Checklist: System Audit

This Audit can be used for gradual roll outs where Categories and/or Record Types go live in phases (Building Department, followed by Health, etc.) or for completed configurations (all Categories and Record Type go live together).

★ **Tip:** Your completed Info Gathering Worksheet is a great tool to use alongside this checklist.

General

- ☐ Logo uploaded.
- ☐ Front Page cover photo, headline, and subheader added.
- ☐ Stripe set up for credit card payments.
- ☐ Location is set.

Users & Groups

- ☐ Employees who need to review, approve, and/or inspect, have been given access.
  - ★ **Tip:** Make sure all have accepted their invitations and have successfully logged in.
- ☐ If Groups are being used, Users have been assigned to each Group.

Inspection Types

- ☐ All Inspection Types are created.

Categories

- ☐ Categories created

Look through each Category**:**

- ☐ Information about the category has been proofread.
- ☐ Cover photo uploaded and photo credit added.
- ☐ The Category is Published.

Record Types

Overall

- ☐ They are assigned to the correct Category.
- ☐ They are set to either Public or Private.
  - ★ **Tip:** Public means that anyone accessing your permitting site can submit an application. Private means it can only be submitted by users.

Look through each Record Type**:**

Settings

- ☐ The Record Type is set to Published.
- ☐ Online Submission settings are enabled:
  - Who can submit. Default: Disabled.
  - Who can view. Default: Internal & Applicant.
  - Applicant: Collects the applicant's information at the start of the process. Default: Turned on.
  - Location: Collects the address at the start of the process. Default: Turned on.
  - Project: Gives the applicant and the reviewer the ability to associate a record with a project. Default: Turned off.

- ☐ Assigned to the correct Category
- ☐ Information is included in the Description text box (optional, but recommended).
- ☐ Additional content, such as department information and announcements, are included in the Content box (optional, but recommended).
- ☐ Requirements are all listed, if requesting.
- ☐ Employee Access set (optional).
  - ★ **Tip:** This setting gives users and groups access to editing applications and/or managing workflow steps for the specific Record Type.

Form

- ☐ Spelling and grammar checked in all fields and sections.
- ☐ All Sections are ready:
  - Help text completed.
  - Shown to Public or Private. Default: Show to Public.
  - Auto-fill enabled (optional).
    - Correct source and search terms are selected.
  - Conditions are set (optional).
- ☐ All Fields are complete:
  - Required Fields reviewed.
  - Viewed by Public or Private is set.
    - ★ **Tip:** If it's Private, then it can only be accessed and completed internally.
  - Auto-fill enabled (optional)
    - ★ **Tip:** This option only appears if Auto-fill is enabled for the Section.
    - Correct Source selected.
    - Public can Modify enabled or disabled. Default: Disabled.
  - Conditions are set (optional)
  - For Drop-down menus: Options added

Documents

- ☐ All Documents needed for the Record Type are created.
  - ★ **Tip:** Make sure they're named appropriately, as the applicant will see that name when it's issued.
- ☐ Each Document includes all the information that's required for and pertinent to that permit or license.
- ☐ All Data Merge tags used in the Document match the tags available.
- ☐ Spelling and grammar checked.

Fees

- ☐ Fees are created and their respective calculations are accounted for.
- ☐ Each Fee has an appropriate Label (ie. Permit Fee) and have been associated with an Account number (both are optional).
- ☐ All Conditions have been double checked.
- ☐ Minimum and maximum fees have been added (optional).

Workflows

- ☐ They are set to either Public or Private.
  - ★ **Tip:** Public means that anyone accessing your permitting site can submit an application for that workflow. Private means it can only be submitted by employee users.
- ☐ Each have a brief description entered.

Look through each Workflow**:**

- ☐ All necessary steps are there and in the correct order.
  - Within each step, the Do this Step drop-down has the correct selection: After the previous step or With the previous step. Default: After the previous step.
- ☐ The correct Users and/or Groups are assigned to the Approval and Inspection steps.
- ☐ Documents are attached to the Issue Document steps.
  - Expiration date set (optional)
  - Print At Home enabled or disabled. Default: Enabled.
- ☐ All of the appropriate Inspection Types have been added to the Inspection Steps.
- ☐ Inspection Steps give the applicant the option to schedule their own inspections. Default: Not enabled.
- ☐ Fees are assigned in the Payment steps.

★ **One Final Tip:** Once everything has been checked, be sure to test each form and workflow as both an applicant and an employee user. See our Testing Tip Sheet for guidance.