Sitecore Experience Commerce
Upgrade Instructions

Sitecore Experience Commerce 9.0. Update-1

Instructions for upgrading from Sitecore XC 9.0 Initial Release to 9.0 Update-1

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Table of Contents

Chapter 1

Upgrading the Sitecore XC solution

This document provides instructions on how to upgrade a Sitecore XC 9.0 deployment, from Initial Release to Update-1.

Note
These instructions apply to on-premises Sitecore XC deployments.

This document contains the following sections:

- Initial assumptions

- Upgrade the Commerce Engine, Connect Core and Commerce Engine Connect

- Upgrade the Commerce Business Tools

- Upgrade the Sitecore Identity Server

- Deploy the SXA Storefront

1.1 Initial assumptions

The instructions in this document assume the following conditions for an on-premises solution:

- Sitecore XP 9.0 Update-1 is deployed

- Sitecore XC 9.0 Initial Release is deployed, including all components

- You have applied any account-specific data and customizations

- You have downloaded and extracted the Sitecore XC 9.0 Update-1 release package (available from the Sitecore Experience Commerce Download page).

These instructions also assume that your Sitecore XP software remains on Update-1, and is not upgraded.

Note

SXA Storefront is not upgraded as part of this task. That means that once you deploy the updated SXA Storefront modules as part of the upgrade, new content will not be available to existing SXA Storefront sties.

1.2 Upgrade the Commerce Engine, Connect Core and Commerce Engine Connect

You must update the Commerce Engine binaries as well as policy configuration when you upgrade the Commerce Engine. You must also upgrade the Connect Core and Commere Engine Connect files.

1.2.1 Update the Commerce Engine binaries

On your Sitecore XC 9.0 Initial Release system:

1. Open IIS Manager, and stop the following Commerce Engine sites:

   - CommerceAuthoring
   - CommerceMinions
   - CommerceOps
   - CommerceShops

2. Replace all existing .dll files with the 9.0.1 versions of the .dll files in each of the following Commerce Engine service folders:

   - *c:\inetpub\wwwroot\CommerceAuthoring_SC9*
   - *c:\inetpub\wwwroot\CommerceShops_SC9*
   - *c:\inetpub\wwwroot\CommerceMinions_SC9*
   - *c:\inetpub\wwwroot\CommerceOps_SC9*

   Files are available in the `Sitecore.Commerce.Engine.*.zip` package or the version you compiled from the Sitecore.Commerce.Engine.SDK package.

   Note
   Do NOT replace any of the data or json configuration files below the parent folder.

1.2.2 Update policy configuration

Sitecore 9.0.1 includes a new Catalog Indexing policy. In addition, the existing promotion functionality has been changed so that promotion approvals can be required or not, depending on the environment.

Update the Catalog Indexing policy configuration

To enable the new Catalog Indexing policy, you must copy the new Catalog Indexing policy set file to your existing deployment, and add the new policy to the policy collection in all Authoring and Shops environment configuration files (for example, `Plugin.Habitat.CommerceShops-*.json`, `Plugin.Habitat.CommerceAuthoring-*.json`).

To update policy configuration:

1. Copy the new `PlugIn.CatalogIndexing.PolicySet-1.0.0.json` file from the 9.0. Update-1 Commerce Engine package (in the *wwwroot\data\Environments* folder) to the equivalent location in your existing deployment.

2. Open each Authoring and Shops environment configuration file and add the following entry in the "Policies" section:

```
{
  "$type": "Sitecore.Commerce.Core.PolicySetPolicy, Sitecore.Commerce.Core",
  "PolicySetId": "Entity-PolicySet-SitecoreCatalogIndexingPolicySet"
},
```

Update the promotion policy configuration

In Sitecore XC 9.0 Update-1, you can enable or disable approvals for promotions based on the environment.

For example, you can configure the promotion policy to require approval for promotions in the Shops environment (which typically serves the Storefront), but not in the Authoring environment (where business users create promotions, and may want to test them before publishing).

Environment configuration files are located in the \inetpub\wwwroot\<Service>\wwwroot\data\Environments folder.

To update promotion policy configuration:

1. Add the following block to the policy collection in all Shops environment configuration files (for example, `Plugin.Habitat.CommerceShops-*.json` and `Plugin.AdventureWorks.CommerceShops-*.json` files).

```
{
    "$type": "Sitecore.Commerce.Plugin.Promotions.GlobalPromotionsPolicy,
Sitecore.Commerce.Plugin.Promotions",
    "MaxPromotionNameLength": "50",
    "MaxPromotionBookNameLength": "50",
    "PromotionsRequireApproval": "true"
 },
```

2. Add the following block to the policy collection in all Authoring environment configuration files (for example, `Plugin.Habitat.CommerceAuthoring-*.json` and `Plugin.AdventureWorks.CommerceAuthoring-*.json` files).

```
{
    "$type": "Sitecore.Commerce.Plugin.Promotions.GlobalPromotionsPolicy,
Sitecore.Commerce.Plugin.Promotions",
    "MaxPromotionNameLength": "50",
    "MaxPromotionBookNameLength": "50",
    "PromotionsRequireApproval": "false"
 },
```

1.2.3 Disable the anti-forgery setting (temporary)

You must disable the anti-forgery setting for the Business Tools in the Authoring service configuration file.

Note
When you place a call to the Commerce Engine API from outside the Commerce Business Tools (for example, using Postman), you must disable the antiforgery protection setting in the `wwwroot\config.json` file.

To disable the anti-forgery setting:

1. Navigate to the \inetpub\wwwroot\CommerceAuthoring_Sc9\wwwroot\ folder and open the `config.json` file.

2. Locate the the anti-forgery setting and change the value to false:

```
"AntiForgeryEnabled":  false,
```

1.2.4 Restart the Commerce Engine sites

1. Open IIS Manager and restart the following Commerce Engine sites:

   - CommerceAuthoring

   - CommerceMinions

   - CommerceOps

   - CommerceShops

1.2.5 Bootstrap the Commerce Engine

You must bootstrap the Commerce Engine to propagate the changes you made to the environment configuration files into the global database.

The Sitecore XC SDK includes code samples for DevOps operations, so that you can access the Sitecore XC API directly. The following instructions assume that you are using Postman to exercise the Sitecore XC API and that you have imported the Adventure Works and Habitat environments into Postman.

To run the bootstrap operation:

1. Launch the Postman application.

2. In the **Collections** pane in Postman, navigate to the *Authentication* folder.

3. Open the *Sitecore* folder and execute the *GetToken* call.

   When Postman displays an access token in the **Body** pane, authentication is successful.

4. In the **Collections** pane, navigate to the *SitecoreCommerce_DevOps* folder.

5. Open the *1 Environment Bootstrap* folder, and execute the *Bootstrap Sitecore Commerce* call.

1.2.6 Update Commerce Connect Core

You use the Sitecore Installer to update the Commerce Connect Core.

To update Commerce Connect Core:

1. Launch the Sitecore Installer and install the Sitecore Commerce Connect Core 11.1.* package.

2. Navigate to the *inetpub\wwwroot\<siteName>\App_Config* folder.

3. If you customized any of your configuration files, make a copy of your changes.

4. Navigate to the *\inetpub\wwwroot\<siteName>\App_Config\Include\Y.Commerce.Engine* folder and delete all the files in the folder.

1.2.7 Update Commerce Engine Connect

To update Commerce Engine Connect, you must install the Commerce Engine Connect Update module.

To update Commerce Engine Connect:

1. Open a browser and launch the **Sitecore Update Installation Wizard** (https://<server>/sitecore/admin/UpdateInstallationWizard.aspx).

2. Click **Select a package** in the first window, and then select the **Sitecore Commerce Enginge Connect 2.1.*.update** package in the next window.

3. Click **Analyze the package** to identify any potential conflicts.

4. Click **Install the package** to install the update module.

5. Under the *\inetpub\wwwroot\<siteName>\App_Config\Include\Y.Commerce.Engine* folder, update the new `Sitecore.Commerce.Engine.Connect.config` file with any required configuration

changes to ensure the correct URL and thumbprints are being used for connectivity from Sitecore to the Commerce Engine.

1.2.8 Clean the Solr Cores

You must delete all data from the Solr Master Index and the Solr Web Index to clean the Solr Cores.

To delete data from the Solr Cores:

1. Open a browser and enter the following URL (using your own <host> and <sitename>):

   https://<host:port>/solr/~cores/<sitename>_master_index/update?stream.body=<delete><query>*:*</query></delete>&commit=true

2. In another browser tab, enter the following URL (using your own <host> and <sitename>):

   https://<host:port>/solr/~cores/<sitename>_web_index/update?stream.body=<delete><query>*:*</query></delete>&commit=true

1.2.9 Update the data templates

To update the data templates:

1. Log into Sitecore Launchpad (https://<host>/sitecore) and click on **Content Editor**.
2. Click on the Commerce tab.
3. Click **Delete Data Templates**.
4. Click **Update Data Templates**.

1.2.10 Update Commerce Engine Connect configuration

To update the Commerce Engine Connect configuration:

1. Open **File Explorer,** and navigate to the *\inetpub\wwwroot\<siteName>\App_Config\Include\Y.Commerce.Engine* folder.
2. Rename the following (disabled) files to enable them:
   - `Sitecore.Commerce.Engine.DataProvider.config`
   - `Sitecore.Commerce.Engine.Connectors.Index.Common.config`
   - all `Sitecore.Commerce.Engine.Connectors.Index.Solr.*.config` (or all `Sitecore.Commerce.Engine.Connectors.Index.Azure.*.config` if using Azure as a search provider)
3. Navigate to the *\inetpub\wwwroot\<siteName>\XConnectModels* folder and make a copy of the `Sitecore.Commerce.Connect.XConnect.Models.json` file.
4. Paste the copied file to the following locations (overwriting the existing file):
   - *\inetpub\wwwroot\<siteName>.xconnect\App_data\jobs\continuous\IndexWorker\App_data\Models*
   - *\inetpub\wwwroot\<siteName>.xconnect\App_data\Models*
5. Open IIS Manager and perform an IIS reset.

1.2.11 Republish and rebuild the search indexes

Republish the site and re-index the Core, Master and web indexes.

1. Log into Sitecore Launchpad (https://<host>/sitecore) and click on **Content Editor**.

2. Click on the **Publish** tab.

3. Click **Publish** and select **Publish site** from the drop-down menu.

4. In the **Publish Site** window, select **Republish – publish everything** and click **Publish**.

5. Return to the Sitecore Launchpad and click on **Control Panel**.

6. Click on **Indexing manager**.

7. Select the following indexes from the Local Indexes list and click **Rebuild**:

   - `sitecore_core_index`

   - `sitecore_master_index`

   - `sitecore_web_index`

1.2.12 Re-enable the anti-forgery setting

Re-enable the anti-forgery setting for the Business Tools in the Authoring service configuration file.

To enable the anti-forgery setting:

1. Navigate to the *\inetpub\wwwroot\CommerceAuthoring_Sc9\wwwroot* folder and open the `config.json` file.

2. Locate the the anti-forgery setting and change the value to true:

```
"AntiForgeryEnabled":  true,
```

1.3 Upgrade the Commerce Business Tools

To upgrade the Commerce Business Tools:

1. Open IIS Manager, and stop the SitecoreBizFx site.

2. Navigate to the *inetpub\wwwroot\SitecoreBizFx\assets* folder.

3. Note any customizations made to the `config.json` file.

4. Delete the contents of the *inetpub\wwwroot\SitecoreBizFx* folder.

5. Copy all of the files from the Sitecore XC 9.0.1 `Sitecore.BizFx.*.zip` package (or from your compiled version of the Sitecore BizFX SDK) into the *inetpub\wwwroot\SitecoreBizFx* folder.

6. Update the `config.json` file (in the *\assets* folder) with any required customizations.

7. In IIS Manager, restart the SitecoreBizFx site.

1.4   Upgrade the Sitecore Identity Server

To upgrade the Sitecore Identity Server:

1. Open IIS Manager, and stop the SitecoreIdentityServer site.

2. Navigate to the *inetpub\wwwroot\<SitecoreIdentityServer_Name>* folder.

3. Delete the contents of the *inetpub\wwwroot\<SitecoreIdentityServer_Name>*folder.

4. Copy all of the files from the Sitecore XC 9.0.1 `Sitecore.IdentityServer.*.zip` package (or from your compiled version of the Sitecore Identity Server SDK) into the *inetpub\wwwroot\<SitecoreIdentityServer_Name>* folder.

5. Navigate to the *inetpub\wwwroot\<SitecoreIdentityServer_Name>\wwwroot* folder and open the `appsettings.json` file.

6. Add the following block under the "AppSettings" section:

```
"RolesInRoles": {
 "Enabled": "true",
 "ApplicationName": "",
 "DatabaseTable": "RolesInRoles"
},
```

7. In IIS Manager, restart the SitecoreIdentityServer site.

1.5   Deploy the SXA Storefront

When you deploy the Sitecore 9.0 Update-1 Storefront on the upgraded solution (as described in this document), the Storefront does not change or upgrade existing sites. Only new sites built with the 9.0 Update-1 Storefront will have access to the new content.

1.5.1   Install the Storefront packages

To install the Storefront packages:

1. Copy the following Sitecore XC 9.0 Update-1 Storefront packages to the *\inetpub\wwwroot\<siteName>\App_Data\packages* folder:

    - Sitecore Commerce Experience Accelerator

    - Sitecore Commerce Experience Accelerator Storefront

    - Sitecore Commerce Experience Accelerator Storefront Themes

    - Sitecore Commerce Experience Accelerator Habitat Catalog

2. Login to the Sitecore Launchpad and click on **Control Panel**,

3. Under **Administration**, click **Install a package**.

4. Click on **Choose package** and select a package to install (for example, Sitecore Commerce Experience Accelerator *.zip). .

5. Verify the package information, click **Next**, then click **Install**.

6. If you are prompted to overwrite an existing file, click **Yes to all**.

7. If the system displays a warning message that "Item being installed already exists in database", select the **Overwrite** option and click **Apply to all**.

8. Repeat steps 3 to 7 for all four Storefront packages

9. In IIS Manager, perform an IIS reset.

1.5.2   Republish and rebuild the search indexes

To republish and rebuild the search indexes:

1. Log in to Sitecore Launchpad and click on **Content Editor**.

2. Click on the **Publish** tab.

3. Click **Publish** and select **Publish site** from the drop-down menu.

4. In the **Publish Site** window, select **Republish – publish everything** and click **Publish**.

5. Return to the Sitecore Launchpad and click on **Control Panel**.

6. Click on **Indexing manager**.

7. Select the following indexes from the Local Indexes list and click **Rebuild**:

    - `sitecore_core_index`

    - `sitecore_master_index`

    - `sitecore_web_index`

8. In IIS Manager, start the 9.0 Update-1 Storefront site and verify that the upgrade completed successfully.

1.5.3   Verify the Current Version number

1. Log in to Sitecore Launchpad and click on **Content Editor.**

2. In the left pane, navigate to */sitecore/system/Settings/Foundation/Commerce Experience Accelerator/Upgrade/Current*.

3. Verify that the value in the **Version** field is 1100.