

Sitecore Experience Platform Upgrade Guide

Sitecore Experience Platform 8.1 Update 3

Step by step guide to the Sitecore 8.1 Update 3 upgrade and conversion process



sitecore[®]
Own the experience[™]

Table of Contents

1.1	Prerequisites.....	3
1.2	Upgrade Process.....	4
1.2.1	Installing the Upgrade Package.....	4
1.2.2	Updating the Solr Assemblies.....	5
1.2.3	Updating Configuration Files.....	5
1.2.4	Rebuilding Search Indexes and the Link Database.....	6
1.2.5	Publish the site.....	6
1.2.6	Upgrading Multiple Instances.....	6

1.1 Prerequisites

If your solution is based on an earlier version of Sitecore, then you must first update to Sitecore 8.1 rev. 151003 before you can install the Sitecore 8.1 Update 3 upgrade package. You can download all prerequisite components from the Sitecore Developer Portal – <https://dev.sitecore.net>.

Prerequisites for running this update:

1. [Sitecore 8.1 rev. 151003 \(Initial Release\) or later.](#)
2. [Sitecore 8.1 rev. 160519 \(Update 3\) Update Package.](#)
3. [Sitecore Update Installation Wizard 1.0.0 rev. 160422.zip](#)

Note

Upgrading a solution that uses Oracle databases is currently not supported.

1.2 Upgrade Process

If you have an earlier version of Sitecore installed and you want to upgrade to Sitecore 8.1 Update 3, follow the instructions in each section of this chapter.

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 Sitecore's documentation site – <https://doc.sitecore.net>.

1.2.1 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 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 Solr search provider, the `Global.asax` file must be changed.

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.

To install the upgrade package to update your website from Sitecore 8.1 or later to 8.1 Update 3 you need to use the Update Installation Wizard.

Sitecore Experience Platform Upgrade Guide

Before you install the upgrade package:

1. Backup 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.160422.zip package.
3. 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. 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>.
2. Install the Sitecore 8.1 Update 3 update package using the Update Installation Wizard.

The wizard guides you through the upgrade process and helps you:

- Upload the upgrade package.
- Analyze the package.
- 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.

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 installing the update package you need to update your configuration files.

1. Apply the configuration file changes described in the [Sitecore 8.1 Update 3 Configuration File Changes](#) document.
2. If you are upgrading from Sitecore 8.1 rev. 151003 (Initial Release) or from Sitecore 8.1 rev. 151207 Update-1, you must also apply the configuration file changes for each previous update.

These changes are described in the following documents:

- a. [Sitecore 8.1 rev. 151207 Update 1 Configuration File Changes](#).
 - b. [Sitecore 8.1 rev. 160302 Update 2 Configuration File Changes](#).
3. Upgrade any modules you have installed to make them compatible with the current, latest version of Sitecore.

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**.

These steps may vary depending on the type of browser you are using.

1.2.4 Rebuilding 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. In the Sitecore Launchpad, click **Control Panel**, and in the **Indexing** section, click **Indexing manager**.
2. In the Indexing Manager, select all indexes and 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 Launchpad, click **Control Panel**, and in the **Database** section, click **Rebuild search indexes**.
2. 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 Launchpad, click **Control Panel**, and in the **Database** section, click **Rebuild Link Databases**.
2. Select the Master and Core databases and then click **Rebuild**.

1.2.5 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, select the **Republish** option.

1.2.6 Upgrading Multiple Instances

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