

Introduction

Ingestion Assistance facilitates the content migration from one of your current storage systems into Brandfolder. It is important to have your priority files consolidated into one, central location prior to uploading. Together, our Solutions Engineers (SE) and your Project Manager (PM) will assess your company's unique goals and use case to provide step-by-step guidance for how to move and sort these Assets.

By default, Ingestion Assistance is a service included with a Guided+ and higher Onboarding package and must be used before Onboarding expires. Although Clients are not required to activate this additional support benefit, there are no extensions or refunds if Ingestion Assistance is not utilized. This service includes **a maximum of 3 rounds of ingestion.**

Timeline

On average, Ingestion Assistance takes 2-3 weeks to complete. To best leverage this service, we highly encourage Clients to initiate the ingestion process during the first half of Onboarding. Starting Ingestion Assistance earlier gives the PM and SE the necessary time to evaluate the current state of your storage and provide recommendations and materials to help you prepare for the file transfer.

Methods

Applicable methods are based on where your Assets are currently located and the export capabilities of that specific platform. For a transfer method to be approved, we require that the files are migrated programmatically (i.e. we will not individually download and upload your files). Your Assets will also need to be accessible by one of our ingestion tools for a bulk file transfer. The PM and SE cannot assist with the import if we don't have the proper access.

Coming from another DAM

If your company content is coming from another Digital Asset Management system (DAM), please note there are limited approved methods for directly importing from some of our competitors. In this instance, the best course of action is to inquire which "Off Boarding" services your vendor provides. The most common off-boarding approaches are:

- Providing a comma-separated values (CSV) sheet of metadata - This approach is critical for sorting and organizing your Assets programmatically once in Brandfolder.
- Providing a CSV of metadata with links to files - If the CSV contains links to your files, they must be publicly accessible and direct to the file. We cannot access files behind a sign-in or that only link to a download page. Click [here](#) for more information on CSV File Ingestion.
- Google Cloud Storage (GCS) Bucket - This temporary, but secure, cloud based storage gives us the ability to connect and pull files directly from the bucket into your Brandfolder.

sFTP (Secure File Transfer Protocol)

Ingestions conducted via sFTP are used when data does not reside in the cloud and either:

- Regularly occurring ingestion will occur (i.e. daily updates) or;
- Data volumes greater than what a user would upload via the Brandfolder UI uploader box (i.e. 500 files)

First, your dedicated PM will activate our sFTP feature. From there, you will configure the sFTP credentials and begin destination mapping.

[Click here](#) for more information on sFTP File Ingestion.

Google Drive, Dropbox, Box

We are able to connect to the above file-storage services using our internal ingestion tool which enables us to upload top-level folders directly into your Brandfolder. If possible, create a folder called “[Your Company Name] Brandfolder Ingest” and move any needed sub-folders into that location.

Below is the permission access we require for each service:

- **Google Drive:** We need to be added as a Content Manager on your Team Drive. We are unable to connect to folders that are “Shared with me”.
- **Dropbox:** We need to be added as a Team Admin on your account or as an Editor on the folder(s).
- **Box:** We need to be added as an Editor on the folder(s) for a successful upload to occur.

CSV with publicly hosted links

Ingestion through a formatted CSV can be done initially to easily upload existing, hosted files/assets with their specific Tags, Custom Fields and Descriptions. Hosted file links have to be direct to the file and cannot be a link that either expires or requires a login.

[Click here](#) for more information on CSV File Ingestion.

GCS (Google Cloud Storage)

Ingestion facilitated through a Brandfolder owned and managed GCS Bucket benefits scenarios where the data volume is greater than 500GB. The process will be initiated and facilitated by your PM who will establish top-level folder destination mappings. Careful curation as well as thoughtful selection and organization of content will accelerate this process and timeline.

AWS S3 (Amazon Web Services)

We have the ability to move content from an S3 instance into a GCS Bucket if you are using Amazon Web Services (AWS) as your hosted storage provider.

Ship a Hard Drive

If your company opts to share a Hard Drive for Ingestion Assistance, files must be contained on a single drive that is USB or USB-C compatible. If the quantity/storage size of your content exceeds a single hard drive, it would be best to opt for a Google Transfer Appliance (GTA).

Metadata Application

If you have existing metadata we can apply that information to your Assets, post-ingestion. You will need to provide that information in a formatted CSV based on the following requirements:

- All metadata updates should be combined in one properly formatted CSV. We can not do conversions or updates to your CSV.
- There cannot be any duplicate file names in the CSV.
- Fields and file names cannot contain special characters such as: `><(){}[]/\“‘*:&$™®©`
- Tags, Labels and each Custom Field should be in their own columns and semicolon separated.

Your PM will work with your team to help define your taxonomy and can provide guidance on how to clean up existing metadata.

Your PM will not manually add Tags or Custom Fields to your content by reviewing individual Assets. At Brandfolder, we take a collaborative approach with Onboarding; you are the expert of your product/organization, and we are the Brandfolder experts. The application of additional taxonomy is outside the scope of the project and outside the expected expertise of the PM.

Taxonomy Update and Expansion

There are several tools and capabilities within the platform that make cleaning up or expanding your taxonomy quick and simple. Your PM will train your Admins on best practices and provide guidance on how to effectively make these updates without hours of manual labor.

Keep in mind, your folder structure will be brought in from ingestion automatically as Tags which can be managed from your Brandfolder's Bulk Management page.

Automations can also be leveraged to:

- Programmatically organize your assets based on metadata provided to the Brandfolder team.
- Add additional Tags or Custom Fields based on any existing Tags or Custom Fields.
- Reorganize Assets into Sections, Collections and Labels from tagged folder structure