



OpenAsset Onboarding Plan

1

Introductions & Planning

Setting attainable goals and a timeline for your firm's onboarding

- Meet the Onboarding Team
- **Kickoff Meeting**
- Analysis of file and project metadata

2

Content Upload

Using the OpenAsset data migration migration service or manual content upload

- Finalize content structure
 - Delivery of content to be migrated
 - **OpenAsset data migration service**
 - Migration review with the Onboarding Team
- OR**
- Delivery of project list to be created in OpenAsset
 - **Content upload**

3

Applying Metadata

Applying Keywords, Ranks, Access Levels and other metadata to your files

- Project metadata
- **Ranking files**
- **File keywords**
- **Access Levels**

4

Finalizing Onboarding

Configuring your system so that it is ready to roll out to your users

- **User Groups & permissions (upload approvals, access to categories)**
- **Login Screen album**
- **Create custom image sizes**
- Scope and build custom InDesign and PowerPoint templates
- **Download the InDesign Plugin**
- Introduction to the Customer Success Team and set agenda for training
- Core User Training

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