

Installation Guide for Sitecore AI Automated Personalization Standard

Sitecore AI 10.1

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1. Getting started

This guide describes how to install Sitecore AI – Auto-Personalization Standard for Sitecore XP 10.1 on-prem or managed cloud solutions.

NOTE

Sitecore AI – Auto-Personalization Standard is an add-on. This guide assumes you have already installed Sitecore Experience Platform. For Sitecore XP installation instruction, visit the [Sitecore Downloads](#) site.

For more information about Sitecore XP, including the Sitecore AI Automated personalization feature, refer to the [Sitecore Documentation website](#).

1.1. Prerequisites

The following are prerequisites for installing the Sitecore AI Auto-Personalization Standard software:

- You have signed up for Sitecore AI – Automated Personalization, and have the required tokens and assigned tenant IDs, that is, one for your QA environment, and another for your production environment.

NOTE

If you do not have the required tenant ID and token, or a link to download the installation package for Sitecore AI Auto-Personalization Standard, contact your Sitecore representative.

- Sitecore AI Auto-Personalization Standard is an add-on to Sitecore XP. You must have Sitecore XP installed.

1.2. Sitecore AI Extension package

The Sitecore AI Extension package for Sitecore AI Auto-Personalization Standard contains the files you need for installing Sitecore AI Auto-Personalization on Sitecore XP release 10.1.

The following shows an example of the package structure.

- Sitecore.AI.standard.10.1
 - Sitecore.AI.standard.10.1
 - website
 - App_Config
 - Include
 - ML
 - App_Data
 - packages
 - Sitecore.AI.Dashboard.201216.zip
 - Sitecore.ML.items.210127.zip
 - bin
 - Event
 - Handler
 - sitecore
 - shell
 - client
 - override
 - xconnect
 - App_Data
 - Models

1.2.1. Sitecore AI Auto-Personalization files

The following table summarizes the contents of the Sitecore.AI.Standard.10.1 package:

Folder	Contents
website	Sitecore.ML.Extension.config - Contains tenant configuration settings.
\App_Config	
\Include\ML	Sitecore.ML.Extension.XConnect.Client.config
website\App_Data	Sitecore.AI.Dashboard.{yyMMdd}.zip
\packages	Sitecore.ML.items.{yyMMdd}.zip
	Sitecore AI package files that you install in Sitecore Control Panel.
<p>NOTE The file names may differ.</p>	
website\bin	Sitecore.ML.Extension.dll
	Microsoft.Azure.EventHubs.dll
	System.Net.Http.dll
\website\Event	MLDashboardData.ashx
\Handler	TrackedLinkHandler.ashx
\website\sitecore	Dashboard files for Sitecore AI dashboard.
\client\...	
\website\sitecore	Personalization.xml -
\shell\override	

Folder	Contents
\xconnect \App_Data\Models	Sitecore.ML.Extension.XConnect.Model, 10.1.json Data model for xConnect, Marketing Automation, Cortex Processing, and other Sitecore role instances.

2. Preparing to install Sitecore AI extension packages

To prepare for installing Sitecore AI extension packages in Sitecore Control Panel, you must complete the following tasks:

- [Create a safeguard copy of existing CD and CM server files](#)
- [Copy Sitecore AI xConnect model extension files to Sitecore roles](#)
- [Copy Sitecore AI extension files on CD and CM servers](#)

2.1. Create a safeguard copy of existing CD and CM server files

You must make a copy of some existing files on your CD and CM servers to avoid conflicts with .DLL files that are included in the install package. You can also use the safeguard copies to recover your Sitecore customizations if needed.

- On your CM and CD servers, in the `C:\inetpub\wwwroot\<sitename>\bin` folder, make a copy of the following .DLL files, if they exist, and move them to a safe location:
 - `Microsoft.Azure.EventHubs.dll`
 - `System.Net.Http.dll`

2.2. Copy Sitecore AI xConnect model extension files to Sitecore roles

The Sitecore AI Extension package for Auto-Personalization Standard contains an xConnect model .JSON file that you must copy to applicable Sitecore roles.

To copy the Sitecore AI xConnect model extension file:

1. For every instance of the xConnect service (xConnect Collection service or xConnect Collection Search service), copy the `\xconnect\App_Data\Models\Sitcore.ML.Extension.XConnect.Model, 10.1.json` file from the package, to the following locations:
 - `C:\inetpub\wwwroot\<xconnectInstance>\root\App_data\Models`
 - `C:\inetpub\wwwroot\<xconnectInstance>\App_data\jobs\continuous\IndexWorker\App_data\Models`
2. Repeat [Step 1](#) for the following Sitecore roles, if present in your topology:

NOTE

For roles that do not have the `C:\inetpub\wwwroot\ folder, only copy the file to the C:\inetpub\wwwroot\ folder.`

- Sitecore Cortex Processing Engine

NOTE

Copy the file to this path: `c:\inetpub\wwwroot\`

- Marketing Automation Operations service
 - Marketing Automation Reporting service
 - Reference Data service
3. In IIS Manager, restart the service for the model to take effect. In a managed cloud deployment, restart the app service.

2.3. Copy Sitecore AI extension files on CD and CM servers

The Sitecore AI extension package for auto-personalization contains files that you must copy to every Content Management (CM) and Content Delivery (CD) servers in your deployment. This includes the `Sitecore.ML.Extension.config` file, which contains configuration specific to the tenant ID assigned to you.

NOTE

Typically, these settings are pre-configured for you.

To copy Sitecore AI extension files to the CM and CD servers:

1. Before you propagate the files to all CM and CD servers, verify the tenant ID settings in the configuration file. In the Sitecore AI Extension package, open the `website\App_Config\Include\ML\Sitecore.ML.Extension.config` file, and make sure that the settings it contains reflect your tenant information:

```
<settings>
  <setting name="TenantId" value="YOUR TENANT ID"/>
  <!-- Config service base URL -->
  <setting name="ML.Config.BaseUrl" value="YOUR BASE URL"/>
  <!-- A token used to authenticate against config service for your tenantId -->
  <setting name="ML.Config.Token" value="YOUR TOKEN"/>
</settings>
```

NOTE

Alternatively, instead of editing this config file, you can use environment variables (to deploy Sitecore CM and CD containers, for example). To use environment variables, add the following variables to the file, using the pre-defined values from the `Sitecore.ML.Extension.config` file.

- `SitecoreAITenantID=<YOUR TENANT ID value>`
- `SitecoreAIConfigServiceURL=<YOUR BASE URL value>`
- `SitecoreAIConfigServiceJWT=<YOUR TOKEN value>`

2. Perform the following for every CM and CD servers in your deployment, one server at a time. In the `Sitecore.AI.Standard.10.1` package, open the `/Website` folder, and copy all contents (folders and sub-folders) to the following path, on the CD or CM server (merge and replace the files if they already exist):

`C:\inetpub\wwwroot\<sitename>`

3. On every CM and CD server, verify that the `C:\inetpub\wwwroot\<sitename>\Web.config` file contains the following dependent assembly, and if not, add it:

```
<dependentAssembly>
  <assemblyIdentity name="System.Diagnostics.DiagnosticSource"
publicKeyToken="cc7b13ffcd2ddd51" culture="neutral"/>
  <bindingRedirect
oldVersion="0.0.0.0-4.0.3.0" newVersion="4.0.2.1"/>
</dependentAssembly>
```

NOTE

If the entry already exists, make sure that it has the correction version. If the version of the assembly is higher than 4.0.3.0, no change is needed.

4. Perform an IIS restart. For a managed cloud solution, restart the app service.

NOTE

When the server restarts, in the `\inetpub\wwwroot\<sitename>\App_Config\Include\ML` folder, you should see the `MLServiceSettings.xml` file after a few minutes. If you don't see the file, contact Sitecore support.

3. Install the Sitecore AI extension packages

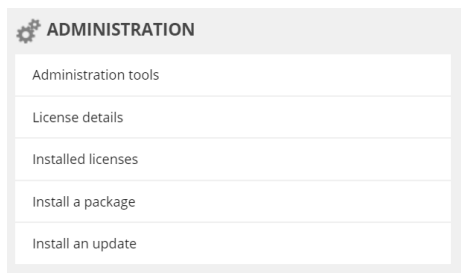
After you copied all the required files from the Sitecore.AI.Standard.*.* package to the CM and CD servers, the ZIP packages that contain the AI dashboard and other required items are available for installation in Sitecore.

You must install the following two packages:

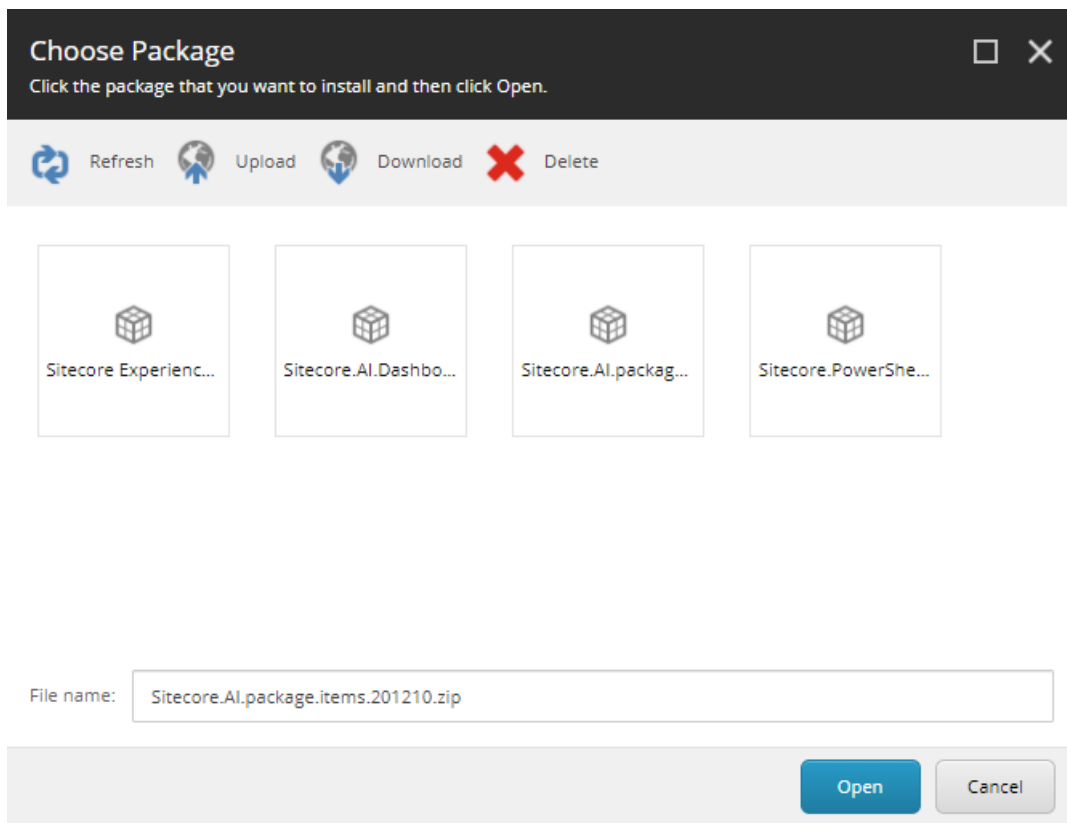
- Sitecore.AI.Dashboard.*****.zip
- Sitecore.ML.package.items.*****.zip

To install the Sitecore AI extension:

1. Log in to Sitecore as an administrator.
2. On the Sitecore Launchpad, in the Control Panel section, click **Control Panel**.
3. In the **Control Panel**, in the **Administration** section, click **Install a package**.



4. In the **Install a Package** dialog box, click **Choose package**, and then select the Sitecore.ML.package.items.*****.zip package, then click **Open**.



NOTE

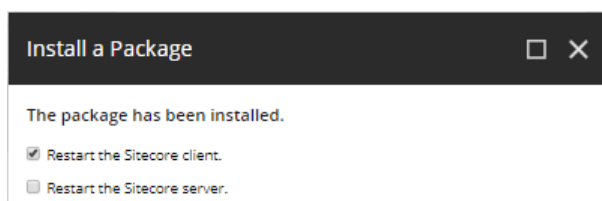
If you cannot see the required package, click **Upload** it from this location:
 \Sitecore.AI.Standard.10.1\Sitecore.AI\website\App_Data
 \packages.

5. Click **Open**, then click **Next** to install the package.
6. Accept the license and click **Next**. Then click **Install**.

NOTE

If you have an older version of the Sitecore AI extension installed, you may be prompted to select the **Merge** option for existing items. Click **Overwrite**, and then click **Apply** to all.

7. Select **Restart the Sitecore client** and then click **Close**.



8. Repeat **step 3** to **step 7** to install the Sitecore.AI.Dashboard.*****.zip package.

9. After you installed the Sitecore AI extension packages, you must publish the new items. Open Content Editor, and in the content tree, navigate to `/sitecore/system/Settings/Analytic/` folder and right-click the **Page Events** folder.

NOTE

If the **Page Events** folder contains items you do not want to publish at this time, you can perform the smart publish on the following item:
MLComponentViewedEvent.

10. Click **Publish Item**, make sure **Smart publish** is selected and, in the **Publishing Language**, choose **English**. Click **Publish**.
11. In the content tree, navigate to the `/sitecore/system/Settings/Rules/Definitions/` folder, right-click the **Elements** folder, and publish the items by following actions in [step 10](#).

NOTE

Alternatively, if you do not want to publish everything contained within the **Elements** folder, you can publish the following items individually:

- `/sitecore/system/Settings/Rules/Definitions/Elements/Conditional Renderings/Set ML Scored Data Source`
- `/sitecore/system/Settings/Rules/Definitions/Elements/Machine Learning`