xDB™ Upgrade Guide

Sitecore Experience Platform 8.0

Step by step guide to the Sitecore 8.0 upgrade and conversion process

sitecore®
Own the experience™

Table of Contents

1.1 Prerequisites

If your solution is based on an earlier version of Sitecore, you must first update to Sitecore 7.5 rev. 141003 or later before you can install the Sitecore 8.0 upgrade package. You can download all the prerequisite components from the SDN.

Prerequisites for running this update:

- Sitecore 7.5 rev. 141003 or later

- Sitecore Update Package

- Sitecore Update Installation Wizard 1.0.0 rev. 150619.zip

If you have installed the Social Connected module, you must ensure that it is upgraded to Social Connected 3.0 rev. 141030. The upgrade instructions are available on the SDN.

Note
Upgrading a solution that uses Oracle databases is currently not supported.

1.2 Upgrade Process

If you have an earlier version of Sitecore installed and you want to upgrade to Sitecore 8.0, you must follow the instructions in each section of this chapter.

As part of the upgrade process, some solutions might require redesigning. If you need more help and guidance, refer to the administrator and developer documentation on the Sitecore Developer Network (SDN).

Note
If you are upgrading from a pre-7.5 instance, and you have the Web Forms For Marketers module installed, the configuration file is called `forms.config` rather than `sitecore.forms.config`. You must disable the config file before upgrading.

1.2.1 Installing the Upgrade Package

To install the upgrade package and update your website from Sitecore 7.5 to 8.0, you must use the Update Installation Wizard.

Before you install the upgrade package:

1. Back up your website.

2. Log in to the Sitecore Desktop, and click **Sitecore**, **Development Tools**, **Installation Wizard** and install the `Sitecore Update Installation Wizard 1.0.0 rev. 150619.zip` package.

3. Execute the SQL Server update scripts:

   o Execute the *Core* script on each of your Sitecore core, master, and web databases.

   o Execute the *Analytics* script on each of your reporting databases.

     To find out how to specify the reporting database to update, refer to the script description.

4. In the `web.config` file, remove the following processor from the `httpRequestBegin` pipeline:

```
<processor type="Sitecore.Pipelines.HttpRequest.PageEditorHandleNoLayout,
Sitecore.Kernel" />
```

5. In the `Sitecore.Analytics.config` file, remove the following processor from the `httpRequestBegin` pipeline:

```
<processor
type="Sitecore.Analytics.Pipelines.HttpRequest.PageLevelTestItemResolver,Sitecore.Analyti
cs" patch:after="processor[@type='Sitecore.Pipelines.HttpRequest.ItemResolver,
Sitecore.Kernel']" />
```

6. If you are upgrading from Sitecore 7.5 rev. 150130 Update-1 or 7.5 rev.150212 Update-2, in the `Sitecore.ContentSearch.config` file, in the `<events>` section, remove the following events:

```
      <event name="publish:end:remote">
        <handler type="Sitecore.ContentSearch.Events.PublishingEventHandler,
Sitecore.ContentSearch" method="OnFullPublishEndRemoteHandler"/>
      </event>
      <event name="publish:end">
        <handler type="Sitecore.ContentSearch.Events.PublishingEventHandler,
Sitecore.ContentSearch" method="OnFullPublishEndHandler"/>
      </event>
      <event name="publish:end">
        <handler type="Sitecore.ContentSearch.Events.PublishingEventHandler,
Sitecore.ContentSearch" method="OnPublishHandler"/>
      </event>
      <event name="publish:end:remote">
        <handler type="Sitecore.ContentSearch.Events.PublishingEventHandler,
Sitecore.ContentSearch" method="OnPublishRemoteHandler"/>
      </event>
```

```
        <event name="indexing:updateditem">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="UpdateIndexTimestampHandler"/>
        </event>
        <event name="indexing:deleteitem">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="UpdateIndexTimestampHandler"/>
        </event>
        <event name="indexing:deletegroup">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="UpdateIndexTimestampHandler"/>
        </event>
        <event name="indexing:end">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="UpdateIndexTimestampDirectHandler"/>
        </event>
        <event name="indexing:committed">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="UpdateIndexTimestampDirectHandler"/>
        </event>
        <event name="indexing:end:remote">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="IndexEndedRemoteHandler"/>
        </event>
        <event name="indexing:end:remote">
          <handler type="Sitecore.ContentSearch.Events.IndexingEventHandler,
Sitecore.ContentSearch" method="UpdateIndexTimestampDirectHandler"/>
        </event>
        <event name="packageinstall:starting">
          <handler type="Sitecore.ContentSearch.Events.PackagingEventHandler,
Sitecore.ContentSearch" method="OnPackageInstallStartingHandler"/>
        </event>
        <event name="packageinstall:poststep:starting">
          <handler type="Sitecore.ContentSearch.Events.PackagingEventHandler,
Sitecore.ContentSearch" method="OnPackagePostStepInstallStartingHandler"/>
        </event>
        <event name="packageinstall:items:ended">
          <handler type="Sitecore.ContentSearch.Events.PackagingEventHandler,
Sitecore.ContentSearch" method="OnPackageInstallItemsEndHandler"/>
        </event>
        <event name="packageinstall:ended">
          <handler type="Sitecore.ContentSearch.Events.PackagingEventHandler,
Sitecore.ContentSearch" method="OnPackageInstallerEndHandler"/>
        </event>
```

To ensure that the upgrade process is not interrupted:

1. To disable analytics, in the `Sitecore.Analytics.config` file, set the `Analytics.Enabled` setting to `false`.

2. Stop any active A/B or MV tests.

3. If you have also installed any modules, disable the following configuration files by adding `.disabled` to the file extension:

   o `Sitecore.EmailCampaign.config`

   o `Sitecore.Forms.config`

   Important
   Remember to undo these changes when the upgrade process is complete.

4. Make sure that IIS is configured to allow access to the `/sitecore/admin` folder.

> **Note**
> This step may be necessary if you installed Sitecore using the `setup.exe`. The `setup.exe` configures the IIS to disallow access to the `/sitecore/admin` folder and prevents you from using the Update Installation Wizard.

To install the upgrade package:

1. To open the Update Installation Wizard, enter the following URL in your web browser:

   `http://<hostname>/sitecore/admin/UpdateInstallationWizard.aspx`

   For more information on how to use the wizard, see the *Update Installation Wizard* guide on SDN.

2. Use the Update Installation Wizard to install the Sitecore 8.o update package.

   The wizard guides you through the update process and helps you:

   o Upload the update package.

   o Analyze the package.

   o Install the package.

> **Note**
> *Item not found* and *Field has been modified* collisions are expected for translation dictionary items. We recommend that you apply the latest translation to your Sitecore instance when the upgrade is finished. For more detailed information, see the section *Warnings and Collisions*.

1.2.2   Warnings and Collisions

The following warnings and collisions are expected.

Warning	May apply to the following items or their sub-items:
Field has been modified	`/core/sitecore/client/Business Component Library/Layouts/Renderings` `/core/sitecore/client/Speak/Templates/Rendering Parameters` `/core/sitecore/system/Dictionary/P` `/master/sitecore/layout/Sublayouts/Social` `/master/sitecore/system/Marketing Center/Campaigns/Social/Social Marketer/Social Marketer` `/master/sitecore/system/Marketing Center/Path Analyzer` `/core/sitecore/client/Speak/Templates/Rendering Parameters/ControlBase`
Version has been modified	`/core/sitecore/client/Business Component Library/Layouts/Renderings`
Item already exists	`/master/sitecore/system/Marketing Control Panel/Goals`

Warning	May apply to the following items or their sub-items:
Item has been modified	• `/core/sitecore/client/Business Component Library/Layouts/Renderings/Navigation/Menu/Menu Parameters/__Standard Values` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Containers/LoadOnDemandPanel/LoadOnDemandPanel Parameters/__Standard Values` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Common/GlobalLogo/GlobalLogo/__Standard Values`
Item has been moved	• `/core/sitecore/content/Applications/WebEdit/Ribbons/WebEdit/Testing` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Navigation/Menu/Menu Parameters/Apperance` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Containers/Accordion`
Item to be deleted is in use	• `/core/sitecore/client/Business Component Library/Templates/Common/Menu/__Standard Values` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Navigation/Menu/Menu Parameters/MenuTypes` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Navigation/Application Launcher` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Forms/FieldImportance/FieldImportance Parameters` • `/core/sitecore/client/Applications/Launch Pad/Page Settings`
Item not found	• `/core/sitecore/system/Dictionary`

1.2.3   Updating Solr Assemblies

If you are using the Solr search provider, you must upgrade the corresponding assemblies. Use the Solr support package and extract the assemblies into the bin folder of the website.

1.2.4   Updating Configuration Files

After the update package has been installed, you must update your configuration files.

1. Apply the configuration file changes described in the *Sitecore Configuration File Changes* document.

2. Upgrade any modules you have installed to make them compatible with the latest version of Sitecore.

3. You may also need to enable the following configuration files:

   o `Sitecore.EmailCampaign.config`

   o `Sitecore.Forms.config`

After you change the configuration files, you must clear the browser cache.

To clear the browser cache:

1. In **Internet Explorer**, click **Tools**, **Internet Options**.

2. In the **Internet Options** dialog box, on the **General** tab, in the **Browsing History** section, click **Delete**, and select the **Temporary Internet files and website files** check box.

3. Click **Delete**.

These steps may vary depending on the version of IE that you are using.

1.2.5 Installing PhantomJS

You must install the PhantomJS tool that is required by the generate screenshots functionality used by personalization and content testing features in Sitecore XP 8.

1. Go to
https://dev.sitecore.net/Downloads/Sitecore_Experience_Platform/8_0/Sitecore_Experience_Platform_8_0.aspx.

2. In the *Upgrade options* section, download the PhantomJS package.

3. Extract the contents of the package to the `\Data\tools` folder of your installation.

1.2.6 Rebuilding Search Indexes and the Link Database

To complete the upgrade process, you must rebuild the search indexes.

To rebuild all the `ContentSearch` indexes:

1. In the Sitecore **Control Panel**, in the **Indexing** section, click **Indexing manager**.

2. In the **Select Search Index** dialog box, click **Select all** and then click **Rebuild**.

To rebuild the search indexes for the `Quick search index` – also for the *Master* and *Core* databases, if you have them:

1. In the Sitecore **Control Panel**, in the **Database** section, click **Rebuild search index**.

2. In the **Rebuild the Search Indexes** dialog box, select the **Quick search index** check box and then click **Rebuild**.

Rebuild the link database for the *Master* and *Core* databases.

1. In the Sitecore **Control Panel**, in the **Database** section, click **Rebuild link databases**.

2. In the Rebuild Link Databases dialog box, select the *Master* and *Core* databases and then click **Rebuild**.

1.2.7 Updating Data

If you have installed the Social Connected module and created some custom social campaigns, in the **Channel** fields for each campaign, enter the following values:

- In Facebook campaigns – *Channel/Online/Social Community/Facebook social community*

- In Twitter campaigns – *Channel/Online/Social Community/Twitter social community*

- In Google+ campaigns – *Channel/Online/Social Community/Google Plus social community*

- In LinkedIn campaigns – *Channel/Online/Social Community/LinkedIn social community*

- In Social Marketer campaigns – *Channel/Online/Social Community/Other social community*

Publish the modified campaigns.

1.2.8   Redeploying Marketing Data

To redeploy marketing data:

1. Go to
   https://dev.sitecore.net/Downloads/Sitecore_Experience_Platform/8_0/Sitecore_Experience_Platform_8_0.aspx .

2. In the **Upgrade options** section, download the `RedeployMarketingData` file.

3. To ensure that analytics is enabled, in the `Sitecore.Analytics.config` file, set the `Analytics.Enabled` setting to `true`.

4. Unzip and copy the `RedeployMarketingData.aspx` file to the `Website\sitecore\admin` folder.

5. Open the `RedeployMarketingData.aspx` file by entering the following URL in your web browser: `http://<localhost>/sitecore/admin/RedeployMarketingData.aspx`.

6. Click **Redeploy segments** and then click **Redeploy maps**.

1.2.9   Upgrading Multiple Instances

Repeat all the steps described in the *Upgrade Process* section for every Sitecore instance that you want to update.

1.2.10   Security roles

The Sitecore XP 8.0 Initial Release update package doesn't add some security roles.

For more information about this issue and how to to resolve it, see the Sitecore Knowledge Base.