Email Experience Manager 3.1 Update 1
Sitecore EXM Installation Guide

Installation guide for administrators and developers

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Prerequisites

Prerequisites for the Email Experience Manager 3.1 Update 1:

- Sitecore XP 8.0 Update 4 (8.0 rev.150621) or later.

- 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>
```

The Installation Process

To install Email Experience Manager 3.1:

1. Download the Email Experience Manager package from the Sitecore Developer Portal.

   The EXM installation package that you download from dev.sitecore.net includes five zip packages – the *Email Experience Manager* and four zip files that match specific server roles.

   Note
   The *Email Experience Manager* is a Sitecore package. You can only use it for the content management server. Do not use the files intended for other servers on the content management server.

   For instructions on how to use server-specific packages, see this document.

   For instructions on how to configure a dedicated server, see this document.

2. 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:

   o `Email Experience Manager 3.1.1 rev. 150811.update\addedfiles\bin\`

   o `Email Experience Manager 3.1.1 rev. 150811.update\properties\addedfiles\bin\`

3. Use the Installation Wizard to install the EXM module. You can open the Installation Wizard from the:

   o Launchpad – click **Control Panel**, **Administration**, and **Install a Package**.

   o Desktop – click the **Sitecore Start** button, **Development Tools**, and then **Installation Wizard**.

4. Follow the steps in the Installation Wizard.

5. Before you close the wizard, select **Restart the Sitecore client**.

To complete the installation process, after you have installed the EXM module, do the following:

1. Attach the `Sitecore_Exm` dispatch database to the SQL server. You can find the file in the *Data* folder or in the *Website\temp\ECM* folder

2. In the `App_Config\ConnectionStrings.config` file of your Sitecore solution, add the `exm.dispatch` SQL server connection string that will provide connectivity to the `Sitecore_EXM` dispatch database. For example:

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

3. Run `Sitecore.EmailExperienceManager.sql` for the reporting database of your instance. The file is available in the *Data* folder.

> **Important**
> If you are running xDB Cloud, do *not* run this SQL script.

4. Use the Smart Publish option to publish your website.

5. On first launch, configure the EXM default settings to create a manager root.

6. In the App Center, configure the Email Delivery service.

7. In the App Center, sign up for the Email Preview and Spam Detect services. This is optional.