Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.4.1

Instructions for upgrading from EXM 3.4 to EXM 3.4 Update 1

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Chapter 1

Upgrading EXM

This document describes how to update Sitecore Email Experience Manager (EXM) from EXM 3.4 (rev. 161028) to EXM 3.4 Update 1 (rev. 170105).

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

- Sitecore XP 8.2 (rev. 161221)

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

- Enable all the configuration files in the following folders:
  - */Website/App_Config/Include/EmailExperience* folder
  - */Website/App_Config/Include/Z.EmailExperience* folder

- In the */Website/App_Config/Include/ExperienceProfile* folder, enable the `Sitecore.ExperienceProfile.Reporting.Sitecore.EmailExperience.ExperienceProfile.config` file.

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

- 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. Update 1 page on the Sitecore Developer Portal and download the package.

1.2.3 Start the Update Process

To start the EXM update process, on the Sitecore Launchpad, click **Control Panel**, and in the **Administration** section, click **Install an update**.

Alternatively, you can open the Update Installation Wizard by entering 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.
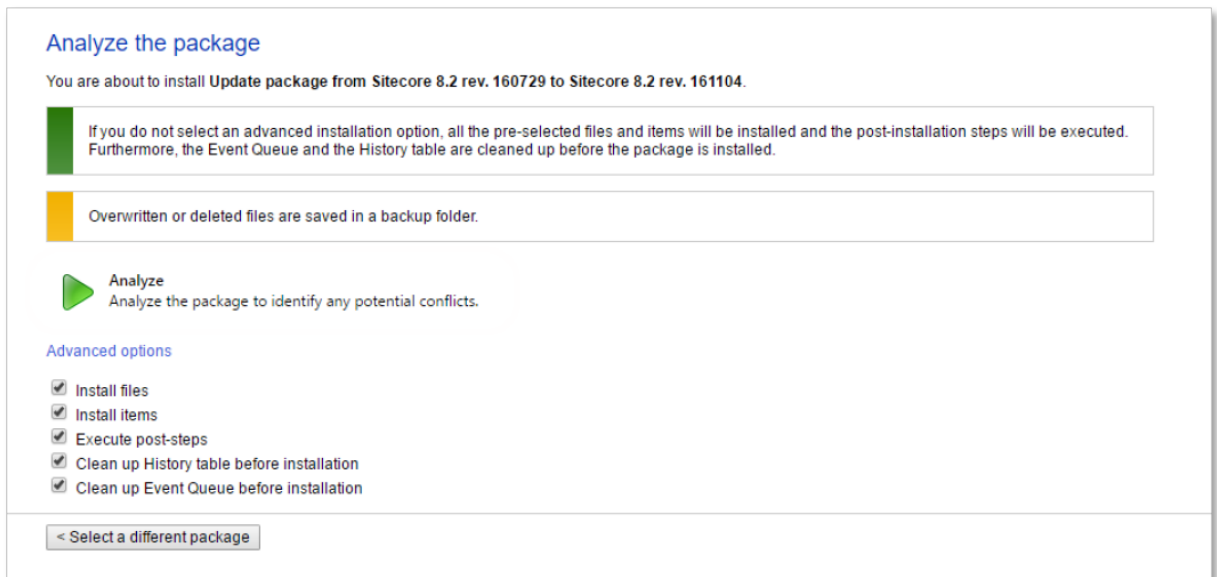
Install the Update Package

To install the update package:

1. In the Sitecore update installation wizard, choose the package you want to install. Click **Package information.** View the package metadata and make sure to read the readme text.

2. Click **Analyze the package** and on the **Analyze the package** page, click **Advanced options** to review the installation options.

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

4. When the analysis has completed, click **Analysis result** to view the details.

   If the Update Installation Wizard did not find any conflicts, click **Install the package.**

Important
On the **Analysis result** page, in the **Message Type** column, if the Update Installation Wizard found Configuration files that must be updated manually, in the **Description** column, click the relevant description and read about the configuration changes.

To avoid breaking changes, after the Update Installation Wizard finishes installing the update package, you must perform the post-installation steps indicated in the description.

5. On the **Analysis result** page, click **Config file changes** and on the **Configuration files changes** page:

   o To automatically resolve all configuration conflicts and install the package, click **Apply and install package**.

     o   To manually resolve a conflict in a configuration file and modify the patch, in the **Action** column for each configuration file, click **Edit**.

6. On the **Resolve configuration file changes** page, review the differences between the original file and the customized file:

     o   To manually resolve the conflicts, in the **Patch File** window, make the necessary changes, and then click **Resolve**.

     o   To skip a conflict and manually resolve it later, click **Skip**. It is best practice to manually review your configuration patch files after the upgrade is complete.

> **Note**
> When you skip the file, the Update Installation Wizard automatically detect any customizations in the Sitecore config files, creates the patch, and replaces the customized file with the original file.

7. When you have resolved or skipped all the configuration file conflicts, on the **Configuration file changes** page, click **Apply and analyze changes**.

8. When the analysis is complete, click **Analysis result**.

> **Note**
> If the analysis fails, you must restart the Update Installation Wizard. If this does not solve the problem, contact Sitecore support.

9. If the Update Installation Wizard does not find any more conflicted configuration files, click **Install the package**.

   The conflicts that were skipped of left unresolved during the configuration are now resolved automatically.

When the installation is completed, you can click **Installation result** to view the results.

1.3 Post-installation Steps

- If you detached the Sitecore.Exm and Sitecore.Exm.Web databases before you installed 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.CustomSmtp.config` file that is disabled.

- If you want to use the *Sample Newsletter* template, download and install the Sample Newsletter package from dev.sitecore.net.

- If you have used any custom settings in your previous version of EXM and did not resolve the conflicts in the configuration files during the upgrade (step 6-9), to apply these changes to EXM 3.4.1, you must edit the `Sitecore.EmailExperience.*.config` files manually.

- Publish your site using the Smart Publish option.