Sitecore Experience Platform 8.0 Update-5

Sitecore Experience Platform Upgrade Guide

Step by step guide to the Sitecore 8.0 Update-5 upgrade and conversion process

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1.1 Prerequisites

If your solution is based on an earlier version of Sitecore such as Sitecore CMS 6.x or 7.x, you must first update to Sitecore 8.0 rev. 141212 (Initial Release) before you can install the Sitecore 8.0 Update-5 upgrade package. You can download all the prerequisite components from the Sitecore Developer Portal.

Prerequisites for running this update:

- Sitecore 8.0 rev. 141212 or later.

- Sitecore Update Installation Wizard 1.0.0 rev. 150804.zip

- The Sitecore Update Package from the Sitecore Developer Portal.

- For Microsoft SQL Server, you also need the following database upgrade scripts:

  o UpgradeCMS80_U3.zip

  o UpgradeSXP80_U5.zip

  To download these files, on the Sitecore Experience Platform 8.0 Update-5 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 ensure that the upgrade process is not interrupted:

1. Disable analytics. In the `Sitecore.Analytics.config` file, set the `Analytics.Enabled` setting to *false*.

2. Disable the `Sitecore.Analytics.Processing.Aggregation.Services.config` and `Sitecore.Analytics.Processing.Services.config` files by renaming them.

3. 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`

4. In `/App_Config/Include/ContentTesting/Sitecore.ContentTesting.config`, comment the following event handler, unless it is already commented:

```
       <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>
```

   Note
   When the upgrade process is complete, you must undo all the changes that you made.

5. If you are using Solr search provider, the `Global.asax` file must be changed.

• Make a backup of your `Global.asax` file, open the file and replace the **Inherits** value with the following "`Sitecore.Web.Application`".

• In the `Sitecore.ContentSearch.config` file, comment out the following settings:

   o `ContentSearch.SearchMaxResults`

   o `ContentSearch.DefaultIndexConfigurationPath`

6. 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` file. The `setup.exe` file configures the IIS to disallow access to the `/sitecore/admin` folder and prevents you from using the Update Installation Wizard.

Use the Update Installation Wizard to install the upgrade package and update your website from Sitecore 8.0 to 8.0 Update-5.

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 then install the `Sitecore Update Installation Wizard 1.0.0 rev. 150804.zip` package.

3. Upgrade the CMS database schemas:

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

4. Upgrade the SXP database schemas:

   SQL Server: Execute the `SXP80U5_BeforeInstall.sql` script on each of your reporting databases.

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-5 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
The "Item not found" and "Field has been modified" collisions are expected for translation dictionary items. You should apply the latest translation to your instance after upgrading to keep it up to date. For detailed information, see the section *Collisions, Warnings, and Errors*.

1.2.2   Collisions, Warnings, and Errors

The following warnings and collisions are expected:

Collosions	May apply to the following items or their subitems
"Item to be deleted is in use"	• /sitecore/templates/System/Modules/Experience Explorer/Clean Up Types • /sitecore/client/Business Component Library/Layouts/Renderings/Forms/Form/Form Parameters • /sitecore/client/Applications/ExperienceProfile/Search/PageSettings • /sitecore/client/Applications/ExperienceEditor/Dialogs/SelectItem/Page Settings

Warnings	May apply to the following items or their subitems
"Field has been modified"	• /sitecore/client/Applications/PathAnalyzer/Common/System/Datasources/FiltersBar • /sitecore/client/Business Component Library/Layouts/Renderings/Common/SubAppRenderer/SubAppRenderer Parameters • /sitecore/client/Applications/ContentTesting/Common/Layouts/Renderings/ContentTestingDataRepeater/ContentTestingDataRepeater-Parameters • /sitecore/client/Speak/Templates/Rendering Parameters/ControlBase
"Version has been modified"	• /sitecore/client/Business Component Library/Layouts/Renderings/Common/ToolTip/ToolTip Parameters • /sitecore/system/Modules/Experience Explorer/Map Settings • /sitecore/system/Tasks/Schedules/Content Testing

The following errors are expected in the analysis results:

Errors	May apply to the following items or their subitems
"Template to be deleted is in use"	• /sitecore/templates/System/Modules/Experience Explorer

Collosions	May apply to the following items or their subitems
"Item to be deleted has children"	• /sitecore/templates/System/Modules
"Field has been modified"	• /sitecore/client/Applications/PathAnalyzer/Common/System/Datasources/FiltersBar • /sitecore/client/Applications/ContentTesting/Common/Layouts/Renderings/ContentTestingDataRepeater/ContentTestingDataRepeater-Parameters • /sitecore/client/Speak/Templates/Rendering Parameters/ControlBase • /sitecore/system/Modules/Experience Explorer/Map Settings

Warnings	May apply to the following items or their subitems
"Item to be deleted is in use"	• /sitecore/templates/System/Modules/Experience Explorer/Clean Up Types • /sitecore/client/Business Component Library/Layouts/Renderings/Forms/Form/Form Parameters • /sitecore/client/Applications/ExperienceProfile/Search/PageSettings • /sitecore/client/Applications/ExperienceProfile/Common/System/SearchButton • /sitecore/client/Applications/ExperienceEditor/Dialogs/SelectItem/Page Settings • /sitecore/client/Applications/Dialogs

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. 150812 (Update-5) 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

    o Sitecore 8.0 rev. 150427 (Update-3) Configuration File Changes document

    o Sitecore 8.0 rev. 150621 (Update-4) 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 the **Browsing History** section, click **Delete,** and then select the **Temporary Internet files and website files** checkbox.

3. Click **Delete**.

These steps may vary depending on the 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 **Indexing Manager**, in the **Rebuild search index** section, 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 Search Indexes** dialog box, select the **Quick search index** check box and then click **Rebuild**.

To 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 upgrade your solution from the initial version of Sitecore, 8.0 rev. 141212, you must update the social profiles data to ensure that it is compliant with Sitecore 8.0 Update-5.

To update the social profiles data:

1. In your browser, open the following page:
   http://<hostname>/sitecore/admin/UpdateSocialProfiles.aspx

   Note
   The tool should be executed on a Content Management server, and only on one of them if you have a multi-instance environment.

2. Log in as an administrator.

3. Click **Run**.

4. See Sitecore logs for details.

Note
You can safely execute the tool several times, which can be helpful if execution is interrupted.

1.2.7   Redeploying Marketing Data

To update the marketing data to ensure that it is compliant with Sitecore 8.0 Update-5:

1. In your browser, open the following page:
   http://<hostname>/sitecore/admin/RedeployMarketingData.aspx

   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 **Redeploy maps**.

Note
You can safely execute the tool several times, which can be helpful if execution is interrupted.

1.2.8 Rebuilding the Reporting Database

As part of the upgrade process, you must also rebuild the Reporting database.

For more information about rebuilding the reporting, see the topic Walkthough: Rebuilding the reporting database.

1.2.9 Upgrading Multiple Instances

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