



Upgrading a v3.x site to a v4 site

General Project overview and Best Practices

Overview: While every ShareVision site has been configured and customized differently according to what each organization specifically needs from it, there are some generic best practises and steps needed to upgrade a previous version of ShareVision to the current version 4 ShareVision. ShareVision is currently planning to phase out previous versions of ShareVision by **sometime in 2024**. This is in order to increase performance and reduce reliance on costly customizations.

Time required: This can vary greatly across organizations and depends on numerous factors. The good news is that there is more than ample time to comfortably upgrade your current ShareVision site. Here are a few common factors to take into consideration for your specific Upgrade.

- Time available to your in-house ShareVision (SV*) Site Administrator.
 - As this is the person who has the most in-depth knowledge and experience working with your specific ShareVision site (including SV staff who do not work daily on any single SV site), the amount of time they can dedicate to the steps below during their workday life is one of the biggest factors in how soon you can move your entire organization over to your new v4 site, and discontinue use of your older v3x site. This is why we recommend beginning the Upgrade process as soon as possible to make the process comfortable, stress-free and allow ample time for optimal decision making as you go through the Upgrade process.
- Complexity and amount of any customizations in your current SV site that need to be re-built rather than re-configured in your v4 SV site.
 - While we're finding that most organizations can use the increased functionality of v4 to easily configure and replace their previous customizations quickly at no cost, there may be some specific to your organization customizations that will need to be rebuilt by our Developers.
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ShareVision Administrators: This is a good time to review how many trained SV Site Administrators you have within your organization. As the Upgrade process is a general review of your current SV site combined with learning the new functionality of your v4

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SV refers to ShareVision

site, it lends itself well to expanding your Site Administrator team with 1 or 2 new members for additional coverage.

General steps or phases of the Upgrade process:

- Continue on to learn about the high level, general phases of every ShareVision v4 Upgrade.

General phases of an ShareVision Upgrade:

- **Watch the v4 Upgrade information video series**

- **WHO:** Client

This is a series of brief videos that introduces you to the various changes and differences between your current version of SV and the new version 4. This will also introduce the minimum system requirements needed to be in place on your current SV system so that it can be upgraded to version 4.

- **Demonstration of v4 demo site/new technology**

- **WHO:** SV Staff, Client

A quick 30 - 60 minute QA session by a SV staff person in an online meeting.

- **Request for a v4 Upgrade site build**

- **WHO:** Client

If, after the demo, you want to begin comfortably working through the Upgrade process, you let us at ShareVision know you want to move ahead. All we'll need from you at this phase is the URL (web address) you want your new site to use. For example, your current SV site address may be www.empoweringpeople.sharevision.ca You'll need to choose a new/different one for your v4 Upgrade site. www.XXXXXXXXX.sharevision.ca where you get to determine the XXXs. NOTE: Within reason, there is no limitation to the number of XXXs.

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- **Begin the online training series for v4**
 - **WHO:** Client

We offer an online training series for version 4 called “Getting Started with ShareVision”. In it you’ll be introduced to the basic concepts, building blocks, and skills needed to configure and administer your version 4 SV site. This is a self paced learning series that you can take and re-visit at your convenience.

- **First look at your new v4 Upgrade site**
 - **WHO:** SV Staff, Client

Once the new site has been built, and we’ve run our basic batch of testing, configuration, etc - it’s time to introduce you to your new site. This is generally an online 30 - 60 minute meeting. This session will also review quickly that all minimum system requirements are in place, or have been identified to be put in place.

- **Compare and contrast v3x to v4 sites**
 - **WHO:** Client

1. Open each site in a different browser tab or window
2. For this stage, we find it works best if you pick/focus on:
 - 1 to 2 Services
 - 1 to 2 Individuals within those Services
3. See how/what things are displayed in your current SV site and now go look at the same Service/Individual page(s) in your new site and see how your new site “compares or contrasts” to your existing site.
 - Same - if you’re happy with that, nothing to do.
 - Improved - congratulations, the new v4 technology adds many incremental improvements everywhere on your site without any configuring necessary.
 - Missing/not working/not happy - this is where you can use the new “Configure Portals / Pages / Pageparts” beginner’s knowledge you’ve acquired so far. See if you can simply change the pages and pagepart settings to achieve your results.

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Many times at this point in an Upgrade, your mastery of these skills is still rudimentary because this is by far the biggest change in the technology from previous versions of SV. Don't become frustrated or take too much time if you're unsure - keep track of these pages, example for the next time you meet with a SV staff person to review.

- **Keep Track of current Customizations**

- **WHO:** Client

1. This step is basically happening simultaneously with the Compare/Contrast phase.

As you're evaluating your current site, you'll come across customizations^{***} that if we can't identify a better way to accomplish it with the new improved functionality of v4, then they may need to be rebuilt.

(^{***} new functionality specific to your organization that you engaged our Development department or an outside vendor to code into your SV site)

- Begin keeping a list of these for your next meeting with an SV Staff person. We find that during those meetings, we can many times assist you in identifying:
 - If it can be accomplished in a better way with the new technology of v4
 - Is no longer relevant/needed because of the new technology
 - Is a legacy customization on your site that your organization no longer requires and hence, can be left out of your new site.

- **Upgrade meetings**

- **WHO:** SV Staff, Client
- As you work through the Compare/Contrast and identifying previous customizations phases above, you'll most likely meet occasionally throughout the project with a SV Staff person for guidance, additional training, etc

- **Pilot / Test launch**

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- **WHO:** Client

1. The most successful Upgrades we've observed are the ones where a Pilot group is defined, launched, evaluated, feedback integrated - before moving your entire organization off of your current SV site onto the new v4 SV Site.

- Define a "subset" of your organization that you will focus on configuring the new site for.
 - Service(s)
 - Staff(s) working in those Service(s)
 - Individuals currently accessing those Service(s)
 - Forms and Processes necessary for those Individuals and Staff
- Configure your new site for that Pilot group
- Train those Staff on accessing and using the new SV v4 site. NOTE: The rest of your organization will continue to use the existing SV site and will see no interruption.
- Go "Live" with this Pilot group
- Gather feedback from them

- **Go Live with your entire organization**
 - **WHO:** SV Staff, Client

1. Schedule cutover day

2. Train / general change management for all organization users of your SV site.

3. Have a well deserved week off because you got this done with time to spare!!!!

NOTE: This section will have additional information added to it at a later date.

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