

## STANDARD OPERATING PROCEDURE - CONSOLIDATION

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Description	Activity	
	Yes	No
1. Project Briefing -Sales and PS Team Internal Meeting		
a. Walkthrough/Demonstration of demo shown to the Client		
2. Project SOP Preparation		
3. Kick-Off meeting		
a. Team Planning -Internal		
b. Project Folder Creation with Subfolders		
c. Agenda Preparation		
d. Agenda Sharing with Client		
e. PS and Sales Meeting-with Client		
f. Formal Training Agenda Finalization Meeting -with Client		
g. <del>Tagetik</del> Champion/POC/PM Finalization Meeting -with Client		
h. Sample Data/Reports requirement Discussion Meeting-with Client		
4.Client Training on <del>Tagetik</del> Standard Training		
5.Scope Document		
a. Sample Data Validation		
b. Sample Report Validation		
c. Scope Document Preparation		
d. Scope Document Validation: Sales and PS Team Meeting		
e. Scope Document Verification Meeting-with Client		
6.POC		
7.Design Meeting		
a. Team Allocation-Internal		
b. External Consultant-scope Document Sharing		
c. External Consultant-Verification/Briefing Call		
d. Clarification call -with Client		
e. Agenda Preparation		
f. Agenda Sharing - with Client		
g. Design Meeting- with Client		
h. Data preparation Meeting-with Client		
i. Development Server Connectivity Meeting -with Client		
j. User Roles/Rights Discussion Meeting -with Client		
8.Design Document		
a. Signoff Phases internal-meeting for Contract Verification		
b. Design Document Preparation		
c. Internal QA/Validation Meeting		
d. External Consultant-Verification/Briefing Call		
e. Design Document Meeting -with Client		
f. Design Document Signoff		
9.Project Plan		
a. Design Document-activities breakup -internal meeting		
b. Project Plan Preparation		
c. Project Plan -Internal Meeting		
d. Project Plan meeting-with client		
e. Client QA Team Planning-with Client		
f. Project Communication/Escalations Planning -with Client		
g. Project Status [Weekly/Monthly] Meeting Planning -with client		
h. Project Plan Signoff		
i. Project Plan Internal-with payment triggers		

10. Project Implementation		
a. Data Analysis		
i. Staging Server Verification		
ii. TDLA Setup		
iii. Data Validation		
iv. Data Confirmation		
b. Phases Signoff Template-Validation/QA Meeting		
c. Project Phases		
i. Installation		
1. Infrastructure Analysis		
2. Installation-One environment		
3. Connectivity Tests		
4. Installation production-by Client		
5. Connectivity Tests -by PS team		
ii. Metadata		
1. Metadata Creation		
2. Internal Validation/QA Meeting/Internal Demo		
3. UAT-with client		
4. Metadata Signoff		
iii. ETL		
1. ETL Creation		
2. Internal Validation/QA Meeting/Internal Demo		
3. UAT-with client		
4. ETL Signoff		
iv. Consolidation Process		
1. Consolidation Setup		
2. Internal Validation/QA Meeting/Internal Demo		
3. UAT-with client		
4. Consolidation Signoff		
v. DE/Output Reports		
1. DE/ Output Reports Creation		
2. Internal Validation/QA Meeting/Internal Demo		
3. UAT-with client		
4. Reports Signoff		
vi. Full Internal Demo and internal sign offs		
1. Performance checks/ETL run time/Report run time etc.		
2. Look & Feel checks		
3. Dashboards/Reports quality check		
vii. Training		
1. Training Agenda		
2. Training Document Preparation		
3. End user Training		
4. IT Training		
5. Training Document Sharing		
6. Training Sign off		
viii. User Roles Setup		

ix. Testing and Quality Check		
1. Internal Project Team Standard Testing		
2. External Testing Team Custom Testing		
3. Quality Clearance before Go Live		
x. Go live		
1. Movement to Production		
2. Internal Validation/QA Meeting		
3. UAT-with client		
4. Project Pre-Closure Meeting		
5. Environment Handover Document Sharing		
6. Go live sign off		
xi. Change Request [CR]		
1. Internal QA/Validation -PS Team		
2. CR Analysis Meeting -with Client		
3. CR Internal Meeting		
4. CR Proposal Meeting- with Client		
5. CR closure		
6. Forward CR to commercial team		
11. Project Closure Meeting		
a. Internal QA Meeting		
b. Lessons Learnt-Documents Preparation		
c. Project Risks Document Update -Internal		
d. Project Technical Documentation Closure		
e. Project Full Cycle Demo-Internal (Implementation Detail, Escalations, Rs etc)		
f. Project Closure Meeting-PS Team & Sales Team		
g. Project Folder Update		
h. Project Handover to Support Department		
i. Closure Mail from PS team internally and externally		