Risk Studio

CLIENT ONBOARDING GUIDE

From first request to an evidence-based activation decision.

A practical guide to ownership, safe intake, identity, client-controlled storage, verification, training and acceptance. It does not represent general availability.

Controlled availability. Risk Studio V2.12.1 is not generally available or authorised for independent client reliance. The client's approved external engine remains the formal system of record; internal quantitative results are cross-check evidence only. QCRA is supervised-pilot only. QSCRA is not offered.

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THE JOURNEY

Four stages. One visible readiness decision.

The request, owners, evidence references and limitations stay connected from first contact through the onboarding decision.

1. **Request.** Create the SRS reference using safe contact information only.
2. **Qualify and invite.** Confirm fit and issue a high-entropy, expiring private-intake link.
3. **Configure securely.** Agree identity, tenant, entitlement and client-controlled storage.
4. **Prove readiness.** Complete synthetic verification, training, UAT and named decisions.

Readiness principles

- Least data first: public forms never request scheme files or credentials.
- No access by assumption: verified identity and tenant context must be explicit.
- Evidence before status: each pass points to a controlled record.
- No client reliance until every controlling release and scope gate closes.

STAGE 1

Request and qualify.

The public entry starts a structured conversation; it does not collect implementation files or create an approved tenant.

The client provides

Organisation, contact name, work email and the outcome required. A valid response returns an opaque SRS reference.

Do not provide

Schedules, XER files, risk registers, credentials, connection strings, scheme identifiers or sensitive narrative.

SOMA confirms

Product fit, approved module, deployment pattern, sponsor, administrator, commercial route and review owners.

Decision

Proceed to private intake, hold for clarification, or close with the reason recorded.

Service promise. Enquiries receive a reply within one working day; client launch requests within two working days. Keep the SRS reference in each launch email and meeting note.

STAGE 2

Complete the private intake.

The nominated administrator receives an expiring link. The intake captures configuration, not scheme content.

Configuration area	What is agreed
Organisation and tenant	Canonical legal/display name, tenant slug and named administrator.
Entitlement	Approved tier, seats and permitted add-ons.
Identity	Entra/OIDC configuration or the explicitly approved access pattern.
Storage	Client-controlled backend, region and opaque pointer fields.
Programme	Stable programme identifier, display name and initial generic structure.

Correction route. Corrections return through the same controlled intake lifecycle; they do not create side-channel configuration.

STAGE 3

Review and provision.

Provisioning follows approval of the exact configuration and commercial authority. Provisioning alone is not activation.

1. **Review.** Check completeness, naming, entitlement, storage, identity and programme structure.
2. **Correct.** Return a precise reason; the administrator updates and resubmits the same intake.
3. **Approve.** Record approval only when configuration and commercial authority are both present.
4. **Provision.** Create tenant and programme context through the governed control-plane workflow.

Provisioning is not release. Access can remain withheld after a tenant exists. Readiness, UAT and named decisions still control.

STAGE 4

Prove readiness before controlled access.

Each pass must link to evidence. A checkbox without evidence is not a pass.

Identity

Named users authenticate through the approved route; role and tenant claims resolve correctly.

Tenant isolation

Positive and negative tests prove one tenant cannot access another tenant's data or state.

Storage

Read, write, delete, restore and offboarding probes use approved client-controlled storage and no exposed secret.

Operations

Audit events, monitoring, support, rollback and incident escalation are exercised with synthetic data.

Gate rule. No live client data and no SRS quantitative reliance until every required technical and human gate is evidenced and passed.

HANDOVER

Train, accept and record the decision.

The onboarding path ends when the client can operate safely and limitations are understood - not when an account is created.

1. **Training.** Run role-based sessions with approved synthetic or reference data.
2. **UAT.** Complete agreed scenarios and record issues, owners, retests and accepted limitations.
3. **Activation decision.** Named owners confirm the exact scope, evidence, restrictions and support route.
4. **Early-life support.** Use a short review period with clear escalation and closure criteria.

Minimum handover pack

- Named release owner, client administrator, service owner and support contact.
- Approved deployment and storage boundary with evidence locations.
- User guide, training record, open-issue list and agreed workarounds.
- Recorded decision, first review milestone and offboarding route.

READINESS CHECKLIST

The short version.

- SRS request reference created and retained.
- Sponsor, administrator and SOMA launch lead named.
- Controlled scope, commercial route, identity and storage agreed.
- Private intake reviewed, corrected and approved.
- Tenant provisioned through the governed workflow.
- Identity, isolation, storage, recovery, operations and offboarding evidence passed.
- Training and UAT completed; limitations and open issues accepted.
- Named numerical, accessibility, security, privacy/legal, commercial, client and release decisions recorded.

Separate release decision. Green onboarding tests do not themselves authorise product release, public application cutover or independent client reliance.

Begin safely

Use the public request only for safe contact and desired-outcome information. Never email client files or credentials.

Request access | Email hello@somariskstudio.com