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A dark blue silhouette of a mountain peak with a sharp central peak and sloping sides.
S U M M I T 0 9

UPGRADE WITH EASE

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What you will learn

- ▶ When to Upgrade
- ▶ Planning for an Upgrade
- ▶ Upgrade Process
- ▶ Success Factors

When to upgrade

- ▶ **Desired Feature(s) Available**
 - Release notes
- ▶ **Business Impacting Issue(s) Resolved**
- ▶ **End of Life**
 - 24 months
- ▶ **Time of Year**
 - Quarterly Releases (Hosted sites only)
 - February
 - May
 - August
 - November
 - Service Packs (Hosted sites only)



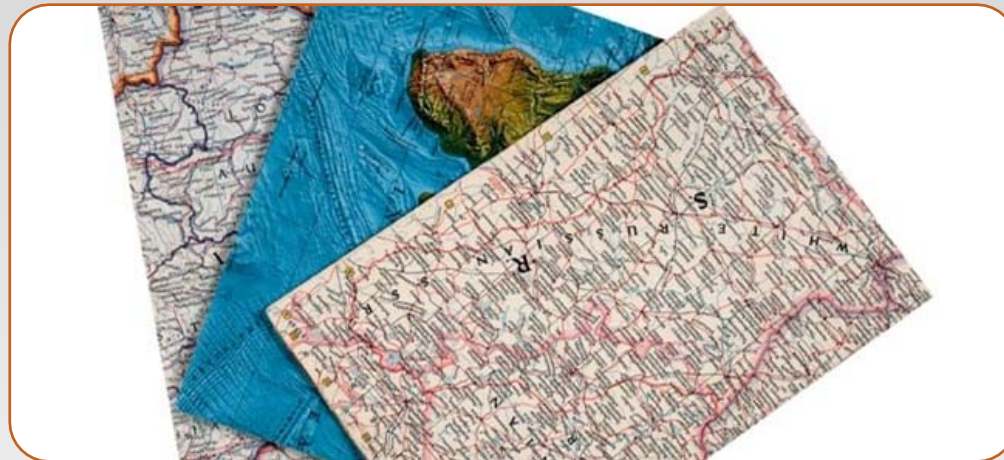
Planning for an Upgrade

1. Smart Conversion Document Review
2. Need for Services
3. Production Site Preparation
4. Project Planning
5. Schedule Upgrade
6. Upgrade Site Assessment
7. Communication



SmartConversion Guide Review

- ▶ 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



Need for Services

► Project Management?

- Organize Project Plan
- Timeline Management
- Status Tracking
- Drive for Results



► Consulting?

- Rules Modifications
- Analytics Modifications
- Configuration Changes

► Training needs?

- Regional
- Remote
- On-site
- More

► Engage Account Executive for further assistance

Production Site Preparation

▶ 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
- Purge User Transactions Table

▶ Conduct basic site clean-up:

- Simplify Workflow Rules
- Remove unused Analytics
- Purge unused contacts
- Etc.

Project Planning

- ▶ Timelines
- ▶ Resources
- ▶ Cutover



Schedule Upgrade

- ▶ **Hosting Management System (HMS)**
 - “HMS Guide” Reference Document
- ▶ **HMS Process:**
 - Upgrade version
 - Production cutover date/time
 - Post cutover utility delay
- ▶ **Upgrade Test Site is Created**
 - Production site cloned
 - Clone upgrade to selected version
 - Production site name + __upgrade

Upgrade Site Product Assessment

► Review for accurate conversion:

- Config settings
- Message bases
- Rules
- Analytics
- Answers
- Reports
- Workspaces

Upgrade Site Customizations Assessment

- ▶ Customizations re-applied to upgrade test site
 - All customized files should be reviewed and redone
 - DO NOT just replace with the old version files
 - 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

Upgrade Site Customizations Assessment Cont'd

- ▶ Customizations/Integrations understood and documented
 - Upgrade Management System (UMS)
 - Requirements & Test Plan Documents
- ▶ Using XML API?
 - Review the Integration Manual for changes that may be required
- ▶ Using PTA?
 - Review the PTA manual for changes that maybe required

Upgrade Site TESTING Assessment

► 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, customization test plan will be provided
- Upgrade Team process flow:
 - Customizations applied & Unit Tested
 - QA Testing & Sign-off
 - User Acceptance Testing

Upgrade Communication

- ▶ Set internal and external expectations
- ▶ Communicate via:
 - Newsletters
 - Email
 - On-hold message
- ▶ Splash page during cutover
 - Can be customized
 - Answer ID 1306



Cutover

- ▶ 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

Post-Cutover Check Points

- ▶ Review conversion of data
 - Rules
 - Analytics
 - Workspaces
 - Reports
- ▶ Test all functionality
 - Core
 - Customizations
- ▶ Smart Client Deployment complete
- ▶ Utilize RightNow Customer Care if issues are found



Upgrade Success Factors

- ▶ Agents Online via Admin Console
- ▶ Customer Accessing End-User Page Functionality
- ▶ Day-to-Day Processes Uninterrupted Post Cutover

Resources

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

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THANK YOU - QUESTIONS

