

# Digital Asset Management - Kentico Custom Module

February 20, 2017

Version 1.4

## Table of Contents

<b>1 INTRODUCTION.....</b>	<b>4</b>
<b>2 FEATURES .....</b>	<b>4</b>
<b>3 INSTALLATION STEPS.....</b>	<b>4</b>
<b>4 FAQs.....</b>	<b>5</b>
1. HOW TO CONTROL ACCESS TO ROLES IN WORKFLOW? .....	5
4.1 USAGE OF MODULE DATA .....	5
4.1.1 HOW TO GET MODULE INFORMATION IN MACROS? .....	5
4.1.2 HOW TO GET MODULE INFORMATION IN MACROS? .....	5
<b>5 DIGITAL ASSET MANAGEMENT .....</b>	<b>6</b>
<b>6 CATEGORY MANAGEMENT .....</b>	<b>7</b>
<b>7 ASSET MANAGEMENT .....</b>	<b>9</b>
7.1 ASSET DETAILS.....	9
7.1.1 GENERAL TAB .....	9
7.1.2 ASSET DETAILS TAB.....	10
7.1.3 COMMENTS TAB.....	10
7.1.4 VERSIONS TAB .....	12
<b>8 WORK FLOW .....</b>	<b>12</b>
8.1 ROLES.....	12
8.2 FLOW .....	12
<b>9 CASE 1 –PRODUCT MANAGEMENT .....</b>	<b>14</b>
9.1 CATEGORY MANAGEMENT .....	14
9.2 ASSET MANAGEMENT .....	15
9.3 WORKFLOW .....	15
<b>10 CASE 2 – PROJECT MANAGEMENT .....</b>	<b>16</b>
10.1 CATEGORY MANAGEMENT .....	16
10.2 ASSET MANAGEMENT .....	16
10.3 WORKFLOW .....	16
<b>11 CASE 3 – E-COMMERCE.....</b>	<b>16</b>

**11.1 CATEGORY MANAGEMENT .....16**

**11.2 ASSET MANAGEMENT .....16**

**11.3 WORKFLOW .....17**

**12 APPENDIX .....17**

**12.1 OBJECTS USED IN DAM MODULE.....17**

## 1 Introduction

Digital asset management is a collaboration module to manage digital assets within Kentico 9 and Kentico 10. It also includes Asset, Category and Asset Comments with workflow and versioning.

It is a collaboration platform that enables marketing teams to work effectively with the creative teams.

Geographically separated teams can take advantage of Digital Asset Management to manage the copy and creative design process using this platform. Using Digital asset management, client profile can be registered and categories can be created and managed. Designs and copy can be uploaded from any location. The copy and designs can be reviewed and comments can be tracked. It supports version control and workflow using which the copy and designs can be managed collaboratively saving time and efforts to coordinate costly meetings and travel schedules.

## 2 Features

Digital Asset Management is a Kentico custom module which supports in Kentico v9 and v10.

Below are the key features:

- Category Management
- Asset Management
- Asset Preview
- Asset Comments
- Asset Workflow
- Asset Versioning
- Asset Export

## 3 Installation steps

1. Import the .zip file into your website
2. You must check **Import code files** and **Global files** while import
3. After successful import, you must resign macros from **System-->Macros-->Signatures**. Check **Sign all macros** and **click update macro signatures**

Digital Asset Management module consist Tree Structure with categories and Assets

- Category – Will have 2 tabs
  - General - Category can be edited.
  - Asset List – List of asset files under selected category
- Asset – will have 4 tabs
  - General – Can edit/upload digital assets
  - Asset Details – Asset Preview
  - Comments – Add or view history of comments of asset
  - Versions – older versions of asset.

## 4 FAQs

### 1. How to control access to roles in workflow?

Workflow can be controlled using module permissions which were added with Digital asset management module.

## 4.1 Usage of Module Data

### 4.1.1 How to get Module information in macros?

You can use below methods to get asset and its category information in various places of Kentico

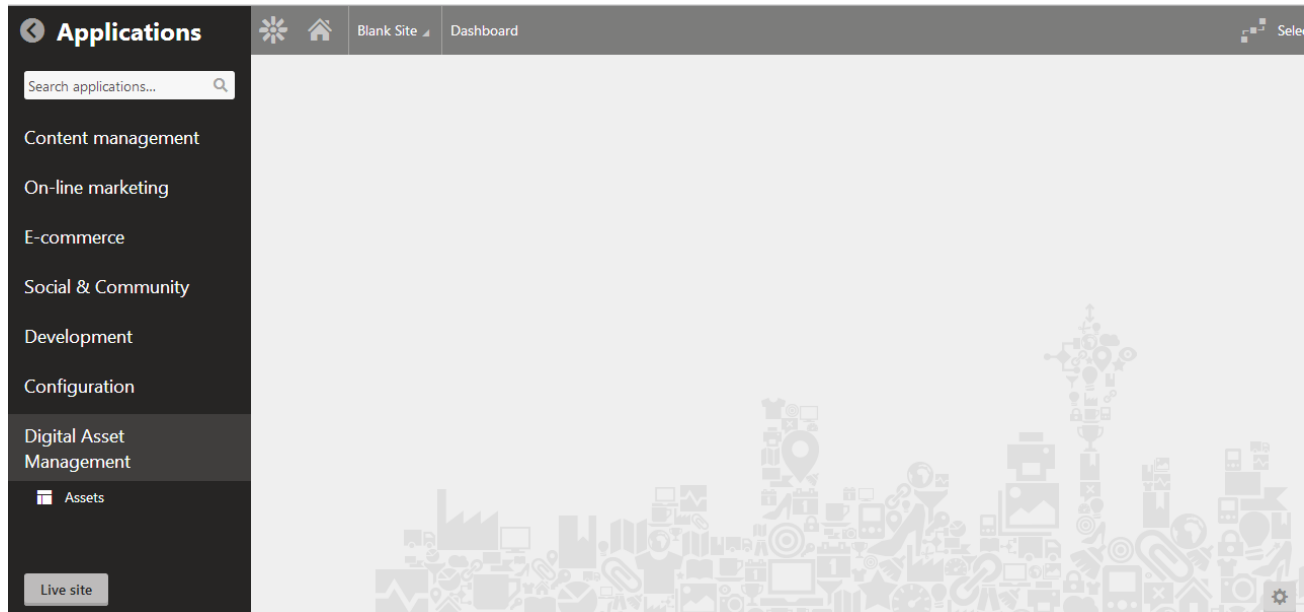
1. [DAMInfo.GetCategory\(<CategoryID>\)](#) – To get category Information
2. [DAMInfo.GetAsset\(<assetID>\)](#) -To get the asset information
3. [DAMInfo.GetMediaInfo\(<assetFile\(url of the media file\), height, width>\)](#) – To get asset file information (Images, videos, docs)

### 4.1.2 How to get Module information in macros?

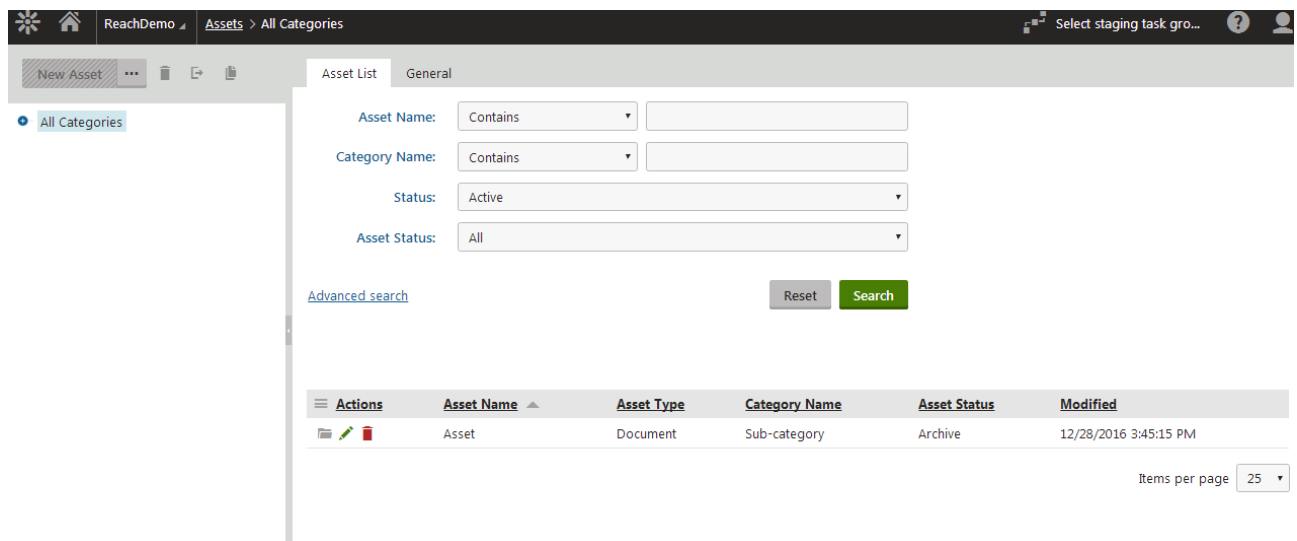
Module information can be rendered using [DAM Asset Repeater](#) Webpart using Asset detail with macros transformation. It is the default transformation for getting asset details. It is available under DAM transformation page type.

## 5 Digital Asset Management

Digital Asset Management is a plug-in in Kentico, which will be displayed at the left hand side once User logs in to Kentico as shown below.

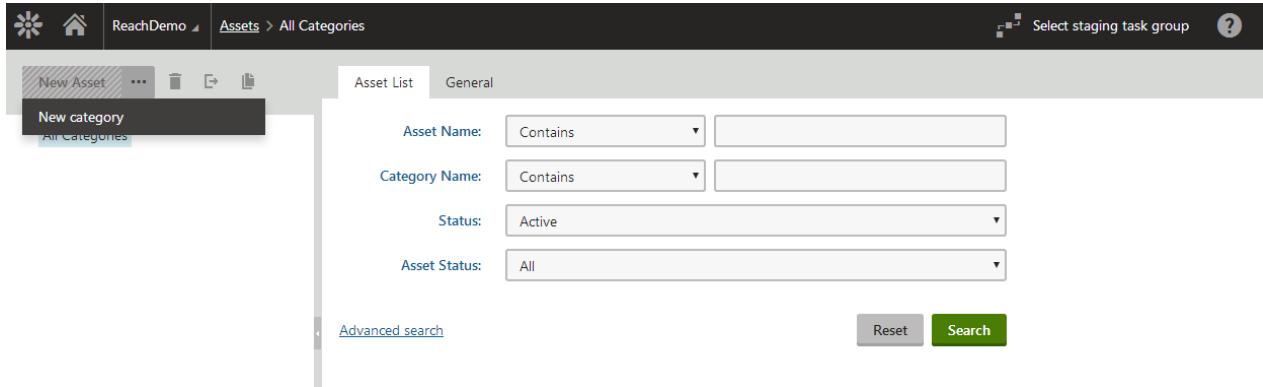


Clicking on Assets will display below page where list of assets will be displayed

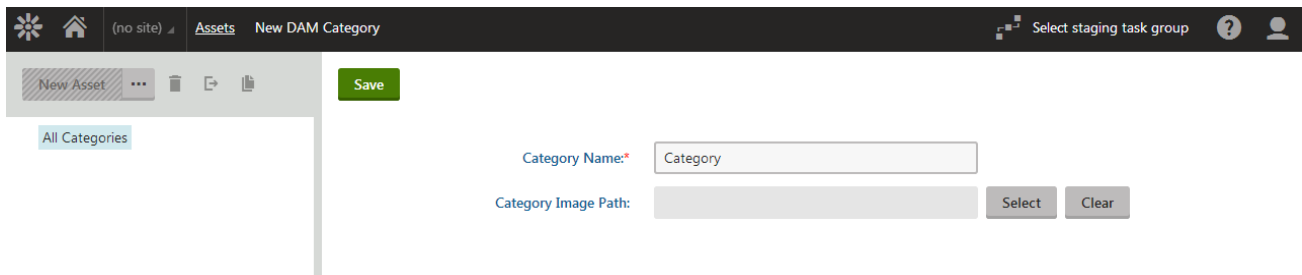


## 6 Category Management

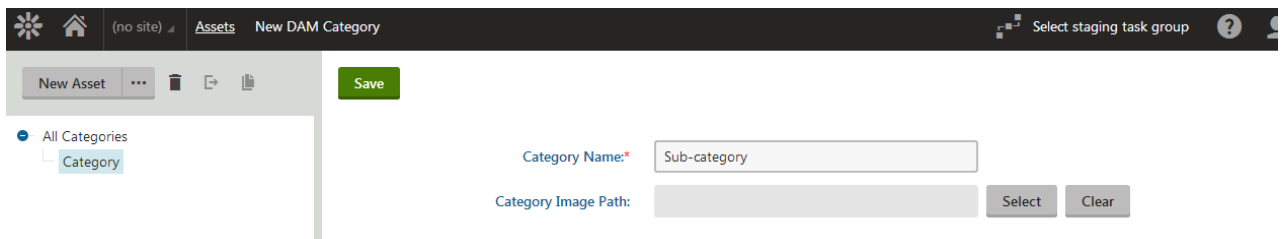
- Categories can be added by following below steps
- By default, 'All Categories' will be displayed which is root
- Click on root, then select Category from the top as shown below

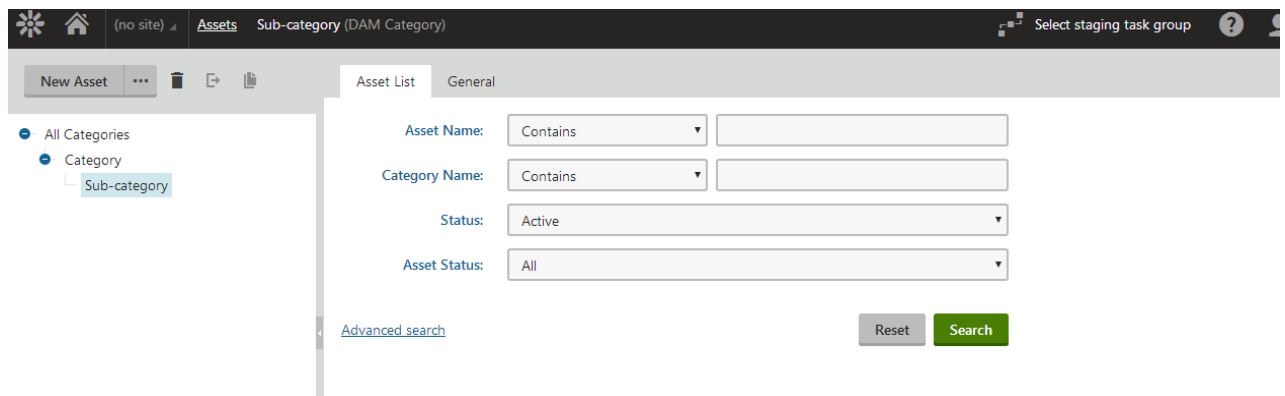


Clicking on 'New Category' will display the below page



- Enter necessary details and click on 'Save', Category will be created.
- To add sub-category - Click on a specific Category and then select 'New Category' from the top.

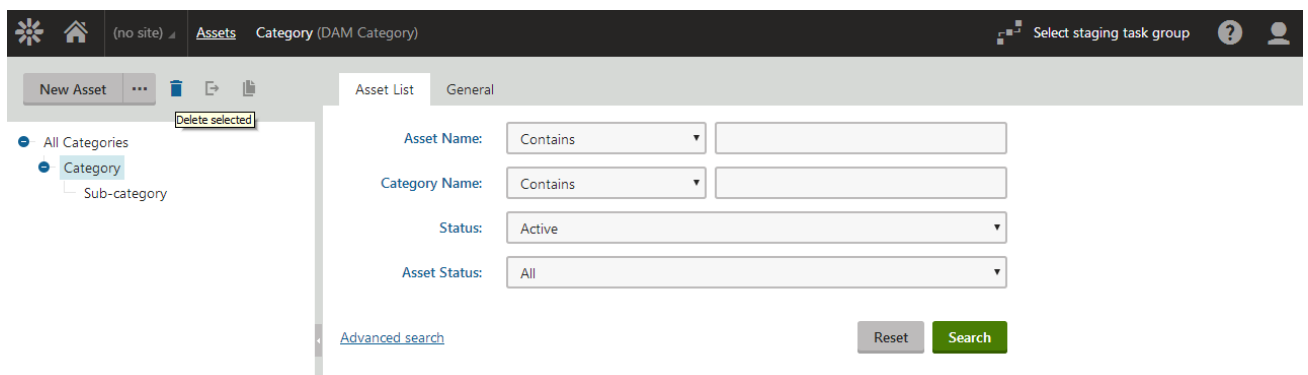




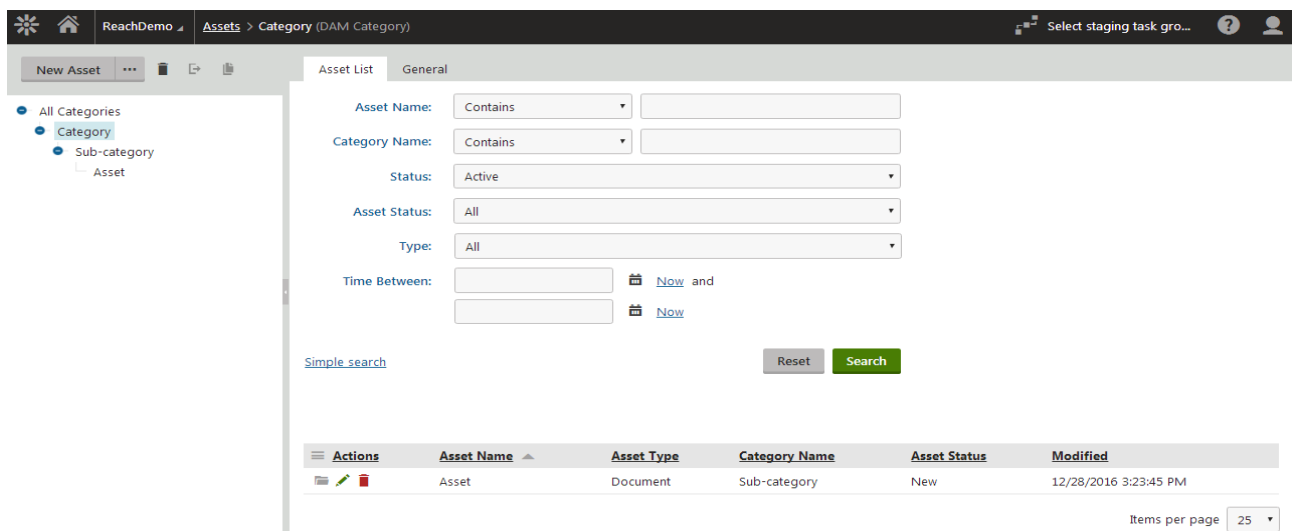
- Any number of categories can be added under a category. Categories from 2<sup>nd</sup> level are considered as sub-categories.
- Category details can be edited from General tab.



### Key Features:

- Categories can be deleted by clicking on category, then clicking on delete icon at the top.



- Assets can be searched based on various factors as shown in below image

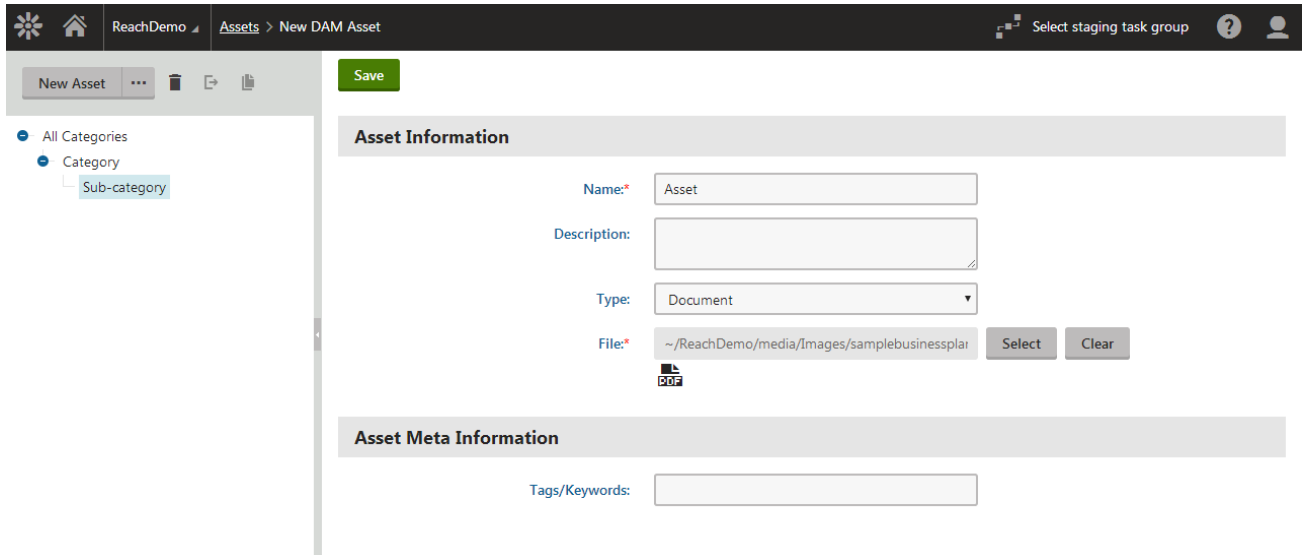


Actions	Asset Name	Asset Type	Category Name	Asset Status	Modified
 	Asset	Document	Sub-category	New	12/28/2016 3:23:45 PM



## 7 Asset Management

- Assets will be added under Categories/Sub-categories
- Select a specific category under which Asset has to be added
- Click on Add Asset from the top as shown below
- Clicking on 'New Asset' button will display below page



Enter necessary details and click on 'Save', Asset will be saved under selected Category/Sub-category.

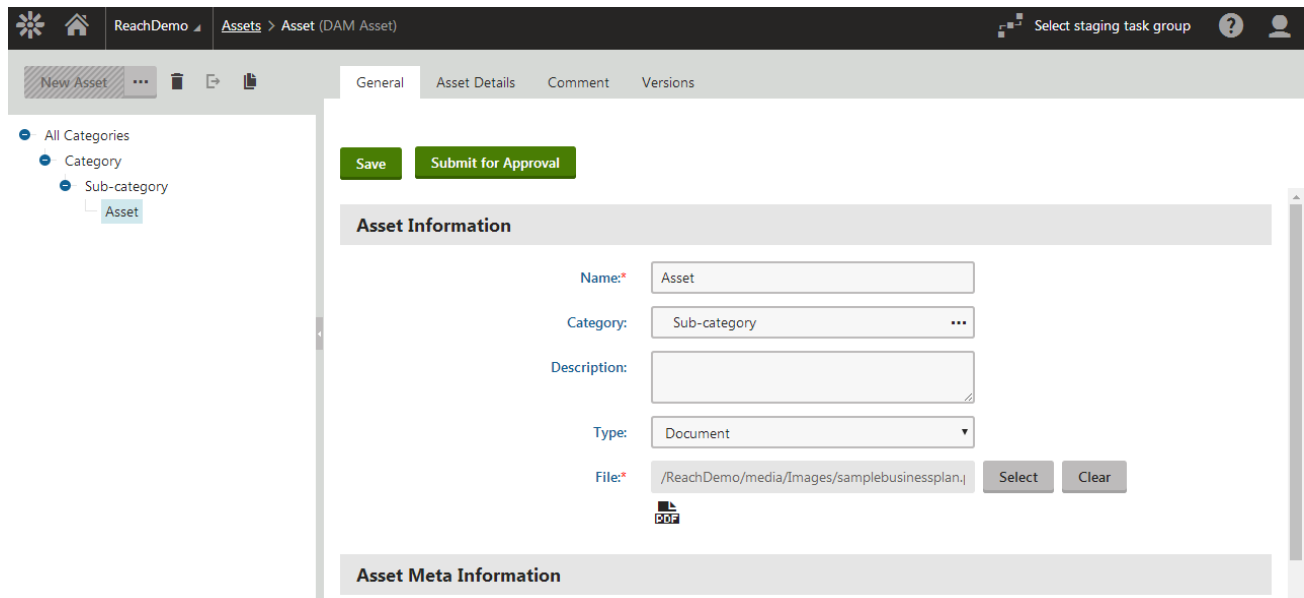
NOTE: Add Asset button will not be enabled until Category/Sub-category is selected.

### 7.1 Asset Details

- Clicking on a specific Asset will display details of Asset in four tabs namely General, Asset details, Comments, Version

#### 7.1.1 General tab

It is edit Asset page where details can be updated as shown below



ReachDemo Assets > Asset (DAM Asset)

Select staging task group

New Asset

General Asset Details Comment Versions

Save Submit for Approval

**Asset Information**

Name: Asset

Category: Sub-category

Description:

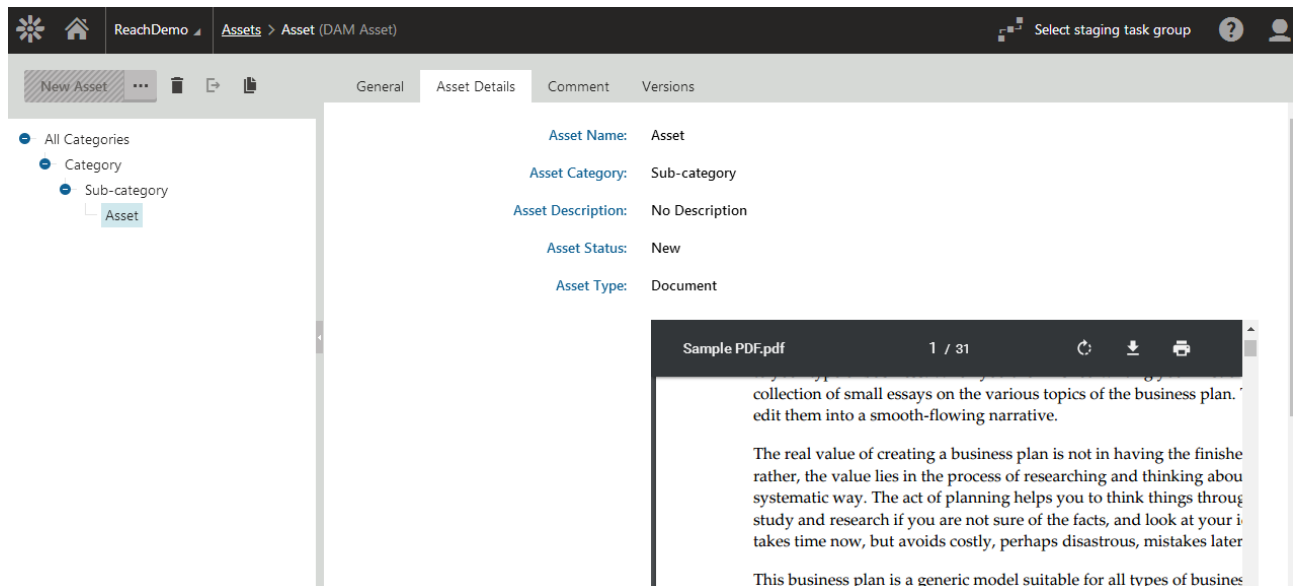
Type: Document

File: /ReachDemo/media/Images/samplebusinessplan.jpg Select Clear

**Asset Meta Information**

### 7.1.2 Asset details tab

It displays detailed information about Asset including files attached to it as shown below.



ReachDemo Assets > Asset (DAM Asset)

Select staging task group

New Asset

General Asset Details Comment Versions

Asset Name: Asset

Asset Category: Sub-category

Asset Description: No Description

Asset Status: New

Asset Type: Document

Sample PDF.pdf 1 / 31

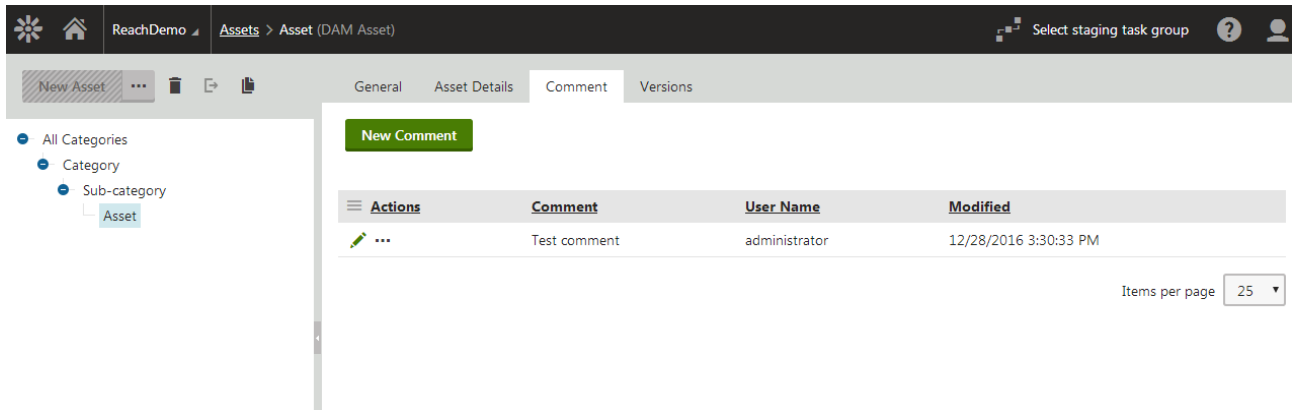
collection of small essays on the various topics of the business plan. edit them into a smooth-flowing narrative.

The real value of creating a business plan is not in having the finished rather, the value lies in the process of researching and thinking about systematic way. The act of planning helps you to think things through study and research if you are not sure of the facts, and look at your mistakes takes time now, but avoids costly, perhaps disastrous, mistakes later

This business plan is a generic model suitable for all types of business

### 7.1.3 Comments tab

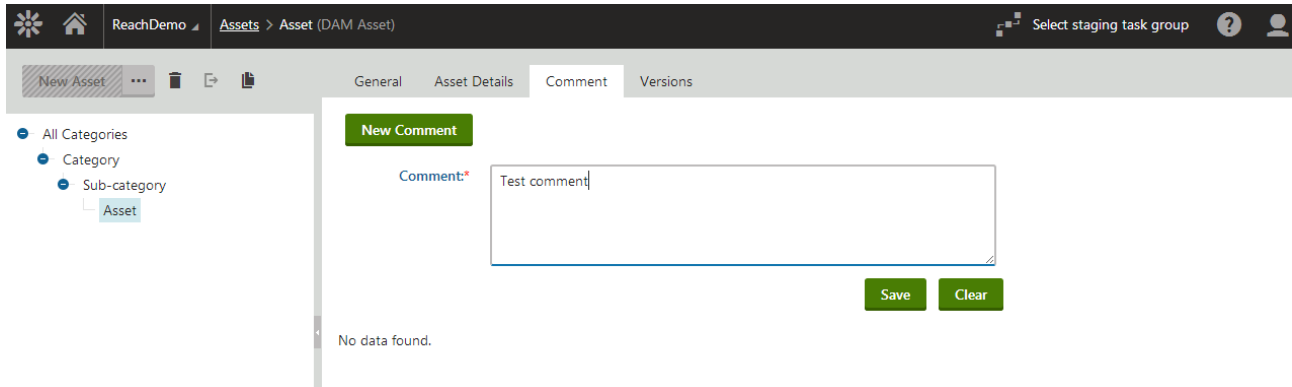
It displays list of comments with details along with 'New Comment' button.



The screenshot shows the 'Assets > Asset (DAM Asset)' page in the 'Comment' tab. A green 'New Comment' button is at the top. Below it is a table with columns: Actions, Comment, User Name, and Modified. One comment is listed: 'Test comment' by 'administrator' on '12/28/2016 3:30:33 PM'. A 'Items per page' dropdown is set to 25.

Actions	Comment	User Name	Modified
	Test comment	administrator	12/28/2016 3:30:33 PM

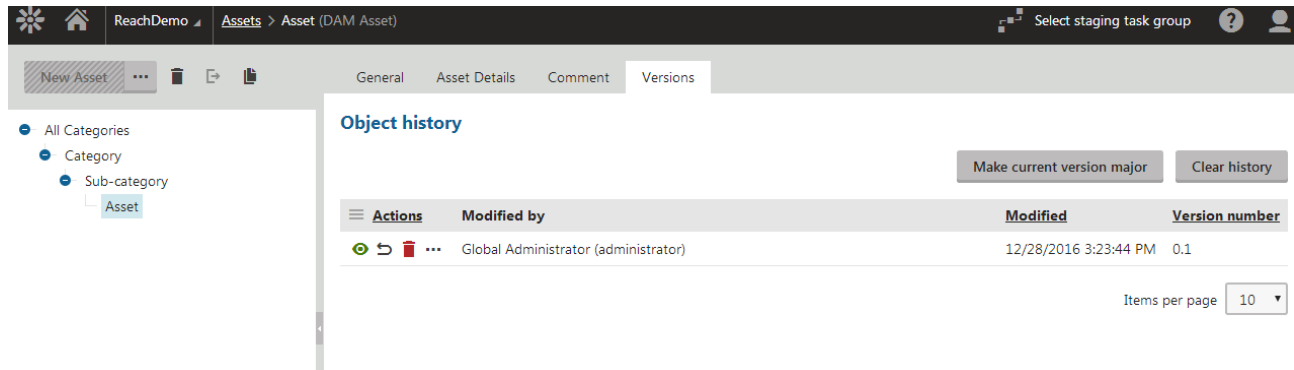
- Clicking on New Comment will display a text area as shown below along with 'Save' and 'Clear' buttons.
- Enter necessary text and click on 'Save' button, Comments will be saved and displayed in the list.



The screenshot shows the 'New Comment' form in the 'Comment' tab. A green 'New Comment' button is at the top. Below it is a text area labeled 'Comment: \*' with the text 'Test comment' entered. At the bottom right are 'Save' and 'Clear' buttons. Below the form, it says 'No data found.'

### 7.1.4 Versions tab

It displays list of versions of the Asset along with the details as shown below



Clicking on rollback icon from the list at a particular version, will roll back all the changes to that version from current version.

#### Key Features:

- Asset version can be deleted by clicking on Delete icon from Assets list

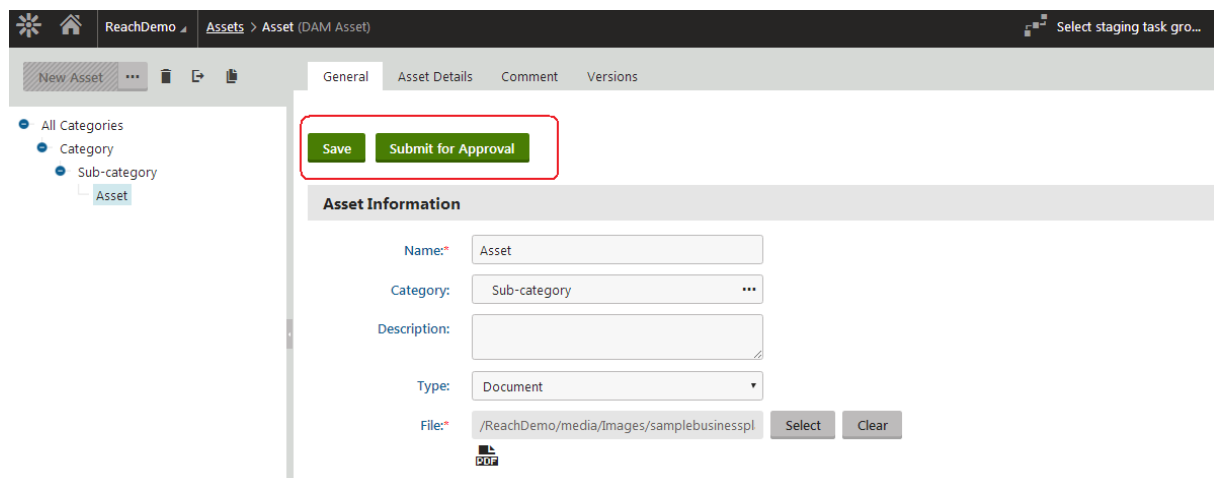
## 8 Work Flow

### 8.1 Roles

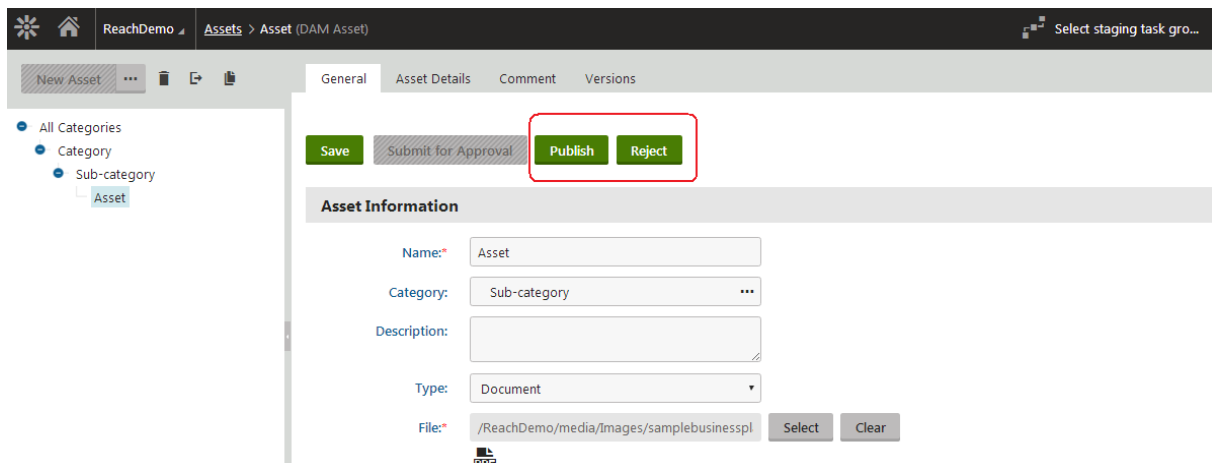
- Based on roles, permission will be changed. By default, there are two roles namely Editor and Admin.
- Editor has permission to create an Asset and send it for Approval to Admin.
- Admin has permission to create, publish, delete and archive Asset.
- To enable this module to user with Editor Permission, uncheck the 'Is global application' property in DAM module user interface.

### 8.2 Flow

- Editor creates an Asset by filling necessary details and sends it to Admin for Approval, after which editor cannot make any changes to the Asset.



- Admin reviews it and will either publish or reject the Asset.

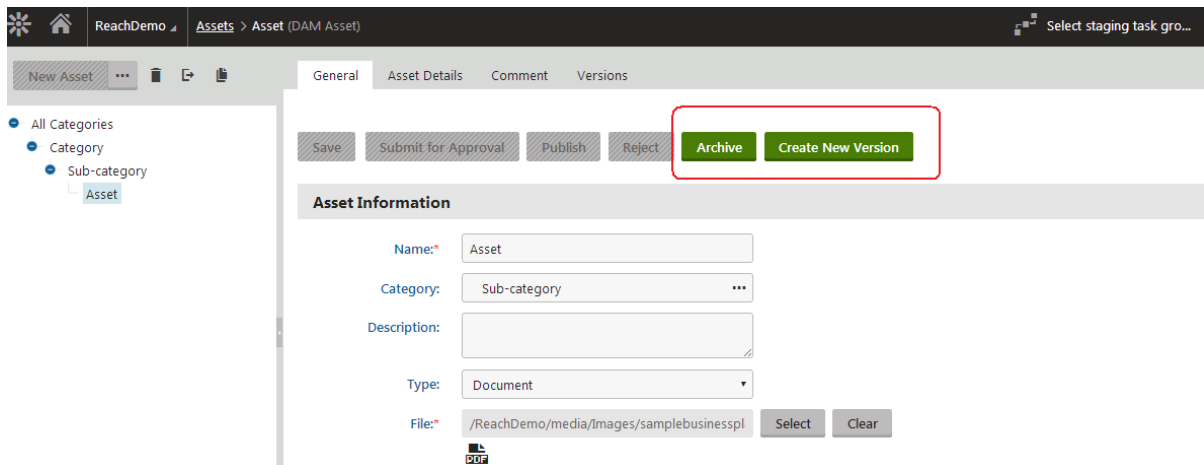


The screenshot shows the 'Asset (DAM Asset)' editor in the 'General' tab. The left sidebar shows a category tree with 'Asset' selected. The main form contains the following fields:

- Name:** Asset
- Category:** Sub-category
- Description:** (empty text area)
- Type:** Document
- File:** /ReachDemo/media/Images/samplebusinesspl (with 'Select' and 'Clear' buttons)

At the top of the form, there are buttons: 'Save', 'Submit for Approval', 'Publish', and 'Reject'. The 'Publish' and 'Reject' buttons are highlighted with a red box.

- Once published, Admin will be displayed with two options namely Create new version, Archive.
  - Clicking on Create new version will enable Creator edit the Asset and submit for approval to admin.
  - Clicking on Archive will unpublish the content from live site.



The screenshot shows the 'Asset (DAM Asset)' editor in the 'General' tab. The left sidebar shows a category tree with 'Asset' selected. The main form contains the following fields:

- Name:** Asset
- Category:** Sub-category
- Description:** (empty text area)
- Type:** Document
- File:** /ReachDemo/media/Images/samplebusinesspl (with 'Select' and 'Clear' buttons)

At the top of the form, there are buttons: 'Save', 'Submit for Approval', 'Publish', 'Reject', 'Archive', and 'Create New Version'. The 'Archive' and 'Create New Version' buttons are highlighted with a red box.

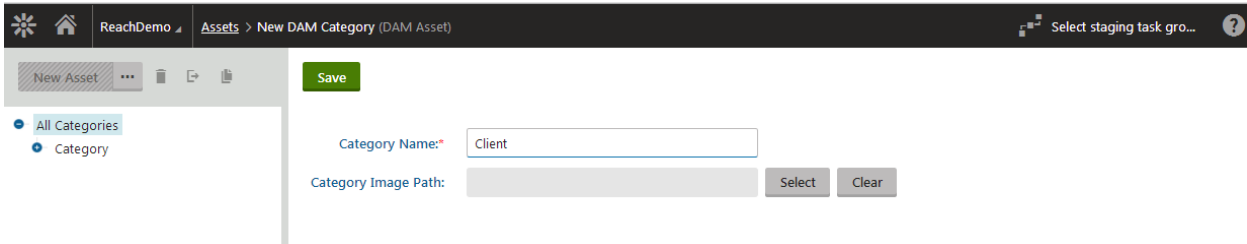
- Once rejected, Editor will again have option to make changes to the Asset and resubmit it for approval to Admin. Process continues until the Asset is published.
- This workflow can be used even after enabling 'Check-in/Check-out' property in Settings -> Object versioning.

NOTE: Only published items can be archived.

## 9 Case 1 –Product Management

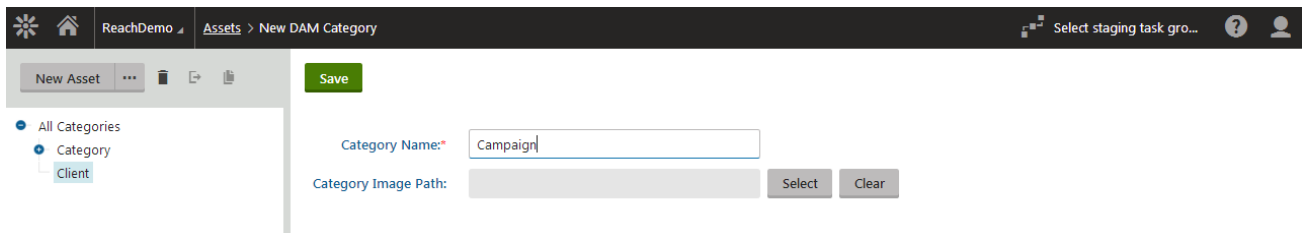
### 9.1 Category Management

- Category can be used to differentiate products based on their type.
- User can add category under another category.
- Client can be added as a Category as shown below.



The screenshot shows the 'New DAM Category' form in the ReachDemo application. The breadcrumb trail is 'Assets > New DAM Category (DAM Asset)'. The left sidebar shows a tree view with 'All Categories' and 'Category'. The main form has a 'Category Name' field with the value 'Client' and a 'Category Image Path' field. There are 'Save', 'Select', and 'Clear' buttons. A 'Select staging task gro...' button is in the top right corner.

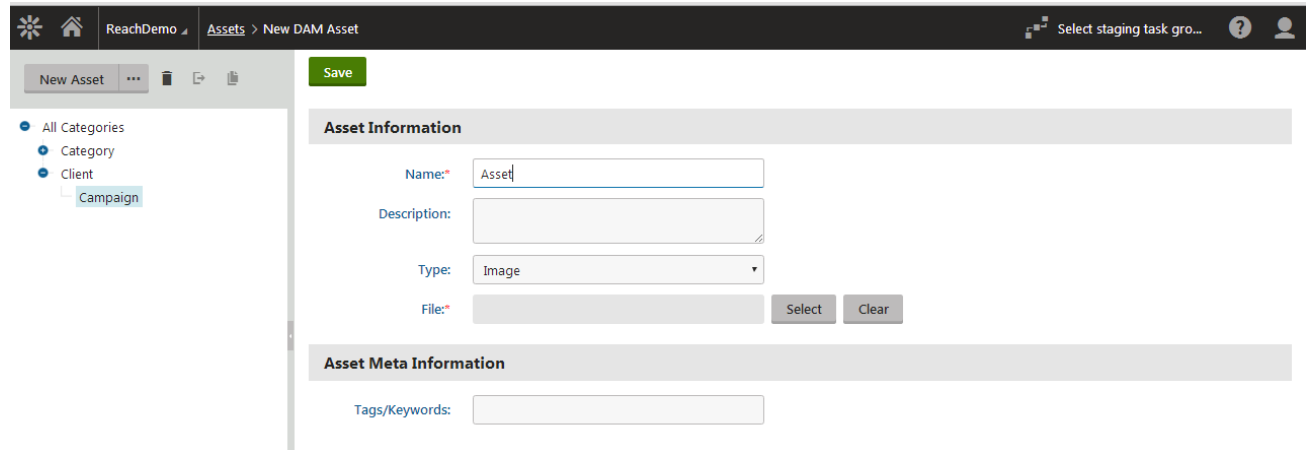
Campaign can be added as a sub-category under Client category



The screenshot shows the 'New DAM Category' form in the ReachDemo application. The breadcrumb trail is 'Assets > New DAM Category'. The left sidebar shows a tree view with 'All Categories', 'Category', and 'Client'. The 'Client' category is selected, and the 'Category Name' field contains 'Campaign'. The 'Category Image Path' field is empty. There are 'Save', 'Select', and 'Clear' buttons. A 'Select staging task gro...' button is in the top right corner.

## 9.2 Asset management

- Asset can be used to display products. Multiple products can be displayed under a Category.
- Clicking on a specific Category will display list of Assets under it.
- Clicking on Add Asset page will display below page



- Once clicked on Save, it will be added under selected category i.e., Campaign.

## 9.3 Workflow

- Creator can add a product and submit it for approval to Admin
- Admin can either publish or Reject the asset shared by Creator.
- Once Asset is published, it will be available to end users(based on access level).
- On Rejection, Asset will be back to previous level for editing.

## 10 Case 2 – Project Management

### 10.1 Category Management

Category can be created for each phase of the project as Initiating, Planning, Executing, Monitoring and Closing.

### 10.2 Asset Management

Once category is created, user will be able to choose category and create asset corresponding to category.

Suppose user has selected Initiating as category then below asset can be created:

- a) Objectives of project
  - b) Organization Process
  - c) Project Definition
  - d) Risk document
  - e) In scope document
  - f) Constraint etc.
- During Asset creation user will be able to select asset type , description and upload the file(image,video or documents ) for reference.
  - Once Asset created, Asset Detail , Comments and version options will be available for end user to preview the selected asset , provide the comment.
  - User can move to previous version of document by using Version option.

### 10.3 Workflow

User will be provided with integrated workflow feature ,which will be used as below:

- Once Asset is created by PM or admin and if review is done, he will submit for approval to next level (Senior leaders)
- Senior leaders(Admin) will have option to publish or Reject the asset shared by PM.
- Once Asset published, will be available to end users(based on access level). On Rejection, Asset will be back to previous level for editing.

## 11 Case 3 – E-Commerce

### 11.1 Category Management

Category can be used to differentiate products based on their type.

### 11.2 Asset management

- Asset can be used to display products. Multiple products can be displayed under a Category.



- For example, 'Electronics' can be added as a Category, 'Mobile' can be added as a sub-category<sup>1</sup> under which sub-category<sup>2</sup> can be added as 'Brand Name' and product can be added as 'Mobile Series Name' with its details.

## 11.3 Workflow

- Creator can add a product and submit it for approval to Admin
- Admin can either publish or Reject the asset shared by Creator.
- Once Asset published, will be available to end users(based on access level).
- On Rejection, Asset will be back to previous level for editing.

## 12 Appendix

### 12.1 Objects used in DAM Module

OBJECTS/TYPE	DESCRIPTION
<b>Form controls</b>	
DAM Category selector	This Form Control is for Fill the all available DAM categories
<b>Page Templates</b>	
DAM New/Edit Object	This Template is for creating , Updating Asset and used as a template for the workflow
DAM Object Tree	This Template is for placing the DAM object TreeMenu webpart
DAM Template	It is used for selecting a template while creating a page which is a default template from DAM Module.
<b>Page Types</b>	
DAM Transformations	This is container page type from DAM Module, it contains default Transformations which displays text content and asset file information.
<b>Resource Strings</b>	
	All the Resource string are used to display the alert messages
<b>Web Parts</b>	
DAM Asset Repeater	This webpart Render the available Assets by default. It has the option for category selection,
DAM Category Actions	This web part is specific to Module Userinterface for maintaining the Asset workflow.
DAM Object Tree menu	This web part is specific to Module Userinterface for displaying DAM category and assets as a tree view
<b>Settings keys</b>	
DAM	This key is for setting the Versioning for Asset