Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.5 Update 2

Instructions for upgrading from EXM 3.5 update 1 to EXM 3.5 update 2

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Email Experience Manager Upgrade Guide

Table of Contents

Chapter 1

Upgrading EXM

This document describes how to update Sitecore Email Experience Manager (EXM) from EXM 3.5 Update 1 (rev. 171103) to EXM 3.5 Update 2 (rev. 180411).

This chapter contains the following sections:

- Introduction

- Installing the EXM Update Package

- Post-installation Steps

1.1 Introduction

To upgrade your Sitecore Email Experience Manager, follow the steps in the sections below carefully. Ensure that the post-installation steps are performed before rebuilding the Experience Database (xDB), which is part of the Sitecore XP upgrade process.

Note
You should back up all Sitecore databases and the Sitecore instance before starting the update process, because this update is a non-reversible procedure.

1.2   Installing the EXM Update Package

1.2.1   Downloading the EXM Update Package

To download the EXM update package, visit the EXM 3.5 page on the Sitecore Developer Portal and download the package.

1.2.2   Starting the Update Process

To start the EXM update process, on the Sitecore Launchpad, click **Control Panel**, and in the **Administration** section, click **Install an update**.

Alternatively, open the Update Installation Wizard by entering the following URL in your browser:

```
http://<your_host_name>/sitecore/admin/UpdateInstallationWizard.aspx
```

If prompted, enter your credentials to access the Sitecore instance.

Note
Before running the update package, you must ensure that there are no message dispatches in the *Processing* or *Paused* state.

Install the Update Package

To install the update package:

1. In the Sitecore update installation wizard, choose the package you want to install and click **Package information** to view the package metadata. Make sure to read the readme text.

2. Click **Analyze the package** and on the **Analyze the package** page, click **Advanced options** to review the installation options.
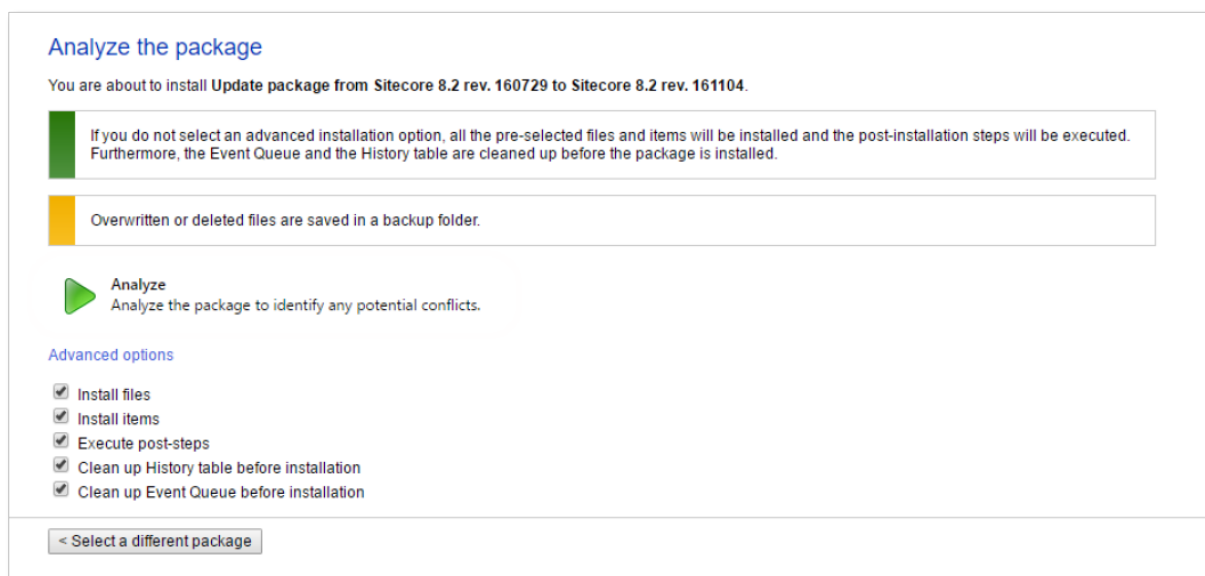
3. Click **Analyze** to perform an analysis of the installation process and identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.

4. When the analysis has completed, click **Analysis result** to view the details.

If the Update Installation Wizard did not find any conflicts, click **Install the package.**

> **Important**
> On the **Analysis result** page, in the **Message Type** column, if the Update Installation Wizard found Configuration files that must be updated manually, in the **Description** column, click the relevant description and read about the configuration changes.
>
> To avoid breaking changes, after the Update Installation Wizard finishes installing the update package, you must perform the post-installation steps indicated in the description.

5. On the **Analysis result** page, click **Config file changes** and on the **Configuration files changes** page:

   o To automatically resolve all configuration conflicts and install the package, click **Apply and install package**.

   o To manually resolve a conflict in a configuration file and modify the patch, in the **Action** column for each configuration file, click **Edit**.

6. On the **Resolve configuration file changes** page, review the differences between the original file and the customized file:

   o To manually resolve the conflicts, in the **Patch File** window, make the necessary changes, and then click **Resolve**.

   o To skip a conflict and manually resolve it later, click **Skip**. It is best practice to manually review your configuration patch files after the upgrade is complete.

   > **Note**
   > When you skip the file, the Update Installation Wizard automatically detect any customizations in the Sitecore config files, creates the patch, and replaces the customized file with the original file.

7. When you have resolved or skipped all the configuration file conflicts, on the **Configuration file changes** page, click **Apply and analyze changes**.

8. When the analysis is complete, click **Analysis result**.

   Note
   If the analysis fails, you must restart the Update Installation Wizard. If this does not solve the problem, contact Sitecore support.

9. If the Update Installation Wizard does not find any more conflicted configuration files, click **Install the package**.

   The conflicts that were skipped of left unresolved during the configuration are now resolved automatically.

When the installation is completed, you can click **Installation result** to view the results.

1.3 Post-installation Steps

- In the *App_Config/Include/EmailExperience* folder, make sure that only the newest versions of each of the configuration files exists. For example, there might be a duplicate version of the `Sitecore.EDS.Providers.CustomSmtp.config` file that is disabled.

- Your custom settings are not automatically ported to the new configuration files. If you have used any custom settings in the previous version and you want to apply them to EXM 3.5, you must make the necessary changes to the `Sitecore.EmailExperience.*.config` files manually.

- Ensure that the connection strings `EXM.DedicatedDispatchService` and `EXM.InternalApiKey` are added as described here.

- To ensure that contact lists are properly uploaded and indexed before they become available to use in EXM, remove the *.disabled* extension from the `/App_Config/Include/ListManagement/Sitecore.ListManagement.DisableListLocking.config.disabled` file.

Note
After the upgrade, if the labels in the EXM application do not display properly, for example, if you see labels such as *ECM.Pages.X.X* instead of normal text, delete the `\website\temp\dictionary.dat` file and restart the application pool.