

Installation Guide

Data Exchange Framework 1.4

A guide to installing and upgrading the Data Exchange Framework



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Chapter 1

Installation

This chapter guides you through the process of installing Data Exchange Framework.

1.1 Prerequisites

This product requires Sitecore 8.1 update 1 (or greater).

If you are using Solr for the analytics index, you must use Sitecore 8.1 update 2 (or greater).

If you are deploying Sitecore to Microsoft Cloud using Web Apps, you must use Sitecore 8.2 update 1 (or greater).

1.2 Installation

This section describes how to install Data Exchange Framework on your Sitecore servers.

1.2.1 Content Management Role

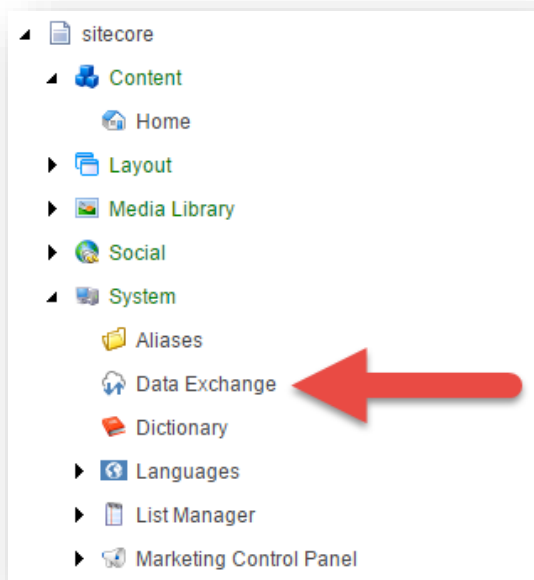
Typically, data synchronization runs on a content management server. This requires the entire Data Exchange Framework product to be installed.

1. In Sitecore, open Installation Wizard.
2. Install the "Data Exchange Framework" package.
3. Install the "Sitecore Provider for Data Exchange Framework" package.

Note

While it is not required, in most cases you will want to install the Sitecore Provider for Data Exchange Framework. This provider allows you to interact with Sitecore data (items, campaigns and contacts).

4. You can confirm the module was installed by opening Content Editor and locating the item `/sitecore/system/Data Exchange`.



1.2.2 Content Delivery Role

In most cases, data synchronization will not run on Sitecore delivery servers. The data that is synchronized, however, is used on those servers. As a result, all parts of Data Exchange Framework must be installed on Sitecore delivery servers.

1.2.3 Aggregation Server Installation

If you have a dedicated aggregation server, all parts of Data Exchange Framework must be installed on the aggregation server.

1.2.4 Reporting Server Installation

If you have a dedicated reporting server, all parts of Data Exchange Framework must be installed on the reporting server.

Chapter 2

Upgrade

This chapter guides you through the process of upgrading from Data Exchange Framework version 1.3 to version 1.4.

2.1 Prerequisites

You must have Data Exchange Framework 1.3.0 rev. 170210 installed on your Sitecore server. Specifically, this means the following Sitecore packages are installed on your Sitecore server:

- Data Exchange Framework 1.3.0 rev. 170210

2.1.1 Data Exchange Framework 1.3 Hotfixes

If you are using a hotfix for Data Exchange Framework 1.3, you may have updated versions of the files originally included with version 1.3.

The upgrade application looks for the original Data Exchange Framework 1.3 files. When you run the upgrade installation on a Sitecore server that has a hotfix for Data Exchange Framework 1.3 installed, the upgrade application will find the hotfix files, will assume those files are there for a reason, and will err on the side of caution and not overwrite those files.

You have two options in this case:

1. Restore the original files for Data Exchange Framework 1.3 before running the upgrade process.
2. Run the upgrade process and then manually replace the files the upgrade process cannot overwrite.

2.2 Installation

Data Exchange Framework version 1.3 is upgraded to version 1.4 using a Sitecore update package.

Note

If you have Dynamics CRM Connect 1.3 installed on your Sitecore server, please use the upgrade instructions for that product. It includes the steps needed to upgrade Data Exchange Framework.

The update package must be installed on the following Sitecore server roles:

- Content management
- Content delivery
- Aggregation

Note

This section was written using Sitecore Experience Platform 8.2 update 3. Earlier for future versions may require slightly different steps, or may involve different screens.

2.2.1 Update Data Exchange Framework

1. Use the Sitecore Update Installation Wizard to install the following update package:
 - Data Exchange Framework 1.4.0 rev. 170419 update.update
2. You must run the package analysis. Analysis will report that potential problems were found. Ignore this warning. Click **Install the package >** to continue.

Analysis result

3 potential problems were found, including 3 warnings.

Filter by message types: Search:

Message Type	Description	Database	Action
Parent item not found	The parent item for '/sitecore/content/Applications/Content Editor/Editors/Data Exchange Framework/Queue' was not found.	core	Create item path
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Framework/Queues/Base Queue Processor/Processing/RemoveUnprocessedEntries' item.	master	Leave item
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Framework/Queues/Base Queue Processor/Processing/Pipelines' item.	master	Leave item

[Download grid as xml file](#)

< Select a different package Install the package >

Note

The exact number of problems depends on the number of tenants you have defined, providers you have installed and the languages you have configured. This is expected behavior.

3. After the wizard finishes, the installation results will report that potential problems were encountered. This is the expected result.

Installation result

3 potential problems were encountered during the installation, including 3 warnings.

Hide installation messages

Filter by message types: Search:

Message Type	Description	Database	Action
Parent item not found	The parent item for '/sitecore/content/Applications/Content Editor/Editors/Data Exchange Framework/Queue' was not found.	core	Create item path
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Framework/Queues Processors/Base Templates/Base Queue Processor/Processing/RemoveUnprocessedEntries' item.	master	Leave item
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Framework/Queues Processors/Base Templates/Base Queue Processor/Processing/Pipelines' item.	master	Leave item

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Overwritten and deleted files have been backed up to the following location:
/temp/___upgrade/upgrade_201704211181558965

[Detailed installation information](#)

[Tell us what you think about the upgrade](#)

< Install another package

Note

The exact number of problems depends on the number of tenants you have defined, providers you have installed and the languages you have configured. This is expected behavior.

4. In Content Editor, navigate to **sitecore > templates > Data Exchange > Framework > Queues Processors > Base Templates > Base Queue Processor > Processing > Pipelines**.
5. Delete this item.
6. Navigate to **sitecore > templates > Data Exchange > Framework > Queues Processors > Base Templates > Base Queue Processor > Processing > RemoveUnprocessedEntries**.
7. Delete this item.

2.2.2 Update Sitecore Provider for Data Exchange Framework

If you do not have the Sitecore provider installed on your Sitecore server, you should skip this section.

1. Use the Sitecore Update Installation Wizard to install the following update package:
 - Sitecore Provider for Data Exchange Framework 1.4.0 rev. 170419 update.update

- You must run the package analysis. Analysis will report that potential problems were found. Ignore this warning. Click **Install the package >** to continue.

Analysis result

2 potential problems were found, including 2 warnings.

Search:

Message Type	Description	Database	Action
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Providers/Sitecore/Pipeline Steps/Resolve xDB Contact from Queue Pipeline Step' item.	master	Leave item
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Providers/Sitecore/Pipeline Steps/Resolve Marketing Campaign from Queue Pipeline Step' item.	master	Leave item

[Download grid as xml file](#)

[< Select a different package](#)

[Install the package >](#)

Note

The exact number of problems depends on the number of tenants you have defined, providers you have installed and the languages you have configured. This is expected behavior.

- After the wizard finishes, the installation results will report that potential problems were encountered. This is the expected result.

Installation result

2 potential problems were encountered during the installation, including 2 warnings.

[Hide installation messages](#)

Search:

Message Type	Description	Database	Action
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Providers/Sitecore/Pipeline Steps/Resolve xDB Contact from Queue Pipeline Step' item.	master	Leave item
Item has been modified	Cannot delete the '/sitecore/templates/Data Exchange/Providers/Sitecore/Pipeline Steps/Resolve Marketing Campaign from Queue Pipeline Step' item.	master	Leave item

[Download grid as xml file](#)

Overwritten and deleted files have been backed up to the following location:
/temp/_upgrade/upgrade_20170421t18302088

[Detailed installation information](#)

[Tell us what you think about the upgrade](#)

[< Install another package](#)

Note

The exact number of problems depends on the number of tenants you have defined, providers you have installed and the languages you have configured. This is expected behavior.

2.2.3 Cleanup Sitecore Database

The upgrade wizard is unable to make all of the required changes. The following steps must be performed manually.

1. In Content Editor, navigate to **sitecore > templates > Data Exchange > Providers > Sitecore > Pipeline Steps > Resolve xDB Contact from Queue Pipeline Step**.
2. Delete this item.
3. Navigate to **sitecore > templates > Data Exchange > Providers > Sitecore > Pipeline Steps > Resolve Marketing Campaign from Queue Pipeline Step**.
4. Delete this item.

2.3 Post Installation Steps

Due to the highly customizable nature of Data Exchange Framework, the update process may include manual steps that must be completed in order to successfully update the product.

2.3.1 Existing Tenants

You may have tenants that were configured prior to upgrading your Sitecore server. The upgrade process updates the templates and files that are included in Data Exchange Framework, but it does not change items under any tenants you previously created. This means that some new functionality will be available to those tenants (such as features inherited from standard values), but not all.