Testing Tip Sheet

After the system has been audited and before going live, we recommend that you test all of the records and workflows to make sure everything is working properly and according to your vision.

★ **Tip:** Use the *System Audit Checklist* to assist you with auditing your site.

Why test.

- ✓ To make sure the record types, workflows, etc. are all configured.
- ✓ To make sure the citizen experience on the site matches your expectations of the permitting process.

When you're ready to start testing:

- We recommend that you do a few rounds of applications as both a citizen or contractor applying on their own and as an employee completing an application on behalf of someone else.
    - ★ **Tip:** To apply as a citizen, use an alternate email address from the one associated with your user account.
- Recruit at least one of two additional people (who are trained and are going to be using the site) to assist with testing.
    - ★ **Tip:** Set up a time for everyone to test together. It will make the process go a lot faster!

What to test.

Applications

- Complete <u>at least</u> 2 applications for each workflow (as a citizen and as an employee).
    - ★ **Tip:** Use some old applications with real permit information. This will give you a clearer picture on the accuracy of the application.
- Make sure any fields that are set to auto-fill populate with the correct information (if applicable).

Workflows/Record Timelines

- For each step, make sure the correct person (in the correct group) is notified.
- Complete the Inspection Steps:
    - Click Pass or Fail next to each Inspection Type
    - To complete an inspection, click Approve.
- Download and print the documents that are issued.

Pricing

- When completing applications, be sure to fill out the fields differently each time in order to trigger any different fees.
    - ★ **Tip:** This is especially important for applications that have a more involved fee structure that are based on certain fields, include minimums or maximums, etc.

After testing.

You made it!

There are just a couple things more things to get done:

- Correct any errors and make any necessary changes to the applications, workflows, etc.
- Contact us to delete your test data.
- Get ready to Go Live!
    - ★ **Tip:** See our *Ready to Go Live Checklist* for guidance.