ORION / Client Portal

UAT closeout & controlled rollout

STATUS NOTE | 08 OCTOBER 2026 | REVISION 1.2

> **UAT COMPLETE / LAUNCH PENDING**
>
> Controlled pilot recommended. Production release remains subject to final business approval.

01 Release overview

ORION is the working name for the Finance Capital Client Portal rollout. The first release covers client sign-in, access to published documents and notification preferences. User acceptance testing (UAT) closed on 07 October with the business checklist signed off.

02 Milestones

MILESTONE	DATE	STATUS
User acceptance testing	07 Oct 2026	Complete
Pilot cohort onboarding	15 Oct 2026	Scheduled
Production launch	22 Oct 2026	Approval pending

03 Ownership & release decision

PERSON / TEAM	RESPONSIBILITY
Daniel Cohen Client Operations	UAT coordinator; pilot participant list; readiness pack and user feedback.
Maya Levi Head of Client Operations	Business owner; final approval for client communications and production release.
Internal IT Portal Support	Account provisioning, service-desk triage and production release execution.

Pilot operating notes

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04 Coordination & working locations

AREA	WORKING ARRANGEMENT
Pilot coordination	Microsoft Teams / ORION-Pilot channel
Working documents	SharePoint / Client Operations / ORION
Support intake	Internal IT service desk / Portal Support queue
Readiness review	Tuesdays, 09:30-10:00 / Tel Aviv local time

05 Support & approval route

Daniel Cohen consolidates pilot feedback and separates access requests from product issues. Access requests go to the Portal Support queue. Changes to the rollout scope or client-facing wording go to **Maya Levi** for business approval.

The pilot remains restricted to the approved participant list. Production invitations are held until the business owner confirms readiness.

06 Items to close before launch

01 Publish the final client quick-start guide in the working document area.

02 Confirm the pilot participant list and service-desk coverage with Internal IT.

03 Close the remaining user feedback items and obtain business release approval.

07 Document control

REVISION	DATE	CHANGE
1.1	06 Oct 2026	UAT review draft; pilot preparation notes.
1.2	08 Oct 2026	UAT closeout recorded; launch approval still pending.

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