

Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.4

Instructions for upgrading to EXM 3.4



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Chapter 1

Upgrading EXM

This document describes how to update the Sitecore Email Experience Manager (EXM) from EXM 3.3 to EXM 3.4.

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 upgrading the EXM module.

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:

- In the `/Website/App_Config/Include/EmailExperience` folder, delete the following configuration files:
 - `Sitecore.EDS.Dyn.Client.config`
 - `Sitecore.EDS.Providers.Dyn.config`
 - `Sitecore.EDS.Providers.Dyn.Sync.config`

Note

Make sure that all other configuration files in this location are enabled.

- Enable all the configuration files in the `/Website/App_Config/Include/EmailExperience` folder and in the `/Website/App_Config/Include_EmailExperience` folder.

Note

If you are using Lucene, then you must disable the `Sitecore.EmailExperience.ContentSearch.Solr.config` file.

- In the `/Website/bin` folder, delete the following assemblies:
 - `Sitecore.EDS.Dyn.Client.dll`
 - `Sitecore.EDS.Dyn.ClientServices.dll`
 - `Sitecore.EDS.Providers.Dyn.dll`
- Detach the *Sitecore.Exm* and the *Sitecore.Exm.Web* databases if they are located in the `/Data` folder and attached to the SQL Server. After the upgrade is complete, you can reattach the databases.
- Disable all the scheduled tasks in the following locations:
 - `/sitecore/system/Modules/E-mail Campaign Manager/Instance Tasks/Content Management Primary`
 - `/sitecore/system/Modules/E-mail Campaign Manager/Tasks`

1.2.2 Downloading the EXM Update Package

To download the EXM update package, visit the EXM 3.4 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.

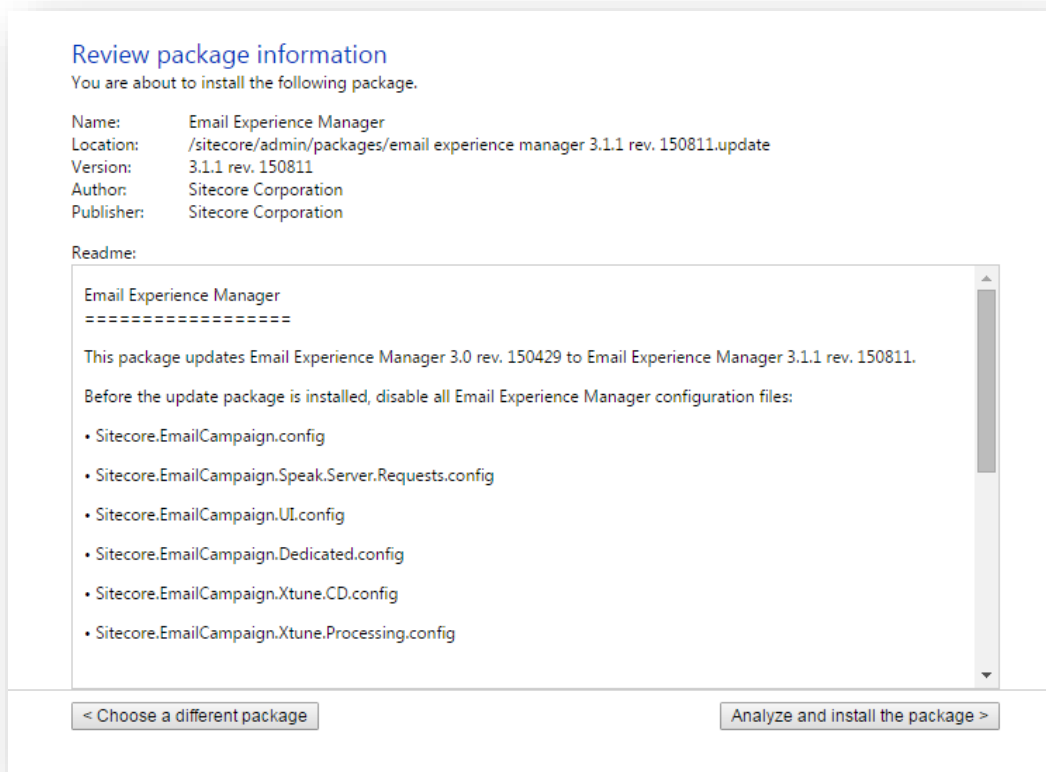
Note

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

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Install the Update Package

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



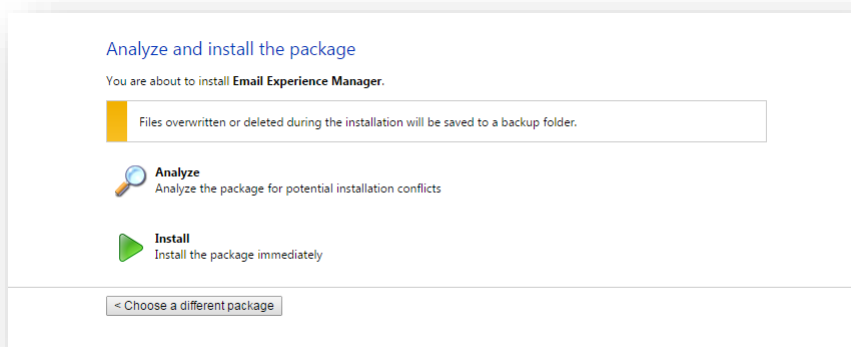
On this page, you can view the package metadata and read the readme text.

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

Analyze and Install the Package

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

To install the package immediately without analyzing for potential conflicts, click **Install**.

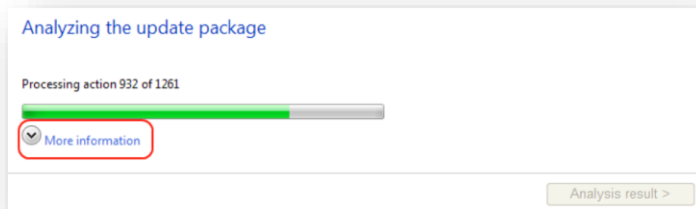


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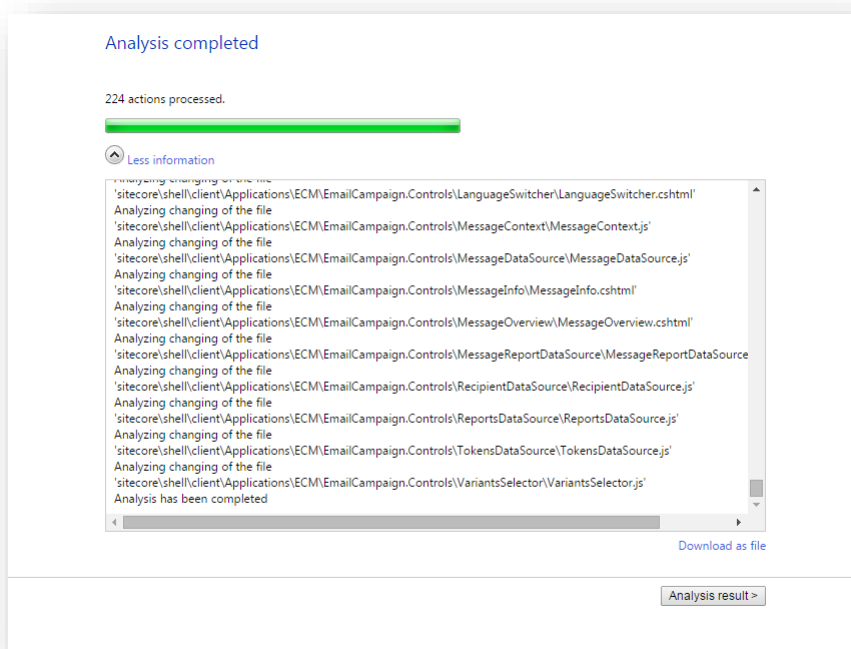
Analyze the Update Package

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.



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 **Analysis result**, 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.

The screenshot shows the 'Analysis result' page. At the top, a yellow bar indicates '105 potential problems were found, including 95 collisions and 10 warnings.' Below this is a search bar and a filter section. A table lists the following message types:

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

At the bottom of the page, there are two buttons: '< Choose a different package' and 'Install the package >'. A link 'Download grid as xml file' is also present.

It is best practice to 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.

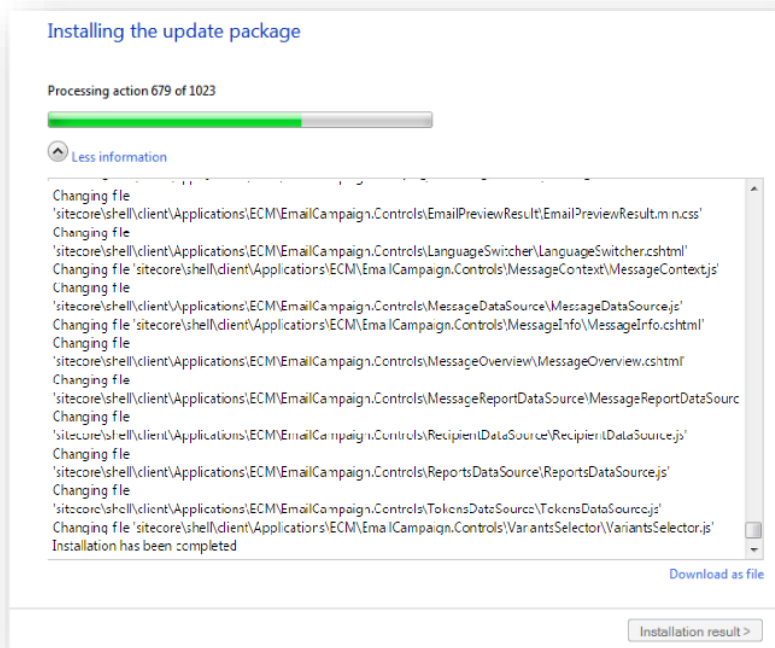
At the top of the page, you can see the information bar. The color of the information bar indicates the importance of problems that were found during the analysis.

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**.

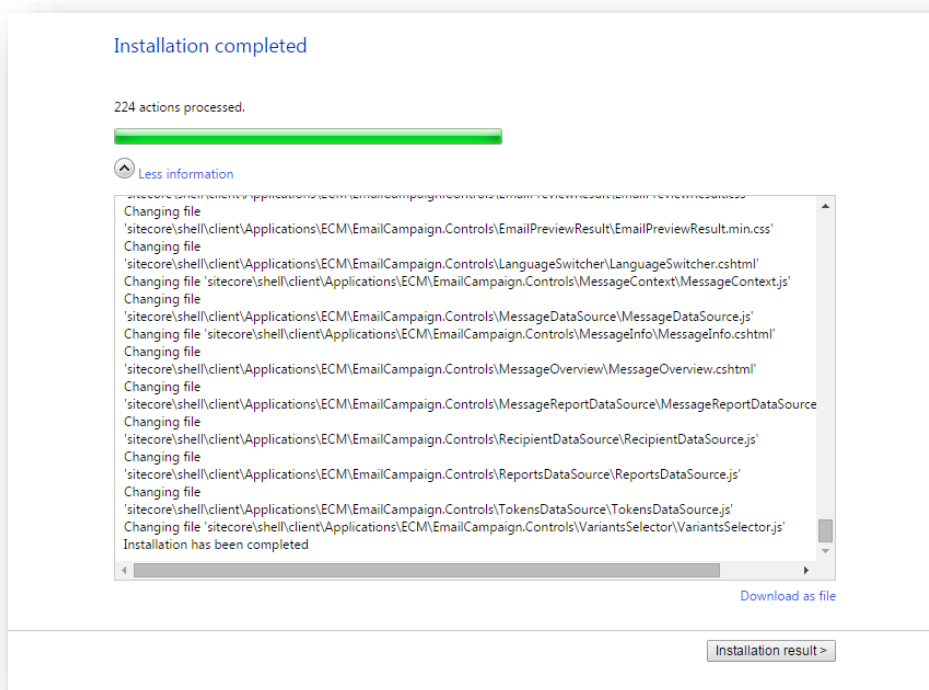
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Install the Package

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



When the installation is completed, the update package displays the **Installation completed** page.



1.3 Post-installation Steps

- If you detached the Sitecore.Exm database and the Sitecore.Exm.Web database before installing the upgrade, reattach the databases to the SQL server.
- In the `/App_Config/Include/EmailExperience` folder, make sure that only the newest versions of each of the configuration files exists. For example, there might be a duplicate version of the `Sitecore.EDS.Providers.CustomSmtplib.config` file that is disabled.
- Run the `Sitecore.EmailExperienceManager3.3to3.4upgrade.sql` file on the Sitecore.Exm database. The `.sql` script is located in the `Website/temp/ECM` folder.
- If you are using Sitecore Email Cloud, in the `/App_Config/Include/EmailExperience` folder, enable the following configuration files by removing the `.disabled` extension:
 - `Sitecore.EDS.Providers.Sparkpost.config`
 - `Sitecore.EDS.Providers.Sparkpost.Sync.config`
 - `Sitecore.EDS.SparkPost.Client.config`

Note

For more information about how to migrate and how to subscribe to Sitecore Email Cloud, contact your local Sitecore representative.

- 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 3.4, make the necessary changes to the `Sitecore.EmailExperience.*.config` files manually.
- If you want to use the *Sample Newsletter* template, download and install the Sample Newsletter package from dev.sitecore.net.
- Publish your site using smart publish.

Note

When you upgrade EXM, your domains are not automatically transferred to the new version. Therefore, in the EXM application, you must manually add the domains that you want to use with your upgraded version.

Your suppression list is automatically updated after the upgrade.