

Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.3

Instructions for upgrading to EXM 3.3



sitecore[®]
Own the experience[™]

Table of Contents

| | | |
|-----------|--|----|
| Chapter 1 | Upgrading EXM..... | 3 |
| 1.1 | Introduction | 4 |
| 1.2 | Installing the EXM Update Package | 5 |
| 1.2.1 | Prerequisites | 5 |
| 1.2.2 | Downloading the EXM Update Package | 5 |
| 1.2.3 | Starting the Update Process..... | 5 |
| | Install the Update Package | 6 |
| | Analyze and Install the Package | 6 |
| | Analyze the Update Package | 6 |
| | Analysis Result | 8 |
| | Install the Package | 9 |
| 1.3 | Post-installation Steps | 10 |

Chapter 1

Upgrading EXM

This document describes how to update the Sitecore Email Experience Manager (EXM) from EXM 3.2 Update 1 to EXM 3.3.

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 Sitecore XP upgrade process.

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.

Important

Please be aware that if you upgrade from EXM 3.0-3.2 to EXM 3.3 or later, the Reporting architecture has been updated and older reporting data is no longer supported. If you need your historical reporting data, you should extract and migrate it to a separate database where you can analyze it with your chosen Business Intelligence (BI) tool.

1.2 Installing the EXM Update Package

1.2.1 Prerequisites

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

- Disable all the configuration files in the *App_Config\Include\EmailExperience* and *App_Config\Include_EmailExperience* folders.
- Detach the Sitecore.Exm database if it is attached to the SQL Server and located in the */Data* folder.. After the upgrade is complete, you can reattach the database.
- In the *\App_Config\ConnectionStrings.config* file:
 - Add the two connection strings *EXM.CryptographicKey* and *EXM.AuthenticationKey*. The keys must be represented in hexadecimal format by 64 characters.
 - Rename the connection string *exm.dispatch* to *exm.master*.
 - Add an empty connection string *exm.web*. For example:

```
<add name="exm.web" connectionString=""/>
```

1.2.2 Downloading the EXM Update Package

To download the EXM update package, visit the EXM 3.3 page on the [Sitecore Developer Portal](#) and download the package.

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.

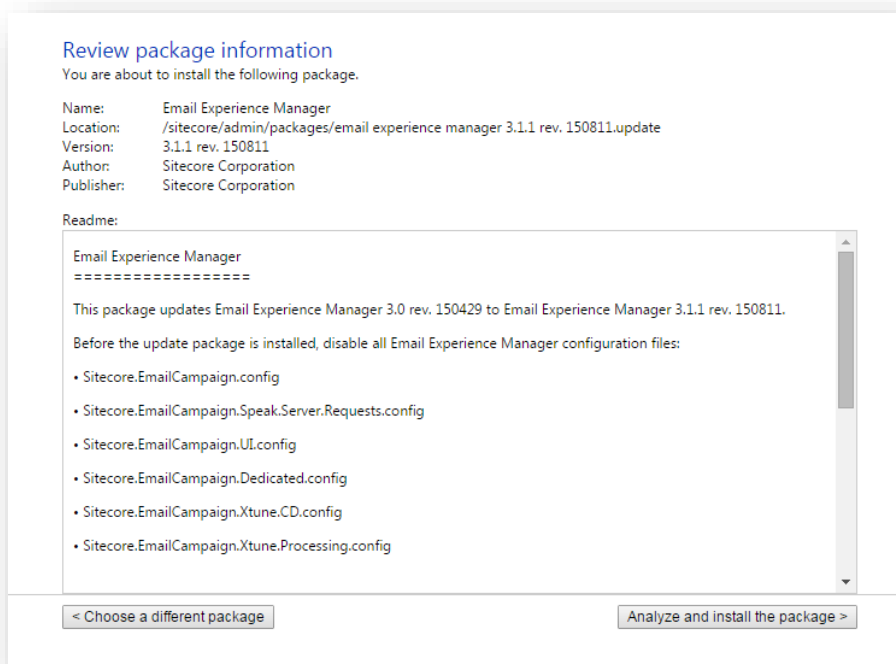
Note

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

Sitecore Email Experience Manager 3.3

Install the Update Package

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



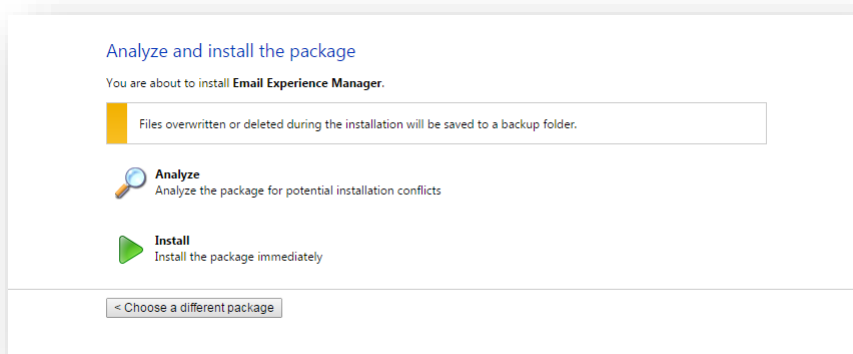
On this page, you can view the package metadata and read the readme text.

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

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.

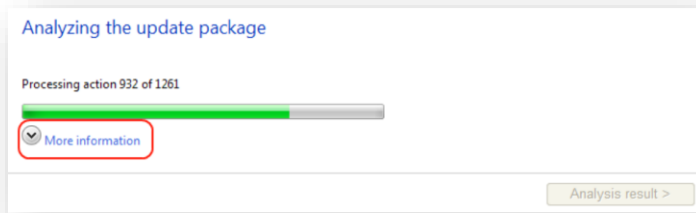


Analyze the Update Package

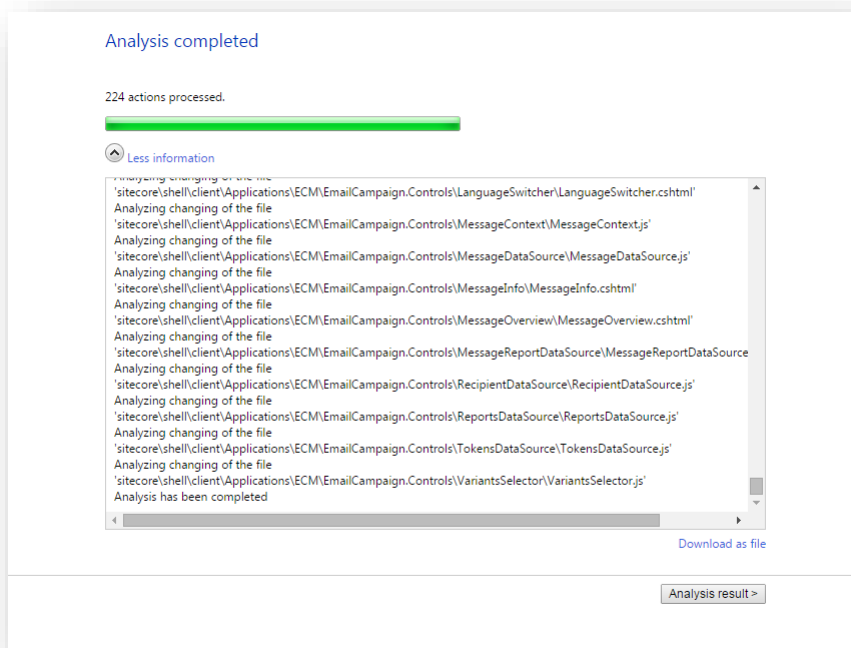
Click **Analyze** to perform an analysis of the installation process to identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.

Email Experience Manager Upgrade Guide

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



Click **More information** to view the detailed information.

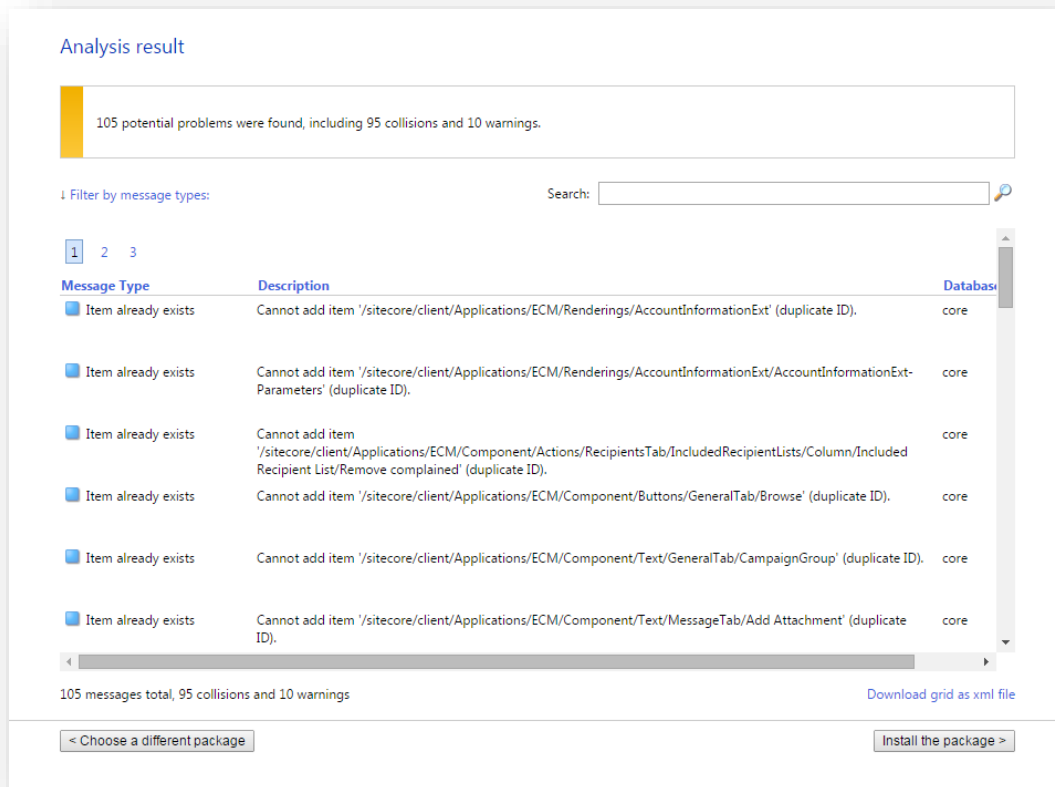


You can review the analysis information messages or download them as a file by clicking the **Download as File** link.

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.

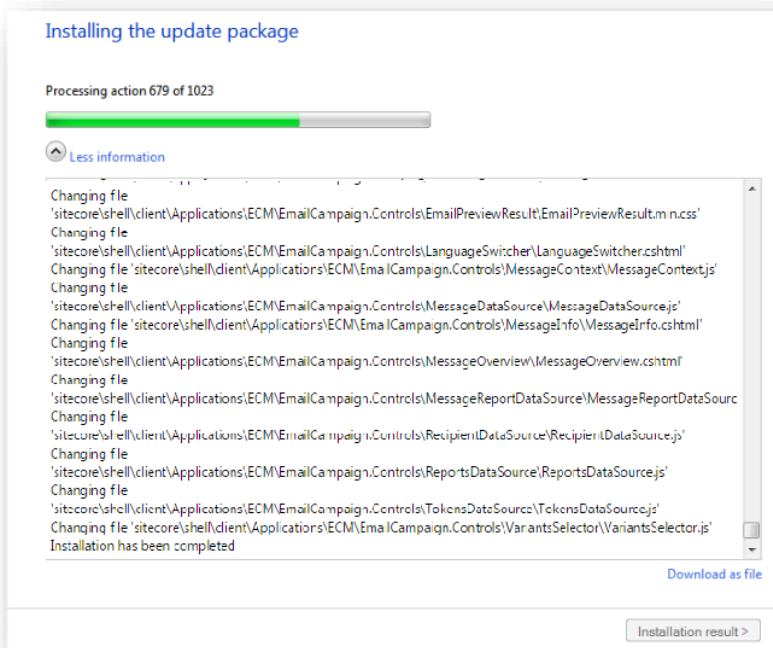
At the top of the page, you can see the information bar. The color of the information bar indicates the importance of problems that were found during the analysis.

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**.

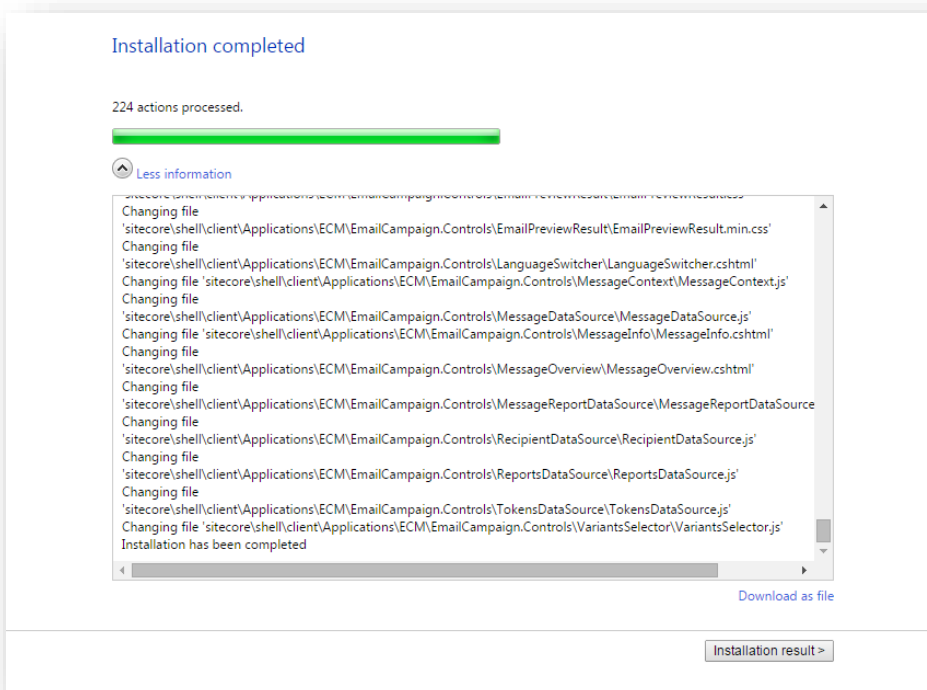
Email Experience Manager Upgrade Guide

Install 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

- Attach the `Sitecore.Exm_Web` database to the SQL server. The file is located in the `Website\temp\ECM` folder.
- Reattach the `Sitecore.Exm` database and then run the `Sitecore.EmailExperienceManager3.2to3.3upgrade.sql` file on it. The file is located in the `Website\temp\ECM` folder.
- In the `\App_Config\ConnectionStrings.config` file, update the connection string `exm.web`. For example:

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

- Enable the `\App_Config\Include\EmailExperience` folder\`Sitecore.EmailExperience.ContentManagementPrimary.config` file.
- In the `\App_Config\Include\EmailExperience` folder, enable the following two configuration files by removing the `.disabled` extension:
 - `Sitecore.EDS.Providers.Dyn.config`
 - `Sitecore.EDS.Providers.Dyn.Sync.config`
- 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 3.3, make the necessary changes to the `Sitecore.EmailExperience.*.config` files manually.