Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.1

Instructions for upgrading from Sitecore EXM 3.0 Update 3 to EXM 3.1

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Chapter 1

Upgrading EXM

This document describes how to upgrade Sitecore Email Experience Manager (EXM) from EXM 3.0 Update-3 to EXM 3.1.

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- Post Installation Steps

1.1 Introduction

You can save the list of potential problems in an XML file and review them later. When the automatic update process is finished, you need to perform the post installation steps described in this manual. Ensure that these steps are performed before rebuilding the Experience database (xDB), which is part of Sitecore XP upgrade process.

Note
We recommend that you back up all Sitecore databases and the Sitecore instance before starting the update process, because this update is a non-reversible procedure.

1.2 Using the EXM Update Package

1.2.1 Prerequisities

Before you can run the EXM update package, you must:

- Disable the following configuration files:
  - `Sitecore.EmailCampaign.config` file.
  - `Sitecore.EmailCampaign.Speak.Server.Requests.config` file.
  - `Sitecore.EmailCampaign.UI.config` file.
  - `Sitecore.EmailCampaign.Dedicated.config` file.
  - `Sitecore.EmailCampaign.Xtune.CD.config` file.
  - `Sitecore.EmailCampaign.Xtune.Processing.config` file.
- Disable all scheduled tasks at the following locations:
  - */sitecore/system/Tasks/Schedules/Email Campaign*
  - */sitecore/system/Modules/E-mail Campaign Manager/Tasks*

  Note
  During the update process, the EXM update tool moves all tasks from the */sitecore/system/Tasks/Schedules/Email Campaign* folder to the */sitecore/system/Modules/E-mail Campaign Manager/Instance Tasks/Content Management Primary* folder.

1.2.2 Starting the Update Process

To start the EXM update process, enter 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.

1.2.3 Update Process

The update package includes new items required for EXM 3.1.
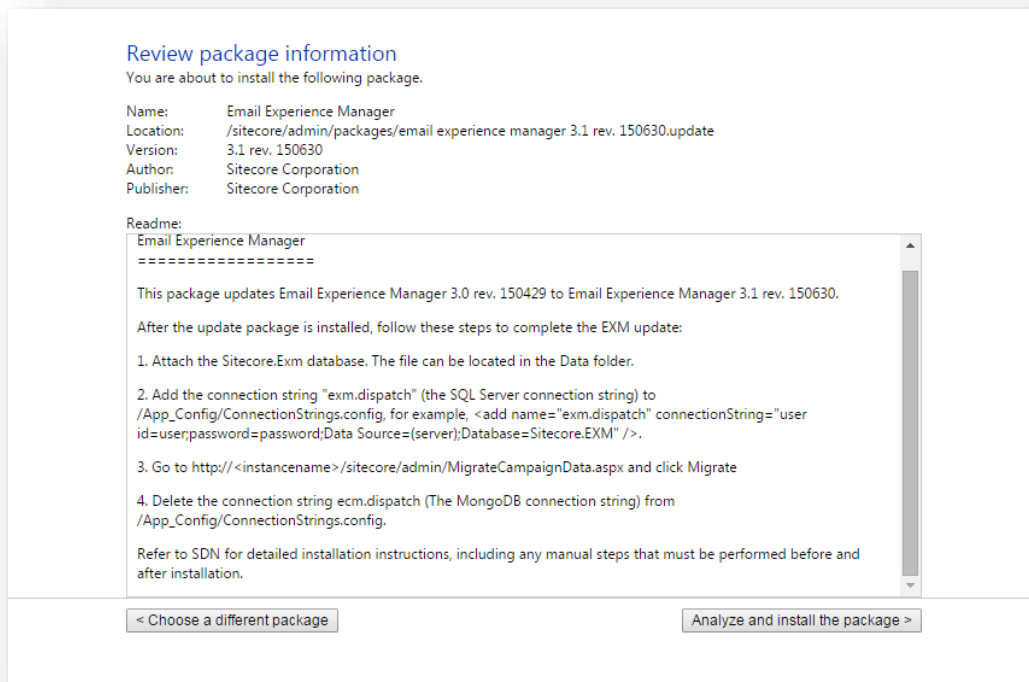
Install the Update Package

To download the EXM update package:

1. Visit the EXM 3.1 page on the <u>Sitecore Developer Portal</u> and download the package.
2. Click **Install update package** to start the update package installation.

Review the Package Information

After you click **Install update package,** the EXM update tool displays the *Review package information* page.


On this page, you can view the package metadata and read the readme text.

Click the **Analyze and install the package** button to proceed to the next step.

Analyze and Install the Package

This page lets you analyze the installation process to identify potential problems and install the package.

Click **Install** to install the package immediately without analyzing for potential conflicts.
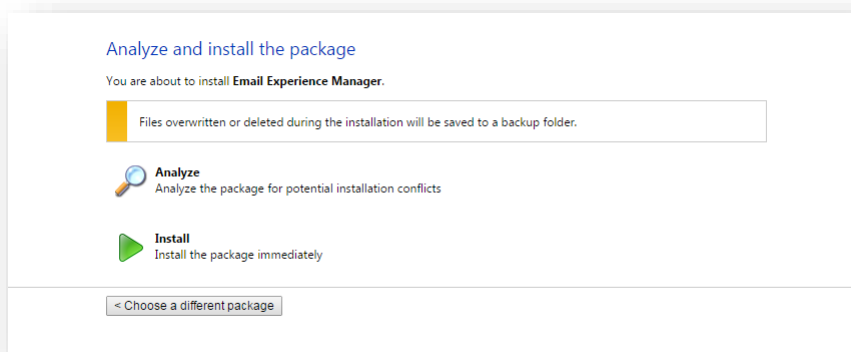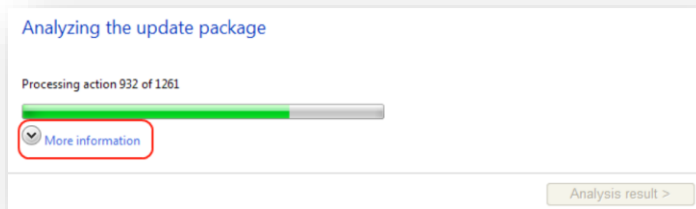
Analyzing the Update Package

Click **Analyze** to perform an analysis of the installation process to identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.

The tool displays the progress bar and the number of processed actions.

Click **More information** to view the detailed information.
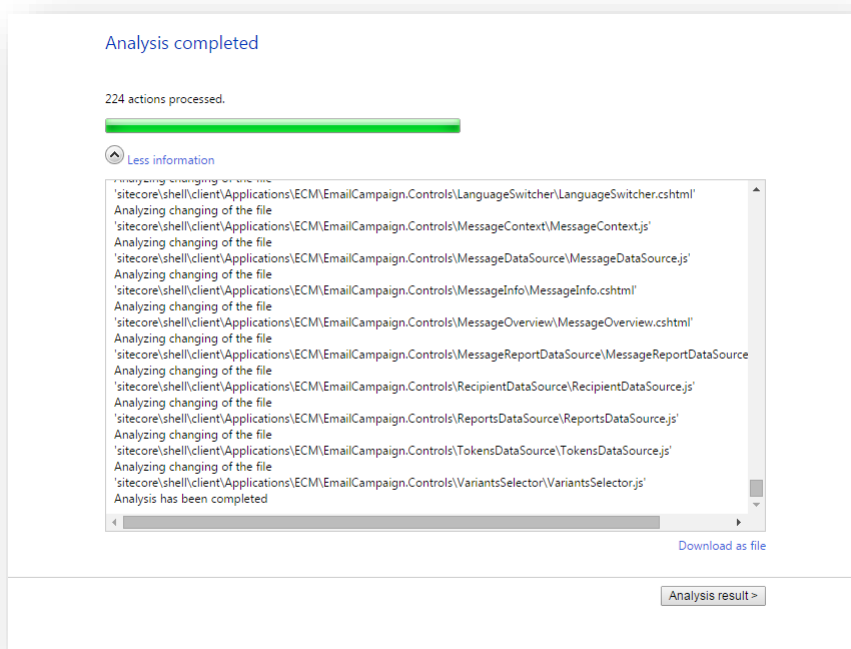
You can review the analysis information messages or download them as a file by clicking the **Download as File** link.

To continue, click the **Analysis result** button, which allows you to review the potential problems that were identified by the wizard.

Analysis Result

On this page, you can review any potential problems that may occur during the installation.
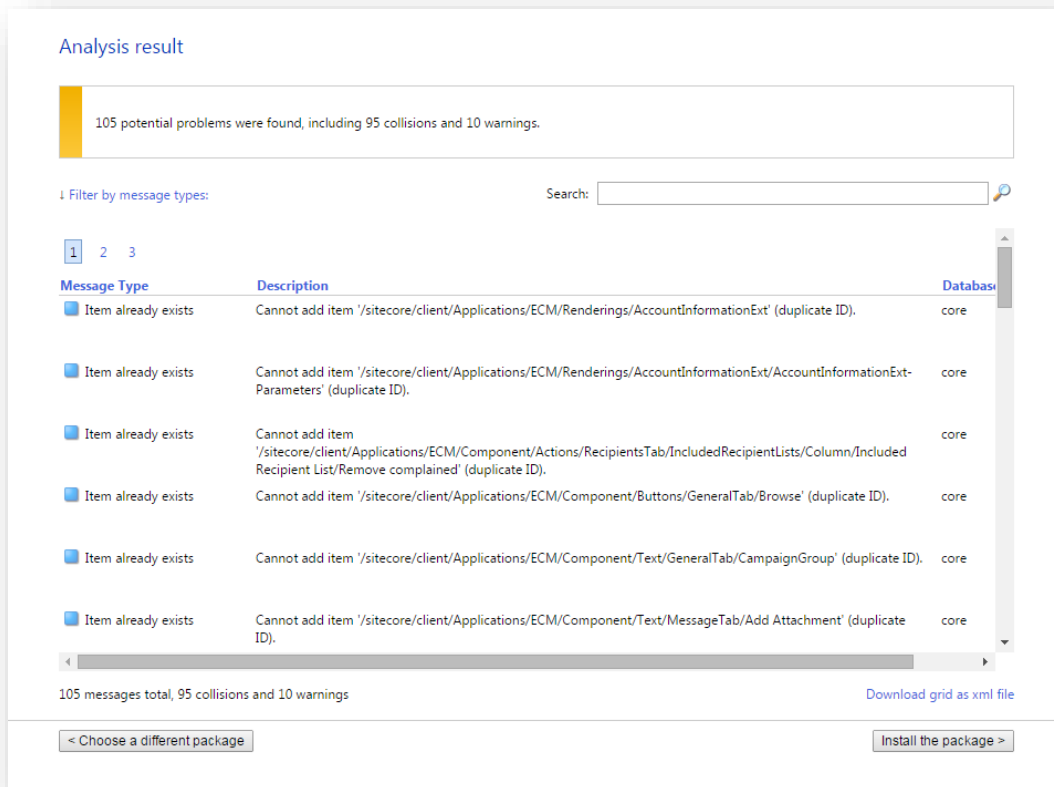
We recommend that you review the analysis messages before continuing with the installation.

There are several types of messages: errors, collisions, warnings, and information messages. Each message type is marked with a colored square:

- red for errors.
- blue for collisions.
- yellow for warnings.
- grey for information messages.

Errors, collisions, and warnings indicate potential problems, so you should pay attention to them.

At the top of the page, you can see the information bar. The color of the information bar indicates the importance of problems that were found during the analysis.

At the bottom of the page, you can see overall statistics and a link that allows you to download all the messages in the grid as an XML file. When you are ready to install the package, click **Install the package**.

Installing the Package

When you click **Install the package,** the EXM update tool displays the **Installing the update package** page.
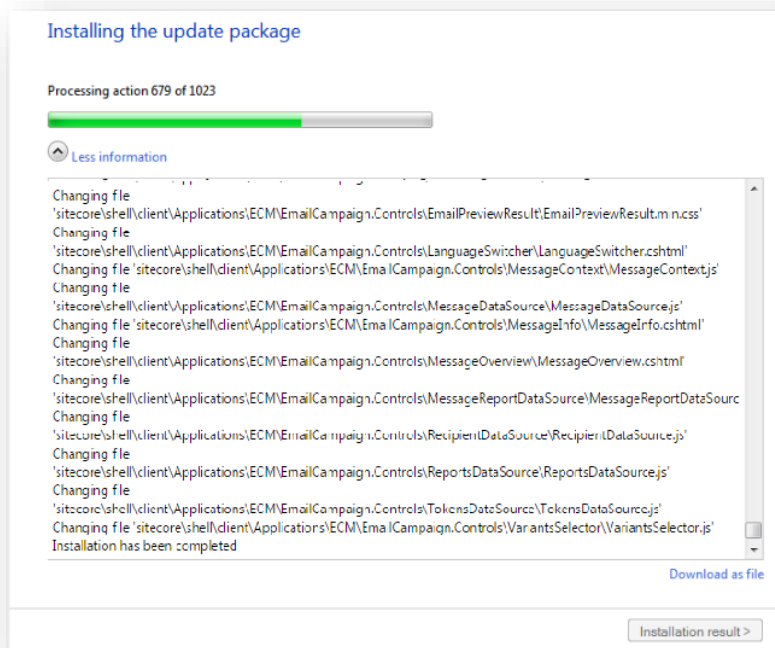
When the installation is completed, the update package displays the **Installation Completed** page.

1.3 Post Installation Steps
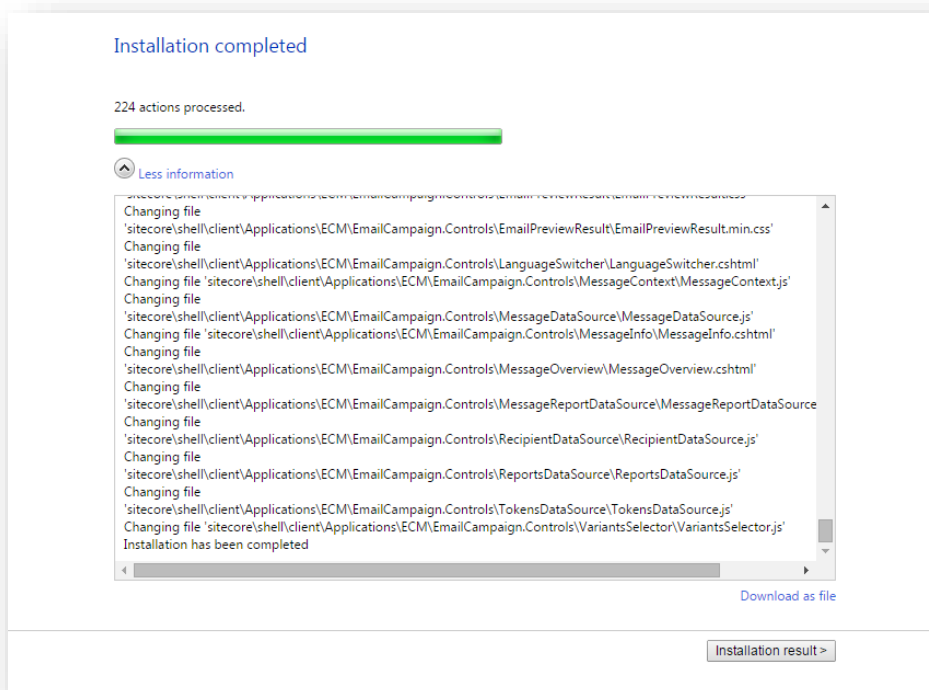
After installing the update package, you should perform the following post-installation steps:

- Attach the *Sitecore_Exm* database to SQL server.

  You can find the file in the *Data* folder or, alternatively, in the *Website\temp\ECM* folder.

- In the `App_Config\ConnectionStrings.config` file, add the SQL server connection string `exm.dispatch` that provides connectivity to the EXM dispatch database, for example:

```
<add name="exm.dispatch" connectionString="user id=user;password=password;Data
Source=(server);Database=Sitecore_EXM" />
```

- Replace the `/bin/Sitecore.ExperienceEditor.dll` assembly of your environment with the Sitecore.ExperienceEditor.dll assembly.

- To migrate your existing email campaign data to SQL server, go to `http://<instancename>/sitecore/admin/MigrateCampaignData.aspx`, where `<instancename>` is the name of your primary CM server, and then click **Migrate**.

  Note
  If you do not have any existing email campaign data to migrate, skip this step.

- In the `/App_Config/ConnectionStrings.config` file, delete the `ecm.dispatch` connection string.

  Important
  Make sure you delete the obsolete `ecm.dispatch` connection string and not the new `exm.dispatch` string that you just created.

- In the `\App_Config\Include\EmailExperience\Sitecore.EmailExperience.Core.config` file, replace the entire `<ecmDataProvider defaultProvider="mongo">` section with the following section:

```
<ecmDataProvider defaultProvider="sql">
<providers>
<clear/>
<add name="sql" type="Sitecore.Modules.EmailCampaign.Core.Data.SqlDbEcmDataProvider,
Sitecore.EmailCampaign" connectionStringName="exm.dispatch"/>
</providers>
</ecmDataProvider>
```

- Remove the EXM httpHandler and handler `sitecore_ecm_speak_request.ashx` from the `web.config` file.

- Remove the following folder from all instances of EXM:

  o `sitecore\shell\client\Applications\ECM\EmailCampaign.Client\Pipelines\UpdateMessagevariant`

- In the Master database, rename the following items:

  o `/sitecore/system/Modules/E-mail Campaign Manager/System/Message Types/Ad-hoc`

    to

    `/sitecore/system/Modules/E-mail Campaign Manager/System/Message Types/OneTime`

  o `sitecore/system/Modules/E-mail Campaign Manager/System/Message Types/Periodical`

> to
>
> ```
> /sitecore/system/Modules/E-mail Campaign Manager/System/Message
> Types/Subscription
> ```

- o `/sitecore/system/Modules/E-mail Campaign Manager/System/Message Types/Trickle`

  > to
  >
  > ```
  > /sitecore/system/Modules/E-mail Campaign Manager/System/Message
  > Types/Triggered
  > ```

- In the Core database, delete the item:

  ```
  /sitecore/client/Applications/ECM/Component/Navigation/Primary
  Navigation/PageSettings/Navigation Links/Dashboard/Messages/Recently
  Sent Messages.
  ```

- For each EXM manager root, change the item name of the following items:

  - o `/Message Types/One Time Message item` (item name *Adhoc*)

    > to
    >
    > `/Message Types/OneTime`

  - o `/Message Types/Subscription Message item` (item name *Periodical*)

    > to
    >
    > `/Message Types/`Subscription

  - o `/Message Types/Triggered Message item` (item name *Trickle*)

    > to
    >
    > `/Message Types/`Triggered

- Your custom settings are not automatically ported to the new configuration file. If you have used any custom settings in the previous version and you want to apply them to EXM 3.1, make the necessary changes to the `Sitecore.EmailExperience.ContentManagement.config` file manually.