SHOUTDIGITAL.COM

Maintaining your Umbraco estate

MARCH 2024 | VERSION 4.0

Introduction

In the run up to Umbraco 7 reaching end of life, we issued our guide to maintaining an Umbraco estate.

The guide helped readers understand how the changes to Umbraco versions would impact their digital ecosystem and support plans.

With Umbraco 7 now fully retired, and the hotly anticipated Umbraco 13 now live, we've updated this edition of the guide to highlight the options for customers on Umbraco 8, providing more information on the benefits and features of the latest versions.

If you have any questions about the content of this guide, or want a no obligation chat about creating the website to support your future goals, schedule a call with our team.

Platinum
Contributing Partner 2023

Time to upgrade your Umbraco website?

When an Umbraco version becomes 'end of life' (EOL), it no longer receives any updates – or crucially, security patching - from Umbraco HQ.

While it's possible to continue using the platform after the EOL date, it would leave your site open to security vulnerabilities and a system that will degrade over time.

As we've discussed in previous editions of this guide, both v.7 and v.9 are now at this EOL stage and so, if your website is still built on these versions, we strongly advise you consider moving to a supported version as soon as possible.

Because Umbraco operate a Long Term Support (LTS) model for some of their versions, the date they become EOL isn't always in version order. It's for that reason that v.8 is still supported until February 2025. However, as we'll discuss in the next section, we'd advise thinking about your options now to avoid getting caught out closer to the time.

VERSION 13
v. 13.1.0
Original Release: Dec 23

VERSION 12
v. 12.3.6
Original Release: Jun 23

VERSION 11
v. 11.5.0
Original Release: Dec 22

VERSION 10
v. 10.8.3
Original Release: Jun 22

VERSION 9
v. 9.5.4
Original Release: Sept 21

VERSION 8
v. 8.18.12
Original Release: Feb 19

VERSION 7
v. 7.15.8.3
Original Release: Nov 13

latest versions as of 6 January 2024.

What are my upgrade options?

There's no hard and fast rule here as the upgrade options available depend on the version of Umbraco you are moving from and to, as well as the complexity of your site(s). By and large however, there are three major factors to consider:

DO YOU NEED TO CONSIDER THE CODEBASE CHANGE?

If your site is currently on Umbraco 7 or 8 you are on the 'old' version of Microsoft's .NET codebase. Migrating to a newer version requires a re-write to the newest version and is therefore more of a 'rebuild and migration' than an 'upgrade'.

WHAT'S YOUR UPDATE STRATEGY GOING TO BE?

If you're on Umbraco 9 or above, you don't have the codebase issue but you do need to consider the longevity of support for the version you'll move to. LTS versions of Umbraco will offer you the longest period of support without having to consider an upgrade. If you have an active product roadmap however, you may get more value from an update strategy based on keeping up to date on the latest version.

DOES UMBRACO CLOUD MAKE SENSE?

If you love Umbraco but don't want any of the burden of hosting or upgrades, Umbraco Cloud might be an option for some. Typically an option for smaller, simpler sites, Umbraco Cloud is a subscription service for hosting and CMS, which means you'll never have to worry about an upgrade again. It comes with some limitations however and so isn't suitable for everyone.

Chosing the right option

If you're already unsure of which way to turn, help is at hand. Simply schedule a call with one of our team and we'll chat through your options without any of the salesy chat. Finding the right CMS fit is arguably the most important step in a website project and, as such, it's important to get right.

For Umbraco sites in need of immediate action (see below), in most cases we'll be targeting Umbraco 13- the most recent Long Term Support (LTS) version.

7	8	9	10 LTS	11	12	13 LTS
END OF LIFE	EOL	EOL	EOL	EOL	EOL	EOL
SEP 2023	FEB 2025	DEC 2022	JUN 2025	DEC 2023	JUN 2024	DEC 2026

END OF LIFE
UPDATE AS SOON AS POSSIBLE
Version 7, 9 and 11 are all end-of-life and sites running those versions could be vulnerable to security issues. Umbraco 9 and 11 were only a Short Term Support (STS) releases, which is why these have reached end-of-life prior to versions 8 and 10.

APPROACHING END OF LIFE
START PLANNING YOUR UPDATE NOW
For version 8, full support ended in February 2024, and it is now in the security only phase until it reached end-of-life in February 2025. We'd still recommend getting your site on to a later version before that date to benefit from improvements and new features.

Umbraco 12 was an STS release and will move to end-of-life in June 2024. You don't have long therefore to make the move to Umbraco 13 and benefit from support until December 2026.

CURRENT LTS VERSION
RELAX, YOU'VE GOT TIME
Umbraco 10 was the first of the LTS releases and is supported until June 2025. It's been around a while however and is limited in terms of functionality compared to Umbraco 12 and 13. Umbraco 13 is well worth looking at as the most recent LTS release.

VERSION 13
YOU'RE COVERED!
Umbraco 13 was only released in December 2023 and is the newest release. If you're already on this version...well, we're not sure why you're here, but suffice to say you're covered for a while and can focus on getting the most out of the CMS.

Future Releases

One of the questions we're asked the most is, won't this upgrade issue just happen again in the future?

The driving force behind the need for v.7 users (and in the future v.8 users) to migrate to the new versions was Microsoft's decision to end support for the old .NET framework in favour of .NET Core. It was a big move, driven by the ever-increasing demand for cross-platform capability and protection against cyber security threats.

There's now no expectation therefore that there'd be another fundamental change to Microsoft's .NET Core framework, as the underlying motivation for the change has been addressed and Microsoft are committed to .NET development. In addition, to better manage releases in the future, Umbraco aligned to the same 6-month release pattern as .NET for all future versions of their platform from Umbraco 10 onwards, with the introduction of the STS and LTS releases we've been referring to above.

Every 4th Umbraco version will align to Microsoft's LTS version at the time, benefiting from platform stability, extended support and security phases.

When I upgrade, will I notice the difference?

On v.7 at the moment...? YES!

Clients are often concerned about the impact of upgrades on their team, whether they love the current content management experience or not, they have got used to it and any change can feel like a disruption.

Users on an Umbraco 7 site will notice a change when they are upgraded, but for most, this should feel like a really positive experience.

Not only is the most up to date version of Umbraco faster and has better compatibility with modern browsers, if you're coming directly from v.7 you'll notice an overhauled content management interface, improved content workflows, and new tools like multilingual support

From a behind the scenes perspective, the rework done in version 9 to get Umbraco CMS running fully on.NET and .NET Core was revolutionary, allowing developers to do more, and more quickly.
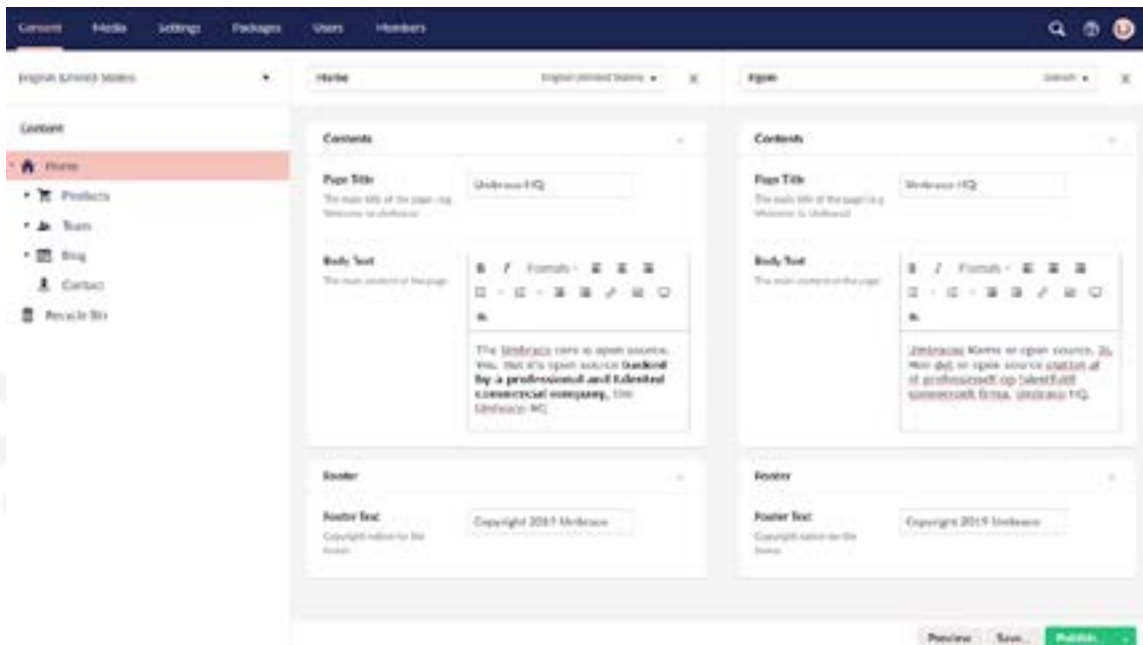
Our engineers get excited about the ability to use modern tech like Razor TagHelpers, Microsoft Dependency Injection, and View Components in their developments.

Welcome to the latest Umbraco experience

> **Fuss free and flexible CMS**. Beautiful user interface andsmooth workflow.

> **Powerful toolkit.** Multi-device previews, new block grid editor, scheduled publishing and multilingual support.

> **Control access and track changes.** Built-in editing change log, and the ability to roll back to any previous version of your content. Granular user access - control who can edit what.

> **Intuitive, folder based media library.** Keep your image files and downloads organised.

> **Focal point based image cropping.** No more heads chopped off on certain screen sizes. Tell Umbraco where the most important part of your image is with a click, and ensure correct presentation on any device.

> **True multi-channel delivery.** Use Umbraco to power anything. Responsive websites, mobile apps, digital signage and IOT devices.
Built using headless principles. Your developers keep full control of their mark-up and frontend code.

> **Designed for agile teams and processes.** Editors can publish anytime, without the need for content freeze windows. Supports CI/CD pipelines. Developers can deploy updates at a time that suits your workflows and business.

> **API-driven integrations & Webhooks.** With a full API for both frontend and backend, integrate Umbraco with anything. Add ecommerce platforms, data from an internal CRM system, whatever you need.

> **Developer-friendly experience.** Umbraco has its roots in open source, and a modern MVC based architecture. Great.NET and REST APIs support integrations. The back office is built using Angular JS, and is designed with extension in mind. The platform is flexible and fun to use for developers, and works with the development flow, not against it.

OK, we've convinced you...what's next?

Each project we tackle follows a tried and tested approach to the discovery process.

Product Selection, CX Audit and Technical Audit are essential when a project includes upgrading an existing estate.

PODUCT SELECTION

Confirm you want to continue with the content platform, and identify any major systems or platforms that form your digital estate.

CX AUDIT

Understand the role the web estate plays in your customer experience.

TECHNICAL AUDIT

Review your existing codebase, feature set and technical architecture to inform the new design and architecture.

Product Selection:
Confirm Umbraco is the right fit for you

Most of our clients want to stick with Umbraco as they love the open source, template driven system and the flexibility of the platform.

It's also suitable for more complex estates, as it has the option of enterprise-level features like multilingual sites, and scalability. Multi-site Umbraco estates mean the ability to pool investment in a single platform, while still allowing individual brands or divisions control over their own digital assets.

However, some organisations may want to explore an enterprise digital experience platform like Sitecore. This can be an appropriate option for sites with high volume online sales, or vast amounts of content to maintain, especially where this can be supported with a strong ROI model and a well-resourced internal team.

For complex solutions, now could also be the appropriate time to move from a monolithic CMS+website approach, and move towards a decoupled set up, perhaps a full API-first microservices architecture.

Umbraco supports this approach, as it can be used as a headless CMS.

CX Audit:
Analyse your content or your content, visual design and user journeys

A user experience review should include goal identification and journey mapping for customers or end-users of the platform, as well as the internal staff who manage the content, support the customer journeys or otherwise interact with the platform. A twin focus on both customer experience (CX) and employee experience (EX) will help ensure a scalable approach.

This process helps define the scope of your new project. Do you want to keep the same user journeys, overall feel, and site architecture, or do you need to go back to basics and do a complete overhaul of your UX & UI? What do your internal users need from your digital estate?

Through user interviews and testing, you can develop an understanding of how successful your current services are and where there are opportunities for improvement and engagement.

The Shout Approach to a CX Audit

BUSINESS ANALYSIS WORKSHOPS

- Understand your business culture
- Document and contextualise business goals
- Ascertain core brand product/offering
- Generate high-level business requirements
- Create a shared definition of success

CUSTOMER RESEARCH

- Review current research and audience understanding
- Map your current product structure and critical user flows
  Undertake original user research, if required

MARKET & COMPETITOR ANALYSIS

- Comparison with best-in-class competitors
- SWOT analysis to Identify challenges, risks and opportunities
- Cross-industry insights

CUSTOMER REQUIREMENTS

- Persona Generation
- Define user goals
- Conduct User interviews & User Testing
- Heuristic evaluation check-lists
- Documented & prioritised feature list

DELIVERY PHASE OUTCOMES

The following outputs are informed by a CX Audit and fed into the delivery phase:

- Defined user flows
- Architecture design
- Solution wireframes
- Clickable prototypes
- User testing
- Prioritised backlog of user stories

CX Audit:
Analyse your content or your content, visual design and user journeys

A user experience review should include goal identification and journey mapping for customers or end-users of the platform, as well as the internal staff who manage the content, support the customer journeys or otherwise interact with the platform. A twin focus on both customer experience (CX) and employee experience (EX) will help ensure a scalable approach.

This process helps define the scope of your new project. Do you want to keep the same user journeys, overall feel, and site architecture, or do you need to go back to basics and do a complete overhaul of your UX & UI? What do your internal users need from your digital estate?

Through user interviews and testing, you can develop an understanding of how successful your current services are and where there are opportunities for improvement and engagement.

Request site source code and supporting databases to perform a technical audit

Request and review technical documentation

Review and understand any outstanding open defects and issues

Setup knowledge capture and transfer sessions

Agree on an appropriate Management of Change

Thank you

We hope you have found this guide useful.

If you have questions about how to take the next step in your upgrade, talk to us about our experience in CMS and DXP implementations, and our product selection advice service.

We have used Umbraco to power over 100 client projects. We have built brand new digital experiences, and retrofitted it as a headless CMS for existing estates. We have used it to create content management for apps, and as part of API-based integrations with legacy software and platforms.

Umbraco is a future-proof, flexible, and cost-effective open-source content management system. It combines engineering flexibility, and a powerful content editing experience.

Use Umbraco to create a digital experience your users will love.

FURTHER READING

> Umbraco's Guide to Migrating a v.8 Site to the new version
> Read more about how we deliver our digital transformation and software engineering projects
> Learn more about choosing the right CMS for your project
> Read about Umbraco release cadence plans here

Newcastle

Keel House, Garth Heads,
Newcastle upon Tyne,
NE1 2JE
+44 (0) 191 231 2377

Philadelphia

100 North 18th Street,
Philadelphia, PA 19103
United States
+1 267-207-3446