

New file name	Folder in Sage City	Description
00 Methodology		
STREAM_Implementation methodology_V2.pptx	00 Methodology	Overview of the STREAM guiding principles, methodology, phases and STREAM Management Process. Also provides information on multi-site implementations.
STREAM_Implementation methodology_V2.docx	00 Methodology	Description of the STREAM methodology phase by phase, project governance principles, and the project management pillars. Also provides insight on knowledge transfer, change management and more.
01 Define		
STREAM_Solution Definition_V2.xlsx	01 Define	Asset allowing to qualify, understand project scope and prepare the sales speech.
STREAM_Technical Questionnaire_V2.xlsx	01 Define	Questionnaire helping to collect information to confirm feasibility, formalize recommended architecture, and estimate tuning service to include in the proposal. This questionnaire is filled out with the prospect to capture the project scope, the expected volumes (common data and transactional data), the operation constraints, and the requested interfaces and IT environment.
STREAM_Presales methodology presentation_V2.pptx	01 Define	Template used by the Sales team to present the STREAM implementation process to prospects. (Note: Irrelevant slides can be removed)
02 Initiate		
STREAM_Sales Handover Checklist_V2.xlsx	02 Initiate	Asset defines what is provided to Professional Services from Sales/Pre-Sales team.
STREAM_Data migration guidelines_V2.docx	02 Initiate	This document provides guidelines to scope the data to migrate, define the migration process, and clarify the related roles and responsibilities.
STREAM_Project Plan Task List_V2.xlsx	02 Initiate	This is the high level project plan template representing a normal STREAM implementation. Based on the project scope and context, adjustments will be necessary. Keep in mind, this represents the minimum list of tasks, so be careful when removing an existing task. The responsibilities for each task are normally defined in a RACI matrix.
STREAM_Initiate_Sign_Off_V2.docx	02 Initiate	Template for Initiate phase gateway sign off.
03 Design		
STREAM_Workshop Agendas_V2.xlsx	03 Design	Workshop agenda example that needs to be adjusted based on the actual project scope and estimate
STREAM_Solution Overview_V1.pptx	03 Design	Template to present the main Sage X3 configuration rules, business flows, and highlight the customizations and interfaces. The purpose of this presentation is to have a first customer feedback before building the SDD. The business flows examples provided can be useful as well during the discovery sessions and design workshops.
STREAM_Design_Sign_Off_V1.docx	03 Design	Template for Design phase gateway sign off.
STREAM_Detailed Technical Design_V1.docx	03 Design	Template used to formalize the solution scope of customized items (complex setup, customization, interfaces, data migration, workflows, reports, etc.).
STREAM_Configuration Checklist_V2.docx	03 Design	Internal document used to define the responsibilities among the project team for the different configuration items, and to monitor the progress of the configuration build.
04 Build		
STREAM_Test Script Template_V2.xlsx	04 Build	Template to define the conditions to test, the expected results, and track the tests execution.
STREAM_Build_Sign_Off_V1.docx	04 Build	Template for Build phase gateway sign off.
05 Validate		
STREAM_Go Live_Cutover Checklist_V2.xlsx	05 Validate	Template to adapt to organization all necessary activities to complete upon Cutover. The template includes the definition of the responsibilities and expected duration to be able to build a detailed schedule.
STREAM_Validate_Sign_Off_V2.docx	05 Validate	Template for Validate phase gateway sign off.
06 Deploy		
STREAM_Deploy_Sign_Off_V2.docx	06 Deploy	Template for Deploy phase gateway sign off.
08 Project Management		
STREAM_Steering committee presentation_V2.pptx	08 Project Management	Template used during steering committees to present the project and budget status, review the risks & issues and monitor the milestones and deliverables completion.
STREAM_Project Status Report Process_V2.pdf	08 Project Management	Document explaining how to use the Project Status Report (PSR)

STREAM_Project Status Report Template_V2.docx	08 Project Management	The Project Status Report (PSR) is designed to enhance project success by enabling the project team to highlight progress, status, risks and issues at any given time to all key stakeholders of a project
STREAM_Change Request Form_V2.xlsx	08 Project Management	Change request form used by the Service Provider to capture the requested change, the solution and estimated effort, timeline ,and fees. This template can be used to capture the customer sign-off. Simple changes might not require using this template, in that case the PSR is used to log and approve/reject the requested change.
STREAM_Items Follow Up_V2.xlsx	08 Project Management	Central tracking log for questions, actions, issues, gaps, and changes. This file can be used to produce summary graph to use during the project committees.
STREAM_Gateway sign off checklists_V2.xlsx	08 Project Management	Internal checklist to monitor the necessary tasks to complete before each phase sign off.
STREAM_Data strategy_V2.pptx	08 Project Management	Data strategy presentation used, from the Define phase, to initiate a discussion around data management and data migration process.
STREAM_Lessons learned_V2.xlsx	08 Project Management	Template to capture the lesson learned. It has to be used at the end of the project but it can be useful as well at the end of each phase.
STREAM_Meeting_Minutes_V1.docx	08 Project Management	Template to write meeting minutes and initiate actions tracking.