

Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.1

Instructions for upgrading to EXM 3.1 Update 1



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Chapter 1

Upgrading EXM

This document describes how to upgrade Sitecore Email Experience Manager (EXM) from EXM 3.1 to EXM 3.1 Update 1.

This chapter contains the following sections:

- Introduction
- Installing the EXM Update Package
- 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 Installing the EXM Update Package

1.2.1 Prerequisites

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.

- If your Sitecore.Exm database is attached to the SQL Server and the database is still located in the /Data folder, you must detach the database before you begin the upgrade. After the upgrade is complete, you can reattach the database.
- For support of Sitecore Experience Platform 8.0 Update 5 and Update 6, add the following code to the web.config file:

```
<dependentAssembly>
  <assemblyIdentity name="MongoDB.Driver" publicKeyToken="f686731cfb9cc103" />
  <bindingRedirect oldVersion="0.0.0.0-1.8.3.9" newVersion="1.10.0.62" />
</dependentAssembly>
  <dependentAssembly>
    <assemblyIdentity name="MongoDB.Bson" publicKeyToken="f686731cfb9cc103" />
    <bindingRedirect oldVersion="0.0.0.0-1.8.3.9" newVersion="1.10.0.62" />
  </dependentAssembly>
```

1.2.2 Downloading the EXM Update Package

To download the EXM update package, visit the EXM 3.1 page on the [Sitecore Developer Portal](#) and download the package.

If you are running Sitecore Experience Platform 8.0 Update 6, in the EXM installation package, remove the file Sitecore.ExperienceEditor.dll from the following two locations:

- package.zip\files\bin
- package.zip\properties\files\bin

1.2.3 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`

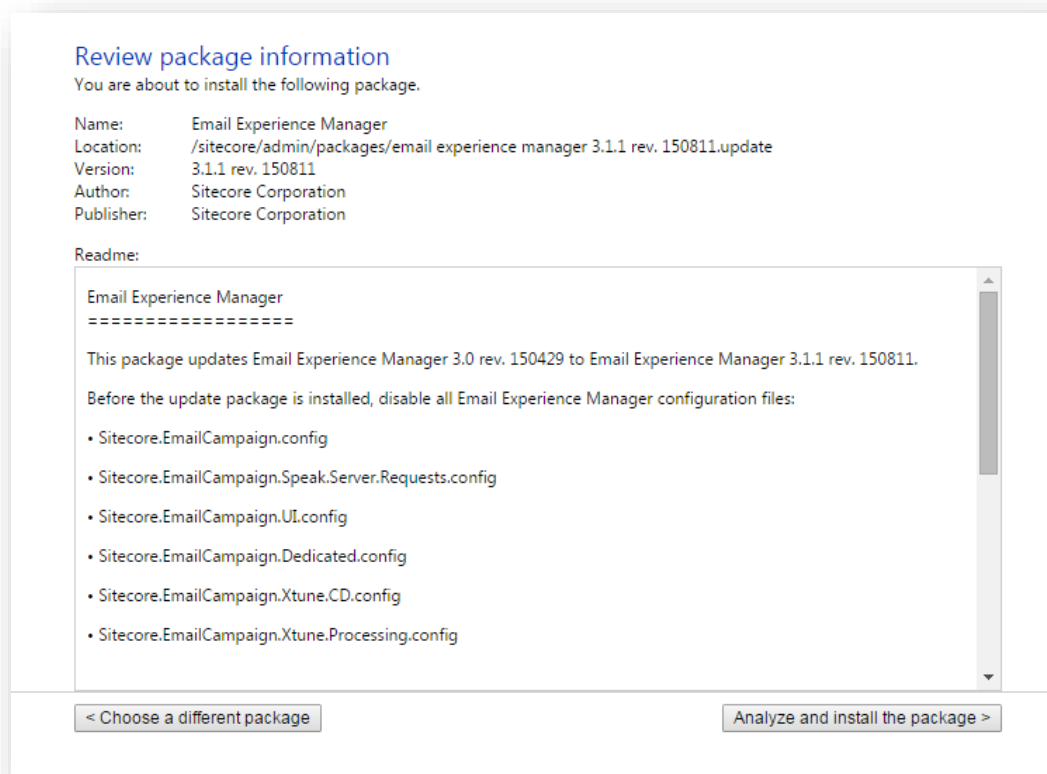
If prompted, enter your credentials to access the Sitecore instance.

Note

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

Install the Update Package

Choose the package you want to install and click **Review package information** to start the update package installation.



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

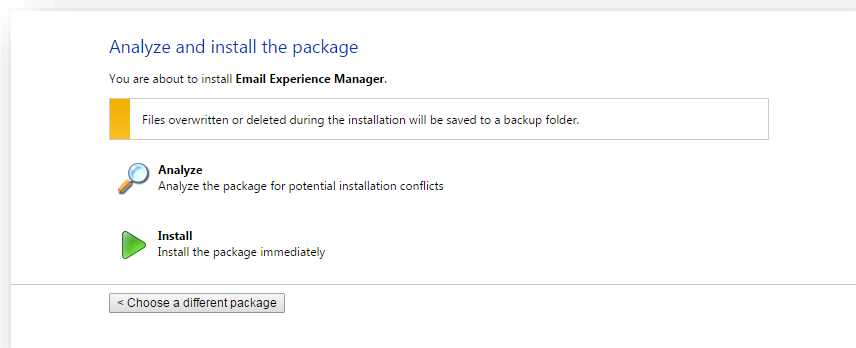
Click the **Analyze and install the package** button to proceed.

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Analyze and Install the Package

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

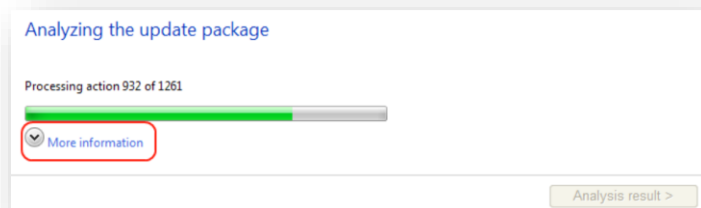
Click **Install** to install the package immediately without analyzing for potential conflicts.



Analyze the Update Package

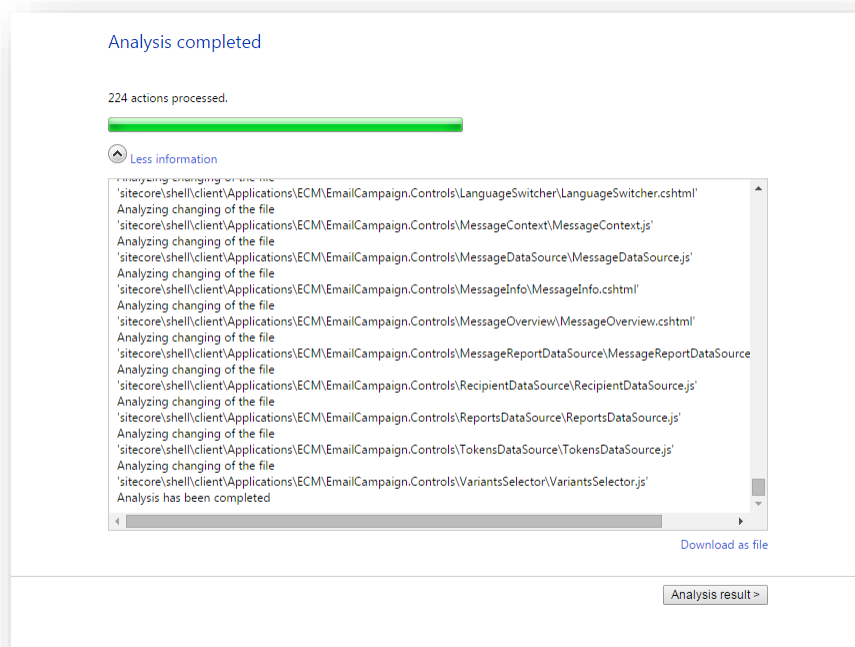
Click **Analyze** to perform an analysis of the installation process to identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.

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



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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.

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Analysis Result

On this page, you can review any potential problems that may occur during the installation.

Analysis result

105 potential problems were found, including 95 collisions and 10 warnings.

Filter by message types: Search:

Message Type	Description	Database
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Renderings/AccountInformationExt' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Renderings/AccountInformationExt/AccountInformationExt-Parameters' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Actions/RecipientsTab/IncludedRecipientLists/Column/IncludedRecipientList/Remove complained' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Buttons/GeneralTab/Browse' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Text/GeneralTab/CampaignGroup' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Text/MessageTab/Add Attachment' (duplicate ID).	core





105 messages total, 95 collisions and 10 warnings

[Download grid as xml file](#)

[< Choose a different package](#) [Install the package >](#)

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.

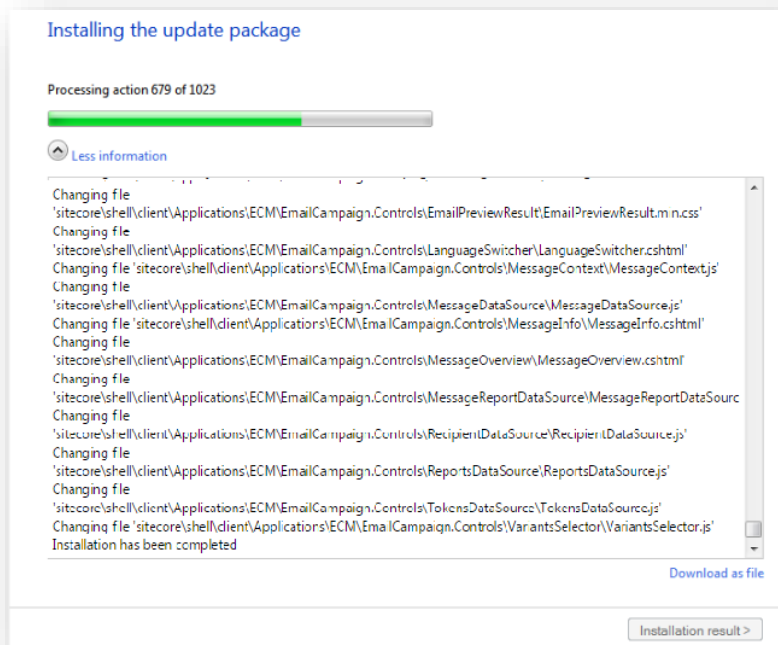
At the top of the page, you can see the information bar. The color of the information bar indicates the importance of problems that were found during the analysis.

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**.

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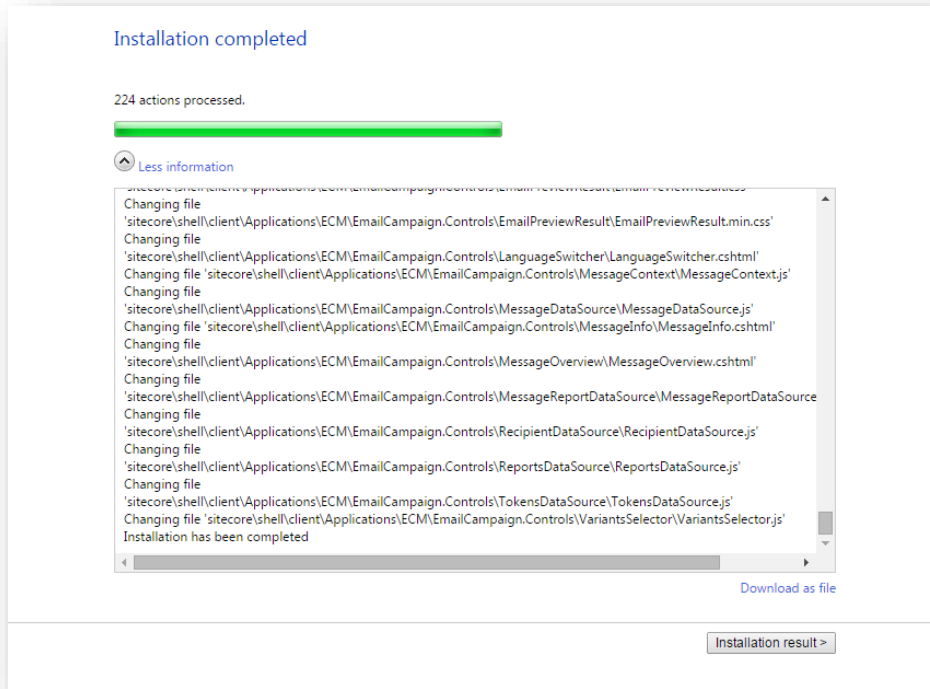
Install the Package

When you click **Install the package**, the EXM update tool displays the **Installing the update package** page.



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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 *Sitcore_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=Sitcore_EXM" />
```

- To migrate your existing email campaign data to SQL server, go to `http://<instancename>/sitcore/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.
- In the Master database, rename the following items:
 - `/sitcore/system/Modules/E-mail Campaign Manager/System/Message Types/Ad-hoc`
to
`/sitcore/system/Modules/E-mail Campaign Manager/System/Message Types/OneTime`
 - `sitecore/system/Modules/E-mail Campaign Manager/System/Message Types/Periodical`
to

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`/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.`

- In the Content Editor, enable all scheduled tasks in the following locations:

- o `/sitecore/system/Modules/E-mail Campaign Manager/Instance Tasks`
- o `/sitecore/system/Modules/E-mail Campaign Manager/Tasks`

- 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.