



# Go-Live Checklist

Version 1.0

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## Document History

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## Go-Live Checklist Overview

The Go Live Checklist is a list of actions to be performed and validated to successfully launch a site Live.

The Go Live Checklist provides CMS developers, partners and support team with effective way to be prepared to any possible risks and issues during the site development and go-live phases of the CMS implementation project.

### Benefits

- Assuring smooth and risk-free Go-Live process
- Adherence to Best Practices
- Ability to audit the site to address and manage UAT critical issues
- Easy transition to support

### Prerequisites

- UAT Completed
- End Users trained
- Content Loaded

## Document Summary

- CrownPeak Playbook – Go-Live Checklist: This document. Describes the overall process for launch planning and go-live.
- Welcome to Support: Generic PDF describing support procedures given to clients prior to go-live.
- Transition to Support Playbook: CrownPeak Internal Playbook describing contents of the Transition Document and the information required to populate the Transition Document.
- Transition Document: The document containing project-specific information for Support. Reviewed in the Transition to Support meeting with Support
- Client Requirements: The document that contains client-specific information for Support.
- Go-Live Plan: Describes in detail the actual cutover and rollback plan
- Compliance Review Checklist: The document containing information for IT for compliance review and transition

## Using the Go Live Checklist

Task	Complete?	Comments/Notes
Client Approval for launch received in writing		
Complete "Compliance Review Checklist" and deliver to IT <a href="https://connect.crownpeak.com/pause_online/documents/feature_playbook">https://connect.crownpeak.com/pause_online/documents/feature_playbook</a>		
Identify Launch Team and create Launch plan. The team should include CrownPeak PM and CrownPeak Tech Lead, as well as IT		
Create Rollback plan.		Usually it is just one task "Make the old IPs active in DNS," but may require more steps based on the implementation.
<p>Conduct a "go live" meeting with the client covering these topics</p> <ul style="list-style-type: none"> <li>- "Welcome to Support" document provided to Client</li> <li>- Client Requirements Document (include support specific documentation)</li> <li>- Transition</li> <li>- Go-Live / Launch Plan &amp; Roll-back Plan</li> <li>- Difference between publishing to live and live DNS</li> <li>- Client to prepare post-launch test plan</li> <li>- Remind customers' IT to lower the TTL prior to go live, so content will be available when DNS is made live</li> </ul>		
Complete Client Requirements Document		
Complete Transition Document		

Task	Complete?	Comments/Notes
Complete Go-Live Plan		
Create CMS / Hosting Jira Change ticket <i><a href="https://crownpeak.atlassian.net">https://crownpeak.atlassian.net</a></i>		
Conduct a Transition to Support meeting with Support  Review implementation with CrownPeak support, & CrownPeak project support team, invite PS, Support, IT Ops, and Partners to the meeting if needed.		Review PID with CP support team; whitelist IPs – include any support specific documentation that prevents CP access to Production site. CP needs to be aware of any special server constraints or configuration
Conduct a Go-Live planning meeting with IT  -Agenda TBD		
All pages should be published and tested in LIVE twice as soon as possible to repair possible broken cross-page links.  Run the orphan report to validate		
Acquire, install and test SSL cert		If site requires SSL
Review / Validate CrownPeak Search configuration in live		Run site crawler and verify search results
Review / Validate WCO Configuration. Some snippets may require redirect URLs update from Stage to Live		Create test WCO snippets and verify workflow from DEV/STAGE to LIVE
Map current URLs to new site, implement redirects/rewrite rules and reset cache		Through web config or URL template?
Ensure error handling is configured to show friendly messages (404 page not found, 500 server error)		Is this handled in web config?

Task	Complete?	Comments/Notes
Create robots.txt file or site map XML if needed		Handled by agency partner or CP?
If client has CDN enabled, is there anything CP needs to do prior to go-live?		
For sites without authentication, verify EDS permissions if they're hosting environment is EDS-enabled? Is this stated correctly?		
Execute any final database scripts (partner should submit request at least 24 hours prior to go-live)		
Validate that load balancer is distributing load to both servers and in sync.		CP IT activity
Ensure the Client prepared high-level test plan in order to run on the new Live site after the DNS cutover.		Make sure forms are tested and make any necessary SMTP changes between environments beforehand
Ensure there is a Client's network resource assigned to the DNS cutover task.		
<p>Provide the Client with hosting DNS Configuration</p> <p>Work with CrownPeak IT Operations to provide load balancer IP, or CNAME.</p> <p>CDN information if needed.</p>		
Ensure "Go-Live" team is ready at launch in case any issues arises.		
DNS cutover. Work with CrownPeak support, CrownPeak project support team, & CrownPeak IT Operations.		

Task	Complete?	Comments/Notes
Request site monitoring, Jira ticket to IT: "Please add <domain name> to the 24x7 site monitor"		Must be done after site is live

## Publishing

For publishing content for the initial go-live, the process will be easy. Typically, the site content will be published in its entirety to the "live/production" site, before DNS is cutover. This way, the site can be validated fully by the customer prior to making it "public". Making it public would be done by cutting over DNS, which would be handled by the customer's IT department.

To launch a site:

- Route from STAGE to LIVE all the contents of the /Site/Assets/folder. (We need to select only the assets that are currently on STAGE to be routed.)
- Start routing a few folders and subfolders from (STAGE to LIVE). We need to route them in different batches to speed up publishing (by doing "batches," we are creating multiple publishing threads).
- After all the folders have been sent, manually publish the assets (branches) that are on the root folder
- Review that the site is getting published correctly
- Republish folders/files if necessary.

It is best to use the Route option in CrownPeak to promote content Live. This allows users (with the correct permission) to select multiple files and move them all to the Live state in a single action.

CrownPeak recommends publishing Live begin at least 5 business days before DNS switch over.

To avoid broken links re-deploy the site after the first publishing to Live.



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## IT Operations and QA Testing Procedures

The following are the recommended steps that should be completed before the first Go-Live meetings:

### Professional Services Staff Duties

1. Read the document: "CrownPeak Playbook - New Hosting Environment v2.doc"
2. Complete the spreadsheet: "CP Compliance Review v2.xls"
3. Attach the CP Compliance Review spreadsheet to the CMS /Hosting Jira Change ticket  
<https://crownpeak.atlassian.net>
4. Request and coordinate QA testing efforts with the CrownPeak QA Manager
5. Schedule and conduct the CP Compliance Review meeting before the Go-Live meetings.
6. Schedule and conduct the CP QA Review meeting before the Go-Live meetings.
7. Review the QA testing results.
8. Attend the internal and external Go-Live meetings to ensure all issues are addressed in a timely manner

### IT Operations Staff Duties

- Work with the IT Operations manager to complete the checklists
- CP Compliance Review v2.xls
- Respond to issue identified in the internal and external Go-Live meetings.

### PlayBook Notes

Reference materials on Connect for the Go Live Checklist:

[http://connect.crownpeak.com/pause\\_online/documents/1define/2projectchecklistauditformdocx](http://connect.crownpeak.com/pause_online/documents/1define/2projectchecklistauditformdocx)