Data Exchange Framework 2.0.1 Installation Guide

A guide to installing and upgrading the Data Exchange Framework 2.0.1

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1. Installation

This chapter guides you through the process of installing Data Exchange Framework.

1.1. Prerequisites

Data Exchange Framework requires Sitecore 9.0.1 or 9.0.2.

1.2. Installing Data Exchange Framework

This section describes how to install Data Exchange Framework on your Sitecore servers.

1.2.1. Content Management role

Typically, data synchronization runs on a content management (CM) server. This requires the entire Data Exchange Framework product to be installed.
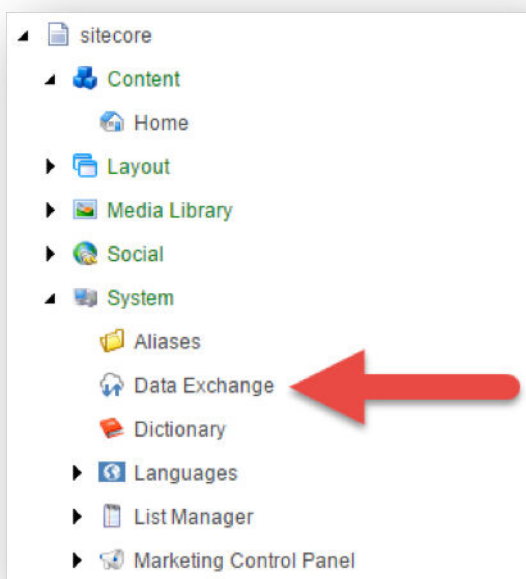
To install the Data Exchange Framework on the CM server:

1. In Sitecore, open the Installation Wizard.

2. Install the Data Exchange Framework package.

3. Install the Sitecore Provider for Data Exchange Framework package.

   > **NOTE**
   >
   > We recommend you install the Sitecore Provider for Data Exchange Framework because it lets you interact with the Sitecore content databases.

4. To confirm the module was installed, open the Content Editor and navigate to the Data Exchange item, `/sitecore/system/Data Exchange`.

1.2.2. Content Delivery Role

In most cases, data synchronization will not run on Sitecore delivery servers. The data that is synchronized, however, is used on those servers. As a result, you must install all parts of the Data Exchange Framework on Sitecore content delivery (CD) servers.

Specific installation packages are available for CD servers.

1.2.3. Aggregation server installation

If you have a dedicated aggregation server, you must install all parts of the Data Exchange Framework on the aggregation server.

1.2.4. Reporting server installation

If you have a dedicated reporting server, you must install all parts of the Data Exchange Framework on the reporting server.

2. Upgrade

This chapter guides you through the process of upgrading from Data Exchange Framework version 2.0 to version 2.0.1.

2.1. Upgrade prerequisites

Before upgrading, you must have Data Exchange Framework 2.0.0 installed on your Sitecore server. Specifically, this means you must have the following Sitecore package installed on your Sitecore server:

- Data Exchange Framework 2.0.0 rev. 171013

2.2. Installing an upgrade

You upgrade Data Exchange Framework version 2.0 to version 2.0.1 using a Sitecore update package.

> **NOTE**
>
> If you have other products based on Data Exchange Framework (such as Sitecore Connect for Salesforce CRM , Sitecore Connect for Microsoft Dynamics 365 for Sales, or xDB Data Migration Tool) installed on your Sitecore server, please use the upgrade instructions for that product. Those instructions include the steps needed to upgrade Data Exchange Framework.

You must install the update package on the following Sitecore server roles:

- Content management

- Content delivery

- Aggregation

> **NOTE**
>
> This section applies to Sitecore Experience Platform 9.0.1. Later versions can require slightly different steps, or might involve different screens.

2.2.1. Update the Data Exchange Framework
To update the Data Exchange Framework:

1. Use the Sitecore Update Installation Wizard to install the following update package:

    - Data Exchange Framework 2.0.1 rev. 180108.update.

2. You must run the package analysis. The analysis will report that potential problems were found. Ignore this warning.

3. Click **Install the package** to continue.

After the wizard finishes, the installation results will report that potential problems were encountered. This is the expected result.

> **NOTE**
>
> The exact number of problems depends on the number of tenants you have defined, providers you have installed, and the languages you have configured. This is expected behavior.

2.2.2. Update Sitecore Provider for Data Exchange Framework

If you do not have the Sitecore provider installed on your Sitecore server, skip this section.

To update the Sitecore Provider:

1. Use the Sitecore Update Installation Wizard to install the following update package:

   • Sitecore Provider for Data Exchange Framework 2.0.1 rev. 180108.update

2. You must run the package analysis. The analysis will report that potential problems were found. Ignore this warning.

3. Click **Install the package** to continue.

After the wizard finishes, the installation results will report that potential problems were encountered. This is the expected result.

> **NOTE**
>
> The exact number of problems depends on the number of tenants you have defined, providers you have installed, and the languages you have configured. This is expected behavior.

2.3. Post installation steps

Because of the highly customizable nature of the Data Exchange Framework, the update process can include manual steps that you must complete to successfully update the product.

2.3.1. Existing tenants

You might have tenants that were configured prior to upgrading your Sitecore server.

The upgrade process updates the templates and files that are included in the Data Exchange Framework, but it does not change items under any tenants that you previously created. This means that some new functionality is available to those tenants (such as features inherited from standard values), but not all.