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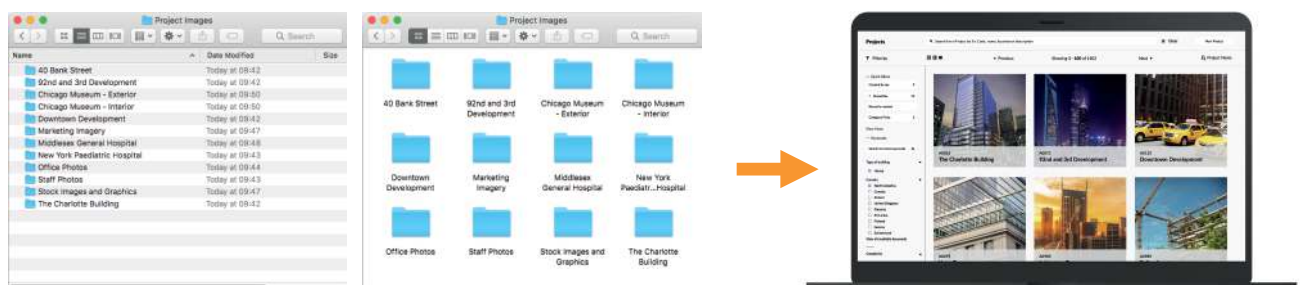
The Onboarding process will commence with a **Kickoff Meeting** with your Onboarding Manager. This meeting will be an opportunity to discuss your Onboarding Plan, and to identify:

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

Your Onboarding will then be divided into four phases:

Content Upload

With the support of your Onboarding manager and the technical support team, you will upload your own content to OpenAsset. We will advise you on the best practices for this process.

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.

Custom Templates are not included in the **Standard Tier** service.

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.

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