

# 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.

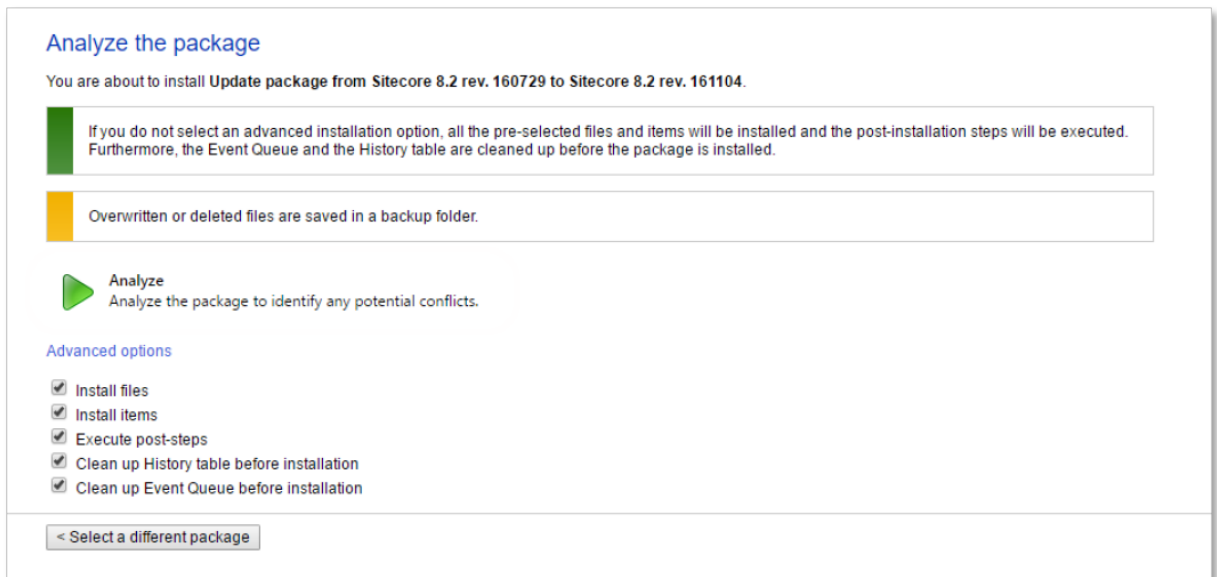
### Install the Update Package

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.

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



The screenshot shows the 'Analyze the package' page. At the top, it says 'Analyze the package' in blue. Below that, it states 'You are about to install Update package from Sitecore 8.2 rev. 160729 to Sitecore 8.2 rev. 161104.' There are two informational boxes: a green one stating that if no advanced options are selected, pre-selected files and items will be installed and post-installation steps will be executed, and a yellow one stating that overwritten or deleted files are saved in a backup folder. Below these is a green play button icon labeled 'Analyze' with the text 'Analyze the package to identify any potential conflicts.' Underneath is a section titled 'Advanced options' with five checked checkboxes: 'Install files', 'Install items', 'Execute post-steps', 'Clean up History table before installation', and 'Clean up Event Queue before installation'. At the bottom left, there is a button labeled '< Select a different package'.

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

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

### Configuration file changes

To resolve the changes in a configuration file, click **Edit**.  
To apply the configuration file changes and analyze the results, click **Apply and analyze changes**.  
To apply the configuration file changes and then install the upgrade package, click **Apply and install package**.

Configuration file	Message	Action
/App_Config/Include/ContentTesting/Sitecore.ContentTesting.config	The 'Sitecore.ContentTesting.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/ListManagement/Sitecore.ListManagement.config	The 'Sitecore.ListManagement.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Sitecore.Commerce.ExperienceAnalytics.config	The 'Sitecore.Commerce.ExperienceAnalytics.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Sitecore.Mvc.config	The 'Sitecore.Mvc.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Sitecore.PathAnalyzer.Client.config	The 'Sitecore.PathAnalyzer.Client.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Social/Sitecore.Social.config	The 'Sitecore.Social.config' configuration file has been modified.	<a href="#">Edit</a>

[Download list as a file](#)

6. On the **Resolve configuration file changes** page, review the differences between the original file and the customized file:
  - To manually resolve the conflicts, in the **Patch File** window, make the necessary changes, and then click **Resolve**.
  - 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 or 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](http://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.