Sitecore Experience Platform Upgrade Guide

Sitecore Experience Platform 8.2

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

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1.1   Prerequisites

If your solution is based on an earlier version of Sitecore, you must first upgrade to Sitecore 8.1 rev. 151003 Initial Release or later, before you can install the Sitecore 8.2 upgrade package. You can download all the prerequisite components from the Sitecore Developer Portal. – https://dev.sitecore.net.

Prerequisites for running this update:

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

- Sitecore 8.2 rev. 160729 Update Package.

- Sitecore Update Installation Wizard 1.1.0 rev. 160717.zip

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

  o   `SXP82_BeforeInstall.sql`

  o   `CMS82_BeforeInstall.sql`

  Note
  To download these files, 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 Scripts\CMS\SXP` folder.

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

1.2 Upgrade Process

If you have an earlier version of Sitecore installed and you want to upgrade to Sitecore XP 8.2 rev. 160729 Initial Release, 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 the content tests that you are running. Stopping the content tests prevents the start date of the tests from being overwritten with the upgrade date.

1.2.2 Pre-conditions 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 file by adding `.disabled` to the file extension:

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

If you are using the Solr search provider:

1. The `Global.asax` file must be changed.

    To do this, 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 the `Sitecore.ContentSearch.config` file, comment out the following node:

```
<event name="packageinstall:poststep:starting">
<handler type="Sitecore.ContentSearch.Events.PackagingEventHandler,
Sitecore.ContentSearch" method="OnPackagePostStepInstallStartingHandler"/>
</event>
```

Note
When the upgrade process is complete, you must undo all the changes that you made, except to the `Global.asax` file, which must stay in a default state.

Upgrade the CMS database schemas:

- SQL Server: Execute the `CMS82_BeforeInstall.sql` script on the Master, Core, and Web databases.

Upgrade the SXP database schemas:

- SQL Server: Execute the `SXP82_BeforeInstall.sql` script on the Reporting databases.

1.2.3 Installing the Upgrade Package

To install the upgrade package to update your website from Sitecore 8.1 or later to 8.2 rev. 160729 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 1.1.0 rev.160717.zip` package.

2. You must change the `maxAllowedContentLength` setting to increase the maximum allowed download size of the update package.

    To do this:

    o   In a text editor, in the `\wwwroot\<instance name>\Website\sitecore\admin\web.config` file, change the `maxAllowedContentLength` setting from:

    ```
    <requestLimits maxAllowedContentLength="1048576000" />
    ```

    to:

    ```
    <requestLimits maxAllowedContentLength="4194304000" />
    ```

3. 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.

4. 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.

5. Use the Update Installation Wizard to install the Sitecore 8.2 rev. 160729 update package.

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

    o   Upload the upgrade package.

    o   Analyze the package.

    o   Install the package.

    o   Review the report.

        In the report, ensure that you review the **Configuration files that must be updated manually** section, and all other messages related to config files.

        After the upgrade is completed, you must manually modify the conflicting files. For each conflicting file, there is an updated one in a disabled state with the relevant package name at the end.

        Ensure that you check the differences between the original and the disabled files, apply the changes and enable the files again.

Note
"*Item not found*" and "*Field has been modified"* collisions are expected for translation dictionary items. To keep it up to date, you must apply the latest translation to your instance after upgrading.

1.3   Post-Installation steps

After installing the upgrade package, there are a number of steps that must be taken in order to complete the installation of Sitecore XP 8.2.

1.3.1   Updating 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 is automatically enabled after the upgrade is completed.

    However, if the current solution is already using IOC and you would like to continue using it, you must upgrade the corresponding assemblies.

    To do this:

    1) Download the Solr support package. You can find the package in the Sitecore Developer Portal, in the Sitecore Experience Platform 8.2 page, in the **Additional Tools** section.

    2) Extract the appropriate assemblies into the `\bin` folder of your website and extract the config files into the `App_Config\Include` folder of your website.

    3) Change the default processor for other IOC providers. For example, for Castle Windsor, in the `Sitecore.ContentSearch.Solr.DefaultIndexConfiguration.config file`, change the default processor from:

    ```
    <processor
    type="Sitecore.ContentSearch.SolrProvider.Pipelines.Loader.InitializeSolrProvider,
    Sitecore.ContentSearch.SolrProvider"/>
    ```

    to:

    ```
    <processor type="
    Sitecore.ContentSearch.SolrProvider.CastleWindsorIntegration.WindsorInitializeSolrP
    rovider, Sitecore.ContentSearch.SolrProvider.CastleWindsorIntegration "/>
    ```

    You must repeat this step for any other IOC providers you may have.

1.3.2   Updating the Target Framework and Clearing Browser Cache

After you install the update package, you must also update the target framework and clear your browser cache.

Update the target framework

To update the target framework, in the `web.config` file, you must adjust the target framework version.

1. In the `web.config` file, update the target framework node from:

    ```
    <configuration>
    <system.web>
     <httpRuntime targetFramework="4.5" />
    </system.web>
    </configuration>
    ```

    to

    ```
    <configuration>
    <system.web>
     <httpRuntime targetFramework="4.5.2" />
    </system.web>
    </configuration>
    ```

2. Upgrade any modules that you have installed to make them compatible with the latest version of Sitecore.

Clearing browser cache

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

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

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**.

1.3.3   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.

1.3.4   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 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**.

1.3.5   Re-deploy marketing definitions

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

1. In 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.

1.3.6   Update role assignment

To update the role assignment:

1. In the Sitecore Launchpad, click **Role Manager**.

2. In the **Role** section, select the *sitecore\Sitecore Client Maintaining* role, and in the **Roles** group, click **Members**.

3. In the **Members** dialog box, click **Add**.

4. In the **Role** section, select the *sitecore\Sitecore Client Bucket Management* role, and click **OK**.

5. Click **Close**.

1.3.7 Upgrading Multiple Instances

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