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CTRL+CLICK CAST #31 Upgrading EE with Shawn Maida

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Lea Alcantara: You are listening to CTRL+CLICK CAST. We inspect the web for you! Today Shawn Maida joins the show to talk about the technical and biz side of upgrading ExpressionEngine. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

Emily Lewis: Emily Lewis!

Lea Alcantara: No episode sponsor today, but we would like to thank [Pixel & Tonic](#) for being CTRL+CLICK's major sponsor. They added a couple of new feature introduction videos for Craft, one for [custom fields](#) and another for [section types](#). Short videos are such a great way to get up to speed, so if you're interested in checking out Craft, we'll have links in the show notes with these intro vids. And we do have openings for episode sponsors! So if you are interested in promoting your business, product or service, please visit ctrlclickcast.com/advertise.

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Emily Lewis: Today we're talking to Shawn Maida about the technical and business side of upgrading EE. Shawn is the owner and president of [Visual Chefs](#), a Richmond, Virginia-based agency specializing in CMS and custom web app development. While Shawn is versed in a number of content management systems, he has a passion for ExpressionEngine, launching over 300 client projects in EE and bringing together ExpressionEngine experts to form [EE Coder](#). Welcome to the show, Shawn!

Shawn Maida: Hey, how are you guys doing?

Emily Lewis: Great!



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Lea Alcantara: Great! So Shawn, can you tell our listeners a bit more about yourself?

Shawn Maida: Sure. Well, like you said, I live in Richmond, Virginia. I've got three kids under four.

Lea Alcantara: Oh.

Shawn Maida: Which means life is crazy.

Emily Lewis: [Laughs]

Shawn Maida: So if I'm not working hard at work and trying to build our team and support our clients, I'm generally at home helping my wife chase all the little ones around.

Lea Alcantara: [Laughs]

Shawn Maida: So I think that that kind of takes up like a 100% of my life at this point.

Emily Lewis: So I'm curious, Shawn. As I said in the intro, Visual Chefs is your agency, and then what exactly is EE Coder. Is it like a coalition, or what would you call it?

Shawn Maida: It's my branding disaster.

Emily Lewis: [Laughs]

Lea Alcantara: Oh.

Shawn Maida: So in 2007 we started EE Coder. It just really is an ExpressionEngine marketing kind of engine to go out and partner with designers and agencies and people that I think at the time like needed a content management system. It was like the add-on feature of a website like in the day where *now* it's expected. And it just grew and just became 100% of our business and who we are, so we're kind of working actually to like realign our brands now. But it was really designed as a service, I mean, for ExpressionEngine, but kind of as a marketing vehicle if you will, and it worked.



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Lea Alcantara: Interesting, so almost kind of like a landing page that ran away with you.

Shawn Maida: [Laughs] A landing page that ended up with its own contracts.

Emily Lewis: [Laughs]

Lea Alcantara: Yeah, exactly. [Laughs]

Shawn Maida: Yeah, yeah. Business cards and everything, yes, that's exactly what it was.

Lea Alcantara: So you've been working on ExpressionEngine for a long time, we've established that. And with all these sites in your arsenal, upgrading EE must be quite the venture. [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: And I guess that's like the easiest way to kindly describe it, I guess. I mean, it's a common question we hear like, "Have you upgraded to version whatever?" after every release. So I guess the first question regarding upgrades, especially when you've got, say, 300 clients or whatever to kind of manage or deal with, what determines if/when you do an upgrade?

Shawn Maida: Sure. I think originally when like our sites were smaller.

Lea Alcantara: Right.

Shawn Maida: So like in the beginning, we upgraded more frequently, and we upgraded a lot because we were getting support in the forums like back in the beginning.

Lea Alcantara: Right.

Shawn Maida: And it was just like that was the answer: "Are you on the latest version?" And you're like, "No. Man, okay, let me upgrade." Now, I think it really, especially with a lot of like larger sites and more customized sites like there's not a specific "Oh, the latest version is out, let's upgrade." It's



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more like evaluating the specific client and the needs. And like we'd a large site that had a lot of users and login issues with the people being able to stay logged in.

Lea Alcantara: Right.

Shawn Maida: So the version of EE came out where they had fixed that or supposedly fixed it at the time, like upgrading kind of made sense.

Lea Alcantara: Sure

Shawn Maida: It was too large of a feature to just go in try and like hack in or fix EE's core. So I think we take it very much client by client, evaluating the costs, the benefits.

Lea Alcantara: [Agrees]

Shawn Maida: Is there anything that they're going to get out of that particular upgrade, why would we do it?

Lea Alcantara: Interesting. I feel like the conflict regarding that is if you do have that simple client where if it ain't broke, don't fix it, you know, that kind of thing?

Shawn Maida: Right.

Lea Alcantara: And then at some point then, they're still chugging along, everything is still working, but they're on like 2.1 or 2.3 or something like that, and we're all the way to 2.9 at this point. Would you still touch that at all, and why?

Shawn Maida: Yeah, and I was actually thinking about that when just like looking back at our own upgrades and some of the challenges we faced. Because I think the downside of waiting a really long time between upgrades is that you get more code that's deprecated and like add-ons that don't work,



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and I feel like you run into more issues. *But* you're sort of only upgrading once instead of 10 times. We don't have many like EE1 clients.

Lea Alcantara: Right.

Shawn Maida: But we do have some clients that are still sitting on early versions of EE, and I just don't think it's ever made sense for them to upgrade because everything kind of hums along and they like have an occasional request for an update. I think there is, like, you want to get the security patches in, and that sort of thing.

Lea Alcantara: Right.

Shawn Maida: So there's like a reason to upgrade, but I think especially with the smaller sites, sometimes they can't justify the cost of upgrading. Especially back when you were doing \$1,500-sites, \$5,000-sites, and then upgrading where we need 12 hours, you know?

Lea Alcantara: Yeah, for sure.

Emily Lewis: Well, that's an interesting point you bring up, so the upgrade process, is it extremely time consuming? I know that's sort of a hard question to answer because every site is going to be kind of custom in terms of what add-ons and stuff you have, but I know from my own experience, I minimally set aside at least two hours.

Shawn Maida: Yeah, I think for us, we just don't have a lot of those sites anymore. But I think you're right, like we used to, and we still do on the smaller sites, we would tell our client, "Hey, potentially a 4-hour window for this site like if we're doing an upgrade." It might only take an hour or it might take two hours. We've done upgrades that are like three or four weeks' worth of effort.

Emily Lewis: Ouch!



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Lea Alcantara: [Agrees]

Shawn Maida: But yeah, I mean, I think there is some sort of minimal time that you need to set aside, be it a couple of hours, if that's what you're asking.

Lea Alcantara: Well, my question is when we're thinking about like a straight upgrade and it sounds like even the projects that take several weeks to upgrade. At what point do you decide whether upgrading make sense versus what I feel like is also common, just creating a new ExpressionEngine instance in that new version and then importing from the old version.

Shawn Maida: Yeah.

Lea Alcantara: So almost as if it's from scratch as opposed to using the upgrade script.

Shawn Maida: I mean, I think we do evaluate both. I think more often we do an upgrade over rebuilding.

Lea Alcantara: Aha.

Shawn Maida: But I think we very often would just sit down and say like, "Okay, this particular upgrade is going to be 16 hours." There's a certain amount of risk in it because it's got an early version structure and it might break or whatever is going on, but I know that I could like confidently rebuild it, but rebuilding it would be 30 hours.

Emily Lewis: Right.

Lea Alcantara: Okay, right.

Shawn Maida: So I think we just try and evaluate the cost and time. And sometimes it's presenting those options to the client.

Lea Alcantara: Right.



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Shawn Maida: Now, we're looking at an EE1 to 2 upgrade with 30 MSM sites.

Lea Alcantara: Oh my god.

Shawn Maida: Yeah, and I'm looking at it. I'm like, "Man, I don't know what the level of effort is. I can probably better judge the level of effort to build it." With the upgrade, there's a lot of risk. And we're either going to take that fixed cost or we're going to like hourly for the client and then it's *their* risk. So sometimes I think it is just kind of working through the business case behind it and then talking it through with your clients of like, "Okay, well, we can upgrade, but we don't know exactly how long this is going to take."

Emily Lewis: I'm curious if you do have that kind of conversation where it's a little more open-ended with the client. Do you have a negative client reaction to that? Are they kind of understanding of this sort of....

Shawn Maida: Oh, it's always.

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

Shawn Maida: It's always that nobody is ever happy. I think sometimes. I mean, I think there's always with the upgrades in general, a lot of times clients don't understand or people don't understand like what the cost is, whose responsibility it is if something breaks during the upgrade. But I think overall like we just tend to be as transparent as we can be. I think that's normally received really well. Like you're going in, you're being honest, you're being transparent, and people like they might not like it sometimes, but I think they get that transparency and honesty sort of, and I think it's really hard to be too mad at somebody when they're just telling you. They might be frustrated that they spent \$10,000 on the site and they need to spend \$2,000 on an update, you know?



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Lea Alcantara: Right.

Shawn Maida: But I feel like that's a different frustration. It's not one with us.

Lea Alcantara: I definitely think though that there is kind of an education aspect when discussing upgrades with clients, especially because there are other CMSs that have one-click upgrades or whatever. Or maybe that particular site doesn't have as many third-party add-ons or they have an experience with another site where you just press a button and everything is upgraded, "Why is this an extra \$2,000 to upgrade this one?" And then having to discuss and say, "Well, no, we can't just do a one click. There are different server environments now to discuss or different security stuff that we have to think about that wasn't there three or five years ago."

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Shawn Maida: Yeah.

Emily Lewis: I'm curious, should we be even mentioning upgrades earlier on in our engagement with the client so that they're sort of prepared? Is that even worth it to think about?

Shawn Maida: I feel like at this point for us, we try and mention as much as we can about *everything*.

Lea Alcantara: Sure.

Shawn Maida: I mean, it's like, I think upgrades is something you should talk about. We pretty much go out the gate with like a Phase 2 bucket or a backlog. And so I think upgrades are the same thing. Like there's a maintenance cost associated with a site or a growing business, you know?

Emily Lewis: [Agrees]



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Shawn Maida: I mean, you're building a site, it only has 200 users. Five years later it has 30,000 users. I think just upfront conversations about ongoing cost of that with clients is really important, just so they understand that what you're building ... you might be building it for now and for this year, but like what's the shelf life of that product before it needs to be updated, upgraded or changed, you know?

Emily Lewis: Yeah, I think that "maintenance" umbrella is a good umbrella to put it under in those earlier discussions with the client because I think if they can get their head around the idea of maintenance, but upgrading might be a little more narrow for them to sort of appreciate the investment of effort. I'm curious: you mentioned a couple of times like that you evaluate for each project on a client-by-client basis. Can you talk a little bit about your evaluation process? What do you do? Do you do an audit of the add-ons? Do you look at server requirements? What's involved?

Shawn Maida: Yeah, I kind of ask the team a little bit because they do more of a day-to-day on this now, but we do an audit of existing add-ons, kind of what's installed, what's there that's custom, what's written specifically for their site. I think we always run the install wizard just to make sure that...

Lea Alcantara: [Agrees]

Shawn Maida: ...there are only like eight requirements in it, but you end up halfway through an upgrade and realize like if the PHP version on the server isn't going to support the new EE install. I think you'll look a little foolish. So we definitely do that audit. We have started doing site audits. A lot of the upgrades we see come to us from other developers. If the site was built like three years ago, something stopped working, they come to us. They've been told they should upgrade, and so they just come in and actually say like, "EE Coder, we want an upgrade."



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What we found was we like started inheriting a lot of like other people's problems like in the site. So things would like break over time just through updates or whatever and then we would upgrade the site and suddenly like we were responsible for every bug that had existed for the last three years.

Emily Lewis: [Agrees]

Lea Alcantara: Right.

Shawn Maida: And like even if we could explain that upfront, it's still was like this funny place with the client like having to go back and prove it was broken. So we started keeping like copies of the pre-upgraded site.

Emily Lewis: Right.

Shawn Maida: So now, we're just, 1) how we would set that contract up, but 2) it's really trying to dig in and do an evaluation of the site. But you can't do that ... or can you do that on the site that's four hours worth of work?

Emily Lewis: Right.

Shawn Maida: So I think it kind of depends. But yeah, we are definitely trying to do full audits, documenting everything upfront of what needs to be updated.

Lea Alcantara: I'm curious about the tools you use for that. Do you just have like to-do list somewhere or do you use Basecamp or do you use just spreadsheet?

Shawn Maida: We call it an "Andrew."

Emily Lewis: [Laughs]

Lea Alcantara: An "Andrew." [Laughs]



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Shawn Maida: An “Andrew.” I was very fortunate in that the first person I hired was really amazing, and I think we built so much of our business around him. I was *unfortunate* because that led to not like documenting some things just because I didn't have to.

Lea Alcantara: Right.

Shawn Maida: And so as we've grown from like one to 12 and there are like multiple people doing upgrades and stuff now. We really have been going back and like making spreadsheets, making lists of what needs to be done. But up until recently, that didn't exist at all.

Now, we have something like basic documentation. We also kind of have an internal knowledge base for bugs and issues that we encounter, it's just like a kind of great place to document something that we've seen before that may help another developer on the team when they jump into an upgrade.

Emily Lewis: [Agrees]

Lea Alcantara: Well, that's a good idea. Do you have any automated script that's just pre-created to sniff a bunch of things the moment you inherit a site?

Shawn Maida: We do not, although it sounds like a decent idea. I talked to Tom Jaeger from EE Harbor.

Lea Alcantara: [Agrees]

Shawn Maida: And he was that they diff. He keeps like a base copy of every version of ExpressionEngine.

Lea Alcantara: Wow!

Shawn Maida: And I think in large part because they're add-on developers.

Emily Lewis: Right.



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Shawn Maida: But he said he actually like diffs the core. He's using like the Mac Diff tool just to see if anybody has like hacked EE. He said that's helped him a lot just because he'll find ... he'll inherit a site where somebody has gone in and changed a line of code here and a line of code there. So he said that's exposed potential issues to him upfront. So I know that was a pretty good idea if you manage to hold on to all the old versions of ExpressionEngine.

Emily Lewis: So when it comes to an upgrade, is it something that a single person on your team tackles or do they work with others to handle the upgrade?

Shawn Maida: I think it depends on size. I think the majority of upgrades are single developer with another developer or multiple developers sort of there for support. I think also as a matter of time. Like it's as soon as an issue is encountered, it's sort of flagged by the team because somebody else might have seen it before. And so yeah, but typically a single developer on the smaller upgrades. The larger upgrades we've done, it's still probably a single developer doing work, but multiple people doing QA, doing some add-on upgrades and that sort of thing.

Lea Alcantara: Cool. So I'm a little bit curious about the nitty-gritty of this particular workflow. So you mentioned that you started to document it a bit more and have a place for multiple members of your team to deal with. Can you just outline the general steps that they do go through?

Shawn Maida: Yeah, I think in terms of workflow for us, one is documentation first. So we really are going through the site, looking at what add-ons were installed, checking the server to make sure that it's going to support the new version. Then we're checking that everything *can* be upgraded, that the upgrades, there is sort of compatibility so verifying that all of the add-ons have been updated to the latest version of ExpressionEngine. Sometimes they haven't been and we'd really need to do an upgrade, so we'll evaluate whether or not we can just upgrade the add-on ourselves.



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Lea Alcantara: [Agrees]

Shawn Maida: A lot of times, the add-on doesn't say that it support the latest version so we'll kind of check and see what's been changed in the code. And sometimes it's simple with just some functions have been deprecated and we'll go in and switch it out. And I think that was more common like with plugins when you are going from like EE1 to 2, just a lot of times it's just faster to go ahead and just update them ourselves. So we check those things.

And then we really talk to the client about it. We don't typically do upgrades on production servers, but there are some clients that just being offline doesn't matter. It's a small personal blog. We only need two hours. We can do a backup first, and sort of client risk for being offline just doesn't matter to them. And then we have other clients where they're like news, content's being published regularly, so we sort of talk about different ideas about content freezes.

Lea Alcantara: Right.

Shawn Maida: And saying, "Okay, can you freeze content for four hours, or can you double-publish for four hours?" And so sort of go through that whole planning with the client of like what the upgrade looks like.

If it's a site with a lot of custom functionality ... so we have a site with half a million member accounts, about 60,000 active members. So it is like when that site needs an upgrade, it needs like a long period of QA. There is a lot more involved. So just kind of working through that with the client.

Once that's all set, we'll go into the upgrade process. Normally, it's copying the production site down to a staging environment. Codes normally and version control with Git and Beanstalk at this point, and we'll do kind of a test upgrade or we'll run through an upgrade on staging. I think our guys are normally like upgrading add-ons first now whenever they can.



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Lea Alcantara: [Agrees]

Shawn Maida: And so they're bringing like the entire system up to the most recent version before they upgrade EE.

Lea Alcantara: Right.

Shawn Maida: Making template changes where they can, kind of getting everything ready to go, and then upgrading ExpressionEngine itself, and then doing QA and testing. And then we'll normally, depending on those earlier conversations with the client, sometimes the client will do QA and we can like just roll their whole site back out into production, because they're only making a few content in it and it's not a membership site, it's not payment. There's no content that really matters.

Lea Alcantara: Yeah.

Shawn Maida: Other times it is sort of then scheduling like what we would call like a live upgrade, and that's one of two things for us generally, because that upgrade process might have taken like a week, depending on if it's a bigger site.

Lea Alcantara: Right.

Shawn Maida: So then it would sort of be rolling through that process again in a very like confined window.

Lea Alcantara: [Agrees]

Shawn Maida: So we'd say to client, "Okay, for the next four hours, don't publish content. We're going to take another snapshot, do an upgrade on staging, take your site down for 15 minutes and like swap out a new production version." I think that's generally how it would go. We're also like at that point we have upgraded templates, we have upgraded add-ons, and we have all like kind of



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upgraded code around, so we're just moving it in through Git and we're not actually having to do that at the time of the upgrade, if that make sense.

Lea Alcantara: So I'm curious also, is there a particular day or time of day that you think four-hour window or "pause content" addition is good to deal with?

Shawn Maida: Friday afternoons at 4 o'clock before we all go home.

Emily Lewis: [Laughs]

Lea Alcantara: Yeah. [Laughs]

Shawn Maida: No, I think that's actually been the hardest for us in talking to clients. I know we've done upgrades at 3 a.m.

Lea Alcantara: Oh god.

Shawn Maida: Yeah, which is certainly not desirable for anybody, and the clients are like normally available. It's like, "I'm upgrading your site, you need to do QA." Like we're all going to sit up on Skype and that's just not fun.

So we try and look at traffic, look at Google Analytics or whatever they have to see if they have down days. If there's a good time, talk to them about their publishing schedules, but we do try and do them like earlier in the week. We also try and do them like really early in the morning, so I've got a couple of guys that they kind of have flex schedules here during the day. So I've got some people that are like 5 and 6 o'clock in the morning people, so they'll get up and do an upgrade first in the morning before the clients get rolling.



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But I tend to do them earlier in the week because I just like having sort of the week to find issues if they do crop up because they do, and I think I'm doing as much as I can to save my employees, team or myself from like nights on weekend type phone calls.

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Emily Lewis: I'm curious if you have any tips or suggestions for that add-on audit process. I can't tell you how many times I go to see if an add-on is compatible with the latest version. There's no documentation anywhere of what the change log is or anything. Do you contact the add-on developer directly or do you dig into the code of it and take a look?

Shawn Maida: I think it depends. I mean, I've definitely contacted add-on developers. I've looked at the code myself. I don't think there's any great magic answer, but I'll reach out. I mean, I've emailed or called people about custom add-ons they've written, just trying to get any information that I can. I've called people about sites that we've taken over and there is functionality that you don't know exists, you know?

Lea Alcantara: Right.

Shawn Maida: So a lot of times I'll get kind of permission from the client to reach out to the previous developer. What's weird to me is like a lot of times the clients are the ones that a little like uncomfortable with that.

Lea Alcantara: Right.

Shawn Maida: Because of however their relationship ended.

Lea Alcantara: Yeah.



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Shawn Maida: But I think most of us is like we know each other in the community now, so you end up just calling somebody that *you* know and saying, “Hey, I've taken over this site. I'm like not really worried about the business of it, but it seems like there's a lot going on I'm trying to upgrade it. Do you have any info?”

Lea Alcantara: Right.

Shawn Maida: But yeah, specific to the add-ons, I don't think there's like a surefire answer for how to figure that out.

Emily Lewis: I think the surefire answer is if the developers would document it. [Laughs]

Lea Alcantara: Well, I'm curious. I want to touch on how you mentioned taking over somebody else's work and trying to figure out what's going on. You kind of touched on it a little bit earlier about trying to figure out, “Well, if it was broken before how do you prove that it wasn't you that broke it, et cetera.” So how do you deal with the liability of inheriting a site that a client wants you to upgrade?

Shawn Maida: A lot of conversations with the client upfront.

Emily Lewis: [Agrees]

Shawn Maida: I mean, I think that's just having those direct, honest conversations about what you're taking over. And that there is risk, and that's *somebody's* risk and I don't think just because we're developers, that it's just our risks to take by default, which seems to be like the mentality sometimes.

Lea Alcantara: Yeah.

Shawn Maida: But almost all of our upgrades now are hourly, so we just don't do fixed cost upgrades because of that. Even that requires a lot of communication too though.



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Lea Alcantara: So have you seen a pattern? Are there any particular common issues you've seen with upgrading someone else's work?

Shawn Maida: I think that a lot of it is just because one of the reasons I think we all love ExpressionEngine is because it's so flexible.

Emily Lewis: [Agrees]

Lea Alcantara: Right.

Shawn Maida: So we all do things like slightly differently.

Lea Alcantara: Yeah.

Shawn Maida: I don't think that's an issue necessarily, but I often find like we'll try and build time in, I would say, to clean things up. I mean, I think that's also just a matter of sites changing over time or standards changing over time.

Lea Alcantara: Right

Shawn Maida: So like in addition to just like trying to bring software up-to-date, we'll take time to like, "Oh, let's implement ExpressionEngine Layouts now because we'll get like a little performance boost when we do it." So it's not really something of an issue from the previous developer as much as it's like trying to push the site forward or nudge it forward.

Lea Alcantara: Using new techniques, yeah.

Shawn Maida: Yeah. I mean, we've all learned so much. People used to build navigation with categories. We don't do that anymore.

Lea Alcantara: Or everything is an embed.



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Shawn Maida: *Everything* is an embed, yeah.

Emily Lewis: [Laughs]

Shawn Maida: And that stuff we all clean up, like if we see it. I've definitely seen where like the closing HTML tag is like an embed by itself.

Lea Alcantara: Oh wow, yeah.

Shawn Maida: It's those sort of things, and so we're all like generally tell the client that stuff upfront and then kind of give them a laundry list and say, "Well, these are some of the things we're also going to clean up. And like they don't really matter, but it keeps your site living and breathing as it is, like it's something you're going to continue to carry forward with you for the next five years, and you just probably just go ahead and do the stuff, you know?"

Emily Lewis: [Agrees]

Lea Alcantara: Yeah.

Shawn Maida: Because at some point it's going to come back to you.

Emily Lewis: So we had a couple of listener questions I wanted to bring in to the conversation. The first of which is Kevin Nicholson wanted to know, "What do you think is the best way to make for a painless EE upgrade?" And he was thinking, "Is it about fewer add-ons?"

Shawn Maida: I always think you should like evaluate what add-ons you're using for sure, like you should.

Lea Alcantara: [Agrees]

Shawn Maida: When you're building a site, you need to think about that and not just grab every plugin that exist. We're probably a little slow to like change here, that's in part...



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Lea Alcantara: Right.

Shawn Maida: ...because we use add-ons that we trust. We use products that have been around, you know?

Lea Alcantara: Right.

Shawn Maida: So I know Brandon's add-ons are always awesome. Brandon (Kelly) supported his add-ons. Solspace supported their add-ons. So when we had upgrade issues, like there was somebody else there. So I think we were just very like selective. And then specifically about using a lot of add-ons, I think for us kind of because our background is more development-focused, we do tend to write like plugins for every site. And so we'll end up with like utilities plugin that we get to have instead of having like 30 plugins from Devot:ee, we'll just have one that might have 20 functions in it. But I think for us that makes upgrading a little easier. But I think definitely like trying to know the software and the developers that you're using their products, I think make sense when upgrades come.

Lea Alcantara: So there's another listener question from Jae Barclay that I wanted to touch on too. His first ... he actually had several questions. Thanks Jae. [Laughs]

Shawn Maida: Oh-oh.

Lea Alcantara: His first question was, "Do you think an honest-to-goodness one-click upgrade tool will or can ever happen for EE?" Have you ever used something like Updater maybe perhaps, or just in general?

Shawn Maida: We tried using Updater I think when it was first released. I never tried it, but one of our developers that does a lot of upgrades tried it. It wasn't, at the time, I think something that he felt was beneficial.



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Lea Alcantara: [Agrees]

Shawn Maida: So kind of his part of this call or planning for this call, we talked about giving it another shot now. And so I think that's something we'll do, but I just really can't answer that. I do wonder about the one-click upgrades. I wonder more because the sites we see so often, I just can't imagine clicking a button and then being fully updated.

Lea Alcantara: Yeah.

Shawn Maida: I think part of it is probably EllisLab's like process and then things changed like in versions. I'm glad that there is forward progress, but things do break. Code gets deprecated. How you template change, and so I think I don't know. I'm almost not comfortable with it, like I prefer to...

Lea Alcantara: Yeah.

Shawn Maida: Because I think that's something with the upgrades that we see that a place where we do run into issues is that like you finish an upgrade and you're like "High five, yes, it worked!" but you didn't deal with the fact that like Structure pagination was deprecated. It still works...

Lea Alcantara: [Agrees]

Shawn Maida: ...but like really probably it's a good time to stop and like go and redo the code now.

Lea Alcantara: Right.

Shawn Maida: Because like five versions from now, it's going to be removed and not work at all. I think sometimes we also have to just stop and kind of again like make sure that everything code-wise is up to where it needs to be in addition to just being excited that the software version now say like 2.9.2, you know?

Lea Alcantara: [Agrees]



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Shawn Maida: Because otherwise we're sort of just delaying your problems.

Lea Alcantara: So Jae had another question. We kind of touched on whether we do upgrades or import stuff so this one is more about the import thing. His second question is, "Do you use any MySQL tool for database migration a la SQL Workbench or others? If so, what do you recommend?"

Shawn Maida: We, not typically. I mean, we had in the past. I feel like that when we had done it, I feel like it's definitely required for somebody with a certain level of knowledge and skill. So I think for us, data migration is a case-by-case. We have done more on rebuilds than upgrades so it's like we rebuild sometimes versus an upgrade, but kind of a new design.

Lea Alcantara: [Agrees]

Shawn Maida: We do a lot of like data exports/imports that way. I mean, we have used, and I don't even remember what SQL it was at this point, but we have done like data merging to pick out members and to pick out orders and that sort of thing.

Lea Alcantara: [Agrees]

Shawn Maida: And that was even a couple of years ago. We just haven't. I think we've gotten our upgrade process, and we really haven't run into that recently.

Emily Lewis: This is not really a question, but I think a point that's useful to mention is from another listener, Dorothy Molloy. She had gone through the process of upgrading an ExpressionEngine MSM site, and for her, I'm gathering at least from the blog post she shared with us, which I'll make sure we link to in our show notes, that she hadn't really looked at the add-ons before doing the upgrade and then had a fatal error. And so she put together a really succinct and straightforward blog post about what to do if you do that yourself and how to sort of undo what you've done so that you can complete your upgrade installation. And I think this is one of those things that you encounter, especially if you're



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kind of new to ExpressionEngine. I know I certainly have in my earlier days working with it, and you mentioned it in your process, kind of getting all the add-ons, modules, extension, all that stuff updated before you do anything with EE.

Shawn Maida: I really do think that's a good idea when you can. I think there were probably times where like the version differences are enough that you can't upgrade it on that on first, but I do like doing it first whenever we can. In terms of like errors, I think it's kind of a different direction, but like making sure that you just like Google. And checking the bug tracker.

I can't think how many times I've logged into EllisLab's like bug tracker and I'm like, "Oh, there's somebody else found the error already" It's been three weeks since the version is out, like I'm not really alone to find out all those errors. And that the Stack Exchange site exists, so I think that most of the times when we run into like a SQL error or template error or just something like that that crops up, I normally just put the error like either directly into Google or directly into bug tracker and I have an answer in like 30 seconds. So I mean, I think that's always something to keep in mind also. It's like just use the tools that are out there.

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Emily Lewis: You mentioned something in your answer just then that the version has been out for like three weeks. Do you give like a window before you even consider an upgrade?

Shawn Maida: Not specifically. I mean, because again I think it's like on a per client, per site basis and then what's currently out and compatible. We upgraded one site to 2.9 pretty quickly like after it came out, maybe a week. But like we just didn't have any conflicts on that site and we were getting ready to do some performance work on the site, and so that was like our primary driver was that the template engine had been re-written. And so just before we're getting in, we're like, "Look, we want to



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upgrade,” and so we talked to the client about it. We upgraded the site. It was a heck of a lot faster like out the gate after an upgrade. So not like a specific window. I mean, like well like 2.9.1 and 2.9.2 came out like a day apart or something, so like I'm not watching the blog, installing it like the moment it comes up.

Emily Lewis: [Agrees]

Lea Alcantara: Do you have a base install for these types of things?

Shawn Maida: We've gone back and forth with the idea as our team has grown. I know a lot of people do. I know some people have some like amazing scripts to help get them started. We don't.

I think the argument could be made that like saving two hours is like two hours. But we've never done that. We've talked about it a lot. We're talking about it again now just because the team is bigger. It would be helpful for the people that are like newer on the team and maybe a little more junior to just like give them a kick-start. But, no, we don't have kind of a base install or template to work from.

Lea Alcantara: So now, we've talked a lot about all the different types of upgrade processes, but you also touched on a little bit about whether we should upgrade even like the smaller clients or legacy clients if everything is not broken. Are there points where you can assess whether or not EE is even a good fit for them at all at that point when they're ready to upgrade or to shift them to another CMS altogether? And if so, how do you decide?

Shawn Maida: Sure. We've traditionally, like I think many of us like have been, we were an EE shop. And I think everybody over the last like year or two has started to explore what other options exist, in large part because there are just good options now.

Lea Alcantara: Right.



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Shawn Maida: For a long time it was like EE or bust. There's just nothing else that I even want to touch.

Lea Alcantara: Yeah.

Shawn Maida: So I do think it's something to consider. I think our path is probably a little different in that a lot of direction we're going when we look at that is like from EE to custom.

Lea Alcantara: Yeah.

Shawn Maida: And because we spent like years like building out really complex custom systems in ExpressionEngine that probably really, like if you step back, like aren't content managed. Like it's not what the CMS was for in my opinion.

Lea Alcantara: Right.

Shawn Maida: We were building out like heavy business rules. And so I think for us, we have come to a place where we're like now keeping an EE site *and* having a custom app that might do some sort of business logic like payment processing or access checking or something. But I do think it's reasonable to look at on the really small sites, it's like, "Do you need EE or will Statamic work with the little sites?"

Lea Alcantara: Yeah.

Shawn Maida: Because sometimes it's just a matter of cost and some of that cost is maintenance costs, you know?

Lea Alcantara: You're right.

Shawn Maida: It is. Maybe Craft is a good option because you don't need anything complicated. One-click updating does work. I think that we should always be ... I think for a long time as a



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community it was like “everything goes in EE.” And I think to be responsible now, we really should step back and try and figure out if the stuff we're using is a good fit.

Emily Lewis: So you mentioned that at this point most of your upgrades are hourly. I'm just curious if you've ever done pricing, like if you have a retainer client, could an upgrade fall under the retainer or if it's a brand new project and you've put in “one upgrade is included” in the fixed price for that project, how are you approaching your costs from a business perspective, and how much if anything do you just suck up yourself?

Shawn Maida: We've all just sucked up something.

Emily Lewis: [Laughs]

Lea Alcantara: Yeah, right.

Shawn Maida: We did not want to do it before. I hope we all learned continuously about that. We do have retainers. We actually do quarterly retainers, and I think my view on retainer, I think there are two things that you're using it for. Like you're using it to add value to the client through things like backups... we've had hosting companies just like delete the backups or delete the server.

Emily Lewis: [Agrees]

Shawn Maida: And so sort of like adding some value through certain services that they might be part of a retainer and it might sort of have a fixed cost. I think the other thing that like we're typically doing is guaranteeing availability. So we're all trying to be busy, so retainers are a way for the clients to have us be available for certain amount of time and sort of us just ensuring it that that can happen.

So the upgrades ... the way our retainers work is like we're not *guaranteeing* an upgrade. We might guarantee that we're going to look at an upgrade. Our job is I think at that point, depending on their retainers, sort of to evaluate your site continuously and to see what's out there and to make



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suggestions or recommendations. So I think like one of our retainers has upgrades built in, but the upgrade is still built in on the “if we can do it” sort of capacity. I think that might also just be a matter of like the retainer. The retainer may be 24 hours a quarter, and the client is doing 24 hours' worth of enhancement. I think it's just not room to upgrade.

Emily Lewis: [Agrees]

Lea Alcantara: [Agrees]

Shawn Maida: And I do think, I mean, I think upgrades, how do you write that like? Well, we'll upgrade unless it's 1 to 2 and see what happens. In fact, when EE1 came out, our retainers had like guaranteed upgrades for everybody, that had been a nightmare. So yeah, I think we don't guarantee it as part of the process, but I think it's our responsibility as part of the retainer relationship to be evaluating their sites. And then we'll step outside of our retainers very regularly with like additional statements of work, and so, “Okay, we're going to do an upgrade. Here's the schedule. Here's the estimated costs. Let's go.”

Emily Lewis: So Shawn, EE3 should be around the corner. Are you perhaps holding off on any upgrades for EE3 to come out?

Shawn Maida: I'd like to know how many people like told their client to wait for EE2. It's like four years later, we're all like, “Oh yeah, I've lost a bunch of work because I told you to wait.”

Emily Lewis: [Laughs]

Shawn Maida: No, I mean, like sitting on the edge of my seat, waiting to figure out what they're doing with EE3 partly because I own a business called EE Coder. [Laughs]

Emily Lewis: [Laughs]



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Lea Alcantara: Right. [Laughs]

Shawn Maida: But no, we don't tell our clients to wait for anything, you know?

Lea Alcantara: [Agrees]

Shawn Maida: I mean, I just don't. I don't think you can. I mean, I don't think you could because you don't know what exactly the product is going to be. You don't know exactly when it's coming out. I mean, I think if you have a good idea like the blog post that's being put out, you're like, "Oh okay, well, they're fixing. They're like redoing date/times so like it finally works correctly. Why don't we wait until this version comes out, like suck it up a big longer instead of us like dumping a bunch of hours trying to figure it out." But no, we're not. I just don't see how we could wait for 3.

Emily Lewis: Kind of a final question. I'm curious if you have any sense of how much or what kind of percentage upgrades make of your business that you have with clients?

Shawn Maida: I'd say very, very small.

Emily Lewis: [Agrees]

Lea Alcantara: [Agrees]

Shawn Maida: I mean, I'd say like a couple of percent maybe. But I think a lot of times it's like a way to a relationship, you know?

Lea Alcantara: [Agrees]

Shawn Maida: So again for us, if we get people who want an upgrade, I'm more evaluating like what does this relationship look like in the long term? Like am I upgrading your site and you're going to go away and I'm never going to see you again? So I have a lot of conversations. I really have to work hard to manage risks. I did eight hours of work and then that's it forever. So I think for me what they



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probably are is like they're probably a greater percentage of eventual work or like relationship started, which I think is really valuable.

Lea Alcantara: [Agrees]

Emily Lewis: Yeah, I think at least from my perspective right now the way I think about upgrades is also for the continuation of a relationship. You mentioned it a couple of times, but just demonstrating the value to a client that we did a project with, they may not be on a retainer with us, but we still have a relationship with them in terms of when they want something new. It's also a great conversation point to reach out, "We haven't talked to you in a while. A new version came out, we think it might give you these benefits." It sort of keeps that relationship going and letting them know that we're still invested in them as a client.

Shawn Maida: Yeah, I completely agree with that. And everybody was talking about like the slow summer.

Lea Alcantara: Right.

Shawn Maida: What a great way I like during the slow summer to have been out there like helping your clients, but also helping your business by reaching out to the hundred sites you built and saying, "Hey, for these 30 of you, I think an upgrade actually really would help, or it would help *all* of you because there are security fixes in there." So I definitely agree.

Lea Alcantara: So final question, do you have any final tips for anyone who's going to tackle an ExpressionEngine upgrade?

Shawn Maida: Tips, I mean, I think really like the preparation. Like taking the time upfront to think about what you're going to do, planning it out like we talked. I really think if it's not your site that you're upgrading, understanding sort of the inherited risks of taking over somebody else's project and



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kind of what's the unknown. And I just think like communicating your butt off, just talking to your client as much as you can. You're not trying to freak them out, you know?

Lea Alcantara: Right, right. [Laughs]

Shawn Maida: But you're not trying to go into an upgrade and like assume all the risks for it. So I think it is talking that through like reasonably because you understand it and saying, "Okay, there is some risk here. It's minimal. Here's what it looks like. Here's what we do about it, and here's what that means. It means that your upgrade might cause you an extra \$500." So I think the communication, so I think those three things.

Lea Alcantara: Awesome. Well, before we finish up, we've got our rapid fire 10 questions so our listeners can get to know you a bit better.

Shawn Maida: Oh-oh.

Emily Lewis: [Laughs]

Lea Alcantara: Are you ready, Shawn?

Shawn Maida: Oh, I guess so.

Emily Lewis: [Laughs]

Lea Alcantara: Okay, question one, Mac OS or Windows?

Shawn Maida: Mac OS.

Emily Lewis: What is your favorite mobile app?

Shawn Maida: My favorite mobile app? Do I even have a phone that has mobile apps? [Laughs]

Emily Lewis: [Laughs]



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Lea Alcantara: [Laughs]

Shawn Maida: Hey, come on now. Oh man, you know what, I think I have none. I'm like telling you, I'm old.

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs] Luddite.

Shawn Maida: I guess Instagram so I can see pictures of my kids because my wife puts them up on Instagram.

Lea Alcantara: Oh.

Shawn Maida: How about that?

Lea Alcantara: All right. So next question, what is your least favorite thing about social media?

Shawn Maida: Oh man, just the noise. Like I think the noise and the complaining, like those two things.

Emily Lewis: What profession other than yours would you like to attempt?

Shawn Maida: I would like to be like a little old like Asian cook somewhere.

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

Shawn Maida: I'm not Asian, but it sounds awesome to me. Just to work in like a traditional like Chinese or Thai restaurant.

Lea Alcantara: Very cool. So what profession would you not like to do?



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Shawn Maida: As like people that get in like cages with snakes. That doesn't sound...

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

Shawn Maida: Those Texas people, that sounds scary to me.

Emily Lewis: Who is the web professional you admire the most?

Shawn Maida: Oh, you two of course.

Emily Lewis: [Laughs]

Lea Alcantara: Oh, well, thank you.

Shawn Maida: Man, admire the most? I'm really impressed with a lot of people in the EE community. I don't think I have a specific person, but I think Carl [Crawley] has done a lot. It's really neat. People like Leslie Camacho and talking to him about his work in the community. Erik Reagan. I think there is just a ton of really, really amazing, bright people, so I don't have a specific one.

Lea Alcantara: So what music do you like to code to?

Shawn Maida: Oh man, I code in silence.

Emily Lewis: Really?

Shawn Maida: Yeah, I was like as a drummer, played all the time, loved listening to music. And then like one day, I started working like 45 minutes from my house and I just sat in silence in the car. I don't know. Maybe it's the three kids like screaming all the time, like I want silence above all else.

Emily Lewis: What is your secret talent?

Shawn Maida: My secret talent ... you should send these questions ahead of time.



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Lea Alcantara: [Laughs] It's more fun when it's impromptu.

Shawn Maida: I make mean chicken 'n' waffles in the office.

Emily Lewis: [Laughs]

Lea Alcantara: Nice. So what's the most recent book you've read?

Shawn Maida: I'm trying to read my Bible. [Laughs] It's like the book I'm working on. Man, probably some of the... yeah, sorry.

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: So last question, *Star Wars* or *Star Trek*?

Shawn Maida: *Star Wars*.

Lea Alcantara: Oh, very definitive.

Shawn Maida: Yeah.

Lea Alcantara: That's all the time we have for today. Thanks for joining us!

Shawn Maida: Thank you very much.

Emily Lewis: In case our listeners want to follow up with you, where can they find you online?

Shawn Maida: The best place is just say hello at [EE Coder](#) or just on Twitter. I'm trying to be a little more active, so [@eecoder](#) on Twitter.

Emily Lewis: Great, thanks Shawn! We had such a great time talking with you today.

Shawn Maida: Thank you.



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[Music starts]

Lea Alcantara: We'd now like to thank our sponsors for this podcast, [Pixel & Tonic](#).

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Emily Lewis: Don't forget to tune in to our next episode when we're talking to Whitney Hess about humanizing user experience and business. Be sure to check out our schedule on our site, [ctrlclickcast.com/schedule](#) for more upcoming topics.

Lea Alcantara: This is Lea Alcantara ...

Emily Lewis: And Emily Lewis ...

Lea Alcantara: Signing off for CTRL+CLICK CAST. See you next time!

Emily Lewis: Cheers!

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