

Sitecore XP 9.0.1 Sitecore EXM Data Migration Guide

Migration guide for administrators and developers



Introduction

From Sitecore XP 9.0 Update 1, the Email Experience Manager (EXM) is a component in the standard Sitecore XP installation. This means that after EXM version 3.5, EXM does not have its own version number and you can no longer install it separately as a module.

If you have used EXM 3.5 on Sitecore XP 8.2 Update 5, you can migrate your EXM installation to Sitecore 9.0 Update 1.

Important

You can only migrate EXM 3.5 data to a new installation of Sitecore XP 9.0.1. It is not possible to upgrade EXM 3.5 to a Sitecore XP 9.0.1 installation.

The migration process

To migrate EXM to XP 9.0.1, you must transfer the following data:

- [Content items](#) – from the Sitecore content tree
- [Files](#) – for example from Imported HTML email campaigns
- [Tables](#) – in the EXM Master Database
- [Analytics data](#) – from MongoDB

Content items

You can use a combination of the [Package Designer](#) and the Installation Wizard to transfer the relevant content items.

In the Package Designer, create a package with all the following EXM items:

- Manager roots – for example, /sitecore/content/Email Campaign
- Media attachments – /sitecore/media library/Email Campaign/Attachments
- Hostname mappings – /sitecore/system/Modules/E-mail Campaign Manager/System/Hostname Mappings
- Manager Root list – /sitecore/system/Modules/E-mail Campaign Manager/System/Root List
- Marketing Control Panel campaigns – /sitecore/system/Marketing Control Panel/Campaigns/Emails
- Imported layouts – /sitecore/layout/Layouts/Email Campaign/Imported
- Contacts lists – /sitecore/system/List Manager/All Lists. You cannot migrate Segmented Lists. You can only transfer Contact Lists.

You can use [this example of a package](#) definition when you create the package in the Package Designer. Before you use it, ensure it meets your own requirements, for example, the example does not include the Manager Roots because they are in different locations on every installation. You can add all the relevant Manager Roots to the package definition before you generate the .zip file.

To migrate the content items:

1. In the Package Designer, generate the Sitecore 8.2 .zip file.
2. Move the .zip file to the <wwwroot>\App_Data\packages folder of the Sitecore 9.0.1 installation.
3. Install the package using the Installation Wizard. In the wizard, when you are asked what you want to do about any existing items, click **Merge, Clear**.
4. In the Content Editor, under /sitecore/layout/Layouts/System/Email/Imported/, correct the paths of all the imported layouts. For example, change

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`/layouts/EmailCampaign/Imported/Test.html.aspx` to `/sitecore/modules/Web/EXM/layouts/Imported/Test.html.aspx`.

5. Perform a smart publish on the Master database.
6. Download the [MigrateLists.aspx script](#) from dev.sitecore.net and copy it to the Content Management server under `/sitecore/admin/MigrateLists.aspx`.
7. Run the script in a browser. This executes the upgrade process for your lists and ensures that they deploy to XConnect.

Files

Transfer any files you use in your email campaigns, for example, images and downloaded files that are stored on the file system instead of the database.

For example, you must transfer any imported HTML layouts under `<wwwroot>\layouts\EmailCampaign\Imported\` to all Content Management servers, Content Delivery servers, and Dedicated Dispatch servers under `<wwwroot>\sitecore\modules\Web\EXM\layouts\Imported`.

Tables

Transfer the data from the following two tables from the EXM database in Sitecore 8.2 to the EXM.Master database in Sitecore 9.0.1:

- Campaigns
- Suppressions

The following script is as an example of how to transfer the data:

- ```
INSERT INTO [sc9_Sitecore.EXM.Master]..Campaigns SELECT * FROM [sc8_Sitecore.Exm]..Campaigns
```
- ```
INSERT INTO [sc9_Sitecore.EXM.Master]..Suppressions SELECT * FROM [sc8_Sitecore.Exm]..Suppressions
```

Important

Use the above queries at your own risk and always back up your environments before you run the migration.

After the data transfer has completed, all your email campaigns are available in your lists (Drafts, In Progress, Sent, and so on). You can also see your email campaigns in the Content Editor.

Note

The EXM dashboard displays no data until you migrate the EXM analytics data.

Analytics data

You use the [xDB Data Migration Tool](#) to migrate the EXM analytics data.

The xDB Data Migration Tool submits all the existing contacts and interactions from MongoDB to xConnect. It queues the contacts and interactions for processing and indexes and aggregates them like any other interaction in xDB.

The EXM dashboard on Sitecore 9.0.1 now contains the same data as the dashboard in Sitecore 8.2.

To confirm that the migration process has completed, verify that the `InteractionLiveProcessingPool` table of the `Processing.Pools` database is empty, and that the `Trail_Interactions` table of the Reporting database contains all the processed interactions.