

Sitecore CMS 8.1

Upgrade from Sitecore Azure 7.2 to 8.1

Upgrade guide and configuration file changes.



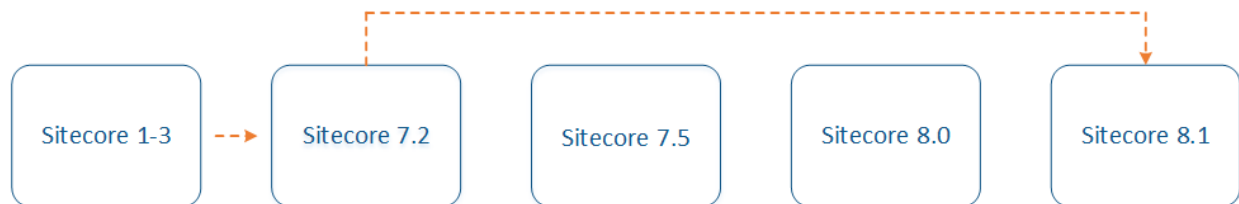
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System requirements

Note

This upgrade has been tested with Sitecore 8.1 rev. 151203

If you are running an earlier version of Sitecore Azure, such as Sitecore Azure version 1 through to version 3, and you want to upgrade to Sitecore Azure 8.1, you must upgrade to Sitecore Azure 7.2 first.



You can download all of the prerequisite components from the [Sitecore Developer Portal](#).

Prerequisites for this update:

- Sitecore Azure 7.2 rev.140411 or later.
- The [Sitecore Azure Update package](#).
- Azure SDK 2.7.1.
- Upgrade your version of Sitecore to 8.1 rev. 151003 *before* you install the Sitecore Azure 8.1 rev. 151028 upgrade package.

Install the upgrade package

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](#).

1. Back up your website.
2. Go to `http://<hostname>/sitecore/admin/UpdateInstallationWizard.aspx` and open the **Update Installation Wizard** to install the upgrade package and update your Sitecore Azure from 7.2 to 8.1
3. Install the Sitecore Azure 8.1 update package.

Note

Any current deployments will be archived. You can access them using the **Archive** feature.

You may expect the following warnings and collisions. This will not affect the upgrade process.

Message	May apply to the following items or their sub-items:
Version not found	<ul style="list-style-type: none">• <code>/core/sitecore/content/Applications/Sitecore Azure/Context Menus</code>
Item has been modified	<ul style="list-style-type: none">• <code>/master/sitecore/templates/Azure/Databases/Azure SQL Database/Properties/Size</code>• <code>/master/sitecore/templates/Azure/Databases/Azure SQL Database/Properties/Edition</code>

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Update the configuration files

After you have installed the update package, you must update the following configuration files according to the instructions outlined in the following sections.

- 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 clean Sitecore Azure 8.1 rev. 151028 configuration files from the [Sitecore Developer Portal](#), – click **Sitecore Azure 8.1, Upgrade options, Config Files for upgrade**.

- Sitecore.Azure_81rev151028.config
- 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 <settings>, add the following settings:

```
<setting name="Azure.CachingRoleName" value="SitecoreCacheWorkerRole" />
<setting name="Azure.BulkCopyBatchSize" value="0" />
<setting name="Azure.CheckAsyncOperationStatusIntervalInMS" value="00:00:00.500" />
```

2. In <processors>, after

Sitecore.Azure.Pipelines.CreateAzurePackage.Azure.LiveModeChanges add the following processor to the first CreateAzurePackage pipeline:

```
<processor
type="Sitecore.Azure.Pipelines.CreateAzurePackage.Azure.XDBCLOUDEditionChanges, Sitecore.Azure"
/>
```

3. In <processors>, after

Sitecore.Azure.Pipelines.CreateAzurePackage.Azure.LiveModeChanges add the following processor to the first CreateDevFabricPackage pipeline:

```
<processor
type="Sitecore.Azure.Pipelines.CreateAzurePackage.Azure.XDBCLOUDEditionChanges, Sitecore.Azure"
/>
```

4. In <processors>, after

Sitecore.Azure.Pipelines.DeployAndRun.Azure.PendingForInnerPipelineJobs add the following processor (displayed in bold) to the first DeployAndRun pipeline:

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

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

```
<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>
```

3. In `<scheduling>`, replace the following agent:

```
<agent type="Sitecore.Azure.Managers.PublishTargetRemoteManager, Sitecore.Azure"
method="Synchronize" interval="00:05:00" />
```

with:

```
<agent type="Sitecore.Azure.Managers.Publishing.PublishTargetRemoteManager,
Sitecore.Azure" method="Synchronize" interval="00:05:00" />
```

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`

1. In the **Connection Strings Patch** field, replace the following node:

```
<xsl:template match="/connectionStrings">
  <connectionStrings />
```

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```
</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>
```

2. In the **Global WebConfig Patch** field, replace the following node:

<xsl:template match="configuration/system.web/sessionState"> with this node:

```
<xsl:template match="configuration/system.web/sessionState">
  <sessionState mode="Custom" customProvider="AzureInRoleCacheSessionStateProvider"
timeout="20">
  <providers>
    <add name="AzureInRoleCacheSessionStateProvider"
type="Sitecore.Azure.SessionStateProviders.AzureInRoleCacheSessionStateProvider,
Sitecore.Azure.SessionStateProviders" cacheName="default" dataCacheClientName="default"
applicationName="SitecoreAzure" pollingInterval="5" />
  </providers>
</sessionState>
</xsl:template>
```

3. 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>
```

4. In the **Global WebConfig Patch** field, under <xsl:param name="pDataCacheClients"><dataCacheClients> replace the following dataCacheClient:

```
<dataCacheClient name="default" isCompressionEnabled="false">
  <autoDiscover isEnabled="true" identifier="" />
  <localCache isEnabled="true" sync="TimeoutBased" objectCount="100000"
ttlValue="300" />
</dataCacheClient>
```

with:

```
<dataCacheClient name="default">
  <autoDiscover isEnabled="true" identifier="SitecoreCacheWorkerRole" />
</dataCacheClient>
```

5. 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>
```

6. 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.

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

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

Note

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
```

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Clear the browser cache

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

Note

These steps may vary depending on the web browser you are using.

To clear the cache of your browser:

1. Open **Internet Explorer**, 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**, then click **Delete**.

Apply the changes to your existing deployments

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