OpenAsset customers are guided through the process of Onboarding by our Onboarding Team. During this stage of your OpenAsset Customer Success journey, we will work closely with you to establish how best to configure our software to suit the needs of your company.

You will have access to the Onboarding Team for **twelve months** from activation. While OpenAsset projects differ in scale and complexity, we aim to move you through your Onboarding project as quickly as we can so you can start to benefit from using OpenAsset.

The Onboarding process will commence with a **Kickoff Meeting** with your Onboarding Manager. This meeting will be an opportunity to discuss your Onboarding Plan, and to identify:

+ *your organization's strategic goals*
+ *Onboarding targets*
+ *key contacts within OpenAsset*

Your Onboarding will then be divided into four phases:

Content Upload

Our Onboarding Team are experts at handling **complex data migrations**, and they will work closely with you to ensure your existing files and project data are successfully migrated across to your OpenAsset system.

The Onboarding Team will be responsible for **part or all** of the content upload project and for mapping file data into appropriate OpenAsset fields.

For **Premier Tier** customers the following services are available:

+ *migration from an existing DAM system*
+ *migration from multiple locations in a complex folder structure*
+ *multiple or phased migrations*

If you require an additional migration after completing Onboarding, you can request a quote for a bespoke Content Upload Service from the Onboarding Team.
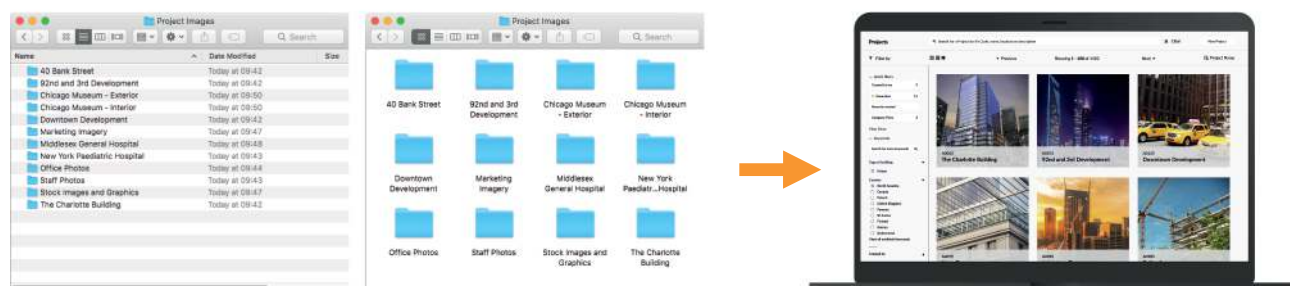
Document Creation

You will be able to use the OpenAsset InDesign Plugin and create unlimited self-service PowerPoint templates. These allow users to source images and project information directly from OpenAsset into pre-formatted documents, ensuring that anyone in your organization can create approved, branded documents at the click of a button.

Premier Tier customers will receive **5 or more custom InDesign or PowerPoint templates**.

All support for custom templates is covered by the OpenAsset subscription and any fixes or minor changes can be completed by the Customer Success Team. After completing Onboarding, you can request a quote for additional Custom Templates from the Onboarding Team.


Integration

To ensure that OpenAsset is successfully integrated with your existing systems, such as project database, CMS or intranet, our Onboarding Team will verify the field mapping. We will give full support for the setup and configuration of the Deltek Vision Connector and any SSO integrations, and our Customer Success Team will share best practice REST API usage.

For **Premier Tier** customers the following services are available:

+ *comprehensive REST API support that continues after you have completed Onboarding*
+ *critical REST API issues may be escalated to the Engineering and Operations Team*
+ *we will attend meetings with any 3rd party developers you are working with*
+ *we will support you with future integration projects*
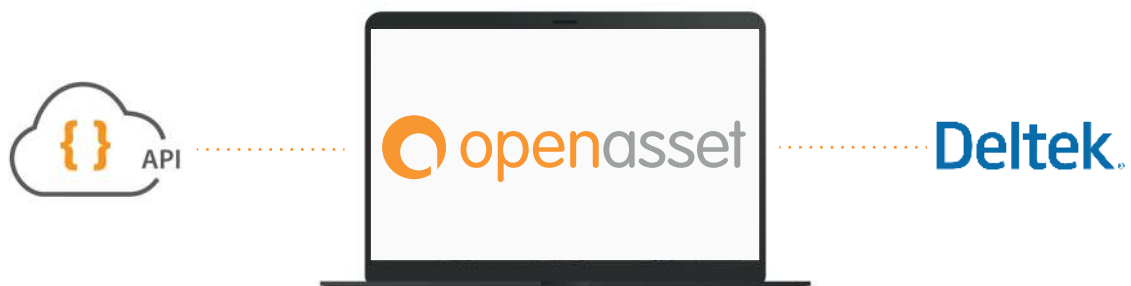
Configuration

The Onboarding Team will assist you in configuring OpenAsset to make it accessible to users and to help your organization achieve your desired goals quickly and efficiently.

There are three elements to the Configuration phase:

+ **Keywords and fields** *Our Onboarding Team will assist you in creating a Keyword Structure that will enable users to search for and discover your assets. Workshops will help you to establish the best file and project keywords to use for tagging assets, and we will configure custom fields for useful information and data*

+ **System Settings** *We will configure the categories, file thumbnails, ranks and system defaults that you will use in OpenAsset*

+ **Security Processes** *Through access levels and user groups, we will help you to establish the permissions for different users*

Resources

As soon as you begin Onboarding, you will receive access to our training and support resources:

Help Center

LinkedIn Community

Resource Library

Onboarding Tech Support

Product Videos

Webinars