

## Client Offboarding Procedures

*Once a client contract is terminated with Riskonnect, there are multiple steps to be completed by other departments. All other company tasks should be completed before Tech Ops can start and complete the following tasks. The following procedures detail the steps required for offboarding a client.*

Tech Ops should receive a case from Sales Ops noting a Client offboarding. All data services items should be completed before Tech Ops starts their portion of the Client Offboarding process.

A list of the company responsibilities for Client Offboardings can be found: [here](#).

### Org Cleanup

1. Verify that all client users in the org are frozen.
2. Verify that all sandboxes have been removed inside the org.
3. Download login history for client org and post to the case for audit purposes, if needed.

### Okta Cleanup

4. Remove sandbox connections in Okta.
5. Remove any additional Okta access for production org; limit access to Sales Ops and System Admin Okta groups only

### Server Cleanup

6. Delete all VisualCron jobs related to the client (Check Production and Development SQL Servers, BIRPT01, and Cognos DB servers).
7. Verify client directories are gone from Production and Development SQL Servers.
8. Remove client FTP directories.
9. Remove client FTP accounts.
10. Remove client related databases from Development SQL Servers, Production SQL Servers, and Cognos.
11. Remove all Linked Servers from Development SQL Servers, Production SQL Servers, and Cognos server.
12. Remove Cognos database user from SQL Server.
13. Remove all licenses for Cognos; note in a new Platform license record how many Cognos licenses were deprovisioned.
14. Remove all client Cognos infrastructure: security groups, public and administrative folders, data source.
15. \*\*Determine if any internal IP addresses were provided for internal FTP feeds. Delete IP addresses from firewall at Rackspace.
16. Delete all apps from Okta.

17. Remove all passwords from Zoho vault (org admin, datamanager, databases)
18. Delete admin email groups from Google Apps.
19. Delete data email groups from Google Apps.
20. Tech Ops Closes Tech Ops Case and notifies Sales Ops to complete remaining steps

## Change Log

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- 12.21.2017 - Calloway - Removed references to PTs, and replaced with Cases; Formatting; Removed reference to singular Dev and Prod servers
- 06.29.2017 - Calloway - Updated with new agreed upon structure based on multi-department ownership of different parts of the process; changed modified to last updated; Linked to multi-department document
- 4.17.2017 - There will be documentation forthcoming on how to offboard edocs and conga.
- 11.16.2016 - JH - Step 25 now includes notification of the need to remove the final Okta app when the org has been deleted by SF.
- 10.21.2016 - JC - Complete revamp of doc based on new steps for all parties involved.