

Data Exchange Framework 5.0 Installation Guide

A guide to installing and upgrading the Data Exchange Framework 5.0

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1. Installation

This chapter guides you through the process of installing Data Exchange Framework (DEF). The DEF installation installs the following:

- Data Exchange Framework 5.0
- Tenant service 5.0
- Save action for Experience Forms 5.0
- Activity for Marketing Automation 5.0.

NOTE

For information on how to configure and use Tenant service, Save action for Experience Forms, and Activity for Marketing Automation, please refer to the [Sitecore developer documentation](#).

1.1. Prerequisites

Data Exchange Framework 5.0 requires Sitecore 10.0.

NOTE

If you need to install the Data Exchange Framework (DEF) on an earlier version of Sitecore, you can find all the DEF versions on the [Sitecore download page](#).

1.2. Installing Data Exchange Framework

This section describes how to install Data Exchange Framework on your Sitecore servers.

1.2.1. Content management role

Typically, data synchronization runs on a content management (CM) server. This requires the entire Data Exchange Framework product to be installed.

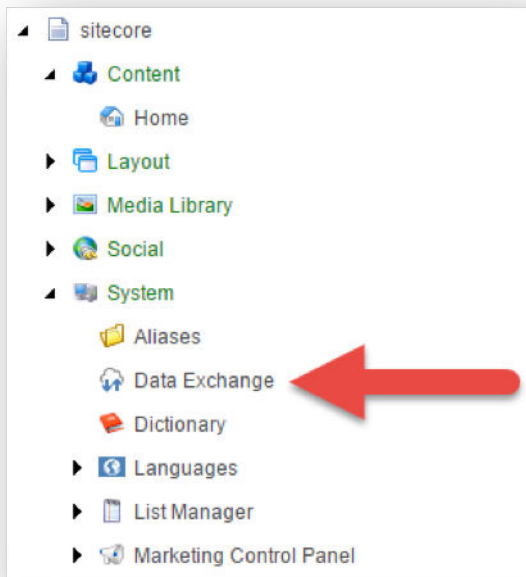
To install the Data Exchange Framework on the CM server:

1. In Sitecore, open the Installation Wizard.
2. Install the Data Exchange Framework package.
3. Before you close the Installation Wizard, select **Restart Server**.

NOTE

You need to restart the Sitecore Server in order to force Sitecore to build/convert the xDB Collection Model as Sitecore items. You can read more about how to convert models to Sitecore items in the [developer documentation](#).

4. To confirm the module was installed, open the Content Editor and verify that the `/sitecore/system/Data Exchange` item is present.



1.2.2. Content delivery role

In most cases, you will not run data synchronization on your Sitecore content delivery (CD) servers. However, the CD servers use the data that is synchronized. You must therefore install parts of Data Exchange Framework (DEF) on all your CD servers.

Requirements

Before installing DEF on a CD server, you must:

1. Install DEF on your Content Management server.
2. Perform Site Publishing in order to get your items published to the CD server.

Installing DEF on a content delivery server

Since there is no installation interface on a CD server, you must deploy the necessary files manually. To deploy the files:

1. Download the Data Exchange Framework package.
2. In the Data Exchange Framework zip file, open the `package.zip` file. Note that there is a `files` folder in the zip file.
3. Extract everything in the `files` folder into the website root folder of your CD server.

NOTE

When you extract the files you must preserve the folder structure from the `files` folder. For example, the `files` folder in the zip contains a subfolder named `bin`, and the files in this folder must go in the `<website>\bin` folder on your CD server.

4. Restart the CD server.

1.2.3. Configure Tenant Service on different servers

The Data Exchange Framework (DEF) installation also installs the Tenant Service.

If you have the Tenant Service installed on a different server than your Sitecore content management server, you must enable communication between the two servers:

1. On your Sitecore Content Management server, in the `\App_Config\Sitecore\Services.Client\` folder, open the `Sitecore.Services.Client.config` file.
2. Locate the following setting:

```
<setting name="Sitecore.Services.SecurityPolicy" value="Sitecore.Services.Infrastructure.Web.Http.Security.ServicesLocalOnlyPolicy,Sitecore.Services.Infrastructure"/>
```

Change the setting to:

```
<setting name="Sitecore.Services.SecurityPolicy" value="Sitecore.Services.Infrastructure.Web.Http.Security.ServicesOnPolicy,Sitecore.Services.Infrastructure"/>
```

The [Sitecore ItemService service](#) provides you with an API to read Sitecore items remotely. For example, the Tenant Service can use ItemService to read the configuration.

2. Upgrade

This chapter guides you through the process of upgrading from Data Exchange Framework version 4.0 to version 5.0.

2.1. Upgrade prerequisites

Before upgrading, you must have Data Exchange Framework 4.0 installed on your server.

IMPORTANT

If you have an earlier version of Data Exchange Framework, you must first upgrade to the prerequisite version. If there is more than one version between your installed version and the prerequisite version, you must upgrade each version separately and in the correct order. For example, if you have 2.0.1 and you want to upgrade to 3.0, you must first upgrade from 2.0.1 to 2.1, and then upgrade from 2.1 to 3.0.

2.2. Installing an upgrade

You upgrade Data Exchange Framework (DEF) version 4.0 to version 5.0 using a Sitecore update package.

You must install the update package on the following Sitecore server roles:

- Content management
- Content delivery, if you have installed DEF on it.

NOTE

This section applies to Sitecore Experience Platform 10.0. Later versions can require slightly different steps, or might involve different screens.

2.2.1. Update the Data Exchange Framework on a content management server

To update the Data Exchange Framework (DEF) on your content management server:

1. On the [Sitecore Download](#) page for DEF, click the *Update Package for Data Exchange Framework* link to download the `Data Exchange Framework (update package) 5.0.0.update` update package.
2. Use the Sitecore Update Installation Wizard to install the update package.

3. Run the package analysis. The analysis will report that potential problems were found. Ignore this warning.
4. Click **Install the package** to continue.

After the wizard finishes, the installation results will report that potential problems were encountered. This is the expected result.

NOTE

The exact number of problems depends on the number of tenants you have defined, providers you have installed, and the languages you have configured. This is expected behavior.

2.2.2. Update the Data Exchange Framework on a content delivery server

This section explains how to update the Data Exchange Framework (DEF) on your content delivery (CD) server.

The CD server does not have an interface to install Sitecore packages, so you must update the files manually.

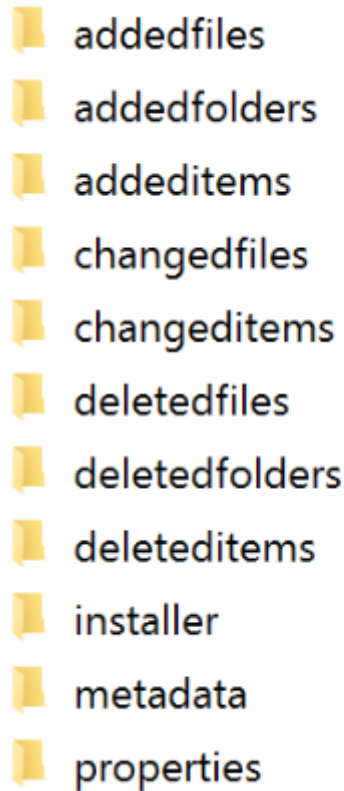
NOTE

For all of the following file operations you must preserve the folder structure from the zip file folders. For example, if the `changedfiles` folder in the zip file contains a `bin` subfolder, the files from this folder must go in the `<website>\bin` folder on your CD server.

To perform the upgrade:

1. Download the Update Package for Data Exchange Framework package.

2. Note that the update package file contains a `package.zip` file. The files in the `package.zip` file are in the following structure:

**NOTE**

The actual update package may not contain all of the folders shown in the image.

3. To install the update package:
 - Add the folders in the `addedfolder` folder into the website root folder of your CD server.
 - Add the files in the `addedfiles` folder into the website root folder of your CD server.
 - Delete the folders in the `deletedfolder` folder from the website root folder of your CD server.
 - Delete the files in the `deletedfiles` folder from the website root folder of your CD server.
 - Add the files in the `changedfiles` folder into the website root folder of your CD server, overwriting the existing files.
4. Restart the CD server.

2.2.3. Post installation steps

Because of the highly customizable nature of the Data Exchange Framework, the update process can include manual steps that you must complete to successfully update the product.

Existing tenants

You might have tenants that were configured prior to upgrading your Sitecore server.

The upgrade process updates the templates and files that are included in the Data Exchange Framework, but it does not change items under any tenants that you previously created. This means that some new functionality is available to those tenants (such as features inherited from standard values), but not all.