

EXM Upgrade Guide

Sitecore Email Experience Manager 3.0

A step by step guide to the EXM 3.0 upgrade and conversion process



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1.1 Prerequisites

If your solution is based on an earlier version of Email Campaign Manager, then you must first update to Email Campaign Manager 2.2 rev. 141007 or later. You can download all prerequisite components from SDN.

Prerequisites for running this update:

- Sitecore 7.5 rev. 141003 or later.
- SPEAK 1.0.0 rev.140131 or later.
- Email Campaign Manager 2.2 rev. 141007 or later.
- Sitecore 8.0 rev. 141212 Update Package.
- Email Experience Manager 3.0 rev. 141215 Update Package.

Note

Upgrading a solution that uses Oracle databases is currently not supported.

1.2 Upgrade Process

If you have an earlier version of the Email Campaign Manager installed and you want to upgrade to EXM 3.0, you must follow the instructions in each section of this chapter.

As part of the upgrade process, some solutions might require redesigning. For more information, refer to the administrator and developer documentation on the Sitecore Developers Network (SDN).

1.2.1 Installing the Upgrade Package

To upgrade ECM 2.2 to EXM 3.0, install the upgrade package using the Update Installation Wizard.

Before you install the upgrade package:

- Upgrade Sitecore from CMS 7.5 to XP 8.0.
- Upgrade Update Installation Wizard to Sitecore Update Installation Wizard 1.0.0 rev. 150219 or later.
- Back up your website.
- Disable the `Sitecore.EmailCampaign.config` file by adding `.disabled` to the file extension.
- Disable all scheduled tasks at the following locations:
 - `/sitecore/system/Tasks/Schedules/Email Campaign`
 - `/sitecore/system/Modules/E-mail Campaign Manager/Tasks`

To install the upgrade package:

1. Open the Update Installation Wizard by entering the following URL in your web browser:
`http://<hostname>/sitecore/admin/UpdateInstallationWizard.aspx`
For more information on how to use the wizard, see the *Update Installation Wizard* guide on SDN.
2. Install the Email Experience Manager 3.0 rev. 141215 Update Package using the Update Installation Wizard.

Summary of the steps:

- Upload the update package.
- Analyze the package.
- Install the package.

Note

"Item not found" and "Field has been modified" collisions are expected for translation dictionary items. You should apply the latest translation to your instance after upgrading to keep it up to date.

1.2.2 Upgrading Email Campaign Manager 2.2 to Email Experience Manager 3.0

After you have installed the update package, you must update your configuration files.

To update your configuration files:

1. Merge your EXM config files with config files from installation package Email Experience Manager 3.0 rev. 141215
2. Install the UserToContactConversion tool.
3. Make sure the `Sitecore.Analytics.Conversion.config` element `EmailEntryName` has the value "Preferred". For example, `<EmailEntryName>Preferred</EmailEntryName>`
4. Add the following line to the end of the `userToContactConversion` pipeline in `Sitecore.Analytics.Conversion.config`:

```
<processor type="Sitecore.EmailCampaign.UpgradeTool.ContactsConversion.ChangeIdentifier, Sitecore.EmailCampaign.UpgradeTool" />
```
5. Run `<your_instance>/sitecore/admin/ConvertUsersToContacts.aspx`
6. Run `<your_instance>/sitecore/admin/SetCampaignChannelId.aspx`
7. Run `<your_instance>/sitecore/admin/MigrateTargetAudiences.aspx`
8. Update the `Web.config` file:
 - o Add the following line to the end of `system.webServer/handlers`:

```
<add verb="*" path="sitecore_ecm_speak_request.ashx" type="Sitecore.EmailCampaign.Speak.Server.RequestHandler, Sitecore.EmailCampaign.Speak.Server" name="Sitecore.EmailCampaign.Speak.Server" />
```
 - o Add the following line to the end of `system.web/httpHandlers`:

```
<add verb="*" path="sitecore_ecm_speak_request.ashx" type="Sitecore.EmailCampaign.Speak.Server.RequestHandler, Sitecore.EmailCampaign.Speak.Server" />
```
9. Publish your website.

You can now delete the `Sitecore.EmailCampaign.UpgradeTool.dll` from the `bin` folder, and the `MigrateTargetAudiences.aspx` and `SetCampaignChannelId.aspx` from the `sitecore/admin` folder.