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# MIGRATING TO CUSTOMER PORTAL PAGE SET

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# What you will learn

- ▶ When & Why to Migrate
- ▶ Migration Planning
- ▶ Tips & Tricks
- ▶ Deployment to Production



# When & Why To Migrate

- ▶ Why not start now?
  - Classic page set depreciated
  - November '07 page set depreciated
  - Both page sets obsolete in February '10 and higher
- ▶ Ease of future upgrades
- ▶ Simplified branding vs. old method of editing headers/footers
- ▶ Immediate changes and preview environment
- ▶ Embed interactive Web 2.0 elements that keep your customers engaged - video, forums, blogs, etc.



# Migration Planning

## ► Design

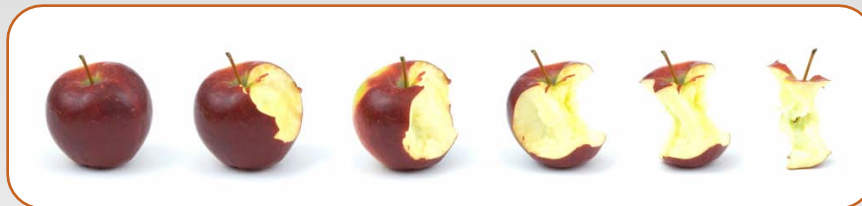
- Customer Portal Mock-Ups

## ► Timelines

- Production release August '08 or higher
  - Implement within current production site
  - Implement as part of upgrade process

## ► Resources

- Skill Set



# Deployment to Production

- ▶ Perform full validation of functionality within development environment
  - Resolve all errors reported during validation
- ▶ Deploy to production
  - Deployment results in an immediate changes to your production end-user pages
    - If deeper errors found, deployment is fails and no changes are made to your production end-user pages
      - Resolve errors within the deployment log and redeploy
- ▶ Perform full validation in the newly deployed production environment

# Tricks & Treats

- ▶ Become familiar with CP Administration  
“reference Implementation”
- ▶ Familiarize resources with webDAV
- ▶ Ensure Successful Deployment on ALL  
interfaces
- ▶ Preview all end-user page functionality  
within your development environment



# Tricks & Treats Continued

- ▶ Reuse widgets and templates where ever possible
- ▶ Brainstorm ideas within RightNow Customer Portal Developer Forum
- ▶ Understand toggling between your development and production environments
- ▶ When deploying to production have development resources available to assist with resolution if any issues occur

# Resources

- ▶ 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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A stylized blue mountain range logo with three peaks of varying heights.  
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**THANK YOU - QUESTIONS**

