

Email Experience Manager Upgrade Guide

EXM 3.0 Update 2 to EXM 3.0 Update 3

Instructions for updating from EXM 3.0 Upd-2 to EXM 3.0 Upd-3



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Introduction

This document describes the EXM update process that lets you update your EXM installation from EXM 3.0 Update-2 to EXM 3.0 Update-3.

You can save the list of potential problems in an XML file and review them later. When the automatic update process is finished, you need to perform the post installation steps described in this manual. Ensure that these steps are performed before rebuilding the Experience database (xDB), which is part of Sitecore XP upgrade process.

Note

We recommend that you back up all Sitecore databases and the Sitecore instance before starting the update process, because this update is a non-reversible procedure.

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Using the EXM Update Package

Prerequisites

Prerequisites for running the EXM update package:

- Disable the `Sitecore.EmailCampaign.config` file by adding `.disabled` to the file extension.
- Disable all scheduled tasks at the following locations:
 - `/sitecore/system/Tasks/Schedules/Email Campaign`
 - `/sitecore/system/Modules/E-mail Campaign Manager/Tasks`
- Upgrade Sitecore to Sitecore XP 8.0 Update-3.

For more information about upgrading the Sitecore XP, visit the [Sitecore XP Upgrade Instructions](#) page.

Accessing the Update Process

To access the EXM update process, enter the following URL in your browser:

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

If prompted, enter your credentials to access the Sitecore instance.

Note

Before running the Update Package, you must ensure that there are no message dispatches in the Processing or Paused state.

Update Process

Install Update Package

The update package includes new items required for EXM 3.0. To download the EXM update package, visit the [EXM 3.0 Module Upgrade](#) page on the [dev.sitecore.net](#).

Click **Install update package** to start the update package installation.

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Review Package Information

After you click **Install update package**, the EXM update tool displays the *Review package information* page.

Review package information

You are about to **install** the following package.

Name: Email Experience Manager
Location: /sitecore/admin/packages/email experience manager 3.0 rev. 150223.update
Version: 3.0 rev. 150223
Author: Sitecore Corporation
Publisher: Sitecore Corporation

Readme:

```
Email Experience Manager
=====
```

This package updates Email Experience Manager 3.0 rev. 141215 to Email Experience Manager 3.0 rev. 150223.

Refer to SDN for detailed installation instructions, including any manual steps that must be performed before and after installation.

< Choose a different package

Analyze and install the package >

On this page, you can view the package metadata and read the readme text. Click the **Analyze and install the package** button to proceed to the next step.

Analyze and Install the Package

This page lets you analyze the installation process to identify potential problems and install the package.

Click **Install** to install the package immediately without analyzing for potential conflicts.

Analyze and install the package

You are about to **install** **Email Experience Manager**.

Files overwritten or deleted during the installation will be saved to a backup folder.



Analyze

Analyze the package for potential installation conflicts



Install

Install the package immediately

< Choose a different package

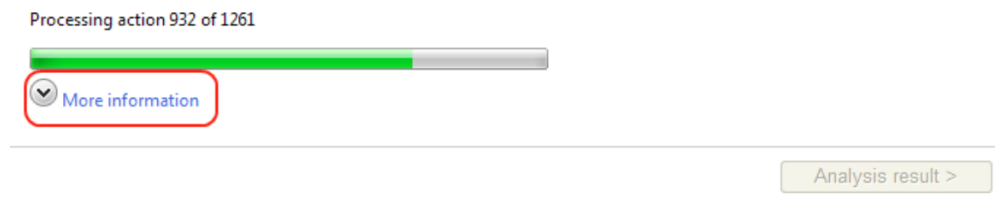
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Analyzing the Update Package

Click **Analyze** to perform an analysis of the installation process to identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.

The tool displays the progress bar and the number of processed actions.

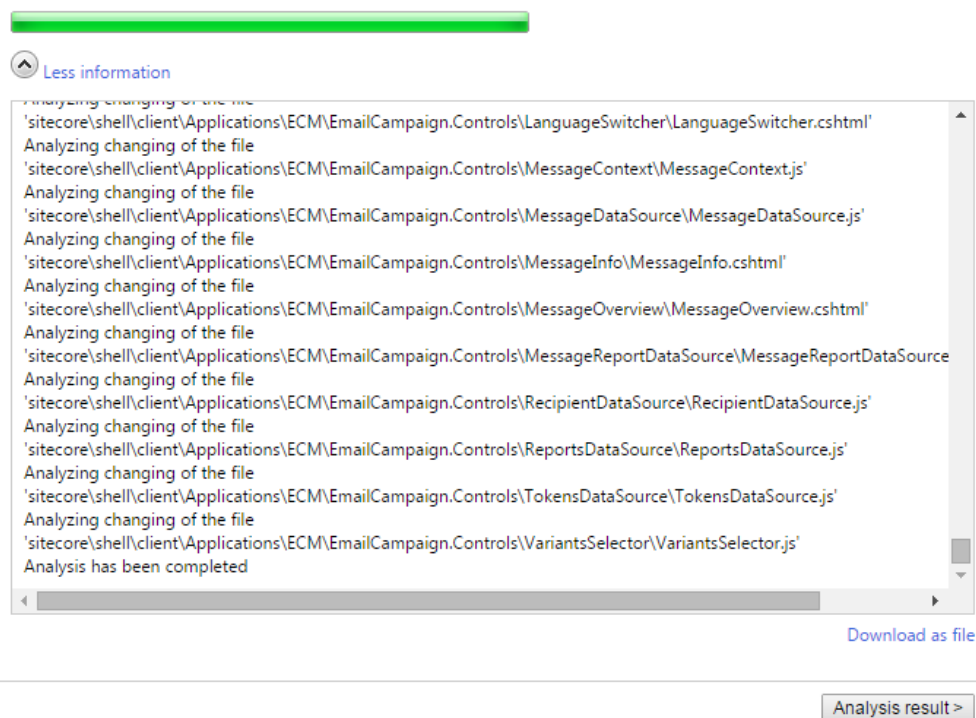
Analyzing the update package



Click **More information** to view the detailed information.

Analysis completed

224 actions processed.



You can review the analysis information messages or download them as a file by clicking the **Download as File** link.

To continue, click the **Analysis result** button, which allows you to review the potential problems that were identified by the wizard.

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Analysis Result

On this page, you can review potential problems that occur during the installation.

Analysis result

105 potential problems were found, including 95 collisions and 10 warnings.

Filter by message types: Search:

1 2 3





Message Type	Description	Database
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Renderings/AccountInformationExt' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Renderings/AccountInformationExt/AccountInformationExt-Parameters' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Actions/RecipientsTab/IncludedRecipientLists/Column/IncludedRecipientList/Remove complained' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Buttons/GeneralTab/Browse' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Text/GeneralTab/CampaignGroup' (duplicate ID).	core
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Text/MessageTab/Add Attachment' (duplicate ID).	core

105 messages total, 95 collisions and 10 warnings [Download grid as xml file](#)

< Choose a different package Install the package >

We strongly recommend to review the analysis messages before continuing the installation.

There are several types of messages: errors, collisions, warnings and information messages. Each message type is marked with a colored square:

-  red for errors.
-  blue for collisions.
-  yellow for warnings.
-  grey for information messages.

Errors, collisions and warnings are considered as potential problems and you should pay attention to them.

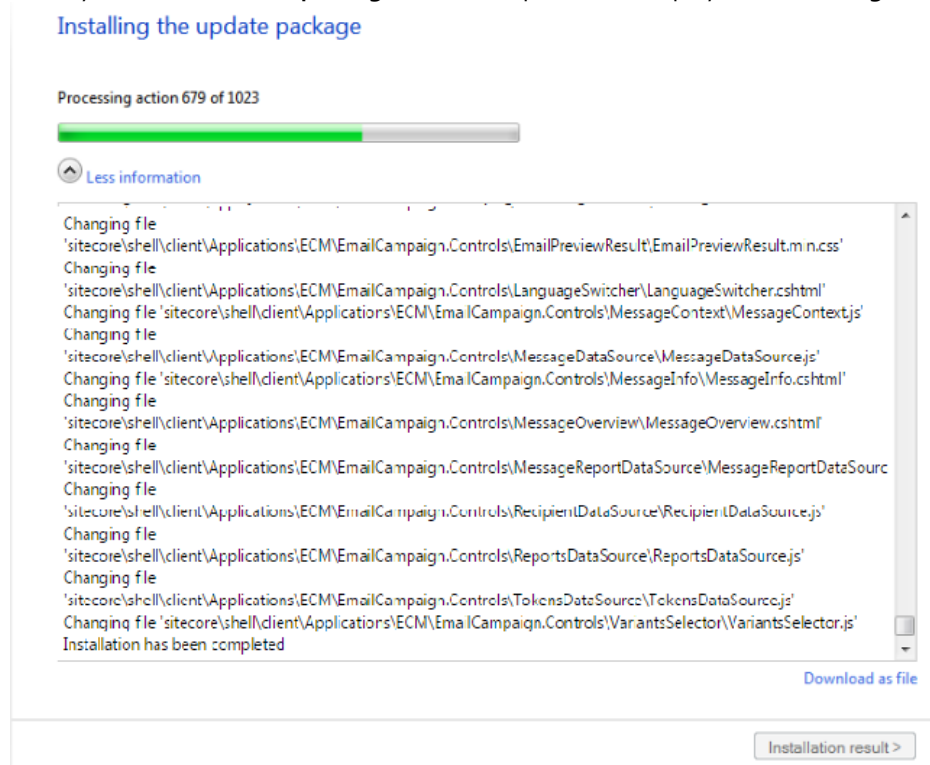
At the top of the page, you can see the information bar. The color of the information bar indicates the importance of problems that were found during the analysis.

At the bottom of the page, you can see overall statistics and a link that allows you to download all the messages in the grid as an XML file. When you are ready to install the package, click **Install the package**.

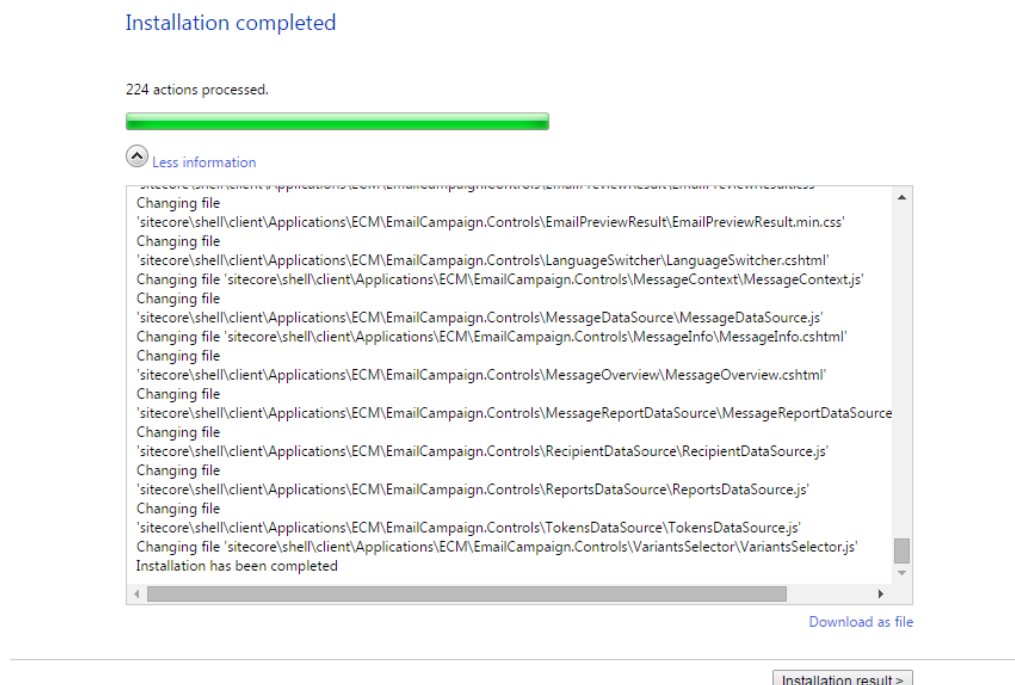
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Installing the Package

When you click **Install the package**, the EXM update tool displays the **Installing the update package** page.



When the installation is completed, the update package displays the **Installation Completed** page.



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Post Installation Steps

After installing the update package, you should perform the following post installation step:

- Copy the `EmailCampaign.config` configuration file from the EXM 3.0 Update-3 package to the instance.

Your custom settings are not ported to the new configuration file automatically. If you used any custom settings in the previous version and you want to apply them to EXM 3.0 Update-3 as well, make needed changes to the `EmailCampaign.config` file manually.