Sitecore Experience Platform 8.0 Update-2 Upgrade Guide

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 8.0 rev. 141212 before you can install the Sitecore 8.0 Update-2 upgrade package. You can download all the prerequisite components from dev.sitecore.net.

Prerequisites for running this update:

- Sitecore 8.0 rev. 141212 or later.
- The Sitecore Update Package.
- Sitecore Update Installation Wizard 1.0.0 rev. 150219.zip

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

1.2　Upgrade Process

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

1.2.1　Installing the Upgrade Package

To install the upgrade package to update you website from Sitecore 8.0 to 8.0 Update-2, you need to 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. 150219.zip` package.

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

   o `Sitecore.EmailCampaign.config`

   o `Sitecore.Forms.config`.

3. In `/App_Config/Include/ContentTesting/Sitecore.ContentTesting.config`, comment the following event handler:

```
        <event name="item:saved">
                <handler type="Sitecore.ContentTesting.Events.GenerateScreenshot,
Sitecore.ContentTesting" method="OnItemSaved">
                  <excludeFields hint="list:ExcludeFieldFromComparison">
                    <created>  created</created>
                    <createdby>  created by</createdby>
                    <updated>__updated</updated>
                    <updatedby>__updated by</updatedby>
                    <revision>__revision</revision>
                    <sortorder>  sortorder</sortorder>
                    <validfrom>  valid from</validfrom>
                    <workflow>  workflow</workflow>
                    <workflowstate>__workflow state</workflowstate>
                    <lock>__lock</lock>
                    <pageleveltestsetdefinition>__Page Level Test Set
Definition</pageleveltestsetdefinition>
                  </excludeFields>
                </handler>
              </event>
```

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

4. Make sure that the 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 8.0 Update-2 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. It is recommended to apply the latest translation to your instance after upgrading to keep it up to date. For detailed information, see section 1.2.2 *Collisions, Warnings and Errors*.

1.2.2   Collisions, Warnings and Errors

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/Applications/ContentTesting/Common/Layouts/Renderings/ContentTestingDataRepeater/ContentTestingDataRepeater-Parameters` • `/core/sitecore/client/Speak/Templates/Rendering Parameters/ControlBase` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Containers/LoadOnDemandPanel/LoadOnDemandPanel Parameters` • `/core/sitecore/client/Applications/PathAnalyzer/Common/System/Datasources/FiltersBar` • `/core/sitecore/system/Dictionary`
"*Version has been modified*"	• `/core/sitecore/client/Business Component Library/Layouts/Renderings/Common/ToolTip/ToolTip Parameters/__Standard Values` • `/core/sitecore/system/Dictionary`
"*Item has been modified*"	• `/core/sitecore/client/Applications/ContentTesting/Common/Layouts/Renderings/ContentTestingDataRepeater/ContentTestingDataRepeater-Parameters` • `/core/sitecore/client/Business Component Library/Layouts/Renderings/Containers/LoadOnDemandPanel/LoadOnDemandPanel Parameters` • `/core/sitecore/client/Speak/Templates/Rendering Parameters/ControlBase`
"*Item to be deleted is in use*"	• `/core/sitecore/client/Business Component Library/Layouts/Renderings/Forms/Form/Form Parameters` • `/core/sitecore/client/Applications/ExperienceEditor/Dialogs/SelectItem/PageSettings` • `/core/sitecore/client/Applications/Dialogs/`
"*Item not found*"	• `/core/sitecore/system/Dictionary`

The following errors are expected in analyze results.

Warning	May apply to the following items or their sub-items:
"Item to be deleted has children"	• `/master/sitecore/templates/System/Modules` • `/core/sitecore/client/Applications/ExperienceProfile/Common/System/` • `/core/sitecore/client/Applications/ExperienceProfile/Search/PageSettings/`
"Template to be deleted is in use"	• `/master/sitecore/templates/System/Modules` • `/core/sitecore/client/Applications/ExperienceProfile/Search/PageSettings`

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 Sitecore 8.0 rev. 150223 (Update-2) Configuration File Changes document.

2. If you are updating to the current update from 8.0 rev. 141212 (Initial Release), you must also apply these configuration file changes:

    o Sitecore 8.0 rev. 150121 (Update-1) Configuration File Changes document

3. Upgrade any modules you have installed to make them compatible with the current latest version of Sitecore. If you are using EXM or WFFM, 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 your browser cache.

To do this:

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

2. In the **Internet** Options dialog box, in **Browsing History**, click **Delete,** and then delete all your **Temporary Internet Files**.

3. Click **Delete**.

These steps may vary depending on the type of browser you are using.

1.2.5   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**.

1.2.6   Updating Data

To update social profiles data to be compliant with Sitecore 8.0 Update-2, you need to perform the following steps:

1. Open page http://<site url>/sitecore/admin/UpdateSocialProfiles.aspx in browser.

Note
The tool should be executed on a Content Management server. Only one of them in case of multi-instance environment.

2. Log in as an administrator.

3. Press the **Run** button.

4. See Sitecore logs for details.

Note
The tool is safe to be executed several times. It can be helpful in case execution is interrupted.

1.2.7   Upgrading Multiple Instances

Repeat all the steps contained in the Upgrade Process (this chapter) for every Sitecore instance that you want to update.