

Sitecore Experience Platform 8.0 Update-7 Sitecore Experience Platform Upgrade Guide

Step by step guide to the Sitecore 8.0 Update-7 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 upgrade to Sitecore 8.0 rev. 141212 (Initial Release) before you can install the Sitecore 8.0 Update-7 upgrade package. You can download all the prerequisite components from <https://dev.sitecore.net>.

Prerequisites for running this update:

- Sitecore 8.0 rev. 141212 or later.
- Sitecore Update Installation Wizard 1.0.0 rev. 151106.zip
- The Sitecore Update Package from <https://dev.sitecore.net>
- For Microsoft SQL Server, you also need the following database upgrade scripts:
 - UpgradeCMS8o_U3.zip
 - UpgradeSXP8o_U5.zip

To download these files, on the [Sitecore Experience Platform 8.0 Update-7](#) 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. 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. 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 Web Forms for Marketers (WFFM) or Email Experience Manager (EXM), disable the following configuration files by adding `.disabled` to the file extension:
 - o `Sitecore.EmailCampaign.config`
 - o `Sitecore.Forms.config`

If you are using the Solr search provider, you must change the `Global.asax` file.

1. Make a backup of your `Global.asax` file, and then open the file and replace the `Inherits` value with the following: `"Sitecore.Web.Application"`.
2. In `Sitecore.ContentSearch.config` file, comment out the following settings:
 - o `ContentSearch.SearchMaxResults`
 - o `ContentSearch.DefaultIndexConfigurationPath`
3. In the `/App_Config/Include/ContentTesting/Sitecore.ContentTesting.config` file, comment out 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.

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` 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.

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Use the Update Installation Wizard to install the upgrade package and upgrade your website to 8.0 Update-7.

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. 151106.zip package.
3. Upgrade the CMS database schemas:
SQL Server: Execute the `CMS80U3_BeforeInstall.sql` script on the 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-7 upgrade package.
The wizard guides you through the upgrade process and helps you:
 - Upload the upgrade package.
 - Analyze the package.
 - 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.

1.2.2 Updating the 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.

1.2.3 Updating Configuration Files

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

1. Apply the configuration file changes described in *Sitecore 8.0 rev 160115 (Update-7) Configuration File Changes* document.
2. If you are upgrading from Sitecore 8.0 rev. 141212 (Initial Release), you must also apply the configuration file changes for each previous update.

These changes are described in the following documents:

- Sitecore 8.0 rev. 150121 (Update-1) Configuration File Changes
- Sitecore 8.0 rev. 150223 (Update-2) Configuration File Changes
- Sitecore 8.0 rev. 150427 (Update-3) Configuration File Changes
- Sitecore 8.0 rev. 150621 (Update-4) Configuration File Changes
- Sitecore 8.0 rev. 150812 (Update-5) Configuration File Changes

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- Sitecore 8.0 rev. 151127 (Update-6) Configuration File Changes
- 3. Upgrade any modules that you have installed to make them compatible with the current latest version of Sitecore. If you are using Email Experience Manager (EXM) or Web Forms for Marketers (WFFM), you may also need to enable the following configuration files:
 - `Sitecore.EmailCampaign.config`
 - `Sitecore.Forms.config`.

After you change the configuration files, you must clear your browser cache:

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.

1.2.4 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**.

1.2.5 Updating Data

To upgrade your solution from Sitecore, 8.0 rev. 141212 (Initial Release), you must update the social profiles data to ensure that it is compliant with Sitecore 8.0 Update-7.

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.

1.2.6 Redeploying Marketing Data

To update the marketing data to ensure that it is compliant with Sitecore 8.0 Update-7:

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**.
4. Click **Redeploy segments**.

Note

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

1.2.7 Publish the site

Publish the entire site (including system items, templates and so on) to every publishing target. To publish the entire site:

1. On the Sitecore Desktop, click the **Sitecore Start** button and then click **Publish Site**.
2. In the **Publish Site** dialog box, select the **Republish** option.

1.2.8 Upgrading Multiple Instances

Repeat all the steps in the upgrade process for every Sitecore instance that you want to update.