

Enterprise Digital Asset Management Training Guide

(Technical Documentation Sample)

Overview

I designed and developed enterprise software training materials for the ADAM digital asset management and product information management platform (now part of Aprimo) used by a global healthcare manufacturer.

This document is an excerpt from a larger training manual created to support enterprise users working with digital assets, product information, and search workflows.

The selected sections demonstrate:

- user-focused technical writing,
- procedural instruction,
- enterprise software training,
- and workflow-based documentation design.

Proprietary information, branding, and system-specific details have been anonymized.

Audience

Internal business users, product teams, and marketing personnel, and operational managers.

Business Need

The organization implemented the ADAM platform to centralize product information, digital assets, and related workflows.

Documentation Goals

- Teach users how to search and locate digital assets
- Improve search efficiency
- Support adoption of enterprise DAM/ tools

My Role

Led development of enterprise software training and user documentation for cross-functional business teams.

Deliverables for the project included:

- Instructor-led training for marketing and inventory teams
- Quick reference materials for general employees
- A comprehensive user reference guide
- Train-the-trainer sessions for marketing managers
- Live software training for operational managers

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Key Terms

Asset File – any digital file.

Batch – A collection of files uploaded together.

Collateral Asset – Brochures, Catalogs, Advertisements, Invitations, Direct Mail, Posters, and other assets. They are also Composite assets.

Composite Asset – an asset that uses linked assets. Example: collateral or packaging.

DAM (Digital Asset Management) – A system used to organize, search, manage, and distribute digital assets such as images, brochures, packaging files, and documents.

Facets – a particular aspect of the data contained in ADAM. The Facets allow you to filter information. For example: the Types Facet allows you to filter by Product Family, SKU or Asset. (covered in Searching section)

Ingestion – The automated process used to import files into the system.

Linked Asset – an asset that is tied to another asset. One example is a product image that is linked to a collateral asset.

Metadata – information about an asset (or digital file).

PIM (Product Information Management) – A system used to manage and organize product-related information such as attributes, specifications, and vendor data.

Search – the ability to locate assets and product information within the system using keywords or filters.

Single Asset – an asset that is not tied to any other asset. An example is a product image.

Searching

ADAM allows you to search for information and assets. To do a search you can use Facets, Full text, or a combination of both.

NOTE: You can begin a search from the Dashboard by selecting search criteria for a Facet or typing text in the Full text search box and clicking the Search icon or pressing Enter. ADAM will automatically highlight the Search button.

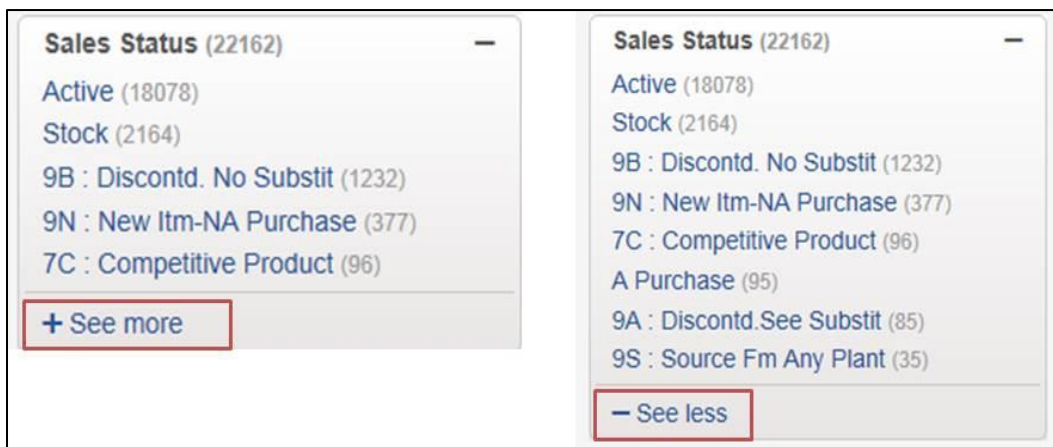
Filtering Search Results

A Facet is a category or attribute used for filtering information. For example, the Types Facet allows you to filter the results to only show Product Families, SKUs, or Assets.

You can collapse and expand each Facet by clicking the – or the + sign for the Facet.



When a Facet has additional options, you can click **+See more** and see all the available filter options.



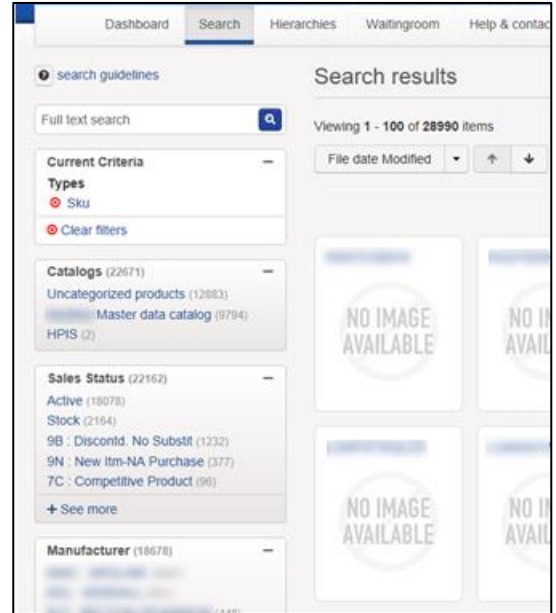
When a facet contains many available values, selecting See more opens an expanded list of filtering options.

Available Facets

Available facets may include asset type, product category, manufacturer, product division, market, language, and other metadata fields used to refine search results.

Selecting a facet dynamically updates the remaining available filtering options based on the current search criteria.

You can add additional criteria using the Facets. For example, if you want to find a SKU for a specific Product Division.



Using Full text Search

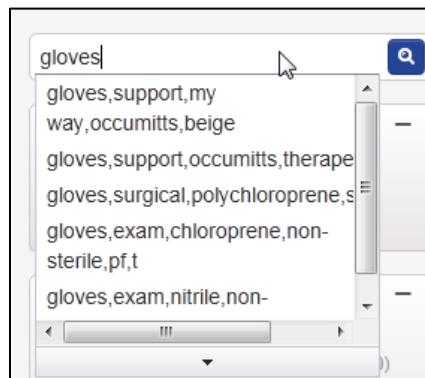
You can also search using text associated with a SKU, Product Family, or Asset.

To add a Full text Search:

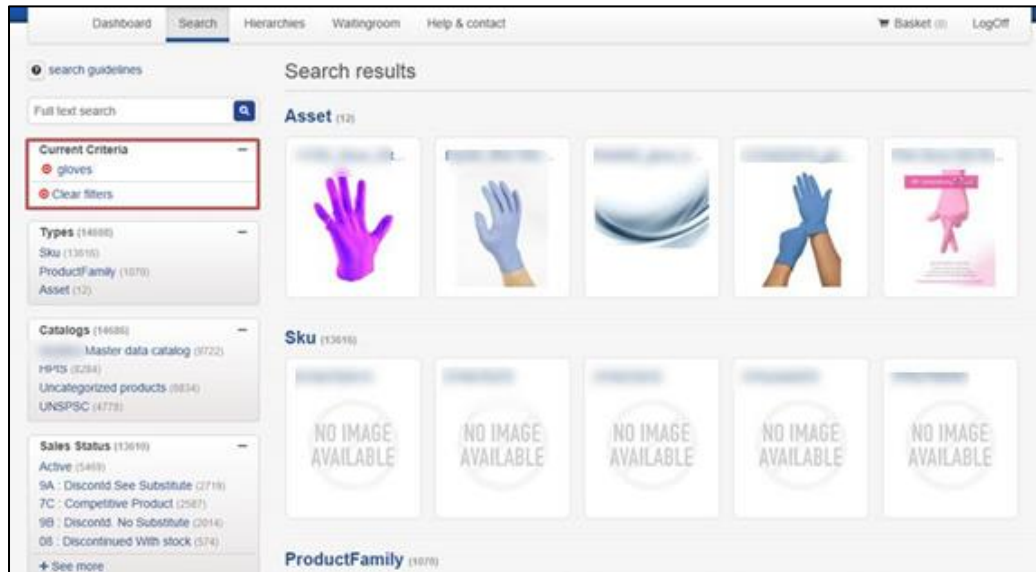
1. Click in the **Full text search box**.
2. Type the text you wish to search for.
3. Click the **Search** button or press *Enter/Return*.
4. You can add more than one Full text search if there is additional text you wish to search for.

Autocomplete:

Once you type six characters in the Full text search box, ADAM's Autocomplete feature will display possible matches based on the text you typed. You can either click one of the Autocomplete options or continue typing.



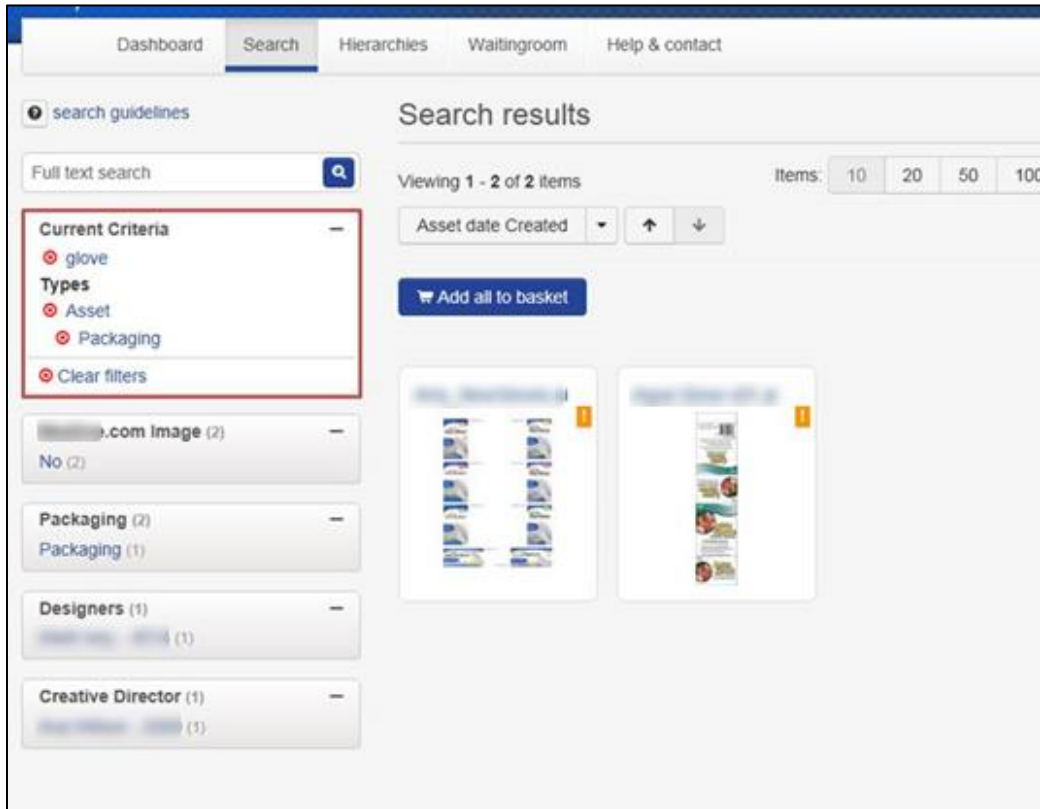
NOTE: By searching for text without selecting any Facet options, you would find SKUs, Product Families, and Assets that have the text “gloves” associated with them.




NOTE: Keep in mind that some of the metadata associated with an asset is searchable. For example, you can use the job number to locate a collateral asset.

Using Combination Searches

A combination search is when you use Facets to narrow your search results and a Full text search to find specific text. Notice in the following graphic, the search shows all assets that are packaging with the text “glove”.



Clearing Searches

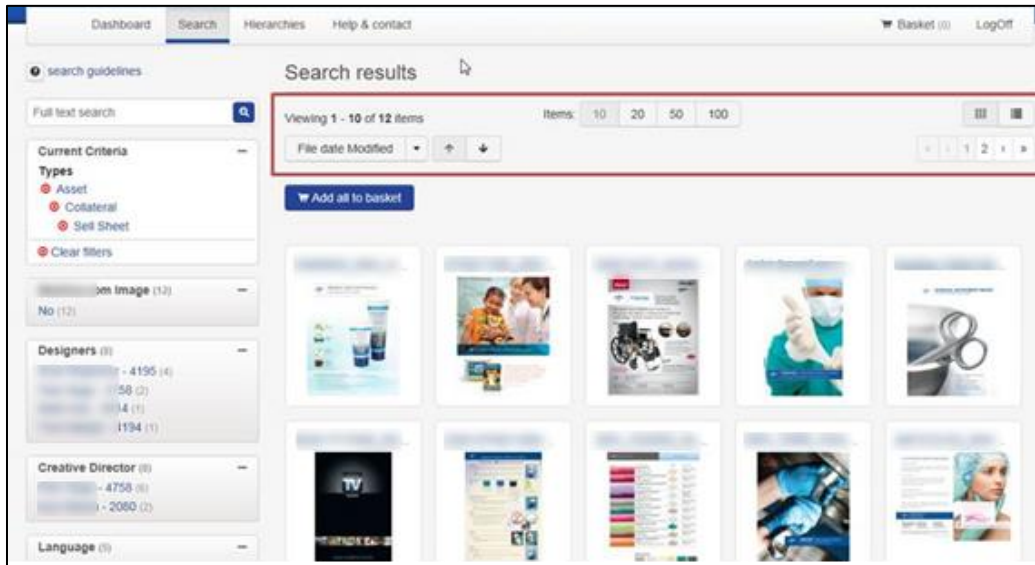
To clear a text search or Facet criteria, click the  button next to the text or click the text itself.



To clear the entire search criteria, click **Clear filters**.

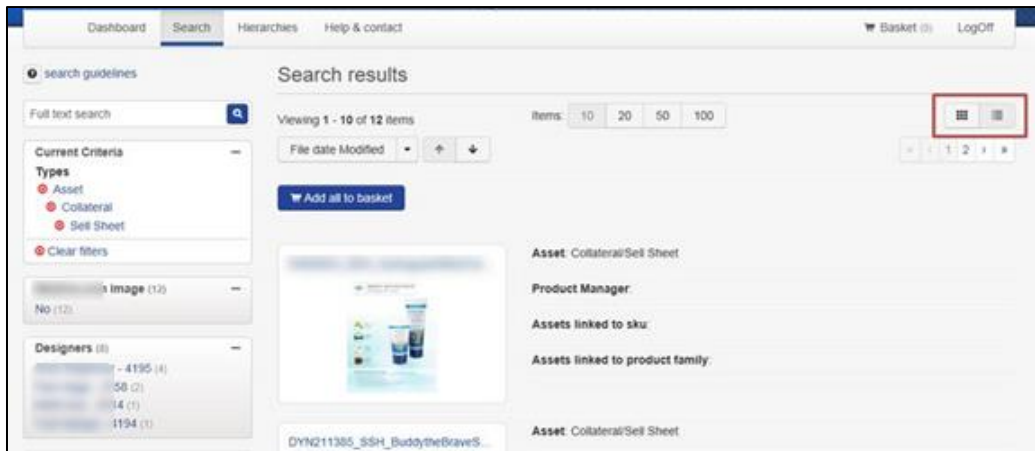
Search Results

ADAM allows you to customize the appearance of your Search results page.



Grid View vs. List View

The search results in the above graphic were displayed in Grid View. The List View button will change the search results to display in List View which allows you to see the Short Description, Product Division, and Manufacturer for the SKUs.

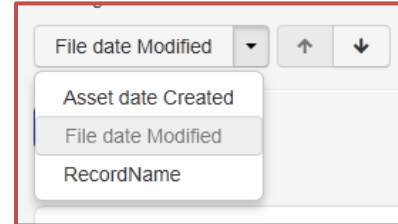


Sort Options

The sort drop-down menu allows you to change the sort criteria.

The choices are:

- **Asset date Created** (when the asset was added to ADAM, this date will not change)
- **File date Modified** (the date the asset was last changed)
- **RecordName** (the filename for the asset)

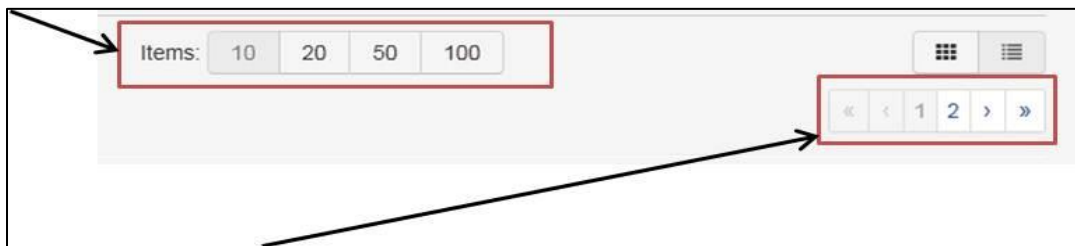


Ascending/Descending Buttons

To change the sort order, click either the **Ascending** or **Descending** button.

Number of Items Displayed

Whenever your search results in more than 10 items, you will see the **Number of Items Displayed** buttons. To see more or less items on each page, click to make a selection.



Paging Buttons

Whenever your search results in more items than can fit on one page, you will see the **Paging** buttons. These buttons allow you to quickly move through the pages of search results.

Notice the buttons that allow you to jump to the **first page and last page** of results.



NOTE: The Sort and View options are “sticky”, meaning they will stay as you set them for the next time you log in.

Uploading Assets

All files (assets) need to be zipped before uploading them into the system. You must have the folders set up on your computer before you can upload any files. Files must be uploaded to the appropriate system upload folder.

Upload Folder Structure

There are three main folders:

- ❖ Upload
- ❖ Success
- ❖ Error

Each of the main folders has subfolders as follows:

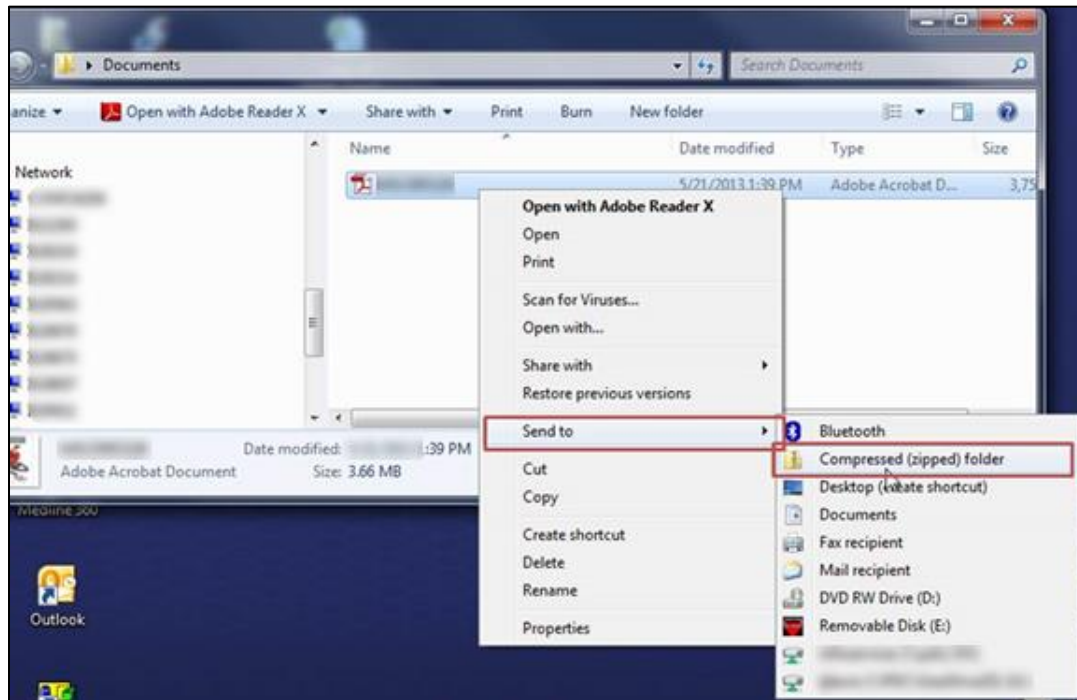
- ❖ Collateral
- ❖ ProductImage
- ❖ Document
- ❖ NonProductImage
- ❖ Packaging

To upload a file, move the asset to the appropriate subfolder within the Upload folder. For example, product images should be placed in the Upload | ProductImage folder.

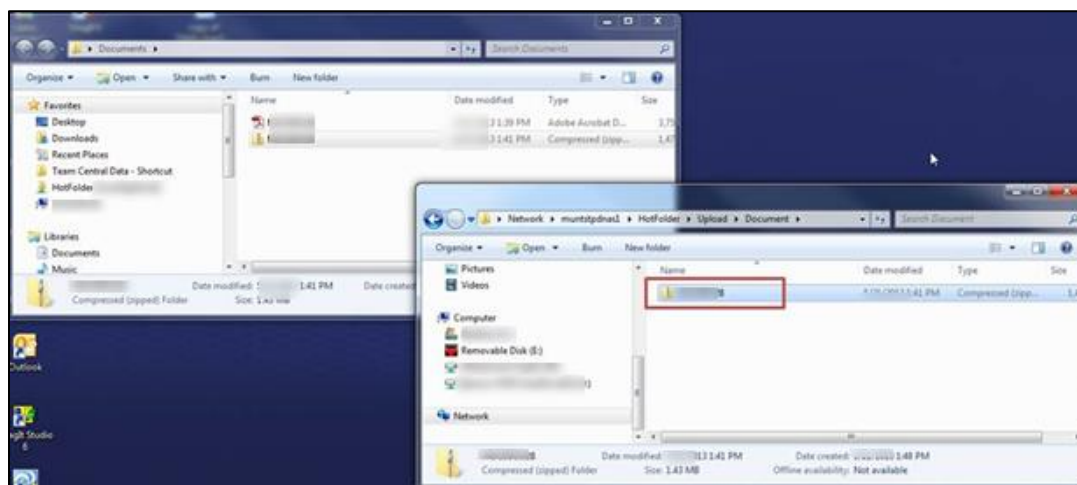
The Success and Error folders contain files that were either processed successfully or flagged for review due to an upload issue.

Uploading a Document

1. Locate and select the document(s) you want to upload.
2. Right click and select **Send to | Compressed (zipped) folder**.



3. Hold down the **Shift** key and click and drag the zip file to the Upload | Document Folder.



Verifying Upload Success

After uploading a file, you can verify successful processing by checking the designated Success folder within the system upload structure.

If a file upload is unsuccessful, the system places the file in the Error folder for review and correction.

Correcting Upload Errors

If a file upload is unsuccessful, the system places the file in the Error folder for review and correction.

The following example demonstrates a common upload issue and resolution workflow.

Duplicate Asset (All Users that Upload Assets)

If a file with the same name and content already exists in ADAM, the upload attempt will fail and the system will generate a duplicate asset error notification.

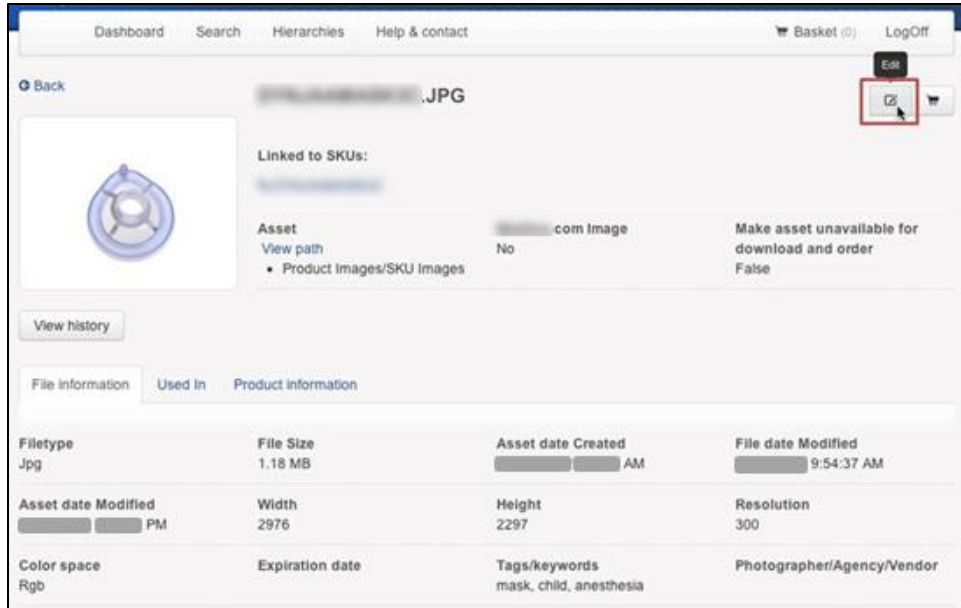


Resolution:

No additional action is required because the asset already exists in the system.

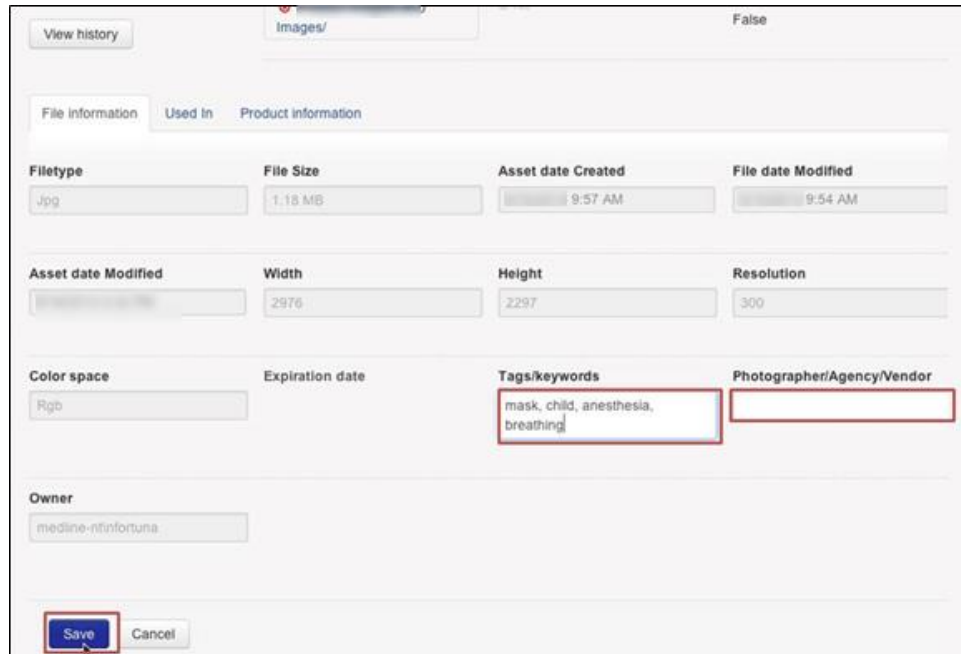
Edit Metadata for Assets

1. From the Asset Detail Page, click the **Edit** button.



NOTE: Editing capabilities may vary based on user permissions.

2. Update editable metadata fields, including keywords and photographer/agency/vendor information.



3. Scroll to the bottom of the page and click the **Save** button.