Installation Guide for Sitecore AI Automated Personalization Standard

Sitecore AI 4.0.0

December 3, 2021

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1. Getting started

This guide describes how to install Sitecore AI – Auto-Personalization Standard 4.0.0 for Sitecore XP 10.2.0 on-prem or managed cloud solutions.

There are two ways to install the Sitecore AI module on your Sitecore Experience Platform (XP) deployment. This guide provides instructions for both:

- Install Sitecore AI using the Sitecore Installation Framework

- Manually install Sitecore AI Auto-Personalization

> **NOTE**
> Sitecore AI – Auto-Personalization Standard is an add-on. This guide assumes you have already installed Sitecore Experience Platform. For Sitecore XP installation instructions, 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 4.0.0 is an add-on to Sitecore Experience Platform (XP) 10.2. You must have Sitecore XP 10.2 installed.

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2. Install Sitecore AI using the Sitecore Installation Framework

This section provides instructions for installing Sitecore AI Auto-Personalization Standard 4.0.0. using the Sitecore Installation Framework (SIF).
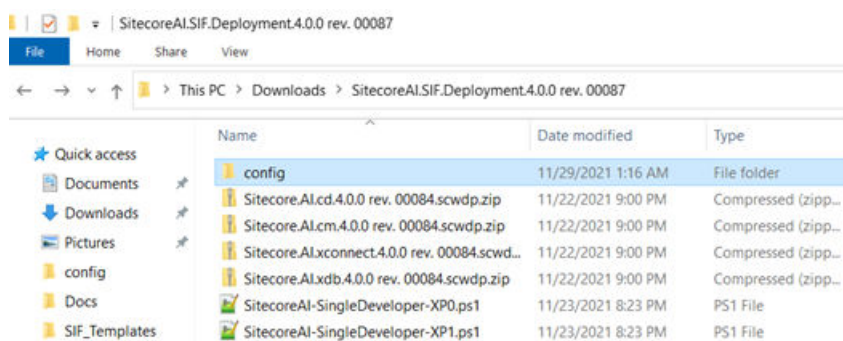
> **NOTE**
> For instructions on how to install Sitecore AI manually, follow these instructions instead.

2.1. Prepare to install the Sitecore AI module using SIF

To prepare for installing Sitecore AI module on top of your Sitecore Experience Platform (XP) deployment using the Sitecore AI SIF deployment package:

1. Download the `Sitecore.AI.SIF.Deployment.*.zip` package.

2. Extract the `Sitecore.AI.SIF.Deployment.*.zip` package to any location on your computer. This documentation refers to this location as the *Sitecore AI SIF* folder.

3. Download the following WDP packages from the Sitecore AI Auto-Personalization Standard 4.0.0 downloads page:

   - For the XP0 topology, download the following Sitecore WPD packages:

     - Sitecore AI CM WDP (`Sitecore.AI.cm.*.scwdp.zip`)

     - Sitecore AI Xconnect WDP (`Sitecore.AI.xconnect.*.scwdp.zip`)

   - For the XP1 topology, download the following Sitecore WDP packages:

     - Sitecore AI CM WDP (`Sitecore.AI.cm.*.scwdp.zip`)

     - Sitecore AI CD WDP (`Sitecore.AI.cd.*.scwdp.zip`)

     - Sitecore AI xdb WDP (`Sitecore.AI.xdb.*.scwdp.zip`)

4. Paste the WDP `.zip` packages into the *Sitecore AI SIF* folder, for example:

> **NOTE**
> You must ensure that the WPD packages are in the same folder as the
> `SitecoreAI-SingleDeveloper-{topology}.ps1`, for example
> `SitecoreAI-SingleDeveloper-XP0.ps1`.

2.2. Install Sitecore AI using SIF

To install the Sitecore AI Auto-personalization Standard using SIF:

1. Open the `SitecoreAI-SingleDeveloper-{topology}.ps1` file, and enter values for the
   following parameters:

   - `$prefix = "The Prefix used on SOLR, Website and Database instances".`

   - `$SitecoreAdminPassword = "The Password for the Sitecore Admin User"`

   - `$SCInstallRoot = "Path for Sitecore AI SIF folder"`

   - `$TenantId = "Your Tenant ID"`

   - `$ML_Config_BaseUrl = "The Config service URL provided to you"`

   - `$ML_Config_Token = "The Authentication Token provided to you"`

2. Open a PowerShell window, and from the folder where you pasted the WDP packages, run the
   following commands:

   ```
   cd{Sitecore AI SIF}
   .\SitecoreAI-SingleDeveloper-{topology}.ps1
   ```

   > **NOTE**
   > If you encounter an error such as "App Pool CD/CM stuck in Stopping state", try
   > running the script again, until it runs successfully.

3. To validate the installation, verify that the files from the Sitecore AI WDPs are copied to the
   appropriate target locations:

   - Unzip the CM WDP and verify whether the files contained in folders are copied to the
     root of your CM instance.

   - At the root of your CM instance, open the `root/App_Config/Modules/ML/`
     `Sitecore.ML.Extension.config` file, and verify that you can see the values you
     provided for tenant ID, URL and authentication token.

   - Optionally, you can verify the contents of the rest of the WDP packages are in their
     respective target locations.

3. Manually install Sitecore AI Auto-Personalization

This section provides instructions to help you install the Sitecore AI Auto-Personalization Standard 4.0.0 module manually on Sitecore Experience Platform (XP) 10.2.

> **NOTE**
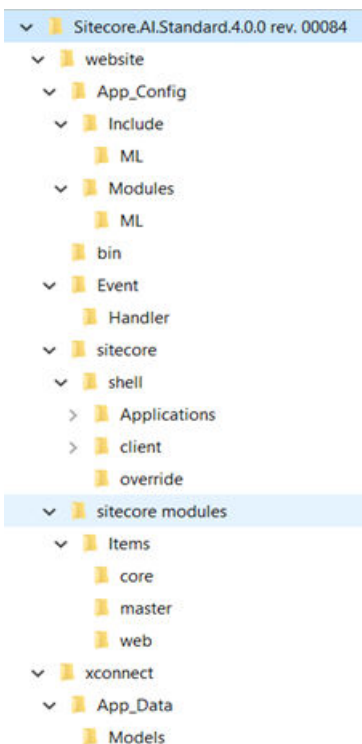> To perform the installation using Sitecore Installation Framework, follow these instructions instead.

To install the Sitecore AI Auto-Personalization module manually, you must complete the following tasks:

- Download the Sitecore AI Auto-Personalization Installation package.
- 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

3.1. 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 4.0.0 on Sitecore XP release 10.2.

The following shows an example of the package structure.

3.1.1. Sitecore AI Auto-Personalization files

The following table summarizes the contents of the `Sitecore.AI.Standard.{version}.rev.{revision}` package (referred to as `Sitecore.AI.Standard.*` in this document hereafter):

Folder	Contents
`website\App_Config\Include\ML`	`Sitecore.ML.Extension.config` - Contains tenant configuration settings. `Sitecore.ML.Extension.XConnect.Client.config`
`website\App_Config\Modules\ML`	Sitecore.ML.Extension.config - Contains tenant configuration settings. Sitecore.ML.Extension.XConnect.Client.config

`website\bin`	`Sitecore.ML.Extension.dll`
	
	`Microsoft.Azure.EventHubs.dll`

`\website\Event\Handler`	`TrackedLinkHandler.ashx`
`\website\sitecore\shell\Applications\ML`	`MLDashboardData.ashx`
`\website\sitecore\shell\client\Applications...`	Dashboard files for Sitecore AI dashboard.
`\website\sitecore\shell\override`	`Personalization.xml`
`\xconnect\App_Data\Models`	`Sitecore.ML.Extension.XConnect.Model, 10.*.json` Data model for xConnect, Marketing Automation, Cortex Processing, and other Sitecore role instances.

3.2. 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`

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

The `Sitecore-AI.Standard.*` package 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 \Sitecore.ML.Extension.XConnect.Model, 10.*.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\<xconnectInstance> \App_data\jobs\continuous\IndexWorker\App_data\Models` folder, only copy the file to the `C:\inetpub\wwwroot\<xconnectInstance> \App_data\Models` folder.

   - Sitecore Cortex Processing Engine

      > **NOTE**
      > Copy the file to this path: `c:\inetpub\wwwroot\<xconnectInstance> \App_Data\jobs\continuous\ProcessingEngine\App_Data \Models`

   - Reference Data service

   - xConnect Collection Search Service

   - xConnect Collection Service

   - Sitecore Cortex Reporting Service

3. In IIS Manager, restart the service for the model to take effect. In a managed cloud deployment, restart the app service.

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

The `Sitecore-AI.Standard.*` package 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.

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`

`\Modules\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.*` package, open the `/Website` folder, copy all contents (folders and sub-folders), and paste them to the following path, on the CD or CM server (merge and replace the files if they already exist):
   `C:\inetpub\wwwroot\<sitename>`

3. 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 do not see the file, contact Sitecore support.