Email Experience Manager Upgrade Guide

Sitecore Email Experience Manager 3.3

Instructions for upgrading to EXM 3.3



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Email Experience Manager Upgrade Guide

Chapter 1

Upgrading EXM

This document describes how to update the Sitecore Email Experience Manager (EXM) from EXM 3.2 Update 1 to EXM 3.3.

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 Sitecore XP upgrade process.

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 Prerequisities

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

- Disable all the configuration files in the *App_Config\Include\EmailExperience* and *App_Config\Include_EmailExperience* folders.
- Detach the Sitecore.Exm database if it is attached to the SQL Server and located in the */Data* folder.. After the upgrade is complete, you can reattach the database.
- In the \App_Config\ConnectionStrings.config file:
 - Add the two connection strings EXM.CryptographicKey and EXM.AuthenticationKey. The keys must be represented in hexadecimal format by 64 characters.
 - o Rename the connection string exm.dispatch to exm.master.

1.2.2 Downloading the EXM Update Package

To download the EXM update package, visit the EXM 3.3 page on the <u>Sitecore Developer Portal</u> and download the package.

1.2.3 Starting the Update Process

To start the EXM update process, enter 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.

Install the Update Package

Choose the package you want to install and click **Review package information** to start the update package installation.

Name: Location:	Email Experience Manager /sitecore/admin/packages/email experience manager 3.1.1 rev. 150811.update
Version:	3.1.1 rev. 150811
Author:	Sitecore Corporation
Publisher:	Sitecore Corporation
Readme:	
Email Expe	rience Manager
	======
This packa	ge updates Email Experience Manager 3.0 rev. 150429 to Email Experience Manager 3.1.1 rev. 150811.
Before the	update package is installed, disable all Email Experience Manager configuration files:
Sitecore.E	mailCampaign.config
 Sitecore.E 	imailCampaign.Speak.Server.Requests.config
Sitecore.E	mailCampaign.ULconfig
 Sitecore.E 	imailCampaign.Dedicated.config
Sitecore.E	mailCampaign.Xtune.CD.config
Sitecore.E	mailCampaign.Xtune.Processing.config
	•
< Choose :	a different package Analyze and install the package >

On this page, you can view the package metadata and read the readme text.

Click the Analyze and install the package button to proceed.

Analyze and Install the Package

This page lets you analyze the installation process to identify potential problems and install the package.

Click Install to install the package immediately without analyzing for potential conflicts.

You are a	about to install Email Experience Manager.
Fil	es overwritten or deleted during the installation will be saved to a backup folder.
	Analyze Analyze the package for potential installation conflicts
	Install Install the package immediately
< Choo	se a different package

Analyze the Update Package

Click **Analyze** to perform an analysis of the installation process to identify potential problems that can occur during the installation. The update tool does not make any changes to the Sitecore instance during this action.



The tool displays the progress bar and the number of processed actions.

Processing action 932 of 1261	
	Analysis result >

Click **More information** to view the detailed information.

224 actions pro	cessed.			
Less inform				
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	nging of the file \client\Applications\ECM\EmailCam		Maria Canta di S	
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'sitecore\shell	\client\Applications\ECM\EmailCam	paign.Controls\MessageData	Source\MessageDataSource	js'
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	client\Applications\ECM\EmailCam	paign.Controls\MessageOven	view\MessageOverview.csht	ml'
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	nging of the file \client\Applications\ECM\EmailCam	paign.Controls\VariantsSelect	or\VariantsSelector.is'	
	een completed			•
4				•
				Download as file
			A	nalysis result >
				naryolo result ?

You can review the analysis information messages or download them as a file by clicking the **Download as File** link.

To continue, click the **Analysis result** button, which allows you to review the potential problems that were identified by the wizard.



Analysis Result

On this page, you can review any potential problems that may occur during the installation.

105 potential problems w	ere found, including 95 collisions and 10 warnings.		
Filter by message types:	Search:	P	
1 2 3		•	
Message Type Item already exists	Description Cannot add item '/sitecore/client/Applications/ECM/Renderings/AccountInformationExt' (duplicate ID).	Database	
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Renderings/AccountInformationExt/AccountInformationExt- Parameters' (duplicate ID).		
Item already exists	Cannot add item '/sitecore/client/Applications/ECIM/Component/Actions/RecipientsTab/IncludedRecipientLists/Column/Included Recipient List/Remove complained' (duplicate ID).		
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Buttons/GeneralTab/Browse' (duplicate ID).		
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Text/GeneralTab/CampaignGroup' (duplicate ID).		
Item already exists	Cannot add item '/sitecore/client/Applications/ECM/Component/Text/MessageTab/Add Attachment' (duplicate ID).	core 🗸	
4		•	
105 messages total, 95 collision	s and 10 warnings Download	grid as xml file	
< Choose a different package	Install th	e package >	

We recommend that you review the analysis messages before continuing with the installation.

There are several types of messages: errors, collisions, warnings, and information messages. Each message type is marked with a colored square:



Errors, collisions, and warnings indicate potential problems, so you should pay attention to them.

At the top of the page, you can see the information bar. The color of the information bar indicates the importance of problems that were found during the analysis.

At the bottom of the page, you can see overall statistics and a link that allows you to download all the messages in the grid as an XML file. When you are ready to install the package, click **Install the package**.



Install the Package

When you click Install the package, the EXM update tool displays the Installing the update package page.

Less informa	ion		
Changing fle	10 T 1 T 1		٨
	ient\Applications\ECM\EmailCan	npaign.Controls\EmailPreviewResult\EmailPreviewResult.min.css'	
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'sitecore\shell\c	ient\Applications\ECM\EmailCan	npaign.Controls\LanguageSwitcher\LanguageSwitcher.cshtml'	
Changing fle 'si	tecore\shell\client\Applications\E	ECM\EmailCampaign.Controls\MessageContext\MessageContext.js'	
Changing file			
'sitecore\shell\c	ient\Applications\ECM\EmailCan	npaign.Controls\MessageDataSource\MessageDataSource.js'	
Changing fle 'si	tecore\shell\client\Applications\E	ECM\EmailCampaign.Controls\MessageInfo\MessageInfo.cshtml'	
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		npaign.Controls\TokensDataSource\TokensDataSource.js'	
Changing fle 'si Installation has		ECM\EmailCampaign.Controls\VariantsSelector\VariantsSelector.js'	+
		Download as	c.,
		Download as	1116

When the installation is completed, the update package displays the **Installation Completed** page.

224 actions processed.	
Less information	
Changing file 'sitecore\shell\client\Applications\ECM\EmailC Changing file	ampaign.Controls\EmailPreviewResult\EmailPreviewResult.min.css' ampaign.Controls\LanguageSwitcher\LanguageSwitcher.cshtml' AECM\EmailCampaign.Controls\MessageContext\MessageContext.js' ampaign.Controls\MessageDataSource\MessageDataSource.js' AECM\EmailCampaign.Controls\MessageOverview.MessageOverview.cshtml' ampaign.Controls\MessageReportDataSource\MessageReportDataSource ampaign.Controls\MessageReportDataSource\MessageReportDataSource ampaign.Controls\MessageReportDataSource\RecipientDataSource.js' ampaign.Controls\RecipientDataSource\ReportSDataSource.js' ampaign.Controls\TokensDataSource\TokensDataSource.js' AECM\EmailCampaign.Controls\UariantsSelector\VariantsSelector.js'
	Download as file Installation result >



1.3 Post-installation Steps

- Attach the Sitecore.Exm_Web database to the SQL server. The file is located in the Website\temp\ECM folder.
- Reattach the Sitecore.Exm database and then run the Sitecore.EmailExperienceManager3.2to3.3upgrade.sql file on it. The file is located in the Website\temp\ECM folder.
- In the \App_Config\ConnectionStrings.config file, update the connection string *exm.web*. For example:

<add name="exm.web" connectionString="user id=user;password=password;Data Source=(server);Database=Sitecore.EXM_Web/>

- Enable the \App_Config\Include \EmailExperience folder\Sitecore.EmailExperience.ContentManagementPrimary.config file.
- In the \App_Config\Include\EmailExperience folder, enable the following two configuration files by removing the .disabled extension:
 - o Sitecore.EDS.Providers.Dyn.config
 - o Sitecore.EDS.Providers.Dyn.Sync.config
- 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 3.3, make the necessary changes to the Sitecore.EmailExperience.*.config files manually.

