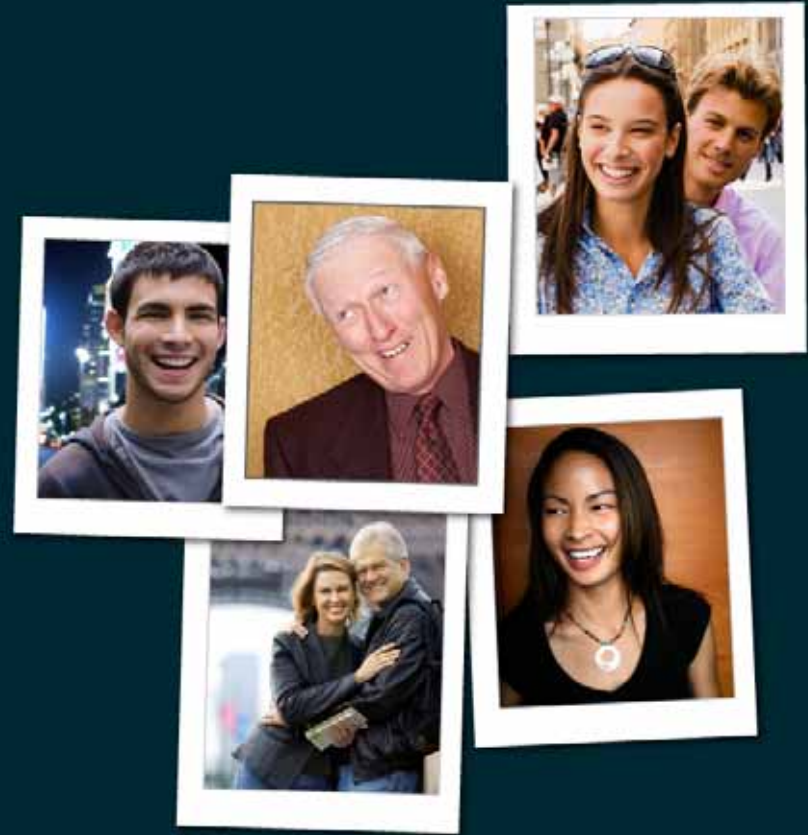




SUMMIT 08



UPGRADING MADE EASY

Heather Fust - Upgrade Team Manager

**RIGHT**  
**NOW.**

- When to Upgrade
- Planning for an Upgrade
- Upgrade Process
- Success Factors
- Tune-Up

- For Fixes of Value
  - Quarterly Releases (Hosted sites only)
    - February
    - May
    - August
    - November
  - Service Packs (Hosted sites only)
- For Features of Value
  - Release Notes
- End of Life
- Time of Year
- Time Investment Required
- Preparation
  - Hosted vs. On Premise

- Hosted
  - Hosting Management System (HMS)
    - Test site provided
    - Automated production cutover process
    - Messaging indicates customized files that need to be addressed
- On Premise
  - Require more preparation, effort and equipment
  - Require test hardware that is exact duplicate of production environment
  - Need to manually copy data from production systems to create test environment

1. SmartConversion Document Review
2. Need for Services
3. Production Site Preparation
4. Request Test Site
5. Upgrade Site Assessment
6. Communication
7. Tune-Up

- Your “map” to the process
- Read it all, but...
  - ...each site is unique, focus on relevant areas
    - Your upgrade path
    - Evaluating your site
- Prepare environment for Workstation Specifications
- Make note of Upgrade Procedure items

- Project Management?
  - Organize Project Plan
  - Timeline Management
  - Status Tracking
  - Drive for Results
- Consulting?
  - Rules Modifications
  - Analytics Modifications
  - Configuration Changes
  - More
- Training needs?
  - Regional
  - Remote
  - On-site
- Engage Account Executive for further assistance

- Help reduce upgrade cutover time:
  - Engage in Archiving (where appropriate)
  - Ensure ClickTrack Table is purging data every 30 days
  - Verify if the phrases table is significantly larger than the threads table. If so, add words to the exclude\_incidents.txt list
- Conduct basic site clean-up:
  - Simplify Workflow Rules
  - Remove unused Analytics
  - Purge unused contacts
  - Etc.

- Hosting Management System (HMS)
  - 'HMS Guide' Reference Document
- HMS Process:
  - Upgrade version
  - Production cutover date/time
  - Post cutover utility delay
  - Demo
- Upgrade Test Site is created
  - Production site cloned
  - Clone upgrade to selected version
  - Production site name + \_\_upgrade

- Review for accurate conversion:
  - Config settings
  - Message bases
  - Rules
  - Analytics
  - Answers
  - Etc.
- Implement/document changes to utilize new features and functions

- Customizations re-applied to upgrade test site
  - All customized files should be reviewed and redone
    - DO NOT just replace with the old version files
    - Modified process with future of Customer Portal
  - May be done by your organization
  - May be done by RightNow
  - May be a combination of the two
  - Ensure timeline provides adequate time for this process
  - Coordinate with RightNow as needed
- Customizations/Integrations understood and documented
  - Upgrade Management System (UMS)
  - Requirements & Test Plan Documents
- Utilizing XML API?
  - Review the Integration Manual for changes that may be required

- Upgrade Management System
  - System created to facilitate upgrade testing
  - Core Functionality test items provided
  - Ability to create Mandatory and Non-Mandatory Tasks
  - Ability to assign tasks to local staff members
  - cutover postponed 1 week if Mandatory Tasks are not complete
  - Demo
- Testing Plans
  - Ensure customization test scripts are created
  - If RightNow owns customization, plan will be provided
  - Upgrade Team process flow:
    - Customizations applied & Unit Tested
    - QA Testing & Sign-off
    - User Acceptance Testing

- Set internal and external expectations
- Communicate via:
  - Newsletters
  - Email
  - On-hold message
- Splash page during cutover
  - Can be customized

- Entire site is unavailable to all parties during cutover
  - End-user pages display maintenance page
  - Emails queue up and distribute after cutover (controlled by utility delay)
- Production site is cloned for rollback purposes
  - Kept for 96 hours for rollback emergency
  - Rollbacks will cause loss of data and are a last resort
  - Unable to request another upgrade during this timeframe
- Production database is upgraded to the new version in combination with the upgrade test site
  - Data migrates from production
  - Configurations, Message Bases, Look & Feel, and Customizations migrate from the upgrade test site

- Review conversion of data
  - Rules
  - Analytics
  - Etc.
- Re-implement changes as required in planning stage
- Test all functionality
  - Core
  - Customizations
- Utilize support resources

- Review of your RightNow production environment to take advantage of Best Practices on the NEW version
  - Maximize your investment
  - Improve your customer's experience/satisfaction
  - Reduce costs through phone call and email reduction
  - Spam compliance review
  - Email response optimization
  - Better understanding of data/report availability
- Conduct approximately 2-4 weeks following cutover
- Free - once every 6 months

- Community (<http://community.rightnow.com>)
  - Documentation
  - Services
  - Training
- RightNow Support Central (<http://crm.rightnow.com>)
- Contact Upgrade Team ([upgrades@rightnow.com](mailto:upgrades@rightnow.com))

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THANK YOU - QUESTIONS

**RIGHT**  
**NOW.**