Sitecore CMS

Update Installation Wizard

A guide on installing Sitecore update packages.

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Chapter 1

Introduction

This document describes the Sitecore Update Installation Wizard which is used to install update packages.

The Update Installation Wizard allows developers to update existing Sitecore CMS solutions using Sitecore update packages. The wizard can not only add new items and files but also delete or change them.

Update Installation Wizard provides the following functionality:

- Package compatibility analysis which helps you to identify potential problems during a real update installation and resolve them in advance.

- Informative result grid which supports searching, grouping, etc.

- An option to save the list of potential problems in an XML file.

- Installation of the update package.

Since the wizard is a standard ASP.NET web application, you can install update packages remotely without direct access to the Sitecore server.

Before installing an update into your solution, make sure you read the upgrade instructions on SDN for that specific update. You typically need to perform a small amount of manual tasks, such as merging configuration file changes, in order to successfully upgrade your Sitecore solution from one CMS version to another.

1.1 Installation Guide

The Update Installation Wizard is provided as part of Sitecore CMS starting with CMS 6.1.

For earlier CMS versions, the Update Installation Wizard is distributed as a Sitecore package. In order to start using it, you should install the package via the Sitecore desktop link *Sitecore » Development Tools » Installation Wizard*.

After the package installation you can start working with the Wizard without any additional modifications.

1.1.1 Accessing the Wizard

To run the Update Installation Wizard,

1. Allow anonymous access to the /sitecore/admin/updateinstallationwizard.aspx file in IIS. Allow anonymous access to the /sitecore/admin/Wizard folder.
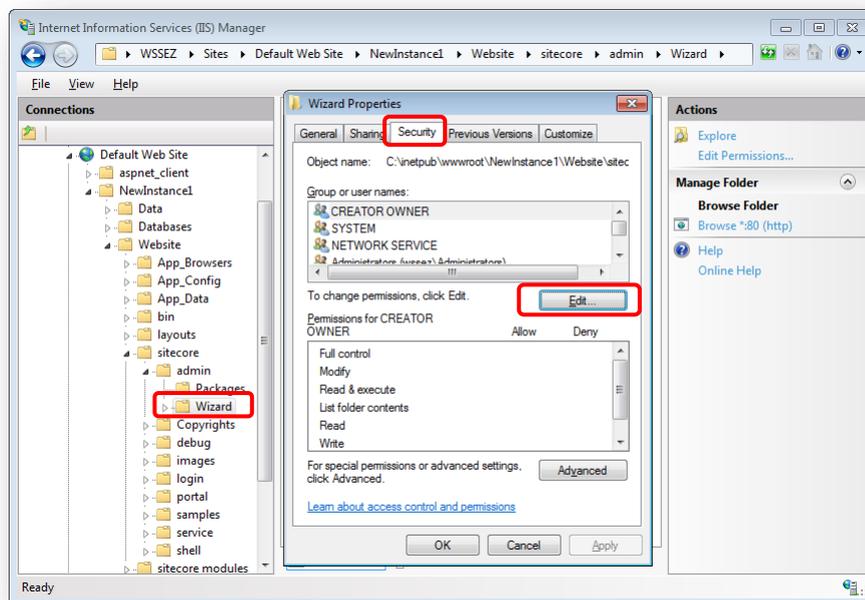

2. Type the following URL in your browser:

   http://<host_name>/sitecore/admin/UpdateInstallationWizard.aspx

3. When prompted, enter a user name and password before the page can be displayed.

Note
Only users with administrator's privileges have access to the Update Installation Wizard page.

1.2 Using the Wizard

The Wizard page provides functionality for installing update packages. The wizard's start page looks like this:
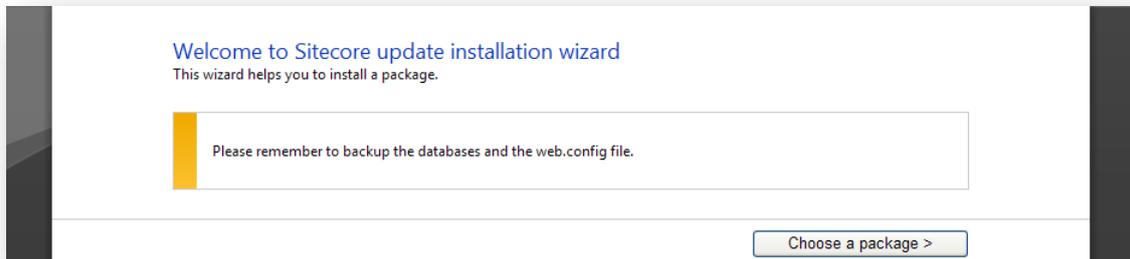
The installation process only requires a minimum of user input:

4. Select an update package to install.

5. Preview the package metadata.

6. Check for conflicts .

7. Install.

These steps are described in detail in the following sections. Click the **Choose a package** button to proceed to the next step.

1.2.1 Choosing a package to install

Use the "Upload a new package" field to upload a new package:

1. Click **Browse** and select the package you want to install.
2. Click **View package information** to upload the package and proceed to the next step.
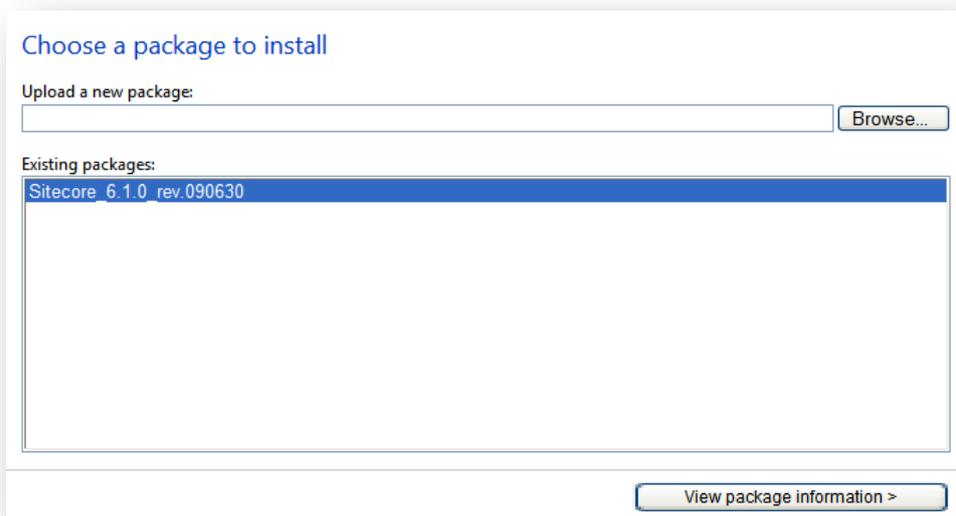
To select an existing package, just select the package from the list and click the **View package information** button to navigate to the next page.

If the **Upload a new package** field is not empty, the Existing packages field will not be available.

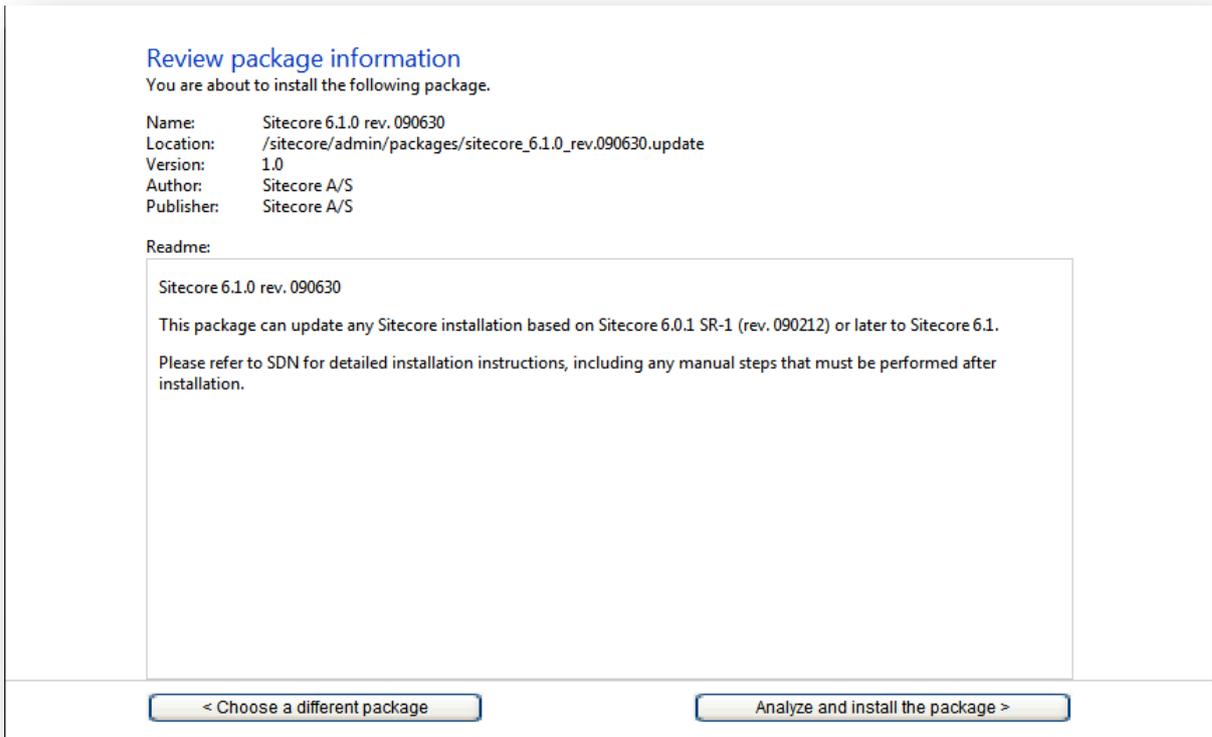By default, all packages are placed in the following folder under the Sitecore root:

`/sitecore/admin/packages`

Note
The update packages have the .update extension.

1.2.2   Review Package Information

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

Click the **Analyze and install the package** button to proceed to the next step.

1.2.3   Installing the Update Package
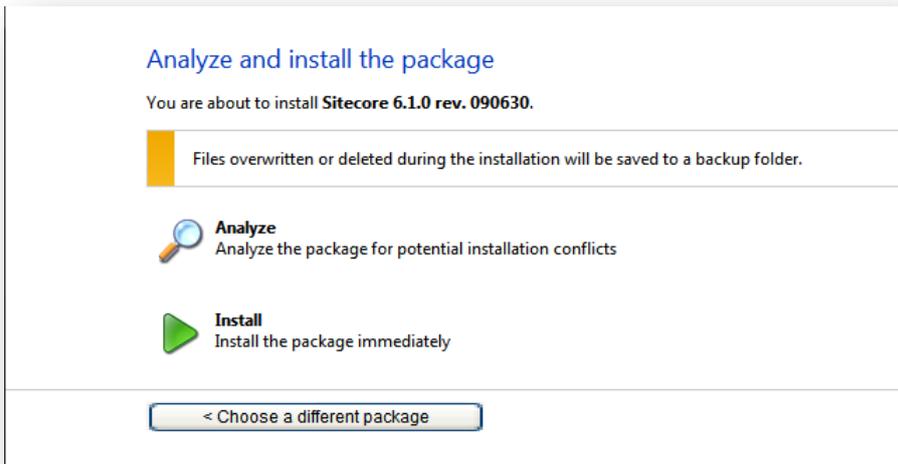
Click **Analyze** to perform an analysis of the installation process to identify potential problems that can occur during the installation. No changes to the Sitecore installation are made during this action.

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

Analyzing the Update Package

Click the "Analyze" button to start the analysis.

You will see a progress bar and the number of processed actions.
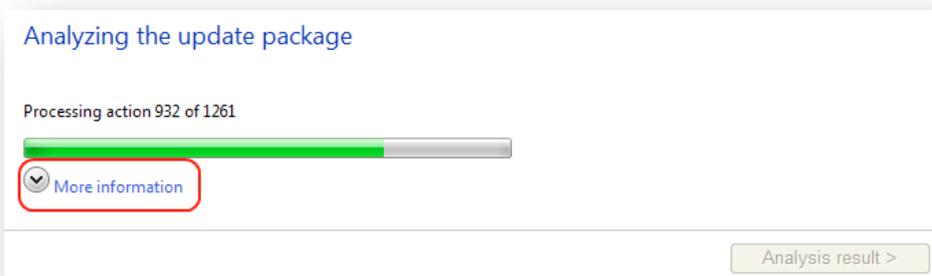
You can view detailed installation information by clicking the **More information** link:
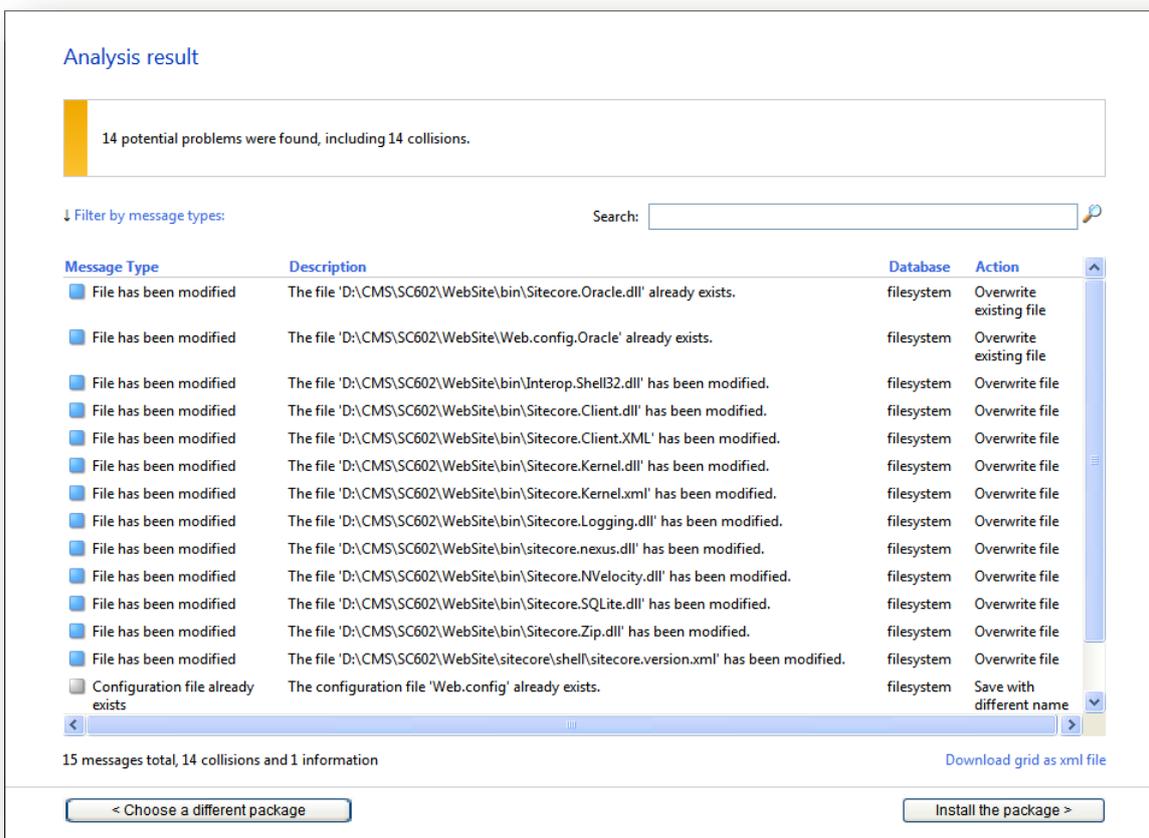

You can review the analysis information messages or download them as a file by clicking the **Download as File** link. Notice that you have to click **More information** to see the download link.

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

Analysis Result

On this page you can review potential problems that will occur during the installation.

An example of the analysis result is shown in the following image:

It is strongly recommended to review the analysis messages before continuing the installation.

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

- red for errors,

- blue for collisions,

- yellow for warnings,

- grey for information messages

Errors, collisions and warnings are considered as potential problems and you should pay special 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 which allows you to download all the messages in the grid as an XML file.

If no potential problems were found, the information bar will be green and display the following message:
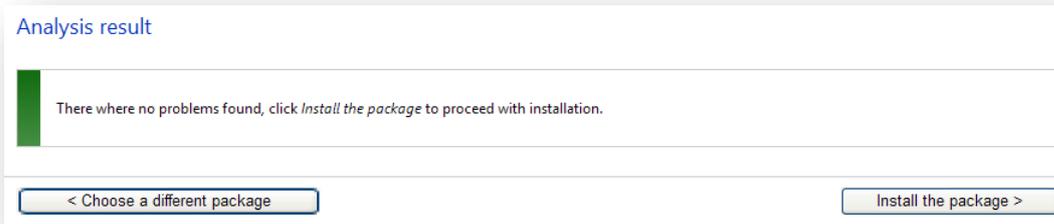
When you are ready to install the package, click the **Install the package** button.

Installing the Package

During the installation you will see a progress page similar to the **Analyzing the update package** page:

Almost all update packages contains files to be updated on the source installation. Sometimes ASP.NET process does not have enough security permissions to update the file. In this case the Wizard will skip these files and inform the user about the problem by showing the installation details with an appropriate error message:

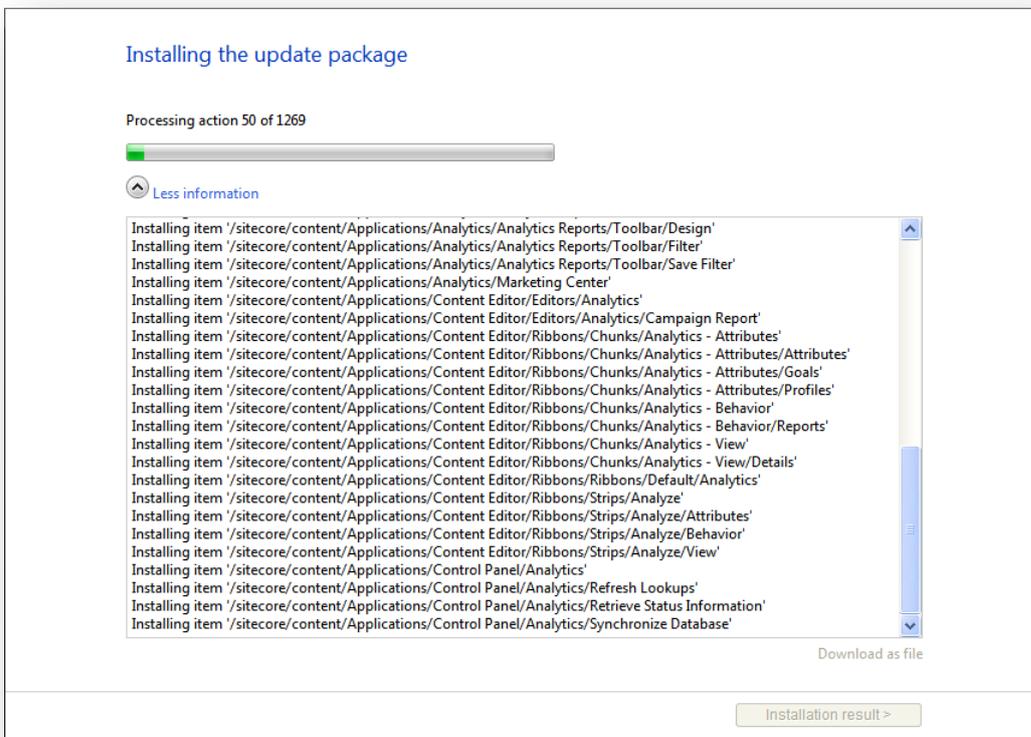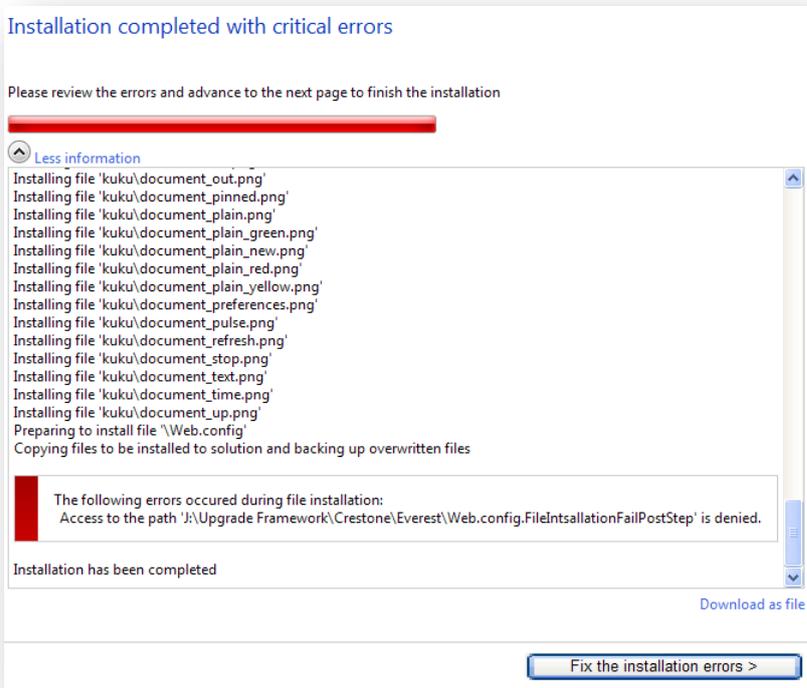To fix problems with file installation, click the **Fix the installation errors** button. You will be informed about further steps to complete the installation. This involves manually running a batch file on the server which will perform the necessary file operations:
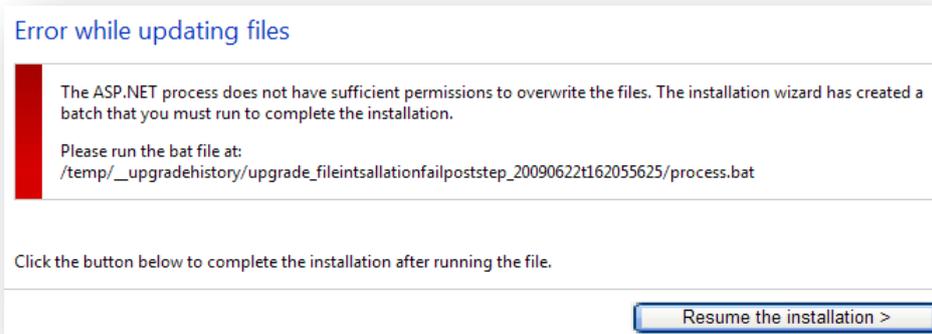
After you fix the problems you should click the **Resume the installation** button to compete the installation.

We strongly recommend that you follow the instructions on how to fix the errors before resuming the installation, otherwise your upgraded Sitecore installation may not be fully supported and you might experience problems with errors or broken functionality in the system.

When your installation is completed you can see the installation result by clicking to the **Installation result** button.
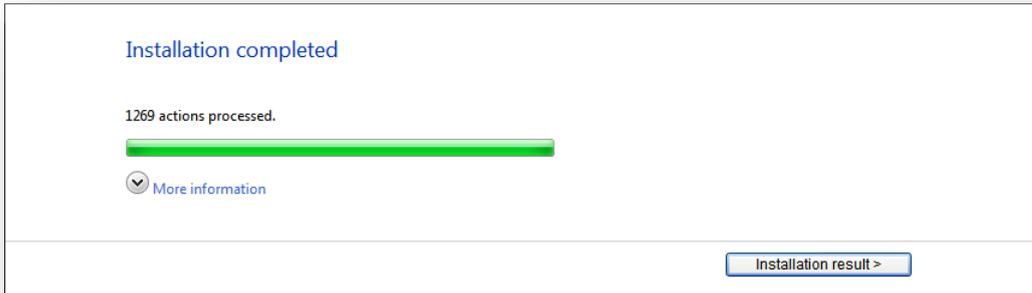
In case of a critical problem that cannot be fixed easily or automatically you will see the following message:

If you click to the link in the message you will be able to download the installation logs that can be used to identify the problem.
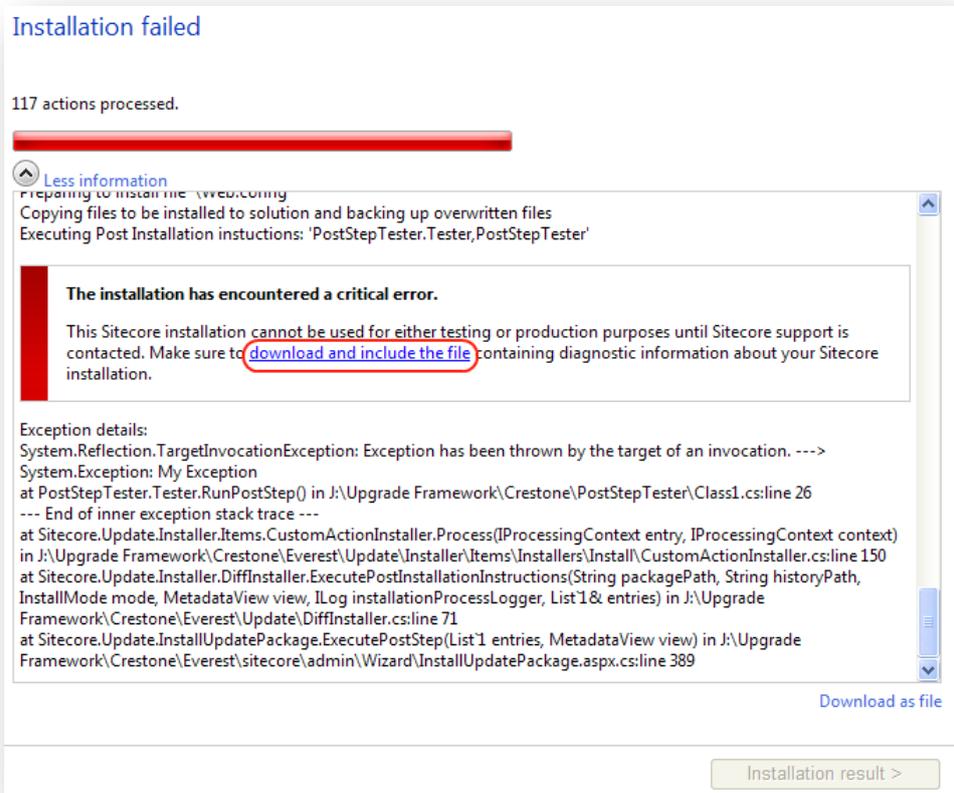
All other installation information is located in a temporary folder:

`/temp/__UpgradeHistory/<package_name>_<timestamp>/`

Installation Result

Several examples of the Installation Result window are shown below. The color of the box depends on the type of problems which occurred during the installation.
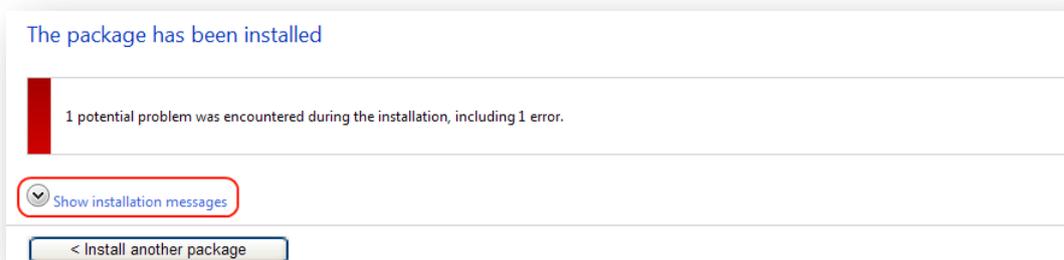
This one is as good as it gets:

This image shows that there were some collisions:

This image shows that some errors happened during the installation:

Click to the "Show Installation messages" link to review the details about the problems.

Post Update Installation Steps

After installing the update package, you should rebuild the search indexes and the links database.

If the update package contains configuration files, these files will be saved with a different name. This makes it easier to manually merge changes to configuration files by allowing you to use a file comparison tool such as WinMerge. For instance, if you are upgrading to version 6.1.0 rev.090630, this update package contains the clean web.config file for 6.1.0 rev. 090630, which will be saved in the root folder with the following name:

```
Web.config.Sitecore_6.1.0_rev.090630
```

Chapter 2

Glossary

The list of new terms introduced in this document.

Update Package: a package used to update Sitecore solutions. Update packages contain not only items, files and metadata but also items or files to be deleted and items or files to be changed. Also, update packages contain information about the expected value of fields and hash values for files, making it possible to identify potential conflicts. An update package use the extension ".update" to distinguish them from regular Sitecore packages. Update packages cannot be installed using the Installation Wizard that is available in the Sitecore Desktop.