

DEPLOYMENT HANDBOOK

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ABOUT THIS DOCUMENT

This document is intended to serve as a general guide to help you through each of the phases to deploy your new website with Finalsite. The Deployment process is the framework each project is built around and is one that we've refined over 10 years - changing and progressing to meet the needs of our Clients. Depending on the scope of work you may see a slight variation of this to meet your project's specifications.

If you have any questions or need any help, contact your Finalsite Project Manager.

PROJECT SET-UP & KICK-OFF

Assigning a Project Manager

Once your contract is signed and received by the manager of the Deployment Department, the deployment team best suited to tackle your project will be assigned. Each team includes a Project Manager, Web Designer and Front-End Web Developer. Your Project Manager will be introduced in an email that includes some background information about the deployment process along with links to preparatory resources. After reviewing your contract including the scope, budget, and Statement of Work (SOW) your project manager will reach out to schedule a kickoff call.

The Kickoff Call

The project kickoff call is designed as an overview and introduction to your project. Kickoff calls typically last about an hour and cover the following agenda items:

- Review the Contract Deliverables, Statement of Work (SOW), modules purchased, corresponding data imports or integrations and creative services.
- Overview of the deployment process including covering the main project phases: Discovery, Design, Production/QA, Warranty, Training and Content Migration
- Review the preliminary timeline with key milestones
- Overview of Mavenlink (the collaborative project workspace) including: posting messages, uploading files, and reading the timeline
- Establish a recurring weekly status meeting for the duration of the project and review status reports
- Assign the first tasks to getting the project started

Preparing for the Kickoff Call

During the kickoff call, your project manager will go into detail about the project process. To help make this call a success, there are a few things you can do in advance.

Select a Client Project Contact

In order to work most effectively with Finalsight, your project team should include a primary contact. This client-side project lead will

- be the primary communication link to Finalsight throughout the process.
- coordinate the collection of assets and content materials from members of your team.
- be responsible for delivering materials to Finalsight within the project plan's timeline.
- relay communications from Finalsight to other members of your team as needed.
- initiate the training for project team members, or others, who need to learn to use the software

Join the Mavenlink Workspace

Mavenlink is the collaborative project management tool Finalsight uses to keep projects on track and on budget. The project workspace also provides a centralized place to send messages, submit files, and review upcoming tasks and timelines. An invitation to Mavenlink will be sent shortly after you receive an introductory email from your project manager. While the initial invitation will be sent to one main project contact, invitations can be extended to other stakeholders who will be active participants in the project. This can be done prior to the kickoff call, or discussed during the kickoff call.

Read Through the Deployment Process Overview

Your project manager will cover a lot of information about the deployment process during the kickoff call. While it's not a requirement, becoming

familiar with the process by reading this document in advance is one way to better understand the project expectations.

Participants

The client project Lead, the stakeholder who will sign off on the design and those stakeholders who will be heavily involved in the project and need to be familiar with the process should join the kickoff call. To ensure a smooth transition from sales to deployment and that all contract related questions have been answered, your Finals site sales person will also join the call. When possible, your Finals site Client Success Manager (account representative) will join the kickoff call as well. While their role in supporting you does not typically begin until you launch your website, there are times we include them in a project and find that this is a good time to make an introduction.

Project Kickoff Phase

The purpose of this first project phase is to introduce the two teams, review the contract, explain the deployment process and gather the information needed for your project manager to create a project plan. The project plan includes all of the project tasks and is used to schedule resources so that your project stays on track and in scope. Each team will be assigned to and held accountable for project tasks that have associated due dates.

During the kickoff call, your project manager may ask some questions about your project goals, stakeholders and availability so that they can create a project plan. You will have an opportunity to review the drafted plan to ensure that you can meet the due dates for all the tasks you've been assigned, and also to be sure that you understand the process. A careful review of the plan is one key to project success because your project manager will need to reschedule project resources and shift the timeline if deadlines are missed. If the project plan meets the needs of both teams, the project manager will ask you to sign a timeline approval.

Deployment Portal

The deployment portal is a repository for resources designed to support and enhance your deployment experience. The portal includes a wealth of

articles and tools that expand upon and support each phase in the process. These materials include articles, tools, links and pro-tips specific to the phase. To make it easy to find materials on specific topics, the navigational structure is the deployment process.

During the kickoff call, your project manager will reference the [Deployment Portal](#) (passkey = deploymentclient). While they will be present to support you at every step, we know that you'll find this portal to be an invaluable resource so take some time to explore the materials and then add it to your bookmarks so you can return to it easily.

DISCOVERY PHASE

The purpose of the Discovery Phase is to gather the assets required to begin designing your website and to set the stage for deeper conversations as we progress through the deployment process. These assets include:

- Sitemap
- Design and Marketing Survey
- Photos (Share a minimum of 12-15 photos. A drive or zip file of photos is also helpful if there is a large number)
- Logo(s) in .eps format.
- Fonts (and licensing if the font isn't free)
- Colors with hex codes
- Branding and Marketing Material (optional)

Because these assets provide the designer with the background needed to begin work on your new website design they need to be shared and approved by the due date listed in the project plan. A signed approval (a docusign form from your Project Manager) will indicate your intention to use these assets in the design of the website, your readiness to begin design and the formal completion of the Discovery Stage.

Sitemap

Sitemaps provide an outline of the navigational structure for your website; therefore, the creation of the sitemap is a critical first step when preparing for your project's design phase. The sitemap should include the tier one menu items (About, Academics, etc.), the associated tier two links, utility navigation and footer information. The tier 1 menu anchors the creative theme of the design and should be set prior to the beginning of the design phase. Utility Links and Footer information should be drafted but may evolve during the design process. We fully expect that the lower level pages (tier 2 and below) will be adjusted as content is created; however, the drafted sitemap provides a picture of the number of website pages and so that the designer can create the dropdown navigation.

As you organize your site content, your project manager will be able to answer questions and provide resources. If you would like feedback on your sitemap before submitting it, let your Project Manager know so they can be sure to account for the review time in the project plan. When you're ready to share your sitemap, please use either the spreadsheet for single or multiple domain websites in the Deployment Portal.

Pro Tip: Google Analytics, if you have it available on your current site, can help you determine which pages receive the most website traffic and those that receive the least. High traffic pages can be more prominently featured on the new site and those that get little traffic and are no longer effective should be omitted.

Design & Marketing Survey

Before we begin designing your website, we need to know more about your school, what makes you unique, your website goals, homepage content and taste in websites. The Design & Marketing Survey is designed to gather this information and, along with the other discovery assets, gives your designer the background information they need to research and discuss the design direction and vision for your website.

Completing this survey thoughtfully and completely also puts the designer in the best possible position to tell your story. If you have multiple people completing the survey, consolidate everyone's input into one survey submission that describes the collective vision and direction of the team. If you are re-branding or feel that past efforts have fallen short of communicating your message, be specific and let us know why. We also want to know which websites appeal to you or convey the message/feeling that you are looking to achieve. Sources of inspiration can be found by exploring Finalsité or other educational websites as well as websites outside the education industry. As you research websites, please be sure to note websites or features that are not appealing so that we understand the full range of your taste and can pinpoint the best direction for your design.

Graphic Assets

Graphic assets include the logos, colors, fonts and other materials used by your designer to ensure your design reflects your brand. These assets need to be shared with your project manager before the design process can get started.

Logos: Finalized logos, including any variations, such as a seal or athletics logo should be shared. Logos in .eps format work best but we can also use .ai, .svg and .png logos as well. Because we cannot manipulate or make .jpg files transparent, these are not ideal for use in websites.

Colors and Brand Guidelines: If your school has formal brand guidelines that include information like the use of your logos and list your colors please upload them into Mavenlink or use the spreadsheet provided by your project manager. If your school does not have them, simply provide your primary and secondary colors. Ideally, we would like the hex value for each color but can work with other formats if necessary.

Web Fonts: Web Safe fonts are required for use on websites. You may already have fonts as part of your branding or you may be choosing new fonts specifically for your website project. Regardless, we will need to know the primary and secondary fonts you want to use. If your font is not web-safe, a comparable font to use in its place can be found in Google Fonts. Further, if your brand font is not available for Finals site to host for free, we will require proof of a web license before we can use it on your site. More information about use of web fonts can be found in [Finalsite's Guide to Font Services](#) (passkey = deploymentclient)..

If you do not have a particular font(s) in mind, we recommend exploring different websites to identify fonts or font combinations that you find appealing. While your designer can provide some direction, we are not a branding company and are in a better position to help you make a final choice than research options.

Photos: Photos and other visuals that capture the spirit of your school are used by the designer to learn more about you and to personalize your design

comps. These may include pictures of your campus, students, faculty, mascots, surrounding geography, etc.

A minimum of 10 - 15 photos is great as a starting point but a link to a drive or a zip file with a larger number of images will give your designer more flexibility. As you think ahead to your new site, do not underestimate the impact of good photography as the sites that are consistently admired the most are those with professional photos. With that in mind, we recommend sharing high-resolution photography at 300 dpi. If, however, your final or best photos are not available at this point in the project, you will be able to swap out photos easily on the new website.

Viewbooks and other marketing material: If you have any slogans or key messaging that you'd like to incorporate into your design, be sure to include them with your discovery assets so our team can get a holistic view of what we have to work with. In addition, viewbooks, brochures and other materials that are current, or currently in use can give us a sense of your school identity, what makes you unique or design elements that can be carried into the website.

School Districts and Multi Domain Websites

For the most part, the list of Discovery materials required for websites that have more than one domain or subdomain are the same. The major difference is that sitemaps, colors and logos need to be shared for each individual site. To help keep all of the information together the deployment portal includes one spreadsheet to consolidate the branding assets (colors and logos) and a separate spreadsheet for sitemaps.

Domain Names: For multisite websites, the name of each school and the associated URLs or subdomains for all the sites that are included in your contract should be shared in the Discovery/Intake spreadsheet. This information will be used to confirm the number of domains on your site, will be considered by the designer as they plan the top banner, and will be used at the end of the project when launch instructions are shared.

DESIGN PHASE

During the Design Phase our teams will work together to create a unique experience that tells your story and meets your website goals through well thought-out design components and content placement. However simply telling your story or designing a website for its aesthetic is not enough; we want to be sure that all site visitors can access the content. To that end, your website will be designed and coded to meet ADA standards for accessibility consistent with WCAG 2.1.

The first task in this phase is a conversation with the designer. The objective of this conversation is to ensure the designer has enough information about your website goals to create initial design comps, or prototypes. Once the initial design comps are shared, the teams work through rounds of feedback and revisions before signing off on the designs included in the contract.

Note: The number of rounds of revisions as well as any additional design work is defined by the contract and statement of work. All custom designs include a homepage, style guide, mobile homepage and a Best Practice Asset (BPA). Larger packages may include more rounds of revisions, a landing page and additional BPA's or enhancement hours. Your project manager will fully articulate the specifics of your contract during the kickoff call.

Design Conversation

The design phase begins with a conversation, which lasts about one hour, and is used to review the discovery assets, your overall concept, and any specific desires you have for the design of your site. Your Web Designer and Project Manager will join the call having reviewed the assets you submitted. The client team that joins the call typically includes 2-3 stakeholders that have a solid understanding of the design direction. Although the people who join the call vary, they are most often the team members who are highly involved in the day to day project work as well as the person who has the final authority to approve the designs. Once we share the designs with your team, you can pass them along to the larger group of stakeholders and to executive sponsors for review.

Pro Tip: While we don't limit the number of people on the call, larger groups can find reaching consensus challenging. For this reason, we recommend that the smaller team coordinate any additional design ideas prior to the call and feedback after the call.

Preparing for the Design Call

Before your design call, it's a good idea to revisit your design assets with extra focus on the sitemap and the design and marketing survey since they will be the basis for your conversation. As you review these materials, be prepared to discuss the following:

1. Sitemap including the main menu items, utility navigation and footer information to be sure that we understand and account for all of the elements when the navigational structure is created.
2. Types of content you want on your homepage or story you want to tell. The amount of content, or number panels, depends upon your contract but it's important to have a clear picture of the types of information you plan to include and are prepared to discuss each section in more detail. For example, do you want a hero video or a slideshow? Do you need testimonials or differentiators? How about news and events? If so, how many news items do you want to show at one time.
3. Websites that inspired you and those that you don't care for. You may have explored many sites so take the time to revisit the sites you listed in the design and marketing survey. Your designer will most certainly want to know why you liked a particular design - is it a feeling that you get, an impression that is perceived when viewing the site, are there specific design components that you like? Conversely, they will also want to know what you do not like as well.
4. Marketing and strategic goals for the school and the key objectives for the website including your primary audience and any challenges you face as a school and organization.

Pro Tip: Define the purpose of the Homepage early in the process so when it comes time to review the design you have a set of criteria (often referred to as Key Performance Indicators or KPI's) to compare against. It's easy to lose sight of these criteria when every department is vying for homepage real

estate but it's important to remember that some content is more suitable for interior pages.

Homepage and Style Guide Design Comps

After the design conversation, your Web Designer will create one Homepage Design and one style guide design consistent with the contract and statement of work. The homepage design is the main entry point for your website and the place where a visitor lands when they visit your website address. The style guide shows examples of the visual styles used on your site and may include fonts, content cards, buttons, and calendars. These two design comps will be shared along with background information, in Mavenlink, and include interactive areas that demonstrate some before and after functionality. Animations will be described since they cannot be created in the prototyping tool. While the prototypes may appear to look like a coded site, keep in mind that they are still considered flat, static comps.

Revision Process

One you receive the design comps, your team should review them with key stakeholders to identify those areas that work well and those areas that need to be revised. The client project lead is responsible for coordinating and consolidating all stakeholder feedback before submitting it to the Web Designer and Project Manager. Do your best to provide thoughtful and thorough feedback. However, if you or your team have questions about the design, best practices or simply need input, your Web Designer will be happy to provide direction.

Once feedback has been submitted, your Web Designer will make adjustments to the design. Depending on the creative package in your contract, this process will be repeated 2 – 4 times. When planning for the revision process with stakeholders, be sure to use the project timeline to note when your designs will be shared and feedback is due. It's also notable that after the initial conversation with your designer, Mavenlink will be the primary form of communication. If additional meetings are required, they can be coordinated through your project manager.

Protip: The design process works best when feedback is submitted as a concise list. While ideas for changes may come to mind after your feedback is submitted, resist the urge to continue submitting feedback. Drip feedback can be disjointed, result in poor design decisions, and impact the project plan or scope.

Mobile Homepage, BPA's and Enhancements

Each Creative Services package includes a mobile homepage along with some level of site features and enhancements used to elevate the aesthetics or function of the website. Although it's not shared initially, your designer will begin considering the mobile homepage even as they create the desktop designs. Once the homepage and style guide have been approved, the designer will share the mobile homepage design. Because the CMS Composer drives the mobile functionality and we use best practices, only one round of design feedback is included in the process.

Additional features and enhancements may include Best Practice Assets (BPA's), Landing Pages or custom work. During the kickoff call, your project manager will give you an overview of the features and enhancements included in your contract. As you progress through the design phase, your project manager and designer will discuss options in more detail and send along a questionnaire designed to help you make choices that best support your website. By the time the homepage and style guide have been approved, BPA's should be selected and/or the direction for additional design work should be decided since the tasks associated with these designs will begin immediately thereafter. For any custom work, the number of rounds of feedback and revisions is the same as the number included for the homepage.

Multidomain and District Websites

For multi-domain or district websites, the main (or district) website will be designed and approved first. Typically, the design of the additional subdomains will reflect the design of the main site with changes to the colors and logos. A defined amount of time for changes to the design may also be included. Since contracts may vary, your project manager will review the details with you at the outset of the project.

Budget

Each project has a budget defined by both the contract and statement of work. These documents define the number of hours and rounds of revisions allotted to create, code and test the design. When we discuss design ideas, our goal is always to find the best solution that can be achieved within the scope of the project. We also want to make sure that anything Finalsite recommends is within your project budget and contractual agreements. To that end, the Web Designer works closely with their team (Project Manager and Front-End Web Developer) to talk through ideas and functionality to present you with the best option.

Design Approvals

Creative deliverables which may include the Homepage, Style Guide, Landing Page and Enhancements, will require your approval. As design deliverables are finished, your Project Manager will send along a docusign agreement. Because we build our websites based upon the approved designs, your signature indicates that you understand what the finished project will look like and how it will function. It also ensures that our work meets your expectations and vision. Changes to the approved designs may incur additional charges and/or cause additional time to be added to the timeline so be sure to review your design carefully. Here is a list of notable factors to consider before approving your designs.

- Font choices /sizes
- Color selection
- Navigation placement
- Information hierarchy (order of what content should be first)
- Overall page layout
- Image/Graphic selection (if applicable)
- Functionality of designed elements and features

PRODUCTION PHASE

During the Production Phase, the approved designs are built out by the Front-End-Developer (FED). This phase of the project is Finalsité's responsibility and begins after all designs have been approved. At this time, the Project Manager and Designer meet with the Front-End-Developer (FED) to review and officially hand-off the designs. The FED will then begin to build-out the approved website design by creating the Style Guide. Because the style guide styles will be used throughout the website, building it first helps us build your site most efficiently. This initial coding phase can last between 2 - 4 weeks depending on the creative package and complexity of the design. At the end of active production, the basic design, navigation, and functionality of your website will be in place and your designer will review the completed site to ensure that the built out website matches the approved designs and includes the features, functionality and requirements discussed during the design phase.

Technical and Accessibility Quality Assurance (QA)

The Technical and Accessibility QA Phase of your website immediately follows your website's production and design review. During this phase of the project, your Finalsité project team along with a QA Specialist will complete a review of the website. The QA Specialist tests the website against a 70+ point checklist that follows design accuracy, responsiveness to viewport, responsiveness to content, components behavior and performance. We also review the desktop, tablet and mobile views of your website on all the major browsers starting with the most recent plus the two previous versions. In addition the QA team will note any areas that do not meet current ADA standards for website accessibility.

Client Review

The Client Review immediately follows the approval of your site by the QA team and is your opportunity to review your built-out site design for any areas that do not match the approved design or function properly. Prior to the review, your project manager will provide you with a spreadsheet where any discrepancies between the built out site and approved design can be listed. At the end of this review period, your Project Manager, Designer and FED will address any issues that you identify. We have your developer scheduled to complete any necessary fixes.

Pro Tip: Early in the process, your project manager will give you access to the website so you can begin learning to use the CMS and begin migrating your content. Since the Development work will happen in this same website you will be able to see the website take shape. In some cases, you will be able to work with the styles as soon as they become available. Although it's easy to point out things that don't look quite right as the developer is working, we recommend keeping your own running list of items and use the formal Client Review to let us know if anything on your list is still outstanding when we're done.

Multi Domain Website Projects

If you have a multi domain website project, the build out of your website will take place in two parts. First, the main website plus one of the additional subdomains will be built and tested up to and including the Client Review. Once any issues identified in the client review are addressed, the remaining domains or subdomains will be configured. Finally, each of the domains or subdomains will be tested to ensure that each is working properly, match the design and pass ADA requirements.

TRAINING

Learning to use the software is a key part of the project because it will provide the background information you need to understand the functionality of your design and the skill set required to effectively use Composer. This information will also provide the prerequisite skills to update the custom features of your website. Our most successful Clients can attest that a strong base of product knowledge is the gateway to creating pages and content that are visually appealing to their audience and functioning as the product was designed.

Because we consider training mission critical, your project manager will initiate the training process early in the project. Shortly thereafter you will be assigned to work with one of our Onboarding Specialists who will introduce the training curriculum and provide guidance as you complete it. The curriculum focuses on the fundamentals of 7 functional areas of the software to get new web administrators successfully onboarded to Composer and its core modules. The curriculum is broken down into easy-to-follow and achievable segments to get you on your way to creating pages and content swiftly. Once your new website has been built, your project manager will provide instructions for using and updating custom features and elements. Successfully completing the curriculum, will provide you with the background you need to use the standard elements and also those that have been adapted for your site.

In addition to our formal curriculum, Finalsité also provides unlimited access to regular live group training webinars, a comprehensive video library of essential website management tasks, and a searchable online Knowledge Base. A Best Practices Blog is available for ongoing tips, how-to's and case studies. Because we place such a significant emphasis on training, access to the training portal and resources such as the knowledge base are included as part of the ongoing annual subscription.

Who Should Attend Training?

Initially, your main project team should participate in training. This generally includes a group of 1 - 3 people who work directly with the Onboarding Specialist. We use a train-the-trainer model so this team will be responsible for training any additional website administrators. For school districts with multiple domains or schools with a large number of website administrators, your project manager can provide strategies for disseminating training.

CONTENT

Among our project goals is for clients to become comfortable working in the Finals site platform. We've found that the more comfortable clients are with the platform, the more successful they will be when preparing the site to launch and to maintain the site post launch. In our experience, the best way to achieve this goal is simply by adding content to the website. Creating and entering content early in the project will:

- uncover questions related to the product or best practices which can be answered by your project manager or Product Education Specialist.
- keep the project moving forward ensuring not only an on-time launch, but also that the best and most thought-out content is seen at launch.
- provide Finals site with a superior environment for testing the website.

Entering content is a continuous process that should begin early in the project when you are first provided with access to your Finals site website. Our most successful clients set aside time each week for this task so that they are in the best possible position to learn to use the CMS and to meet launch goals. Underestimating the time required to gather, create, organize or simply migrate content to the new website is a common reason launch goals are missed and why. It is important to begin assembling content as soon as possible. As a general rule, Finals site recommends that clients complete about 30% of their content by the time that the design is approved and 60% when the initial build is complete. These percentages will vary, however, based upon your launch goals. During weekly meetings with your project manager, you will be able to discuss your launch goals and content strategies that can be used to meet them.

Content Migration

A website redesign is the perfect opportunity to refresh your website content. That said, this task is significant and will require some thought and strategizing, especially when multiple people are responsible for doing the writing. To help get you started, here are some recommendations for creating a content migration plan.

1. Evaluate the content that you already have on your website: To determine the amount of work, carefully review the current website content, decide what to keep, what to edit and what to discard. A website redesign is the perfect time to freshen your content, so review it with a critical eye.
2. Prepare a list of new pages that need to be developed and identify the people who will write them: If it's been a while since your content was last updated, new pages may be needed. Don't leave writing new content to the last minute - plan ahead to determine what you need, who's responsible for it and when it should be due.
3. Collect images that reflect your text: Text and photos should work together; make sure your photo subject corresponds with the purpose or content of the page. Begin early to save photos that you like and will support the website content. As you add content to pages, this library of approved photos will be readily available to upload and use.
4. Add content to a page: If content is available, add it to a page. Website content will continuously evolve so it's OK if the copy isn't perfect. With Composer's intuitive interface, editing and finessing content is just as easy as opening a word document and will even save you a step.

Finalsite's Content Migration, Optimization and Virtual Webmaster Services

Finalsite's Content Migration, Optimization and Virtual Webmaster Services provide support for client's who may not have the time or the available resources to move or layout the content in their new website. Based on the creative services package, Finalsite will migrate or optimize a select number of pages into your website and include this task as part of the deployment project. Other than these pages, moving or entering content into the website along with editing and proofreading is the responsibility of the client. If, however, support beyond the services included would be helpful to get a website launch ready, these additional Migration, Optimization or Virtual Webmaster Services can be purchased at any time by speaking with your Project Manager.

Content Migration: is the simple copy-paste of static and non-dynamic content only (text, images, and files) with no formatting or layout work

included. This service is designed to help with the heavy lifting of data transfer and is sold by the page.

Content Optimization: is the process of laying out page content using Composer best practices and your site's specific styles. You, the client, enter content, but the Finals site team does the rest. Once complete, you are responsible for subsequent editing. This service is good for getting some layout work completed and seeing some great examples and best practices in action that you can then use in your own site management. This service is sold by the page.

Virtual Webmaster: Our virtual webmasters are school professionals and Finals site software experts who can assist with content migration and optimization as well as pretty much anything else you can think of as it relates to your Finals site website. This service is good when you just want to hand over your content, provide some direction, and forget about it, or to have more of a jack-of-all-trades or strategic partner working with you or for you on your content tasks. This service is sold by the hour.

DATA IMPORTS & INTEGRATION

Website data refers to the import of data to your website. Depending upon the contractual agreement you have with Finalsite, data can be imported manually by preparing Excel spreadsheets we call datasheets or through an automated integration with a partner Student Information System (SIS) for a one-way flow of data from the SIS to Finalsite.

Data Imports

Shortly after the Discovery Phase ends, you and your project manager will discuss your data needs and work with you to identify the person from your team who will lead this effort. For most manual data imports, your Project Manager will be able to answer questions or provide you with the appropriate datasheets. If you have more technical questions, you will be connected with a Finalsite Data Specialist.

Once you've completed a data sheet you can share it with your Project Manager and they will ensure that the information gets uploaded to your website. Note that Finalsite will only import data once during the deployment period.

Pro Tip: This effort is typically separate from the design of the site but we recommend getting started early because it can take some time to prepare your data for import.

Datasheets

Datasheets are Excel templates that Finalsite uses to bulk import data into your website. Depending on the modules you purchased, the areas that we can bulk import data are:

- Constituent profiles and relationships
- Calendars

- Athletic teams, opponents and events
- School store products
- Academic classes and rosters

Data Integration

If you have purchased data integration services for automated data feeds into Finalsight and/or Finalsight Learn, LDAP, or an SSO, you will be partnered with a Data Integration Project Manager who will work directly with you to implement the data component of your website project. Once assigned, the Data Integration Project Manager will create a Zendesk ticket and reach out with an introduction, the information you need to get started and to coordinate a phone call if one is required.

All of your communication with your Data Integration Project Manager will take place through the Zendesk ticket. While the Project Manager for your website will keep track of the progress you make on your integration, the implementation of your integration is separate from your site design timeline.

Warranty & Post Warranty

Warranty is the 30 day period beyond the completion of the build and testing of your website and a huge milestone in your website project as you're approaching the finish line. Transitioning to this phase means that Finalsité has delivered a working website built to the specifications set from discovery and design. During this period, you and your project manager will work together to close out any remaining project tasks and ensure that your website is defect free. While we will always address issues with your website, after this period concludes, changes to the design or functionality of the website may incur a fee. During this time we also recommend that you prepare your content for launch and ask questions about the use of the software.

Once the warranty period has started, you are free to schedule your website launch whenever you are ready and your content is complete. While many clients launch toward the end of the warranty phase, some launch their sites during the Post-Warranty phase.

The Post-Warranty Phase lasts for 60 calendar days or until you launch your website; whichever comes first. The purpose of this phase is to continue preparing the finished website for public viewing by refining any content you wanted to revisit, writing and coordinating any communication material to announce your launch and doing a last click-through on your pages and links to make sure everything is in order.

Since you will be experienced with the software, your Project Manager will continue to monitor your project and will be available for occasional questions via your Project Workspace. Once the website has launched, your Deployment Project will be considered complete. From that point on, questions or issues will be directed to our Support team or to your Client Success Manager.

Ultimately, it is your decision to set the date and time of your launch. While we recommend launching your website by the end of Post Delivery, we understand that occasionally, schools need more time. If that's the case, your project manager will create a new Mavenlink workspace monitored by an Onboarding Specialists who will be able to answer questions that arise and schedule your launch when you're ready.

Launch

You may launch your new website at any time during the Warranty or Post Warranty Phases. While there's often a desire to perfect the content before setting a launch date, a website will always be a work in progress, and unlike print, you can add, edit, remove and finesse indefinitely, so don't get too caught up in the content nuances that could delay launching your website. There's no perfect season or time of year to launch your website so, go ahead and set a launch date. Once your site is live, your constituents can revel in your hard work and new families can fall in love with your school and community.

As far as the logistics of launching, please provide your Project Manager with at least 10 days notice prior to the desired launch date. Although issues are rare we simply want to be sure that we are fully staffed and ready to monitor your site when the site goes live. When selecting a date, we recommend launching most websites Monday - Friday during East Coast business hours. If you need to launch at a time outside those hours, simply let your project manager know so that they can coordinate your launch with our support team.

Whether you are a new or current client, launching your website is the last milestone in the project, your Project Manager will reach out to accounting to be sure we're in a position to schedule your launch. If you are a new client, this is the point where we will release the DNS information which will include the following information.

- A personalized website launch guide with the instructions you need to send your site live.
- Details about the support portal and submitting support tickets after launch.
- Additional resources about preparing your website for launch.

If you are a current client, Finalsité will make the switch from the current site to the newly redesigned site.

In either case, your Project Manager will share the intended date and time of your launch with the site launch coordinator who will create a ticket and reach out to you with additional launch details. Should questions or issues arise during the launch of your website, you will use this ticket to communicate directly with them.

Existing Clients

If you are an existing client, FInalsite's launch support team will launch your new website on the date and time that you specify. Once your project manager knows your launch date, they will notify the support team. Someone from the launch team will create a ticket and reach out to you to confirm your launch and communicate if you need to change your plans.

Pro Tip: If launching on a Monday or Friday is important, we suggest Monday afternoon or Friday morning just in case something arises over the weekend preceding or following your launch. Further, support will not be readily available outside standard business hours so we strongly encourage launching sites during the recommended time frame.

Support

The purpose and area of expertise of the Deployment team is to tell your story online, through your website. We live and breathe website development and digital trends and know what it takes to take an idea and turn it into a tangible experience. Support is all about maintenance - maintaining your site to keep it running and looking like it did on launch day. Whether you need technical assistance and guidance because something isn't working properly, or you finally decide to add that Notable Alumni page to your site the support team is there to answer your questions.

When your launch instructions are provided, your project manager will also provide information about the support portal that includes best practices for submitting tickets. Your rights to submit tickets will be enabled at the time of your site launch. Once your website launches, our fabulous support team will be your main point of contact for any issues or questions that arise.