Sitecore Experience Platform Upgrade Guide

Sitecore Experience Platform 8.2 Update 1

Step-by-step guide to the Sitecore 8.2 upgrade and conversion process

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1.1 Prerequisites

If you are upgrading from Sitecore 8.1 rev. 151003 (Initial Release) or later, you can upgrade directly to Sitecore 8.2 rev. 161115 (Update-1). However, if your solution is based on an earlier version of Sitecore, you must first upgrade to Sitecore 8.1 rev. 151003 (Initial Release).

You can download all the prerequisite components from the Sitecore Developer Portal (https://dev.sitecore.net).

Prerequisites for running this update from Sitecore 8.1:

- Sitecore 8.1 rev. 151003 (Initial Release) or later.

- Sitecore 8.2 rev. 161115 Update Package.

- Sitecore Update Installation Wizard 2.0.0 rev. 161109.zip

- For Microsoft SQL Server, you must download the following database upgrade scripts:

    o `SXP82U1_BeforeInstall.sql`

    o `CMS82_BeforeInstall.sql`

    Note
    Upgrading a solution that uses Oracle databases is not supported in Sitecore XP 8.1.

Prerequisites for running this update from Sitecore 8.2:

- Sitecore 8.2 rev. 160729 (Initial Release).

- Sitecore 8.2 rev. 161115 (Update-1) Update Package.

- Sitecore Update Installation Wizard 2.0.0 rev. 161109.zip

- For Microsoft SQL Server, you must download the following database upgrade script:

    o `SXP82_BeforeInstall.sql`

    Note
    To download this file, on the Sitecore Developer Portal, navigate to the Sitecore Experience Platform 8.2 page, and in the **Upgrade options** section, click *Configuration files for upgrade*.

    The upgrade scripts can be found in the `\Database Upgrade Script.zip` folder.

1.2 Upgrade Process

If you have an earlier version of Sitecore installed and you want to upgrade to Sitecore XP 8.2 rev. 161115, follow the instructions in each section of this chapter.

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 Documentation site – https://doc.sitecore.net.

1.2.1 Content Testing

Before you upgrade your Sitecore installation, you must stop all content tests. This prevents the start date of the tests from being overwritten with the upgrade date.

1.2.2 Preconditions for Installing the Upgrade Package

To ensure that the upgrade process is not interrupted:

1. In the `Sitecore.Xdb.config` file, set the `Xdb.Enabled` setting to *false*.

2. In the `Sitecore.Xdb.config` file, set the `Xdb.Tracking.Enabled` setting to *false*.

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

4. If you have installed Email Experience Manager (EXM), disable all configuration files in the following folders by adding `.disabled` to the file extension:

   o `\Website\App_Config\Include\EmailExperience`

   o `\Website\App_Config\Include\Z.EmailExperience`

   o `\Website\App_Config\Include\ExperienceProfile\Sitecore.ExperienceProfile.Reporting.Sitecore.EmailExperience.ExperienceProfile.config`

5. If you have installed the Web Forms for Marketers module, disable the following configuration files by adding `.disabled` to the file extension:

   o `\Website\App_Config\Include\Sitecore.EmailCampaign.config`

   o `\Website\App_Config\Sitecore.Forms.config`

1.2.3 Upgrading the Databases

For solutions running any version of Sitecore XP 8.1:

1. Execute the `CMS82_BeforeInstall.sql` script for the Core, Master, and Web databases.

2. Execute the `SXP82U1_BeforeInstall.sql` script for the Reporting database.

For solutions running Sitecore XP 8.2:

- Execute the `SXP82U1_BeforeInstall.sql` script for the Reporting database.

1.2.4 Installing the Upgrade Package

To install the upgrade package to update your website from Sitecore XP 8.1 Initial or later to Sitecore XP 8.2 rev. 161115, you must use the Update Installation Wizard.

Before you install the upgrade package:

   o Back up your website.

To install the upgrade package:

1. Log in to the Sitecore Desktop, click the **Sitecore Start** button, **Development Tools**, **Installation Wizard**, and then install the `Sitecore Update Installation Wizard 2.0.0 rev.161109.zip` package.

2. Ensure that Internet Information Services (IIS) is configured to allow access to the `\sitecore\admin` folder.

   Note
   This step may be necessary if you installed Sitecore XP using the `setup.exe` file.

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

3. In the **Sitecore Launchpad**, click **Control Panel**, and in the **Administration** section, click **Install an update**.

   Alternatively, you can open the Update Installation Wizard by entering 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 the Sitecore Developer Network – https://sdn.sitecore.net.

4. On the **Welcome to Sitecore update installation wizard** page, click **Select a package**.

5. On the **Select a package** page, click **Choose File** and navigate to the folder where you saved the `Sitecore 8.2 rev.161115.update` file. Select the file, and then click **Open**.

6. Click **Package information**.

   Note
   If the Update Installation Wizard fails to detect your current Sitecore version, on the **Select an upgrade path** page, manually select the Sitecore version and revision number that your solution is based on, and then click **View package information**.

7. On the **Package information** page, review the information about the package, and then click **Analyze the package**.

8. On the **Analyze the package** page, click **Advanced options**, review the installation options, and then click **Analyze**.

9. After the analysis process is complete, click **Analysis result**.

If the Update Installation Wizard did not find any conflicts, click **Install the package,** and skip to step 7 in the section *Analyzing the Update Package and Resolving Configuration Conflicts*.

Analyzing the Update Package and Resolving Configuration Conflicts

To analyze the package and resolve the configuration conflicts:

1. On the **Analysis result** page, click **Config file changes**.

Important
On the **Analysis result** page, in the **Message Type** column, if the Update Installation Wizard found *Configuration files that must be updated manually*, in the **Description** column, click the relevant description and read about the configuration changes.

To avoid breaking changes, after the Update Installation Wizard finishes installing the update package, you must perform the post-installation steps indicated in the description.

2. On the **Configuration file changes** page:

   o To automatically resolve all configuration conflicts and install the package, click **Apply and install package**. When you are finished, skip to step 7.

   o To manually resolve a conflict in a configuration file and modify the patch, in the **Action** column for each configuration file, click **Edit**.

3. On the **Resolve configuration file changes** page, review the differences between the original file and the customized file:

   o To manually resolve the conflicts, in the **Patch File** window, make the necessary changes, and then click **Resolve**.

   o To skip a conflict and manually resolve it later, click **Skip**. It is best practice to manually review your configuration patch files after the upgrade is complete.

   Note
   When you skip the file, the Update Installation Wizard automatically detects any customization(s) in the Sitecore config files, creates the patch, and replaces the customized file with the original file.

4. After you resolve or skip all configuration file conflicts, on the **Configuration file changes** page, click **Apply and analyze changes**.

   At this point, the Update Installation Wizard restarts the analysis and ensures that all configuration file conflicts are either resolved or skipped.

   The Update Installation Wizard then creates patch files with the customization(s), and disables the patches by adding the `.disabled` extension to the files.

Note

In certain scenarios, the generated patch files can contain customizations that are critical for the Sitecore instance to run correctly. To avoid breaking changes, the Update Installation Wizard displays an error on the **Apply and analyze changes** page.

If this happens, you must enable the patch files by removing the `.disabled` extension, and then refresh the **Update Installation Wizard** page in your browser.

5. When the analysis is complete, click **Analysis result**.

Note

If the analysis fails, you must restart the Update Installation Wizard. If this does not solve the problem, contact Sitecore support.

6. If the Update Installation Wizard does not find any more conflicted configuration files, click **Install the package**. Any unresolved or skipped conflicts during configuration will be resolved automatically.

7. On the **Installation complete** page, when the installation process is finished, click **Installation result**.

Installation complete

806 actions were completed.

More information

Installation result >

Tip

When the installation is complete, you can give feedback to the Sitecore development team about your upgrade experience.

On the **Installation result** page, click **Tell us what you think about the upgrade**.

The feedback is anonymous and the feedback form does not collect instance or license-specific information.

Installation result

2 potential problems were encountered during the installation, including 2 warnings.

Show installation messages

Tell us what you think about the upgrade

< Install another package

1.3   Post-Installation Steps

After installing the upgrade package, to complete the installation of Sitecore XP 8.2 Update-1, you must complete the following post-installation steps:

- Review custom changes in configuration files.
- Update Solr assemblies.
- Clear the browser cache.
- Publish the site.
- Rebuild search indexes and the link database.
- Re-deploy marketing definitions.

1.3.1   Review Custom Changes in Configuration Files

When the installation is complete, you must enable the patch files with the customization(s) that were generated by the Update Installation Wizard.

For example, during analysis, if the `Sitecore.Mvc.config` file has been customized, the Update Installation Wizard creates a patch file with your customization(s) and creates a back up of the config file in a disabled state.

The patch files are created and stored in the same folder where the original config files are located, and are saved in the following file format: `<filename>.patch.config.disabled`.

For better traceability and debugging, the wizard also saves the original file with customization in the following file format: `<filename>.custom.config.disabled`.

To enable the patch files with the customization(s) that were generated by the Update Installation Wizard:

- Remove the `.disabled` extension from the file name.

Important
Sometimes the Update Installation Wizard cannot generate the configuration file patches, for example, when there are non-Sitecore sections in the `web.config` file.

When this happens, the Update Installation Wizard extracts the customization(s) from the config file, and merges the customization(s) with the corresponding file from the upgrade package.

The merged configuration file is then saved as `<filename>.merged.config.disabled` and the original file with custom changes is saved as `<filename>.custom.config.disabled`.

To replace the original file with the merged file for files that could not be patched:

1. Rename the original file `<filename>.config` file, to `<filename>.config.old`.
2. Rename the merged file `<filename>.merged.config.disabled` to `<filename>.config`.

Note
It is best practice to create a *Custom* folder to store all generated patches in the `\Website\App_Config\Include` path.

1.3.2   Update Solr Assemblies

If you are using the Solr search provider, you must upgrade the corresponding assemblies.

To update the Solr assemblies:

1. Re-generate the `schema.xml` file and reload Solr.

2. Enable all new Solr files located in the `App_config\Include` folder.

   Starting with Sitecore XP 8.2, the default installation includes a default implementation of the Solr connector. This connector can be used without a third-party Inversion of Control (IOC) and it is automatically enabled after the upgrade is complete.

   The third-party IOC is no longer available on the **Sitecore Downloads** page. However, if you want to continue using it, you can download it from the Sitecore GitHub page.

1.3.3 Clear the Browser Cache

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

Note
These steps can vary depending on the browser and version of the browser that you are using.

To clear your browser cache:

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**.

1.3.4 Publish the Site

You must publish the entire site (including system items, templates, and so on) to every publishing target.

To publish the entire site:

1. In the Sitecore Desktop, click the **Sitecore Start** button, and then click **Publish Site**.

2. In the **Publish Site** dialog box, select **Republish**.

1.3.5 Rebuild Search Indexes and the Link Database

To complete the upgrade process, you must rebuild your search indexes and the Link database.

To rebuild all the `ContentSearch` indexes:

1. On the **Sitecore Launchpad**, click **Control Panel**, and in the **Indexing** section, click **Indexing manager**.

2. In the **Indexing Manager** dialog box, click **Select all,** and then click **Rebuild**.

To rebuild the Link database for the Master and Core databases:

1. On the **Sitecore Launchpad**, click **Control Panel**, and in the **Database** section, click **Rebuild Link Databases**.

2. Select the Master and Core databases and then click **Rebuild**.

1.3.6 Re-deploy Marketing Definitions

To re-deploy *Outcomes* and *Taxonomies* to the Reporting database:

1. On the **Sitecore Launchpad**, click **Control Panel**, **Analytics**, and then click **Deploy Marketing Definitions**.

2. Select all the definitions and taxonomies and click **Deploy**.

   Note
   If you do not do this, the binary data stored in the **Data** column in the definition tables (*CampaignActivityDefinitions*, *GoalDefinitions,* and so on) may not be compatible with Sitecore XP 8.2 Update 1.

1.3.7 Upgrading Multiple Instances

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

Note
If you want to skip installing files, items, executing post-steps or other options, in the Update Installation Wizard, in the **Advanced Options** section, ensure that you clear the relevant check boxes.