Sitecore Experience Accelerator Upgrade Guide

SXA 1.3.1

Step by step guide to the Sitecore Experience Accelerator 1.3.1 upgrade and conversion process

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1.1 Prerequisites

The Sitecore Experience Accelerator (SXA) 1.3.1 is a complete SXA version that you can install separately or you can use it to upgrade from a previous version. To use it as full installation package, refer to the installation guide.

The prerequisites for running this update:

1. Sitecore Experience Platform 8.1 Update-3 or 8.2 Update-3.

2. Sitecore PowerShell extensions: full 4.5 version for Sitecore 8.

1.2 Installing the package

Before installing the package:

1. Comment out all of the events in *Sitecore.XA.Foundation.Multisite.config* file:

   Website\App_Config\Include\Foundation\Sitecore.XA.Foundation.Multisite.config

2. Disable all SXA search providers configs in *z.Foundation.Overrides* file:

   Website\App_Config\Include\ z.Foundation.Overrides

To install the package:

1. Download SXA 1.3.1 package from the Sitecore Developer Portal.

2. On the Sitecore Launchpad, click **Control Panel**.

3. In the **Control Panel**, in the **Administration** section, click **Install a package**, to open the Installation Wizard.

4. Click **Upload package** and follow the steps to upload the SXA package to Sitecore.

5. Click **Next** and follow the steps to install the package.

6. Before you close the wizard, select **Restart the Sitecore Client** and **Restart the Sitecore Server**.

After installing the package:

1. Uncomment the events in *Sitecore.XA.Foundation.Multisite.config* file:

   Website\App_Config\Include\Foundation\Sitecore.XA.Foundation.Multisite.config

2. Enable all SXA search providers configs in *z.Foundation.Overrides:*

   Website\App_Config\Include\ z.Foundation.Overrides

3. Rebuild the Search Indexes:

   1) On the Sitecore Launchpad, click **Control Panel.**

   2) Click **Indexing** and in the **Indexing Manager**, select the indexes that you want to rebuild.

After upgrading SXA from 1.2 to 1.3.1:

- Publish the site by clicking **Publish Site**. Use the Smart Publish option.

1.3   Updating existing sites

After you install the SXA 1.3.1 package on top of SXA 1.2 or SXA 1.3, the **Experience Accelerator Content Upgrade Required** message appears.

To use the SXA upgrade tool:

1.   In the message, click **Upgrade** to start the upgrade procedure.

     The **PowerShell Script Results** dialog displays all the upgrade steps for your installation. Every upgrade step comes with a title, a description, and additional options (if any).

2.   Click **Upgrade**.

     Before executing each upgrade step, you can decide to have a **Dry run**. A dry run tests this upgrade step and creates a log of all content changes before the upgrade script starts. To apply the changes click **Proceed**.
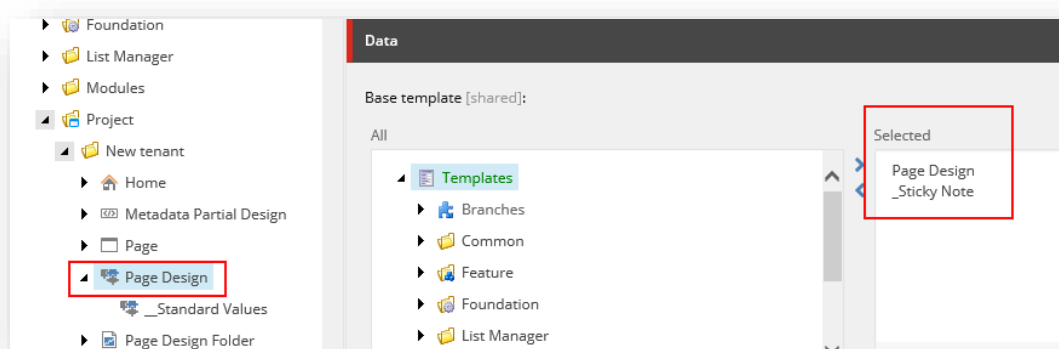
1.4 Manual steps

1.4.1 Sticky Notes for Partial Designs

With SXA 1.3, you can add Sticky Notes to partial designs.

To enable this feature for partial designs on existing sites:

1. Use the SXA upgrade tool to upgrade to SXA 1.3.1.

2. Go to your Tenant templates folder *sitecore/Templates/Project/* and create the following templates *Page Design, Partial Design, Metadata Partial Design.*

3. For each of these templates add the template with its name and the *_Sticky Note* template.

   For example, for the *Page Design* template add the *Page Design* template and the *_Sticky Note* template as base templates.

Template	Base templates
Page Design	/sitecore/templates/Foundation/Experience Accelerator/Presentation/Page Design /sitecore/templates/Feature/Experience Accelerator/StickyNotes/_Sticky Note
Partial Design	/sitecore/templates/Foundation/Experience Accelerator/Presentation/Partial Design /sitecore/templates/Feature/Experience Accelerator/StickyNotes/_Sticky Note
Metadata Partial Design	/sitecore/templates/Foundation/Experience Accelerator/Presentation/Metadata Partial Design /sitecore/templates/Feature/Experience Accelerator/StickyNotes/_Sticky Note

4. Go to your Tenant templates folder *sitecore/Templates/Project/,* create a new template and name it *Partial Design Folder.*

5. Add this new template to the base templates: */sitecore/templates/Foundation/Experience Accelerator/Presentation/Partial Design Folder.*

6. Create some standard values for the template:

   1) Remove the old insert options.

   2) Add the *Partial Design* template to the insert options.

   3) Add the *Partial Design Folder* template to the insert options.

7. Find *Page Designs* template and create some standard values for it:

   1) Remove the old insert options.

   2) Add the *Page Design* template to the insert options.

3) Add the *Page Designs* template to the insert options.

8. Now you must find all the sites that use templates from the current tenant templates location and perform template changes. Find all the items based on the *Partial Design Folder* template (*/sitecore/templates/Foundation/Experience Accelerator/Presentation/Partial Design Folder*) and change the template to the new **Partial Design Folder** template that you added to the tenant templates.

9. Find all the items based on the *Page Design* template (*/sitecore/templates/Foundation/Experience Accelerator/Presentation/Page Design*) and change the template to the new *Page Design* tenant template.

10. Find all the items based on the *Partial Design* template (*/sitecore/templates/Foundation/Experience Accelerator/Presentation/Partial Design*) and change the template to the new *Partial Design* tenant template.

11. Find all the items based on the *Metadata Partial Design* template (*/sitecore/templates/Foundation/Experience Accelerator/Presentation/Metadata Partial Design*) and change the template to new *Metadata Partial Design* tenant template.