Sitecore Experience Platform 8.0 Update-3 Upgrade Guide

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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-3 upgrade package. You can download all the prerequisite components from dev.sitecore.net.

Prerequisites for running this update:

1.   Sitecore 8.0 rev. 141212 or later.

2.   Sitecore Update Installation Wizard 1.0.0 rev. 150619.zip

3.   The Sitecore Update Package from dev.sitecore.net

4.   For MS SQL Server, you also need the following database upgrade scripts:

     o   UpgradeCMS80_U3.zip

     o   UpgradeSXP80_U3.zip

     To download these files, on the Sitecore Experience Platform 8.0 Update-3 page, in the **Upgrade options** section, click *Config files for upgrade*.

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-3, 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. 150619.zip` package.

3. Upgrade the CMS database schemas:

4. SQL Server: Execute the `CMS80U3_BeforeInstall.sql` script on master and web databases.

5. In case of upgrading your solution from the initial version of Sitecore 8.0 rev. 150121 (Update-1) or earlier, upgrade the SXP database schemas:

6. SQL Server: Execute the SXP80U3_BeforeInstall.sql script on reporting database.

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-3 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*.

After you have installed the upgrade package:

1. Navigate to the `/Website` folder and locate the *$(dataFolder)* folder.
2. Copy all the contents from the *$(dataFolder)* folder to the clipboard.
3. Navigate to the `/Data` folder.
4. Paste with replacement all the contents from the $(dataFolder) folder.
5. Delete the *$(dataFolder)* folder under the `/Website` folder.

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` `/sitecore/client/Applications/PathAnalyzer/Common/System/Datasources/FiltersBar`
"*Version has been modified*"	`/core/sitecore/client/Business Component Library/Layouts/Renderings/Common/ToolTip/ToolTip Parameters/__Standard Values` `/core/sitecore/system/Dictionary`

Warning	May apply to the following items or their sub-items:
"Item has been modified"	`/core/sitecore/client/Applications/ContentTesting /Common/Layouts/Renderings/ContentTestingDataRepe ater/ContentTestingDataRepeater-Parameters` `/core/sitecore/client/Business Component Library/Layouts/Renderings/Containers/LoadOnDeman dPanel/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/ExperienceEdit or/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/ExperienceProf ile/Common/System/` `/core/sitecore/client/Applications/ExperienceProf ile/Search/PageSettings/`
"Template to be deleted is in use"	`/master/sitecore/templates/System/Modules` `/core/sitecore/client/Applications/ExperienceProf ile/Search/PageSettings`
"Field has been modified"	`/sitecore/client/Applications/PathAnalyzer/Common /System/Datasources/FiltersBar`

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. 150427 (Update-3) 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

   o Sitecore 8.0 rev. 150223 (Update-2) 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

In case of upgrading your solution from the initial version of Sitecore, 8.0 rev. 141212, to update social profiles data to be compliant with Sitecore 8.0 Update-3, you need to perform the following steps:

1.   Open page http://<hostname>/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   Redeploying Marketing Data

To update marketing data to be compliant with Sitecore 8.0 Update-3, you need to perform the following steps:

1.   Open page http://<hostname>/sitecore/admin/RedeployMarketingData.aspx in browser.

> **Note**
> Make sure that analytics is enabled. To enable analytics, in the `Sitecore.Analytics.config` file, set the `Analytics.Enabled` setting to *true*.

2. Log in as an administrator.

3. Click the **Redeploy maps**.

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

1.2.8   Upgrading Multiple Instances

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