

Data Exchange Framework 7.0 Installation Guide

A guide to installing and upgrading the Data Exchange Framework 7.0

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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 7.0
- Tenant Service 7.0
- Save action for Experience Forms 7.0
- Activity for Marketing Automation 7.0.

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

To upgrade to Data Exchange Framework 7.0 you must:

- have Sitecore 10.2 installed
- [download](#) the Data Exchange Framework 7.0 software package.

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:

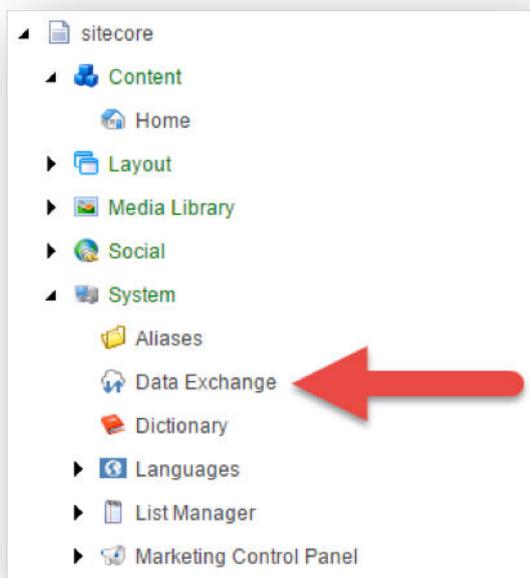
1. In Sitecore, open the Installation Wizard.

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.

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:

- install DEF on your Content Management server.

Installing DEF on a content delivery server

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

NOTE

Starting with DEF 7.0, DEF items are provided as `.dat` files, in line with Sitecore items as resources introduced in Sitecore 10.2.

To deploy the files:

1. On the content management (CM) instance, in the `sitecore modules/items/` folder, copy all database folders, that is `core`, `master` and `web`, and paste them to the content delivery (CD) instance, following the same folder structure.
Once you have copied the folders, on the CD instance, the `sitecore modules/items` folder should contain three `<db type>/items.<db type>.dat` files, one for each database type. For example: `items/core/items.core.def.dat`, `items/master/items.master.def.dat`, and `items/web/items.web.def.dat`.
2. Restart the CD server.

1.2.3. Configure Tenant Service on different servers

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 needs the ItemService to read the configuration.

2. Upgrade Data Exchange Framework on-prem

How to upgrade Data Exchange Framework in an on-prem Sitecore installation.

Starting with Sitecore Experience Platform (SXP) version 10.2, you can upgrade from any previous Data Exchange Framework (DEF) version directly to DEF version 7.0.

IMPORTANT

Starting with Sitecore 10.2, you must perform any module upgrade, including the DEF connector module, as part of the overall Sitecore upgrade process.

Instructions in this guide assume you are upgrading Sitecore from a previous release to Sitecore 10.2 and DEF 7.0.

2.1. Prerequisites

Before you can upgrade DEF to version 7.0, you must:

- Review the [Upgrade Guide for Sitecore Experience Platform](#) for SXP 10.2 as you must perform module upgrades, such as the DEF upgrade, as part of the overall Sitecore upgrade process.
- Create backups of your current Sitecore databases.
- Create a backup copy of Sitecore folders under `wwwroot` (for your current Sitecore instance).

2.2. Upgrade process

To upgrade DEF, you must

- Clean up your Sitecore databases.
- Install the new version of DEF on top of the old version.

Database clean-up is a one-time operation that you must perform when you upgrade from a previous version of Data Exchange Framework (DEF).

NOTE

In Sitecore 10.1 and earlier, DEF items were stored in the databases. Starting with Sitecore 10.2 DEF items are stored as resources instead.

To upgrade DEF:

1. Follow the Sitecore 10.2.0 [Upgrade Guide for Sitecore Experience Platform](#) to install and set up the `Sitecore.UpdateApp` tool.
2. [Download](#) the Data Exchange Framework Upgrade resources package, and extract it to a local directory, keeping the folder structure intact.
3. Navigate to the Data Exchange Framework Upgrade `resources.1.0.0\<version>\Data\Items` folder for the version you are upgrading from. Copy the `.dat` files that are included in the `core`, `master`, and `web` folders to the corresponding folder paths under `\Sitecore.UpdateApp\`. For example:
 - Copy the `Data\Items\core\items.core.def.dat` file, and paste it in the `\Sitecore.UpdateApp\Data\Items\core` folder.
 - Copy the `Data\Items\master\items.master.def.dat` files and paste it in the `\Sitecore.UpdateApp\Data\Items\master` folder.
 - Copy the `Data\Items\web\items.web.def.dat` file, and paste it in the `\Sitecore.UpdateApp\Data\Items\web` folder.

NOTE

Each folder under the path `\Sitecore.UpdateApp\Data\Items\` now contains two files, that is, the file you just copied and the `items.<master/web/core>.dat` file.

4. Open the Data Exchange Framework Upgrade resources `1.0.0\<version>\Data\` folder.
5. In the `Data` folder, navigate to the `Items\core\localization` folder, copy all the `.dat` files, and paste them in the `\Sitecore.UpdateApp\Data\Items\core\localization` folder.
6. In the `Data` folder, navigate to the `Items\master\localization` folder, copy all the `.dat` files, and paste them in the `\Sitecore.UpdateApp\Data\Items\master\localization` folder.
7. In the `Data` folder, navigate to the `Items\web\localization` folder, copy all the `.dat` files, and paste them in the `\Sitecore.UpdateApp\Data\Items\web\localization` folder.
8. In the `Sitecore.UpdateApp\App_config` folder, update the `ConnectionStrings.config` file with the connections to your databases. If you do not have a security database, use the connection to the core database for the security connection string.

NOTE

If you have more than one Web database, you must repeat [Step 8](#) for every Web database.

You must update the connection string to each Web database as you run the tool, and not change the connection strings to the other databases.

9. Follow the steps in the [Upgrade Guide for Sitecore Experience Platform](#) to run the update tool. Check the logs in the `Data\logs` folder for detailed information about any modified items

that were skipped by the clean up. The update tool displays the number of items it removed in the command prompt window. For example:

```
C:\Sitecore.UpdateApp.Content\content>Sitecore.UpdateApp.exe clean
Clean up resource items:
master: 5592 item(s)
web: 5591 item(s)
core: 19448 item(s)
Resource items are cleaned up.

C:\Sitecore.UpdateApp.Content\content>
```

10. On all the servers where you have DEF installed, follow the instructions in [Installation](#) to install the new version of DEF on top of the old version.