

Checklist: Ready to Go Live?

The time has come and you're ready to start officially accepting permitting requests online! Before you open the gates to online permitting, review this list to make sure you have all of your ducks in a row.

Employees

- Everyone who needs access has been invited and has logged in.
- They have all been trained!
 - ★ **Tip:** Distribute copies of the *Employee Training Guide* to prepare staff.
- They understand their roles in each of the workflows and feel comfortable using the site.

Storefront

- Logo and text for header and subheader are complete in the General section.
- Category cover photos, descriptions, and content are complete.

System Set up

- Your site is connected to Stripe.
 - ★ **Tip:** This is required in order to collect and process payments through the site.
- Settings and system have been completely audited.
 - ★ **Tip:** See the *System Audit Checklist* to make sure you've gone through everything.
- Record Types and Workflows have the correct visibility (Public or Private). Descriptions and content are complete.

Technical Add-Ons

- ★ **Tip:** These may not all be applicable to your set up.
- MAT (Master Address Table) is uploaded and fully functional.
- GIS (Geographic Information System) integration is set up and loaded on the map page.
- Contractor integration is set up and populating correctly on the form(s).
- Historical Data is uploaded and mapped properly.
 - ★ **Tip:** Determine ahead of time if this information is critical or not to your site going live.

Testing Complete

- The site, all of the applications, and workflows have been thoroughly tested.
 - ★ **Tip:** Use the *Testing Tip Sheet* for guidance.
- Any corrections or changes found while testing have been made.

Community Awareness

- Announcements made through various channels (email, social media, etc.).
- Link to the permitting site has been added to the appropriate places on the city website.
- Other departments and offices are aware of the new site and system.