

Sitecore CMS 8.1

Upgrade from Sitecore Azure 7.5 to 8.1

Upgrade guide and configuration file changes



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Sitecore CMS 8.1

As part of the upgrade process, some solutions may need to be redesigned. For further help and guidance, check the [Release Notes](#) and refer to the administrator and developer documentation on the [Sitecore Developer portal](#) or the [Sitecore Documentation portal](#).

Note

This upgrade has been tested with Sitecore 8.1 rev. 151203

Prerequisites for this update:

- Sitecore Azure 7.5 rev.141126 or later.
- The [Sitecore Azure 8.1 rev. 151028 update package](#)
- [Azure SDK 2.7.1](#)

System requirements

Before you install the Sitecore Azure 8.1 rev. 151028 update package, you must upgrade your Sitecore version to 8.1 rev. 151003.

Important

Ensure that you back up your website *before* you install the upgrade package.

To install the upgrade package and update Sitecore Azure from 7.5 to 8.1:

1. Go to `http://<yourhostname>/sitecore/admin/UpdateInstallationWizard.aspx` and open the **Update Installation Wizard**. See the [Update Installation Wizard Guide](#) for more information on how to use the wizard.
2. Install the Sitecore Azure 8.1 update package

Note

If you have any current deployment configuration items, they will be archived. You can access them using the **Archive** feature.

You may expect to see the following warning: *Item to be deleted is in use*, which may apply to the following item and sub-items: `/sitecore/system/Settings/Validation Rules/Item Rules/Azure/SQL Server Tiers`

Update the Configuration Files

After you have installed the update package, you must update the following configuration files:

- `App_Config\Include\Sitecore.Azure.config`
- `App_Data\AzureOverrideFiles\App_Config\Include\Azure.ServiceRuntime.config`

Note

Most customers have only applied a small number of changes (if any) to these files. To save time and reduce the risk of errors when there are changes to the file, download the clean configuration files and re-apply any changes that you have made.

You can download the following clean configuration files for Sitecore Azure 8.1 rev. 15028 from the [Sitecore Developer Portal](#) – click Upgrade options, Config Files for upgrade:

- `Sitecore.Azure_81rev151028.config`

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- Azure.ServiceRuntime_81rev151028.config

Changes to Sitecore.Azure.config

To upgrade your existing configuration file to Sitecore Azure 8.1 rev. 151028, you must make the following changes to the Sitecore.Azure.config file:

1. In `<processors>`, in the `DeployAndRun` pipeline, after:
`Sitecore.Azure.Pipelines.DeployAndRun.Azure.PendingForInnerPipelineJobs`
add the processor (displayed in bold in the following sample).

```
<processors>
  <DeployAndRun>
    ...
    <processor
type="Sitecore.Azure.Pipelines.DeployAndRun.Azure.PendingForInnerPipelineJobs, Sitecore.Azure" />
    <processor
type="Sitecore.Azure.Pipelines.DeployAndRun.Azure.ConfigureDiagnostics, Sitecore.Azure" />
    ...
  </DeployAndRun>
</processors>
```

2. In `<processors>`, in the `DeleteAzureDeployment` pipeline, after:
`Sitecore.Azure.Pipelines.DeleteAzureDeployment.DeleteDeployment` add the
processor (displayed in bold in the following sample).

```
<processors>
  <DeleteAzureDeployment>
    <processor type="Sitecore.Azure.Pipelines.DeleteAzureDeployment.DeleteDeployment,
Sitecore.Azure" />
    <processor
type="Sitecore.Azure.Pipelines.DeleteAzureDeployment.DeleteDiagnosticsExtension, Sitecore.Azure"
/>
    ...
  </DeleteAzureDeployment>
</processors>
```

Changes to Azure.ServiceRuntime.config

To upgrade your existing configuration file to Sitecore Azure 8.1 rev. 151028, you must make the following changes to the Azure.ServiceRuntime.config file:

1. In `<settings>`, rename `Azure.ServiceRuntime.Heartbeat.ExcludeConnection` to
`Sitecore.Services.Heartbeat.ExcludeConnection`

```
<!-- ExcludeConnection - Exclude connection string from heartbeat check.
Set Sitecore.Services.Heartbeat.ExcludeConnection to a '|' separated list of
connection string names
that should be excluded from heartbeat check.
-->
<setting name="Sitecore.Services.Heartbeat.ExcludeConnection"
value="LocalSqlServer" />
```

2. In `<pipelines>`, add the following initialize pipeline patch:

```
<initialize>
  <processor
type="Sitecore.Azure.ServiceRuntime.Pipelines.Initialize.RemoveSitecoreTraceListener,
Sitecore.Azure.ServiceRuntime"
patch:before="processor[@type='Sitecore.Pipelines.Loader.ShowVersion, Sitecore.Kernel']" />
</initialize>
```

Update the Configuration Items

Apply the following changes to each slot item of all existing deployments and to the standard values of the Azure Deployment template. You can find the Azure deployment template in `/sitecore/templates/Azure/Deployment/Azure Deployment`.

A slot item path looks like this:

```
/sitecore/System/Modules/Azure/<MicrosoftSubscriptionName>/<LocationName>/<FarmName>/<RoleName>/<SlotName>
```

For example `/sitecore/System/Modules/Azure/YmyTest2-Test/North Europe/Editing01/Role01/Production`

3. In the **Service Definition** field, under `<WebRole name="SitecoreWebRole" enableNativeCodeExecution="false" vmsize="Medium">`, delete the following node:

```
<Imports>
  <Import moduleName="Diagnostics" />
</Imports>
```

4. In the **Service Definition** field, under `<WebRole name="SitecoreWebRole" enableNativeCodeExecution="false" vmsize="Medium"><LocalResources>` replace this node:

```
<LocalStorage name="Temp" sizeInMB="102400" cleanOnRoleRecycle="true" />
```

with this node:

```
<LocalStorage name="Temp" sizeInMB="10240" cleanOnRoleRecycle="true" />
```

5. In the **Service Definition** field, under `<WorkerRole name="SitecoreCacheWorkerRole" vmsize="Medium"><Imports>` delete the following node:

```
<Import moduleName="Diagnostics" />
```

6. In the **Service Configuration** field, under `<Role name="SitecoreWebRole"><ConfigurationSettings>` delete the following node:

```
<Setting name="Microsoft.WindowsAzure.Plugins.Diagnostics.ConnectionString" value="" />
```

7. In the **Service Configuration** field, under `<Role name="SitecoreCacheWorkerRole"><ConfigurationSettings>` delete the following node:

```
<Setting name="Microsoft.WindowsAzure.Plugins.Diagnostics.ConnectionString" value="" />
```

8. In the **Service Configuration** field, under `<Role name="SitecoreCacheWorkerRole"><ConfigurationSettings>` update the default TTL value of the named cache default to 22, as in the following sample:

```
<Setting name="Microsoft.WindowsAzure.Plugins.Caching.NamedCaches"
value="{&quot;caches&quot;:[{&quot;name&quot;:&quot;default&quot;,&quot;policy&quot;:{&quot;eviction&quot;:{&quot;type&quot;:0},&quot;expiration&quot;:{&quot;defaultTTL&quot;:22,&quot;isExpirable&quot;:true,&quot;type&quot;:1},&quot;serverNotification&quot;:{&quot;isEnabled&quot;:false}},&quot;secondaries&quot;:0]}" />
```

Note

If you customize the session state timeout, the default TTL value required for your deployment may differ. For more information, see [Session state timeout and In-Role cache TTL value synchronization](#).

9. In the **Connection Strings Patch** field, replace this node:

```
<xsl:template match="/connectionStrings">
  <connectionStrings>
    <add name="reporting" connectionString="do not remove" />
  </connectionStrings>
</xsl:template>
```

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```
</connectionStrings>  
</xsl:template>
```

with this node:

```
<xsl:template match="/connectionStrings">  
  <connectionStrings>  
    <add name="reporting" connectionString="do not remove" />  
    <add name="analytics" connectionString="do not remove" />  
    <add name="tracking.live" connectionString="do not remove" />  
    <add name="tracking.history" connectionString="do not remove" />  
    <add name="tracking.contact" connectionString="do not remove" />  
  </connectionStrings>  
</xsl:template>
```

10. In the **Global WebConfig Patch** field, after `<xsl:template match="configuration/system.web/sessionState">` add the following nodes:

```
<xsl:template match="sitecore/tracking/sharedSessionState/@defaultProvider">  
  <xsl:attribute  
name="defaultProvider">AzureInRoleCacheSessionStateProvider</xsl:attribute>  
</xsl:template>  
  
<xsl:template match="sitecore/tracking/sharedSessionState/providers">  
  <providers>  
    <clear/>  
    <add name="AzureInRoleCacheSessionStateProvider"  
type="Sitecore.Azure.SessionStateProviders.AzureInRoleCacheSessionStateProvider,  
Sitecore.Azure.SessionStateProviders" cacheName="default" dataCacheClientName="default"  
applicationName="SitecoreAzure" pollingInterval="5" />  
  </providers>  
</xsl:template>
```

11. In the **Global WebConfig Patch** field, replace this node:

```
<xsl:template match="/configuration">  
  <xsl:copy>  
    <xsl:apply-templates select="@* | node()" />  
    <xsl:element name="system.diagnostics">  
      <trace autoflush="true">  
        <listeners>  
          <add type="Microsoft.WindowsAzure.Diagnostics.DiagnosticMonitorTraceListener,  
Microsoft.WindowsAzure.Diagnostics" name="AzureDiagnostics"></add>  
        </listeners>  
      </trace>  
    </xsl:element>  
  </xsl:copy>  
</xsl:template>
```

with this node:

```
<xsl:template match="/configuration">  
  <xsl:copy>  
    <xsl:apply-templates select="@* | node()" />  
    <xsl:element name="system.diagnostics">  
      <trace autoflush="true">  
        <listeners>  
          <add name="AzureDiagnostics" />  
        </listeners>  
      </trace>  
      <sources>  
        <source name="AzureDiagnostics" switchName="SourceSwitch"  
switchType="System.Diagnostics.SourceSwitch">  
          <listeners>  
            <add name="AzureDiagnostics" />  
            <remove name="Default" />  
          </listeners>  
        </source>  
      </sources>  
      <switches>  
        <add name="SourceSwitch" value="All" />  
      </switches>
```

```
<sharedListeners>
  <add name="AzureDiagnostics"
type="Microsoft.WindowsAzure.Diagnostics.DiagnosticMonitorTraceListener,
Microsoft.WindowsAzure.Diagnostics" />
</sharedListeners>
</xsl:element>
</xsl:copy>
</xsl:template>
```

12. In the **Global WebConfig Patch** field, remove the following node:

```
<xsl:template match="configuration/system.web/customErrors">
  <customErrors mode="Off" />
</xsl:template>
```

Important

Only apply the following changes to the Azure CD Deployment branch and each content delivery slot item of all existing deployments.

Content delivery slots are created from the **Azure CD Deployment** branch.

You can change the Azure CD Deployment branch item in:

/sitecore/templates/Branches/Azure/Azure Cd Deployment/Deployment Cd.

13. In the **Deployment Type Exclude Directories** field, add the following lines.

```
sitecore\shell\client;
sitecore\shell\ClientBin;
```

Clear the browser cache

After you change the configuration files and items, you must clear the cache of your browser.

Note

These steps may vary depending on your web browser.

1. In **Internet Explorer**, for example, click **Tools, Internet Options**.
2. In the **Internet Options** dialog, on the **General** tab, in **Browsing History**, click **Delete**.
3. In the Delete Browsing History dialog, select **Temporary Internet files and website files** and then click **Delete**.

Applying changes to existing deployments

To apply the changes to all your existing deployments, you must redeploy each of them.