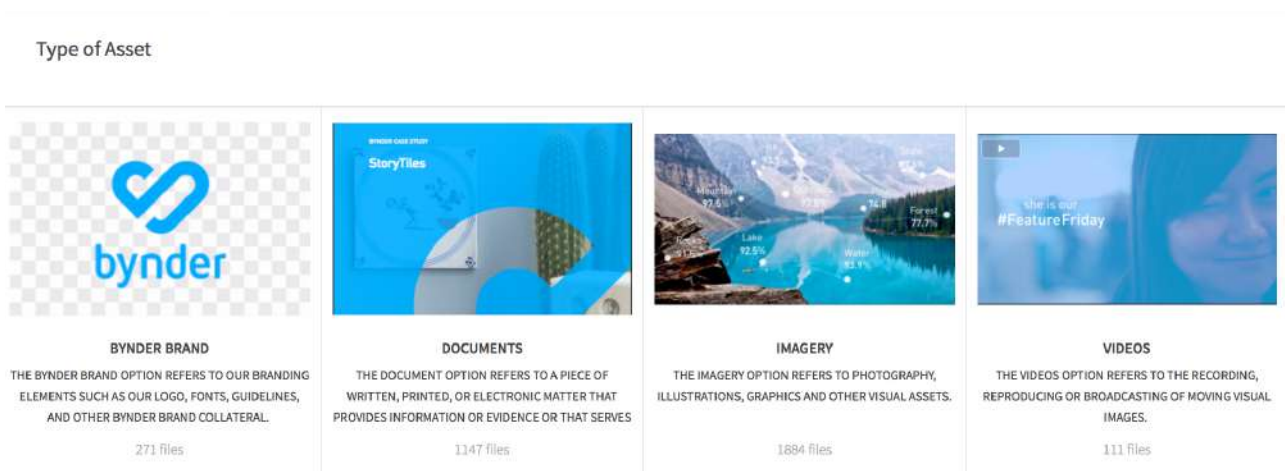


Figure 1.13 A visualization of part of a metadata dictionary

4. Required Fields

There are some definite pros and cons to forcing metadata application with required fields:

Pro - Search is potentially better because you are requiring the data to be applied.

Con - There may be edge cases in which the required fields don't make sense, or perhaps there doesn't yet exist the right option for that field.

5. Automating Archiving Schedules with Metadata

Some DAM systems allow you to use a date field to automatically archive an asset on a specific date. This is great because you can “set it and forget it” and also make it part of the uploaders job to enter this data instead of it being a manual process by an administrator.

6. Folder Level Tagging Versus Item Level

In archival theory there's a practice called MPLP. It means “More product, less process” and it came about because of huge backlogs in archives waiting for processing because of the enormous amount of time it takes to “tag” or catalog materials one by one.

You can apply this to your digital asset management system when you are faced with very large collections of assets without metadata. To use MPLP in DAM, you apply a few descriptors to a collection of assets instead of classifying each asset one by one and filling out all the data fields. Applying the very minimum of data to these large collections can help you start to make order out of chaos (and more granular tagging can take place when you have the resources to do so.) But also remember that the search in your DAM system relies heavily upon high quality metadata.

7. Using data from other systems to automate metadata application

DAM should be the foundation for your digital ecosystem, or as we like to say the “invisible glue” between all of your systems. Re-purpose data from your other digital systems to help describe your assets, especially if you have a product information management (PIM) system where product data has already been entered—there's no sense in reentering this information manually! You may also have other systems such as SAP, CRM, MDM, and more that may have valuable descriptors that could be applied to your digital assets. Check first that it is data that can be trusted (has integrity and is quality-controlled.)

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8. Standardized file-naming conventions

A standardized file-naming convention provides additional context for a file. If the file leaves your DAM system, it still takes with it a little bit of context. In addition, embedding metadata inside of your assets can provide provenance information as well (information about where the asset came from originally).

Lessons Learned

Too many metadata fields

There is such a thing as information overload. More often than not, we see diminishing returns when too many filters are used. An interface that is simple, intuitive and streamlined is ideal. Each metadata field require time and effort to populate.

Too complex

You can easily go overboard on dependencies, special permissions and hierarchy in your taxonomy. The more complex the taxonomy, the more time and effort it will take to maintain.

Too stubborn

There may be rules for taxonomy and metadata to help guide you but know when to break them. End user opinion (the people who will be the champions and users of your DAM) > The rules.

Too perfect

The pursuit of perfection can hinder progress. If you wait for perfection in your taxonomy, you'll never get started. Yes, take the time to plan and think critically, but at some point you do have to "jump in the deep end" and start swimming.

Too nerdy

I consider myself a metadata nerd and do love to talk about the topic, but there are people who are less enthusiastic. Curate what you share about taxonomy and metadata as an administrator. Not all of it is relevant to the end-user, or they may also not share an understanding of how it affects them directly. Spend time thinking about being in the end-users shoes. What do they care about? How can metadata and taxonomy help them?

Core Fields Across Industries

Metadata name	Description
Type, Asset Type	The type of asset is a high-level descriptor to denote things like is the asset a document, a branding element, imagery or multimedia
UsageRights / Rights / Confidentiality	Rights information that specifies: Who can use it? What can they use? When can they use it? Where can they use it? Why can or can't they use it? How can or can't they use it?
Brand or Company	The brand-name or company name pertaining to the asset
Author / Photographer / Creator	The creator of the asset
Year	The year the asset was created

Rights Management Metadata

Documenting rights metadata can really empower or hold back adoption and full use of the DAM because by supplying this information you are eliminating any kind of doubt about if a user is allowed to use an asset or not. Documenting usage rights for your assets protects your company's intellectual property and mitigates the risk of misuse. Rights fields should be operationally defined, explicit and detailed. In addition to filling out rights metadata on assets, you can also attach or relate contracts to assets inside of your DAM system. Finally, you can also make rights metadata fields required upon asset upload.

Different Types of Rights

Rights Managed

Digital assets that are rights managed have specific rules about when, where, and how you are permitted to utilize them. Rights managed assets can be found in popular stock photography websites and also in digital asset management systems for various companies. Including rights information on your digital assets is the first step in monetizing your assets for potential use outside of your company, and is also the first step in ensuring there will not be misuse of your important assets. Restrictions can include how long the asset can be used, what channel it can be used on, the format and even the geographic region it can be used in! Figure 1.2 shows an example from Shutterstock of the rights associated with a particular image asset:

Usage Limitations	Standard License Subscriptions and On Demand
Number of users	1
License duration	Perpetual
Number of countries you can use images	Worldwide
Digital reproductions, such as website views, ebook downloads, use in "apps", software, email, etc.	Unlimited
Physical reproductions, such as books, magazines, advertising posters, and packaging	Up to 500K
TV, online video, and film viewers	Production budgets up to \$10K
Legal indemnification	Up to \$10K per image
Copies of web or print templates	Not allowed
Copies of merchandise for sale	Not allowed

Figure 1.2 Example of a license for an asset

Royalty Free

These types of digital assets can be used over and over by the company or person who purchased them but they may not be used by companies or individuals who have not purchased them. The asset owner maintains the copyright.

Creative Commons

Creative Commons licenses are generic licenses that individual content owners can use to specify how their assets can be used. Creative Commons license options are detailed below:

Attribution

Others can copy, distribute, display, perform and remix your work if they credit your name as requested by you.

No Derivative Works

Others can only copy, distribute, display or perform verbatim copies of your work.

Share Alike

Others can distribute your work only under a license identical to the one you have chosen for your work.

Non-Commercial

Others can copy, distribute, display, perform or remix your work but for non-commercial purposes only.

Common Rights Fields and Options in DAM Systems

Metadata Field Name: Usage Rights

Definition:	Details information about how and when you can use an asset
Field Type:	Multi-select recommended for filtering, but can be text if needed
Required upon upload?	Yes
Example 1:	Free for use / Public
Definition:	You do not need to obtain any further permissions to use these assets. They are publicly available and free for use.
Example 2:	At request
Definition:	A request is required to obtain access to the asset. Usually you must specify what you would like to use the asset for, on which channels/formats, and for how long.
Example 3:	Rights expired
Definition:	To be used with at request, the company no longer has the right to use the asset until rights are re-purchased from the owner.
Example 4:	Full buyout / Company Owned
Definition:	Company created and owned assets with full rights to publish on any channel. No model release or photographer release required.
Example 5:	Photographer release
Definition:	A legal release exists for this asset that is signed by the photographer explicitly granting permission to publish the photograph.
Example 6 :	Model Release
Definition:	A legal release exists for this asset that is signed by the subject of a photograph granting permission to publish the photograph.

Metadata Field Name: Confidentiality

Definition:	Confidentiality is the security level of the asset and the definitions from each option can come directly from InfoSec definitions if they are available at your organization.
Field Type:	Single Select Option
Required upon upload?	Yes
Example 1:	Public
Definition:	Can be shared out publicly now and forever until it's marked archive or it's no longer marked public.
Example 2 :	Internal

Definition: You can only share this asset internally within the organization.
Example 3: Confidential
Definition: You can not share this asset and it should be treated as classified and it's access limited to as few people as possible because of it's sensitive nature.

*If there is no value for Confidentiality, we consider the asset confidential until we discover the accurate usage rights. Some people might say "Ask for forgiveness later," but misuse of digital assets, especially when contract terms are in effect, can be upwards of \$150,000 per misuse. You'll find these types of terms explicitly outlined in many stock photography rights guidelines.

Geographic Location (for use in)

Definition: Geographic area an asset is allowed to be published in.
Field Type: Multi-select
Required upon upload: It depends.
Example 1: North America, United States Only
Definition: Can only be used in the United States.
Example 2: Global
Definition: Can be used in all geographic locations

Copyright

Definition: The exclusive legal right, given to an originator or an assignee to print, publish, perform, film, or record literary, artistic, or musical material, and to authorize others to do the same.
Field Type: Free text
Required upon upload: No
Example: All Rights Reserved 2017 Bynder LLC

Rights Usage Terms

Definition: Terms that define how an asset can be used and rights associated with the asset.
Field Type: Long Text
Required upon upload: No
Example: This image is the property of Bynder LLC and is protected under US and International copyright laws. Copying, duplicating, saving as a

digital file, printing, publishing in form of media including web, manipulating, transmitting or reproducing without the prior written permission of Bynder LLC is strictly forbidden and would constitute a breach of copyright.

Copyright info url

Definition: The URL where additional contact information or copyright information can be found.

Field Type: Text

Required upon upload: No

Example: <https://www.bynder.com/en/support/>

The Big Question: Can I use it?

When creating your rights metadata strategy, consider using the metadata to answer any questions users may have about the where, why, when, and how of potential usage:

Common questions end-users may have:

- Can I use it internally?
- Is it private to my company?
- Can I share it publicly?
- Can I publish it?
- If I can publish it, what channels and in what territories?

Metadata Standards

There are so many metadata standards! For a brief look at what you are up against when selecting or picking out of existing standards see Figure 1.3:

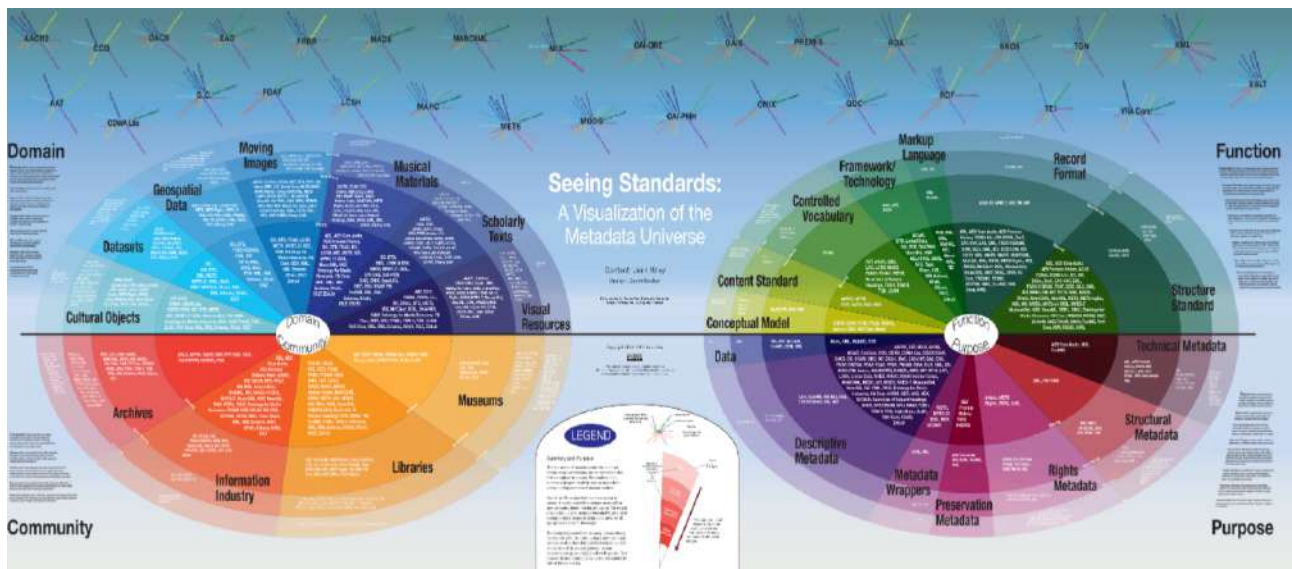


Figure 1.3 Jean Riley’s “A Visualization of the Metadata Universe”

Which one do I choose?

Well, you don’t have to choose just one. Many clients create **application profiles** for their custom metadata for their portal, which is a combination of company-specific fields and standard fields from various other metadata namespaces. A great resource for the world of metadata standards is available at the DAM Directory here: <http://damdirectory.libguides.com/metadastandards>



Some facts

About Bynder

Bynder is a leading cloud-based branding automation and marketing solution that removes the roadblocks to creativity and empowers marketers to easily create, organize and share digital content.

Founded in 2010, Bynder has been on a mission to make marketing more agile. Streamlining the content production process for marketers globally, users can collaborate from anywhere in the world, at any time via one centralized platform. Supporting end-to-end brand consistency, with the click of a button, you can resize graphics and videos, distribute files that are customized for social and digital channels, and prove and improve your marketing ROI. Helping organizations to reduce the time to market of all marketing materials, Bynder grew into the initiative solution it is today.

Named a Deloitte Fast 50 Rising Star in 2015, Bynder is driven by action and thought leadership. Powering digital content management for over 350 companies globally—with clients including KLM Royal Dutch Airlines, xxx, and AkzoNobel—Bynder is headquartered in Amsterdam but also has regional offices in London, Rotterdam, Barcelona, Boston, and Dubai.



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