

# Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.5

*Instructions for upgrading from EXM 3.4 Update 2 to EXM 3.5*



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# Email Experience Manager Upgrade Guide

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## Chapter 1

### Upgrading EXM

This document describes how to update Sitecore Email Experience Manager (EXM) from EXM 3.4 Update 2 to EXM 3.5 (rev. 170810).

This chapter contains the following sections:

- Introduction
- Installing the EXM Update Package
- Post-installation Steps

## 1.1 Introduction

To upgrade your Sitecore Email Experience Manager, follow the steps in the sections below carefully. Ensure that the post-installation steps are performed before rebuilding the Experience Database (xDB), which is part of upgrading the EXM module.

We recommend that you back up all Sitecore databases and the Sitecore instance before starting the update process, because this update is a non-reversible procedure.

### **Important**

Please be aware that if you upgrade from EXM 3.0-3.2 to EXM 3.3 or later, the Reporting architecture has been updated and older reporting data is no longer supported. If you need your historical reporting data, you should extract and migrate it to a separate database where you can analyze it with your chosen Business Intelligence (BI) tool.

## 1.2 Installing the EXM Update Package

### 1.2.1 Prerequisites

- Sitecore XP 8.2 Update 5 (rev. 170728)

Before you can run the EXM update package, you must:

- Enable all the configuration files in the following folders:
  - `/Website/App_Config/Include/EmailExperience` folder
  - `/Website/App_Config/Include/Z.EmailExperience` folder
- In the `/Website/App_Config/Include/ExperienceProfile` folder, enable the `Sitecore.ExperienceProfile.Reporting.Sitecore.EmailExperience.ExperienceProfile.config` file.

#### Note

If you are using Lucene, then you must disable the `Sitecore.EmailExperience.ContentSearch.Solr.config` file.

- In the `/Website/bin` folder, enable the following three files:
  - `Sitecore.EmailCampaign`
  - `Sitecore.EDS`
  - `Sitecore.ExM`
- Detach the `Sitecore.Exm` and the `Sitecore.Exm.Web` databases if they are located in the `/Data` folder and attached to the SQL Server. After the upgrade is complete, you can reattach the databases.
- Disable all the scheduled tasks in the following locations:
  - `/sitecore/system/Modules/E-mail Campaign Manager/Instance Tasks/Content Management Primary`
  - `/sitecore/system/Modules/E-mail Campaign Manager/Tasks`

### 1.2.2 Downloading the EXM Update Package

To download the EXM update package, visit the EXM 3.5 page on the [Sitecore Developer Portal](#) and download the package.

### 1.2.3 Starting the Update Process

To start the EXM update process, on the Sitecore Launchpad, click **Control Panel**, and in the **Administration** section, click **Install an update**.

Alternatively, open the Update Installation Wizard by entering the following URL in your browser:

```
http://<your_host_name>/sitecore/admin/UpdateInstallationWizard.aspx
```

If prompted, enter your credentials to access the Sitecore instance.

#### Note

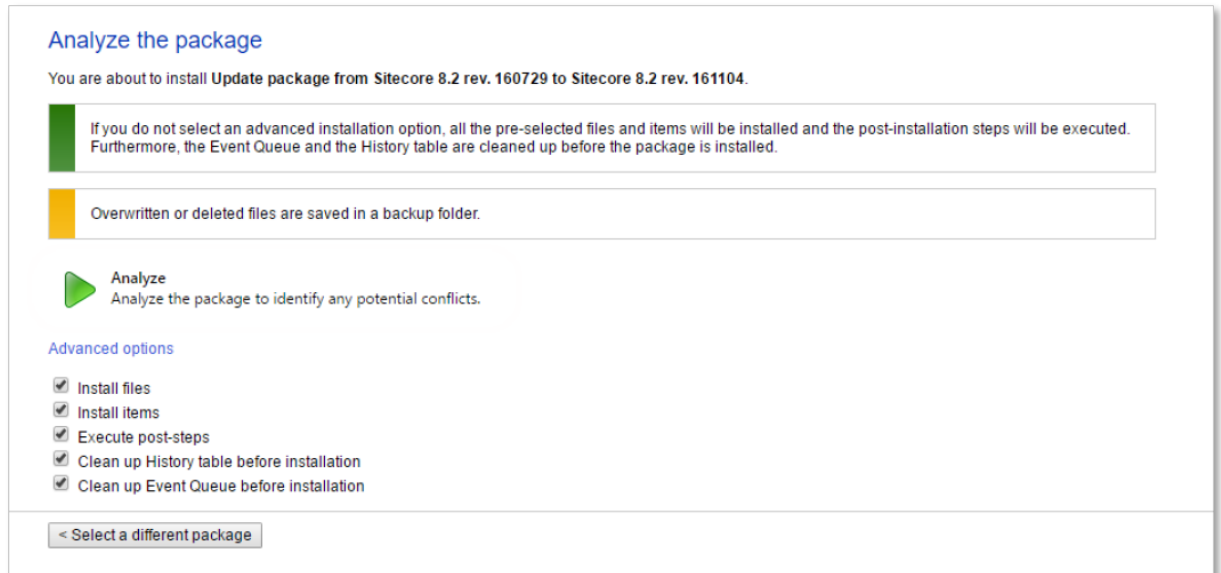
Before running the update package, you must ensure that there are no message dispatches in the *Processing* or *Paused* state.

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## Install the Update Package

To install the update package:

1. In the Sitecore update installation wizard, choose the package you want to install and click **Package information** to view the package metadata. Make sure to read the readme text.
2. Click **Analyze the package** and on the **Analyze the package** page, click **Advanced options** to review the installation options.



3. Click **Analyze** to perform an analysis of the installation process and identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.
4. When the analysis has completed, click **Analysis result** to view the details.  
If the Update Installation Wizard did not find any conflicts, click **Install the package**.

### 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.

5. On the **Analysis result** page, click **Config file changes** and on the **Configuration files changes** page:
  - o To automatically resolve all configuration conflicts and install the package, click **Apply and install package**.

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

### Configuration file changes

To resolve the changes in a configuration file, click **Edit**.  
To apply the configuration file changes and analyze the results, click **Apply and analyze changes**.  
To apply the configuration file changes and then install the upgrade package, click **Apply and install package**.

Configuration file	Message	Action
/App_Config/Include/ContentTesting/Sitecore.ContentTesting.config	The 'Sitecore.ContentTesting.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/ListManagement/Sitecore.ListManagement.config	The 'Sitecore.ListManagement.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Sitecore.Commerce.ExperienceAnalytics.config	The 'Sitecore.Commerce.ExperienceAnalytics.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Sitecore.Mvc.config	The 'Sitecore.Mvc.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Sitecore.PathAnalyzer.Client.config	The 'Sitecore.PathAnalyzer.Client.config' configuration file has been modified.	<a href="#">Edit</a>
/App_Config/Include/Social/Sitecore.Social.config	The 'Sitecore.Social.config' configuration file has been modified.	<a href="#">Edit</a>

[Download list as a file](#)

[Apply and analyze changes](#) [Apply and install package](#)

6. On the **Resolve configuration file changes** page, review the differences between the original file and the customized file:
  - To manually resolve the conflicts, in the **Patch File** window, make the necessary changes, and then click **Resolve**.
  - 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 detect any customizations in the Sitecore config files, creates the patch, and replaces the customized file with the original file.

7. When you have resolved or skipped all the configuration file conflicts, on the **Configuration file changes** page, click **Apply and analyze changes**.
8. 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.

9. If the Update Installation Wizard does not find any more conflicted configuration files, click **Install the package**.

The conflicts that were skipped or left unresolved during the configuration are now resolved automatically.

When the installation is completed, you can click **Installation result** to view the results.

## 1.3 Post-installation Steps

- If you detached the *Sitecore.Exm* and *Sitecore.Exm.Web* databases before you installed the upgrade, reattach the databases to the SQL server.
- In the */App\_Config/Include/EmailExperience* folder, make sure that only the newest versions of each of the configuration files exists. For example, there might be a duplicate version of the *Sitecore.EDS.Providers.CustomSmtplib.config* file that is disabled.
- Run the *Sitecore.EmailExperienceManager3.4to3.5.sql* script on the EXM database. The script is located in the */website/temp/ExM/* folder.
- Some of the Sitecore security roles have been renamed and therefore, if you use ASP.Net membership, you must run the *Sitecore.EmailExperienceManager3.4to3.5upgrade.roles.sql* script on the Core database. The script is located in the */website/temp/ExM/* folder. After you run the script, clear the cache or restart your site in IIS.

### Note

You can reassign your users and roles in the User Manager and the Roles Manager manually instead of using SQL.

- Ensure that the connection strings *EXM.DedicatedDispatchService* and *EXM.InternalApiKey* are added as described [here](#).
- During the installation, all the *.aspx* pages, *.asmx* web services, and the *.ashx* handlers have been moved to the *\Sitecore\modules\Web\EXM* folder of the instance. If you have any references to the old location in your items or code, you should [apply a URL Rewrite rule in IIS](#) or manually add the following section in the *Web.config* file in the *system.webServer* section:

```
<rewrite>
  <rules>
    <rule name="ExmSitecoreFolderRule">
      <match
url="^(.*) (ConfirmSubscription.aspx|DedicatedDispatchService.asmx|ECMClientService.asmx|RedirectUrlPage.aspx|RegisterEmailOpened.ashx|Unsubscribe.aspx|UnsubscribeFromAll.aspx)"/>
      < action type="Rewrite" url="sitecore modules/Web/EXM/{R:2}" />
    </rule>
  </rules>
</rewrite>
```

For more detailed information, refer to: <https://www.iis.net/learn/extensions/url-rewrite-module/creating-rewrite-rules-for-the-url-rewrite-module>.

- Your custom settings are not automatically ported to the new configuration files. If you have used any custom settings in the previous version and you want to apply them to EXM 3.5, you must make the necessary changes to the *Sitecore.EmailExperience.\*.config* files manually.
- If you want to use the *Sample Newsletter* template, download and install the Sample Newsletter package from [dev.sitecore.net](http://dev.sitecore.net).
- To ensure that contact lists are properly uploaded and indexed before they become available to use in EXM, remove the *.disabled* extension from the */App\_Config/Include/ListManagement/Sitecore.ListManagement.DisableListLocking.config.disabled* file.
- Publish your site using the Smart Publish option.



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**Note**

After the upgrade, if the labels in the EXM application do not display properly, for example, if you see labels such as *ECM.Pages.X.X* instead of normal text, delete the `\website\temp\dictionary.dat` file and restart the application pool.

- Rebuild the search indexes.
- Redeploy your marketing definitions.
- To make sure that your reporting data is accurate in your upgraded version of EXM, open <http://<INSTANCE-NAME>/sitecore/admin/MessageStatistics.aspx> in a browser and click *Upgrade*.

**Note**

In EXM 3.5, engagement plans are no longer created for an email campaign. This change has no impact on reporting, even when upgrading from a previous version of EXM to EXM 3.5. However, after you upgrade to EXM 3.5, engagement plan actions will no longer be executed because your contacts can no longer be moved through the states of any previous engagement plans.