Upgrade Skype Chat Summary

April 23rd

Attendees:

Evan Menkhus – Junior Achievement (2.94)

Susan Arrington – Junior Achievement (2.94)

Clare Cooley – University of Georgia (2.94)

Tanya Crowe – University of Georgia (2.94)

Jeff Garmon - University of Georgia (2.94)

Sam Lufi – American Bible Society (2.9)

Jan Shorter – City of Hope (2.94)

Arnetta Gosse – University of Iowa (2.9)

Tracy Parizek – University of Iowa (2.9)

Roger Jacobs – Earthjustice (3.0)

Polly Heninger – Jewish Community Federation of Baltimore (3.0)

Brennan Hadden - Southern Methodist University (3.0)

Yvonne Novick – Pittsburg Federation/JFNA - (2.94)

Reane Travis – UNC-Chapel Hill (2.94)

David Stepp – Legacy Health (3.0)

Michelle Manno – Save the Children (2.91)

Barb Laane – Feeding America (3.0)

1. Sam wants to know if others make process changes during an upgrade (getting users to adjust to version and procedure changes all at once), or if they do the upgrade and procedural changes separately? Doing everything all at once puts a lot of pressure on a team already strained by the upgrade prep.
	1. Roger – they did major conversations during their upgrade. Start preparing for changes now, figure out what will happen as part of the upgrade.
	2. Jeff – if required due to functionality changes, upgrade may be the best time.
	3. Brennan – consider how hard it is to implement changes? Are there time constraints for when changes can be made? Who is impacted? - the situation may vary
	4. David – their staff responds better to one big change than a series of changes over time.
2. Jeff – what are the big gotchas others have run into in 3.0?
	1. Roger- batch processing and reporting timeouts. They ignored timeouts because their test environment was not as powerful and they thought it was environmental. OOB and Custom batches and reports.
		1. Polly found that some timeouts happened in reports because of the FTM changes (revenue tables moving to financial transaction tables and the revenue information being made into views). They re-wrote the reports to use the FTM tables are that resolved their issues.
		2. Arnetta - their problems with their testing environment held up their plan to upgrade to 2.94
		3. Brennan – they have their test environments for their current version and their upgraded version on the same sized hardware so they can compare performance between the two without having to copy production-sized hardware.
		4. David and Jeff have this problem as well.
	2. Sam – they had problems with running OOB reports in 2.9. They use custom reports, and need to have those working for 3.0 – this has been a challenge so far.
	3. Polly – they found a joint name format problem in 3.0 – formats were thrown off
		1. ACTION: Caroline to locate this case/bug/issue and share the specifics of the problem and fix with the group.
	4. David: their web and app servers are two load balanced servers each. In the middle of their upgrade, the load balancers on the web servers went to sleep because they couldn’t see the servers – it took the team a while to figure out what happened and wake them up to proceed with the upgrade.
	5. Brennan: Allow 50% more time if switching to Web Shell (for UI model changes for customizations).
	6. Brennan: Allot additional time for FTM (if crossing over the 2.93 threshold where FTM was introduced)
3. Michelle – How long did Roger’s (Earthjustice’s) upgrade take (2.91-3.0)?
	1. Roger: 3 months – July/August - October. He recommends to test as much as possible. They did a few user trainings. Found it easy to transition to the new environment.
	2. Sam: They started the upgrade from 2.9 to 3.0 in February and will go live in August/September
		1. Their finance team is hoping to close out their fiscal year (June 30th) in 2.9 and do a parallel process in 3.0 to see how that will go – major focus
	3. Barb: December-April
	4. David: 2.94 to 3.0 upgrade took a month – January-February.
4. Jeff: Is anyone using BBIS with 3.0? How did the transition from web batches to Enhanced Revenue Batch/Constituent Batches go?
	1. Barb: North Texas Food Bank uses BBIS. They had help from Blackbaud getting their Enhanced Revenue Batch template set up.
	2. Barb: They did a lot of test transactions through BBIS
	3. Barb: They also had to upgrade their eStore
5. Ivana: Do others run the upgrade as a separate project or in addition to your regular work?
	1. Brennan: In addition to regular work; it took about 3 months
	2. Barb: Separate project with a charter, meetings, etc. Technology dept did most of the testing, other users needed to keep up with regular work, but they stepped in to test key features later on.
	3. Jeff – separate project in conjunction with regular work. They’re only going from 2.94-3.0, so they don’t have the web shell and FTM issues to work through.
	4. Roger: a project, but everyone was still doing their normal job as well.
6. Michelle: Did others go to web shell with 3.0? Why?
	1. Roger: Yes – it works better with Citrix and is a “snappier” user experience
	2. Barb: Yes
	3. Brennan: Yes
	4. David: Yes, but acknowledgement letter processes are easier with Smart Client
		1. Brennan: Is the issue with output to Microsoft Word? David: Yes – that and editing the merge document in CRM
		2. Brennan – check out SP4 or 5 for v3.0 – there have been some fixes
		3. ACTION: Caroline to identify and share the specifics of this issue with the group.
	5. Smart Client is going away in 4.0
	6. Jeff: 2.94 still requires Smart Client for web batches, design mode, etc. All of that is resolved in 3.0 for Web shell
7. Jeff: Are 3.0 organizations using the new Constituent Update Rules for replacing/creating addresses?
	1. Barb: No
8. Roger: How do people refresh data in a second SQL environment?
	1. Problems: security; connecting to the appropriate(test) report server and datamart; refreshing the test report environment
	2. Brennan: They script the refresh. Files copied from Prod and restored, then scripts change the configurations. Custom scripts, SQL agent runs them.
	3. Jeff: They do custom scripts as well. Biggest gap they have is with BBIS – users embed URLs and the scripts miss them.
9. Jan: Is anyone using Luminate Online with CRM; what version of CRM?
10. Jeff: Has anyone on 3.0 had problems with security enhancements?
11. Overall, FTM and Web Shell are the biggest hurdles with upgrading.
12. Murel Warren (LCMS) asked to pose the following questions: How do others come up with a test plan, what do the plans look like, and do others use test scripts during an upgrade?
	1. Barb: They write use cases and use some from their last upgrade. They wrote new ones for new functionality. They also look at daily/mission critical processes.
		1. IT wrote the use cases; they and end users did testing
	2. Jeff: During go-live, they had SME’s define their use cases and that didn’t go well. They are writing a guideline per functional area and will expand with SME input.
		1. About 80 users were selected to use the test env.; they also lean on key people
	3. Roger: Write down all business processes; think through jobs that people have and what they each do.
		1. End users did the testing
		2. A DBA managed the testing process
		3. Test cases came from a collaboration with end users in different depts and the DBA
	4. Tanya: as a developer, she tested her own customizations
13. Michelle: Do developers maintain two environments – 3.0 and current version?
	1. Brennan and Jeff: Yes
	2. Barb: They had two 3.0 environments and kept two for 2.94 so they could go back and compare.
		1. They had one customization that only worked with Smart Client, so they have developers making that web shell compatible now.
	3. Roger: They still have 2 test environments (2.91 and 3.0) until they feel that all the bugs have been worked out. Can’t do a data refresh on 2.91 environment now though.

ACTION: To continue the conversation, Caroline will reach out to 3.0 organizations to share a brief overview of their upgrade experience to be shared in the community.