SDL Tridion 2013 Upgrade Manual

Content Management Technologies Division of SDL

SDL Tridion 2013 Upgrade Manual

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About upgrading

The upgrading documentation describes how to upgrade each part of your SDL Tridion system to SDL Tridion 2013.

Versions from which you can upgrade

You can upgrade to the current version of SDL Tridion from the following versions:

- SDL Tridion 2011 SP1, Hotfix Release 1 (possibly with User Interface Update for SDL Tridion 2011 SP1 installed)
- SDL Tridion 2011 SP1
- SDL Tridion 2009 SP1

Audience Manager is fully-integrated in SDL Tridion. You can upgrade to the current version from the following versions:

- Audience Manager and Outbound E-mail 2011 SP1
- Audience Manager and Outbound E-mail 2009 SP1

Translation Manager is fully-integrated in SDL Tridion. You can upgrade to the current version from the following versions:

- Translation Manager 2.0 SP2
- Translation Manager 2.0 SP1
- Translation Manager 2.0

Changes in prerequisites

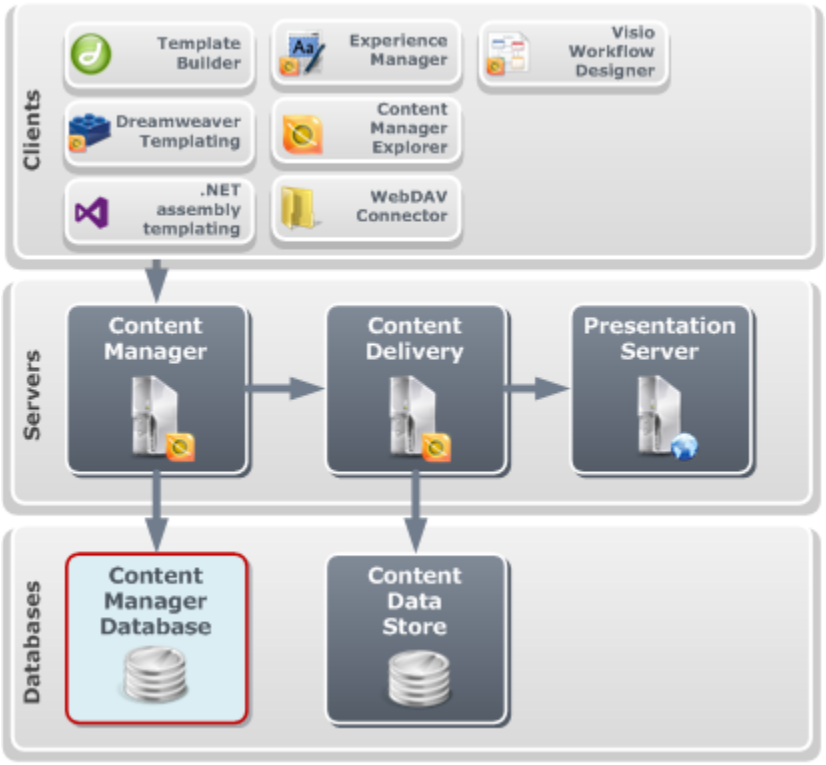
Before upgrading, it is recommended to read the changes in product prerequisites. The support history is described separately for each part of the SDL Tridion system in each section.

Release Notes

Before upgrading, it is recommended to read the Release Notes, available as a PDF on the installation media or as a section in the documentation portal.

Chapter 1 Upgrading Content Manager databases

Upgrade your Content Manager databases by running a PowerShell script. Note that as of SDL Tridion 2013, the Content Manager Logging database no longer exists. You can leave your existing database as is, or remove it.



1.1 Content Manager database server support history

The Content Manager database in SDL Tridion 2013 has a number of changed software prerequisites compared to the databases in SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1. If your current version of Oracle or SQL Server is not supported, you need to upgrade your Oracle or SQL Server before upgrading the Content Manager databases.

In the following table: N=not supported, Y=supported, Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Database server	2009 SP1	2011 SP1	2013
Microsoft SQL Server 2005 SP3	Y	Dr	N
Microsoft SQL Server 2005 SP4	N	P	N
Microsoft SQL Server 2008 SP1	Y	N	N
Microsoft SQL Server 2008 R2	N	Dr	N
Microsoft SQL Server 2008 R2 SP2	N	Y	Y
Microsoft SQL Server 2012 SP1	N	N	Y
Oracle Database 10*g* Release 2 patch set 10.2.0.4	Y	N	N
Oracle Database 10*g* Release 2 patch set 10.2.0.5	N	Y	Y
Oracle Database 10*g* Release 2 patch set 11.1.0.7	Y	N	N
Oracle Database 11*g* Release 2 patch set 11.2.0.1	N	Dr	N
Oracle Database 11*g* Release 2 patch set 11.2.0.2	N	Y	N
Oracle Database 11*g* Release 2 patch set 11.2.0.3 with one of the following patches applied: • For Linux/UNIX systems: PSU 11.2.0.3.2 • For Windows systems: 11.2.0.3 Patch 2 or higher (for Windows)	N	N	Y

As of SDL Tridion 2013, to install a database on a Windows machine also requires the following:

- Windows PowerShell 3.0
- Microsoft .NET Framework 4.0 or higher

1.2 Preparing for the Content Manager database upgrade

Before performing your actual upgrade, back up any Custom Pages and Custom URLs, and upgrade the SQL SDL Tridion administrator user for Oracle.

Steps to execute

1. If you have Custom Pages, back them up.
2. If you have Custom URLs, back them up.
3. If you are upgrading from SDL Tridion 2009 SP1, note that upgrading will do the following:
   - Remove all items in the Publish Queue
   - Remove all publishing history

   It is advisable to warn your end users that they will need to resubmit any outstanding publish jobs after the upgrade.

4. If you use Oracle and if you are upgrading from SDL Tridion 2009 SP1, then you used an SQL script called `CreateTridionSYSUser.sql` to create and name an SQL SDL Tridion administrator user when you first installed the Content Manager databases. This script granted certain rights to this user, so that it could create the databases.

   Grant this SQL SDL Tridion administrator user a new right by executing the following command:

   ```
   GRANT EXECUTE ON SYS.DBMS_LOCK TO <user> WITH GRANT OPTION;
   ```

   where *<user>* is the user name of your SQL SDL Tridion administrator (by default, this user name would be `TRIDION_SYS`).

1.3 Upgrading Content Manager database

Upgrade your Content Manager database by running a PowerShell script.

Requirements

To install SDL Tridion databases on a Windows machine requires Windows PowerShell 3.0 and Microsoft .NET Framework 4.0 or higher.

To upgrade the Content Manager database you need details of DBA and user credentials and the names of the Content Manager database.

Before running the PowerShell script, if you use an Oracle database, make sure that there are no open database connections.

Steps to execute

1. Open Windows PowerShell from the Windows Start Menu.
2. In PowerShell, depending on your database navigate to one of the following folders on the installation media:
   - `Database\MSSQL\` or
   - `Database\Oracle\`
3. Type the following command to upgrade your Content Manager database:

   ```
   & '.\Upgrade Content Manager database.ps1'
   ```

4. Follow the instructions in the PowerShell console to upgrade the database.

Result

The database upgrade modifies the structure of the database tables. Depending on the amount of data in your existing database, the upgrade process may take some time.

Next steps

If you encounter problems upgrade, consult SDL Tridion Customer Support for assistance. Do not attempt to fix the database.

1.4 Optional: removing the Content Manager Logging database

As of SDL Tridion 2013, the Content Manager Logging database no longer exists. To keep a record of past logging events, keep or export the logging database you have. If you want, you can also remove this database.

Steps to execute

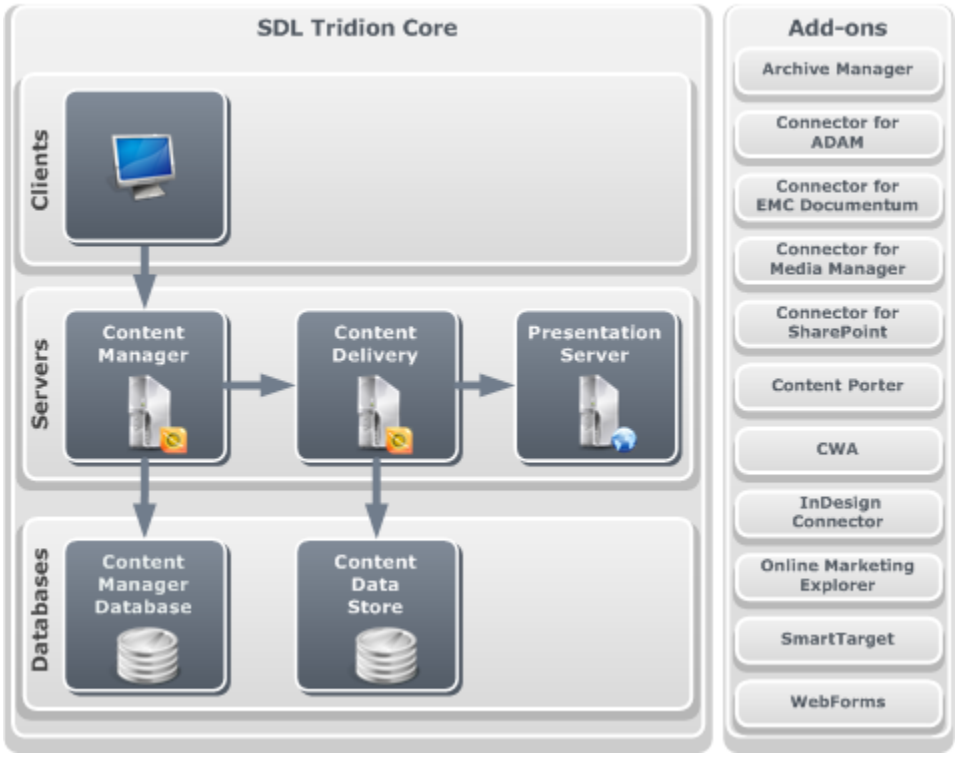
1. Access the client software for your SQL Server or Oracle database.
2. Remove the Content Manager Logging database.

   If you have not changed the default name of the database, it has one of the following names:

   - In SQL Server, the Content Manager Logging database is called `Tridion_cm_log`
   - In Oracle, the database schema for the Content Manager Logging database is called `TCMLogDBUser`.
3. Close your client software.

Chapter 2 Upgrading add-on products

You can upgrade all add-on products except WebForms after you have upgraded the Content Manager. You must uninstall WebForms before upgrading. This section explains which versions of add-on products are compatible with SDL Tridion 2013 and which hotfixes you need to apply. For information on how to upgrade these products, refer to the add-on product documentation. Note that an upgrade minimally involves uninstalling and reinstalling the add-on.



2.1 Add-on product versions compatible with SDL Tridion 2013

This topic lists which versions of add-on products are known to be compatible with SDL Tridion 2013.

Add-on product	Compatibili version	Hotfix or other requirement	Link
Content Porter	2013	None	Content Porter 2013
Archive Manager	1.0 SP2	Hotfix 83265	Archive Manager 1.0 SP2

Add-on product	Compatibili version	Hotfix or other requirement	Link
Connector for ADAM	1.0	External Content Library (ECL) 7.0 (part of suite installer)	
Connector for Media Manager	1.1	External Content Library (ECL) 7.0 (part of suite installer)	
Online Marketing Explorer	2011 SP2	None	

Note: At the time of release, the compatibility requirements for all add-ons was not yet known. For the most up-to-date information about which add-ons are compatible with this release, contact SDL Customer Support.

Know issues with add-ons

The following add-ons have known issues associated with them:

Archive Manager 1.0 SP2

Archive Manager fails when a transactional unpublish occurs.

2.2 Making add-ons work with new Content Delivery .NET assemblies

If you run one or more Content Delivery Server Roles as (part of) a .NET Web application, then in order to work with Content Delivery 2013, WebForms, Online Marketing Explorer and SmartTarget require policy files that resolve DLL versioning conflicts. Copy these policy files (and the new Content Delivery DLLs) to your Windows assembly on the machine that runs your add-on.

Steps to execute

1. Access the Windows machine on which your add-on runs.
2. On the SDL Tridion installation media, navigate to the folder `Content Delivery\roles\api\dotNet\publishpolicies\`.
3. From that location, copy the following files to the `c:\Windows\assembly\` folder on your Windows machine:
   - `policy.6.1.Tridion.ContentDelivery.dll`
   - `policy.6.1.Tridion.ContentDelivery.config`
   - `policy.6.1.Tridion.ContentDelivery.Configuration.dll`
   - `policy.6.1.Tridion.ContentDelivery.Configuration.config`
4. On the installation media, navigate to `Content Delivery\roles\api\dotNet\x86_64\` and copy the following files to the `c:\Windows\assembly\` folder on your Windows machine:

- `Tridion.ContentDelivery.dll`
- `Tridion.ContentDelivery.Configuration.dll`

2.3 Upgrading Connector for Media Manager

If you have SDL Tridion Connector for SDL Media Manager installed, you will need to upgrade your installation when you upgrade to SDL Tridion 2013.

Steps to execute

1. Back up the following configuration files, by default located in your `TRIDION_HOME\config` directory:
   - `ExternalContentLibrary.xml`
   - `TridionSTS.xml`
2. Uninstall SDL Tridion Connector for SDL Media Manager:
   a. Access the **Add/Remove Programs** options in your Windows Control Panel.
   b. Select SDL Tridion Connector for SDL Media Manager and click **Remove**.
3. Upgrade to SDL Tridion 2013: when you run the Content Manager installer, in the **Features** window make sure to select **External Content Library**.
4. Install SDL Tridion Connector for SDL Media Manager 1.1.:
   a. Access the installation media.
   b. In the root directory, run **Install SDL Tridion Connector for SDL Media Manager.lnk**.
   c. Follow the instructions to install the SDL Tridion Connector for SDL Media Manager.
5. Copy `ExternalContentLibrary.xml` and `TridionSTS.xml` back into the `TRIDION_HOME\config` directory,
6. Open **Component Services**:
   a. In **Component Services** > **Computers** > **My Computer** > **COM + Applications** , restart the Tridion COM+ Applications.
   b. In **Services**, restart all the Tridion Windows Services.
7. Restart IIS.

2.4 Upgrading Connector for ADAM

If you have SDL Tridion Connector for ADAM installed, you will need to upgrade your installation when you upgrade to SDL Tridion 2013.

Steps to execute

1. Back up the following configuration files, by default located in your `TRIDION_HOME\config` directory:
   - `ExternalContentLibrary.xml`
   - `TridionSTS.xml`
2. Uninstall SDL Tridion Connector for ADAM:
   a. Access the **Add/Remove Programs** options in your Windows Control Panel.
   b. Select SDL Tridion Connector for ADAM and click **Remove**.
3. Upgrade to SDL Tridion 2013: when you run the Content Manager installer, in the **Features** window make sure to select **External Content Library**.
4. Install SDL Tridion Connector for ADAM:
   a. Access the installation media.
   b. In the root directory, run **Install SDL Tridion Connector for ADAM.lnk**.
   c. Follow the instructions to install the SDL Tridion Connector for ADAM.
5. Copy `ExternalContentLibrary.xml` and `TridionSTS.xml` back into the `TRIDION_HOME\config` directory,
6. Open **Component Services**:
   a. In **Component Services** > **Computers** > **My Computer** > **COM + Applications** , restart the Tridion COM+ Applications.
   b. In **Services**, restart all the Tridion Windows Services.
7. Restart IIS.

2.5 Upgrading Device Emulator

When you upgrade to SDL Tridion 2013, the existing `Devices.xml` is left untouched. The `Devices.xml` delivered with SDL Tridion 2013 provides updated default configured devices. To use these devices in conjunction with custom devices you have added, merge the two files.

Context

The `Devices.xml` is the configuration file for Device Emulator where you configure the types of devices available for users to edit and preview content in Experience Manager.

Steps to execute

1. Open the `Devices.xml` configuration file, located by default in your SDL Tridion installation `TRIDION_HOME\web\WebUI\Editors\DeviceEmulator\Configuration` directory, in a text editor.
2. Access the installation media.
3. Open the `Devices.xml` configuration file in the `Experience Manager\Samples\Configuration\` folder.
4. Compare the two `Devices.xml` configuration files.
5. Where you have duplicate `<device>` elements, copy and paste those `<device>` elements in the `\Samples` configuration file in your existing`Devices.xml` configuration file.
6. Save and close `Devices.xml`.
7. Copy the files in the `Experience Manager\Samples\DeviceIcons` folder and paste them into your `TRIDION_HOME\web\WebUI\Editors\DeviceEmulator\DeviceIcons` folder.
8. Copy the files in the `Experience Manager\Samples\DeviceImages` folder and paste them into your `TRIDION_HOME\web\WebUI\Editors\DeviceEmulator\DeviceImages` folder.

2.6 Upgrading Safeguard

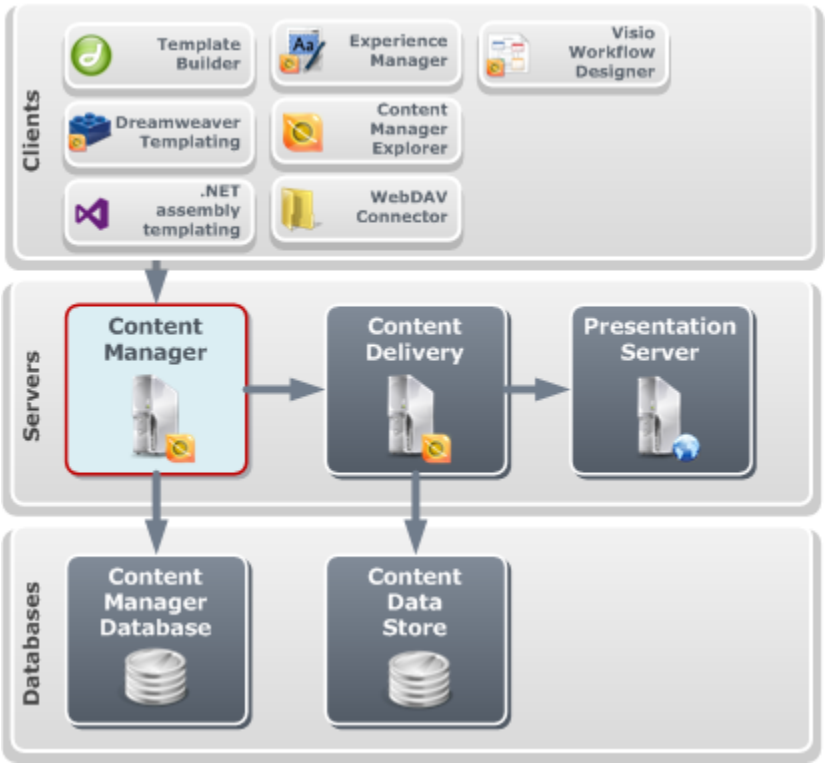
SDL Safeguard was previously delivered as an extension to SDL Tridion. In SDL Tridion 2013, Safeguard is delivered as part of the suite. When you install the Content Manager of SDL Tridion 2013, your Safeguard installation is upgraded for you including your custom settings in the `TRIDION_HOME\web\WebUI\Editors\Safeguard\ConfigurationSafeguard.config` file.

Requirements

When you run the Content Manager installer, in the **Advanced View** of the **Features** pane make sure **User Interfaces** > **Experience Manager** > **Safeguard** is selected.

Chapter 3 Upgrading the Content Manager server

Upgrade your Content Manager server and related features, such as Visio Workflow Designer and WebDAV Connector, by running the installer. If you are upgrading from SDL Tridion 2009 SP1, you first need to uninstall Content Manager.



3.1 Checking changes in prerequisites for Content Manager server

SDL Tridion 2013 Content Manager modules have different software prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1. This section provides an overview of changes in Content Manager module prerequisites.

3.1.1 Content Manager operating system support history

SDL Tridion 2013 Content Manager has a number of changed operating system prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Operating system	2009 SP1	2011 SP1	2013
Microsoft Windows 2003 SP2 (x86)	Y	P	N
Microsoft Windows 2003 SP2 (x64)	Y	P	N
Microsoft Windows 2003 R2 SP2 (x86)	Y	P	N
Microsoft Windows 2003 R2 SP2 (x64)	Y	P	N
Microsoft Windows 2008 SP2 (x86)	Y	Dr	N
Microsoft Windows 2008 SP2 (x64)	Y	Dr	N
Microsoft Windows 2008 R2 (x64)	N	Dr	N
Microsoft Windows 2008 R2 SP1 (x64)	N	Y	Y
Microsoft Windows Server 2012 (x64)	N	N	Y

3.1.2 Content Manager database client support history

SDL Tridion 2013 Content Manager has a number of changed database client prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release):

Database client	2009 SP1	2011 SP1	2013
Oracle ODAC 10.2.0.4	D	N	N
Oracle ODAC 11.1.0.7	Y	N	N
Oracle ODAC 11.2.0.1.2	N	Dr	N
Oracle ODAC 11.2.0.2	N	Y	N
Oracle ODAC 11.2.0.3	N	N	Y

3.1.3 Content Manager Web application server support history

SDL Tridion 2013 Content Manager has a number of changed Web application server prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Web application server	2009 SP1	2011 SP1	2013
Microsoft IIS 6	Y	P	N

Web application server	2009 SP1	2011 SP1	2013
Microsoft IIS 7	Y	Dr	N
Microsoft IIS 7.5	N	Y	Y
Microsoft IIS 8	N	N	Y

3.1.4 Content Manager Java and .NET support history

SDL Tridion 2013 Content Manager has a number of changed Java and .NET prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following tables: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

.NET Framework	2009 SP1	2011 SP1	2013
Microsoft .NET Framework 2.0 SP2	D	N	N
Microsoft .NET Framework 3.5 SP1	Y	Dr	N
Microsoft .NET Framework 4.0	N	Y	Y
Microsoft .NET Framework 4.5	N	N	Y

Java instance	2009 SP1	2011 SP1	2013
Java JDK 5.0	Y	Dr	N
Java JDK 6.0	Y	Y	P
Java JDK 7.0	N	N	Y
Java JRE 5.0	Y	Dr	N
Java JRE 6.0	Y	Y	P
Java JRE 7.0	N	N	Y

Content Manager server requires a 64-bit version of Java. Note that if you still use the Business Connector (deprecated), you may still require a 32-bit version of Java.

If you intend to run Java 7.0 on Windows, note that you also require the Microsoft Visual C++ 2010 Redistributable SP1. Refer to the `Readme.htm` Web page on the installation media for more information.

3.2 Preparing for the Content Manager server upgrade

Before upgrading Content Manager server, perform a number of preparatory tasks.

3.2.1 Uninstalling add-ons

If you have any add-on products installed, even if they are compatible with SDL Tridion 2013, uninstall all of them before upgrading Content Manager server. Compatible add-ons minimally require an uninstall and reinstall.

3.2.2 Preparing to upgrade SiteEdit to Experience Manager

If your current implementation of SDL Tridion software also includes an SDL SiteEdit implementation, some backup steps are required before you can upgrade Content Manager server.

Context

Depending on your

Steps to execute

1. If your instance of SDL SiteEdit is (partially) implemented in deprecated VBScript/JScript templates, decide if you want to upgrade these VBScript/JScript templates, or to migrate them.

   Upgrade

   Upgrading your existing SiteEdit-enabled VBScript/JScript templating code only requires you to add a Javascript command and republish. Do bear in mind, however, that your templating code is deprecated.

   Migration

   If you would prefer to migrate your VBScript/JScript code instead, migration would be part of a larger effort to migrate your VBScript templates to modular templating. For more general information about such a migration, refer to the documentation topics about deprecation. If you choose this option, you may also wish to run your old instance of SiteEdit and Experience Manager side by side.

2. On the Content Manager server machine, access the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`).

3. Navigate to the subfolder `SiteEdit 2009\SiteEdit\Application \Configuration\`.

4. In this folder, back up the file `SiteEdit.config` to a location of your choosing.

5. If all of the following applies:

   - You currently have SiteEdit implemented in VBScript/JScript templates
   - You want to upgrade your current implementation, or you want to run SiteEdit and Experience Manager side by side

then navigate to the `bin\` subfolder of the Content Manager root location. From that folder, back up the file `cc_SiteEdit2.dll` to a location of your choosing.

6. Unless you intend to run SiteEdit and Experience Manager side by side, access the section to add and remove software from your Windows Start Menu, and select to uninstall SiteEdit 2009 SP3.

3.2.3 Removing JAR files from the endorsed\ folder

If you are upgrading from SDL Tridion 2009 SP1, remove a set of JAR files that you were previously instructed to include in the `lib\endorsed\` subfolder of your Java installation.

Context

If you are upgrading from SDL Tridion 2009 SP1, then when setting up the Business Connector for that version on your Content Manager server, you were instructed to copy a number of JAR files to the `lib\endorsed\` subfolder of your Java installation. As of SDL Tridion 2011 SP1, this is no longer necessary and you must remove these JAR files.

To do this, access your Java Runtime Environment (JRE) root directory. You can identify this directory as the value of the following key in your registry: `HKLM\Software\JavaSoft\Java Runtime Environment\<VERSION>\JavaHome`, where `<VERSION>` is the Java version you use. From this root directory, access the `lib\endorsed\` subfolder and remove the following files in that location:

Steps to execute

1. On your Content Manager server, open your Registry Editor.
2. To find out the location of your Java Runtime Environment (JRE), check the value of the following key in your registry: `HKLM\Software\JavaSoft\Java Runtime Environment\<VERSION>\JavaHome`, where `<VERSION>` is the Java version you use.
3. Access this directory and then navigate to the `lib\endorsed\` subfolder.
4. Remove the following files in that location:
   - `xalan.jar`
   - `xercesImpl.jar`
   - `xml-apis.jar`

3.2.4 Renaming default Parameter Schemas

Before running your upgrade, you must rename some or all of your default Parameter Schemas in Content Manager Explorer.

Steps to execute

1. Access the Content Manager Explorer Web site.
2. Navigate to the Publication in which you set up your default templating items when you started using the Template Builder client application. By default, this Publication has a `Default Templates\` folder in the root folder, which contains these items.
3. In the folder that contains the default Parameter Schemas (`Building Blocks\Default Templates\` by default), rename every Schema that ends in the words 'Parameter Schema' so that those words are removed.

   For example, you would rename the item `Default Finish Actions Parameter Schema` to `Default Finish Actions`.

3.2.5 Backing up custom icons for Multimedia Types

If you are upgrading from SDL Tridion 2009 SP1, and if you have previously added Multimedia Types to your Content Manager installation, your icons for these Multimedia Types will be removed during the upgrade. Because of this, you must back up these icons.

Steps to execute

1. Access `web\Library\XML\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`).
2. In this location, open the file `Icons.xml` for editing.
3. At the bottom of the file, find a section marked `<!-- custom mimetypes -->`. If you see no such section, you have not added any icons.
4. In this section, identify the various `base` elements and check their `name` attributes. Each attribute value is a letter 'M' followed by the name of a MIME type associated with one of your custom Multimedia Types (for example, `Mapplication%2Fpff` if the MIME type is `application/pff`).
5. Go through the list of `base` elements and compile a list of MIME types.
6. Next, in Content Manager Explorer, access the list of **Multimedia Types**. You can find this list in the **Content Configuration** node,which you can find in the **System Administration** node.
7. In the list, find and open the Multimedia Types that you added. The following Multimedia Types are shipped with the product:
   - Gif image
   - Jpeg image
   - Png image
   - Word document
   - Excel sheet
   - Powerpoint presentation
   - Pdf document
   - Sound file
   - Plain text

- Rich text
- Executable
- MSAccess database
- Bitmap image
- Real player
- QuickTime movie
- Mp3 music
- Mpeg video
- Flash file
- Cascading style sheets
- Java script

8. Verify that the Multimedia Types you identified are indeed custom types by comparing each item's **MIME Type** field against the list of MIME types you collected from the `Icons.xml` file. For each item, right-click the icons you see and save them to a backup location of your choosing, and for convenience, note down which icons belong with with custom Multimedia Type.

9. Repeat this until you have found Multimedia Types for all MIME types listed in `Icons.xml`. You have now saved all custom icons you added.

3.2.6 Backing up TCM54.config

If you changed caching settings in the `TCM54.config` file in the `web\WebUI\Models\TCM54\Configuration\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`), back it up to a safe location.

3.2.7 Removing your Verity search collection

As of SDL Tridion 2011, the search engine used by Content Manager server is Lucene. Lucene replaces the old search engine, Verity, and so you can delete your Verity search collection. (After the upgrade, Lucene will create its own search collection automatically.)

Steps to execute

1. On the Content Manager server machine, access the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`)

2. Delete the `Search\` subfolder of this folder.

3.2.8 Uninstalling Content Manager server

If you are upgrading from SDL Tridion 2009 SP1, uninstall Content Manager server.

Steps to execute

1. Access your Content Manager server.

2. From your Windows Control Panel, access the **Programs and Features** option.
3. From the list that you see, selecting your old Content Manager: **Content Manager 2009 SP1** or **Content Manager 2011 SP1**
4. Selecting **Uninstall** in the toolbar above the list to uninstall the software.

   Windows uninstalls the software.
5. If the system prompts you for a restart, restart the machine.

Result

The Content Manager uninstall removes the following software components:

- Content Manager
- Content Manager Language Packs (English, Dutch, French, German, Spanish and Japanese)
- WebDAV Connector
- Visio Workflow Server
- Content Manager Explorer
- SpellChecker

The following items will remain:

- `cm_cnfg_git` (a configuration)
- license files
- Content Delivery files
- SiteEdit 1.3 files
- `CustomPages.xml`

3.2.9 Setting up Oracle client software before upgrading Content Manager server

Set up Oracle client software, as instructed by the installation topic.

3.2.10 Checking Workflow Process Definitions

As of SDL Tridion 2013, the old default Process Definitions "Component Process" and "Page Process" are no longer created when a new Publication is created. Instead, new Publications will include a new Process Definition called "Task Process". If you have any existing Process Definitions called "Task Process", rename them.

Steps to execute

1. Access the Content Manager Explorer Web site.
2. Select **Administration** in the navigation pane.
3. Expand the **Workflow Management** node.

4. Select **Process Definitions** .

   The list view displays the Process Definitions available in Content Manager.

5. Check the list for a Process Definition called "Task Process" (you would have created such a Process Definition yourself).

6. Only if you see one or more items called "Task Process" in the list, start Microsoft Visio and using Visio Workflow Designer, rename the Process Definition(s).

3.3 Upgrading Content Manager server

Upgrade the Content Manager server by running the installer. You can also choose to run an unattended installation from the command line.

Requirements

If you are upgrading from SDL Tridion 2009 SP1, ensure that you have uninstalled the Content Manager; if you are upgrading from SDL Tridion 2011 SP1, the installer will upgrade your installation for you.

Before you upgrade Content Manager Server:

- Stop IIS services to ensure that there are no active connections to the system. If connections to the database remain active, you will receive errors.
- Upgrade your Content Manager databases to SDL Tridion 2013.
- Log on as an administrator user.
- Create a backup of your Content Manager and Transport Service license files.
- Ensure that you have system administration information and database details you entered during your initial installation of the Content Manager as you will be prompted to provide these during upgrade.

Steps to execute

1. Do one of the following:
   - If you are upgrading from SDL Tridion 2009 SP1, open a command prompt, access the SDL Tridion installation media, navigate to the `Content Manager\` directory and enter the following command:

     ```
     SDLTridion2013CM.exe LEGACY_VISIBLE=TRUE
     ```

   - If you are upgrading from SDL Tridion 2011 SP1, open Windows Explorer, access the SDL Tridion installation media, navigate to the `Content Manager\` directory and double-click the executable `SDLTridion2013CM.exe`

   The installer wizard starts.

2. Follow the instructions on the screen, bearing in mind the following:

- You can select or clear features in **Typical View**, and individual software components in **Advanced View**. By default, the installer installs all software components (except legacy features if you are upgrading from SDL Tridion 2009 SP1).
- If you are upgrading from SDL Tridion 2009 SP1, select **Advanced View** and select all checkboxes in italics. These are legacy features that will otherwise not be installed.
- After running the installer, you can still install software components you choose not to install at a later time by running the installer again and selecting the **Modify** option.

Result

The installer has created a log file in subdirectory `SDL\Tridion\Logs\` of the path indicated by the `%PROGRAMDATA%` environment variable (defaults to `c:\ProgramData\`).

3.4 Configuring after the upgrade

Depending on your upgrade scenario, you may need to perform some configuration tasks after the upgrade. This section lists those tasks. Note that after you have completed these tasks, you must instruct users of the Content Manager Explorer interface to clear their Internet cache

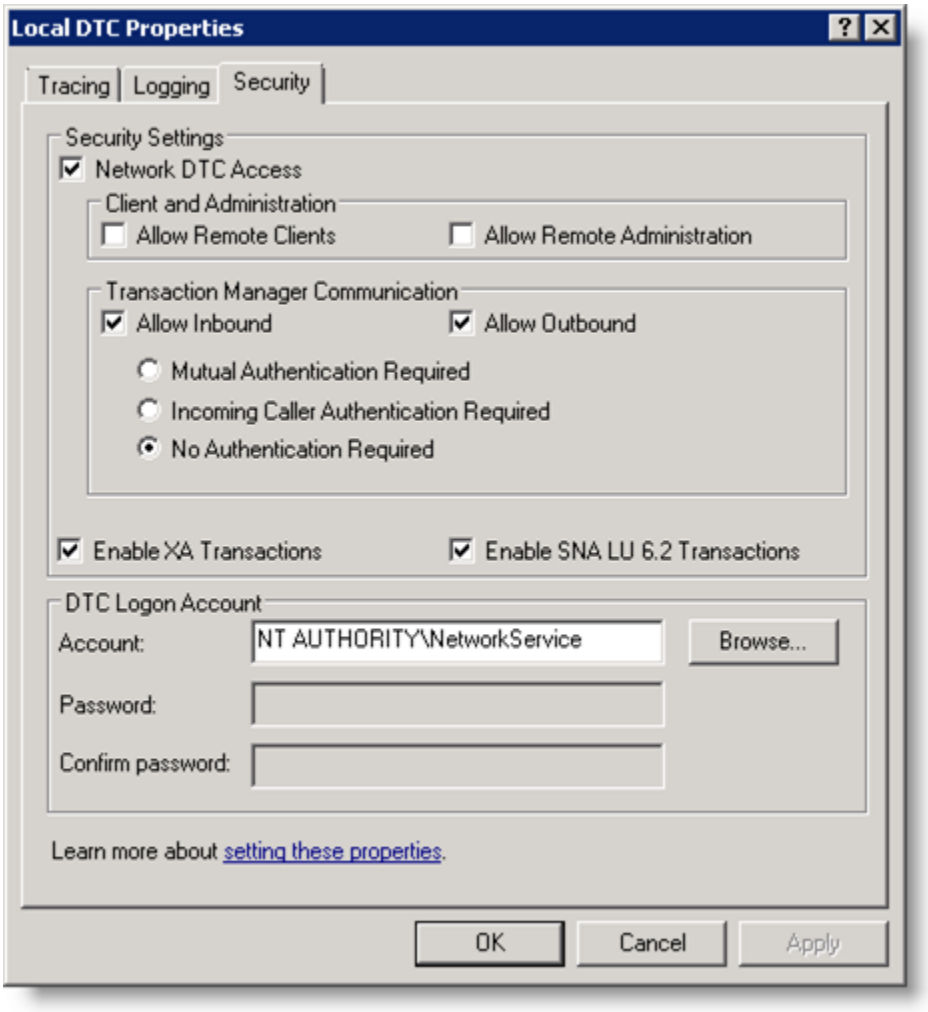
3.4.1 Changing DTC security settings

Only if your installation uses authentication across domains, change your DTC security settings.

Steps to execute

1. Open Server Manager and navigate to **Server Manager** > **Roles** > **Application Server** > **Component Services** > **Distributed Transaction Coordinator** > **Local DTC** . Right-click the **Local DTC** node and select **Properties** from the context menu. In the **Local DTC Properties** dialog that opens, select the **Security** tab.

2. The following settings are displayed:



3. In the **Transaction Manager Communication** area, select **No Authentication Required**.
4. Click **OK** to close the dialog.
5. Close all dialogs and windows you opened.

3.4.2 Indexing and configuring search after the upgrade

If you are upgrading from SDL Tridion 2009 SP1, then to use the new search engine, reindexing is required.

Context

If you are upgrading from SDL Tridion 2009 SP1, then after you have upgraded, you must create a new index for the new search engine. If you expect to index items containing more than 10,000 words, you must also configure your maximum item size (and possibly the amount of memory allocated by the search engine).

Also, the new Lucene-based search engine may result in different search results to your search queries than the old search engine. Specifically, operator precedence (in search queries such as `a AND b OR c`) is different in Lucene than in the old Verity search engine. You can work around the problem by using brackets to indicate precedence.

Steps to execute

1. On the Content Manager server machine, start Windows PowerShell (64-bit version) and execute the following command from the PowerShell command prompt:

   ```
   Import-Module Tridion.ContentManager.Automation
   ```

   PowerShell loads the assembly.

2. To reindex all Publications, from the PowerShell command prompt, enter the command `Sync-TcmSearchIndex`.

   A new search index is created.

3. Ask yourself if you know or expect that some of your Content Manager items will contain more than 10,000 words (equivalent to about 14 single-spaced pages of 11-point text), and if you want to have them indexed by the search engine. This also applies to words in binary documents, such as PDF files.

4. If the answer to this question is yes, then open the file `solrconfig.xml`, located in the `solr-home\tridion\conf` subfolder of the Content Manager server root location, for editing.

5. Find the element called `<maxFieldLength>`, change its value to the maximum number of words you expect the search engine to have to index, and save and close the `solrconfig.xml` file.

   The number you specify is itself bound by available memory (which by default is set to 1 GB). That is, if you specify a very large number here and actually try to index a content item with that many words, a memory exception may still occur. If you expect the default 1 GB to be too small, you can allocate more memory to the search engine as follows:

   - Access the subfolder `bin\` of the Content Manager root location.
   - In this folder, open the file `TcmSearchHost.exe.config` for editing.
   - Find the `solrHost` element. This element has an attribute called `jvmArguments` which contains a large number of settings.
   - Inside this string, find a setting called `jvmOptions`, which has a value that starts with `-Xmx1024M`.
   - Change `1024M` (that is, 1024 MB or 1 GB) to a memory value you expect to be sufficient for the `<maxFieldLength>` value specified earlier.
   - Save and close `TcmSearchHost.exe.config`.

6. Next, restart the **Tridion Content Manager Search Host** Windows service as above.

3.4.3 New identity of TDSE objects created by Event Handler

If your implementation contains 5.3 or 5.3 SP1 Event Handler code, reconfigure the identity of the user associated with executing this code.

The following information applies only if all of the following is true for you:

- At some point in the past, you have upgraded from SDL Tridion R5 5.3 or 5.3 SP1 to a newer version of SDL Tridion.
- You have 5.3 or 5.3 SP1 event handler code running in your system.
- You do not wish to migrate to the new TOM.NET-based Event System.
- You do not use LDAP.

If all of the above apply, note the following change: `TDSE` objects created by your Event Handler now assume the identity of the SDL Tridion Application Pool, which defaults to `NETWORK SERVICE` (or your localized equivalent on French or German systems).

This means one of the following:

- `NETWORK SERVICE` has insufficient access to execute the Event Handler code, and the Event Handler fails.
- `NETWORK SERVICE` has sufficient access to execute the Event Handler code, but now all events are logged as having been executed by `NETWORK SERVICE` rather than by the actual user who triggered the event.

You must now ensure that `NETWORK SERVICE` impersonates the actual user who triggered the event. To do this use `TDSE.Impersonate`. You can obtain the identity of the actual user by checking the `ITCMEvents.Identity` property.

It is also possible that you have chosen to run the Event Handlers in your own COM+ server application, `TDSE` objects are created by the server account that is configured as the identity of that COM+ application. In this situation, you must ensure that the server account configured as the identity of your COM+ application has sufficient access.

3.4.4 Setting up 32-bit Templating on the Content Manager after the upgrade

If you upgraded Content Manager server and if you use in-process 32-bit COM server DLLs as Template Building Blocks in a Template, replace your 64-bit Content Manager Publisher Windows service with its 32-bit equivalent.

Steps to execute

1. Access your Windows **Services**.
2. In the list of Services, find the item called **Tridion Content Manager Publisher**, select it and stop this service.
3. Without closing the **Services** dialog, open a command prompt and enter the following:

```
sc config TcmPublisher binPath="C:\Program Files
```


```
(x86)\Tridion\bin\TcmPublisher_x86.exe"
```

where `c:\Program Files (x86)\Tridion` can be replaced by the actual root location of SDL Tridion Content Manager, if you specified an alternative path during installation.

4. Close the command window.
5. In the **Services** dialog, restart the **Tridion Content Manager Publisher** Windows service.

Result

You have now configured a 32-bit Publisher service and can use 32-bit DLLs as Template Building Blocks.

3.4.5 Reconfiguring the Content Manager Explorer Web site

Several steps may be required to restore Content Manager Explorer.

Steps to execute

1. If you use a host header for HTTP(S) communication with your Content Manager Explorer Web site, update your `web.config` file as explained in the installation instructions.
2. If you backed up the `TCM54.config` file in the `web\WebUI\Models\TCM54\Configuration\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`), open the backed-up file and check which `cfg:cache` elements you uncommented, and how you configured them.
3. Open the new file by the same name in this location for editing, and reapply the same changes.

3.4.6 Updating the URLs without HTTP authentication setting

Upgrading to SDL Tridion 2013 or later requires you to extend the URLs that must be excluded from HTTP authentication. These URLs are defined by a regular expression in the **Urls without HTTP authentication** setting in the MMC Snap-in.

Steps to execute

1. Start the MMC Snap-in by selecting **Programs** > **SDL Tridion** > **SDL Tridion Content Manager configuration** in the Microsoft Windows Start menu.
2. Navigate to the **General Settings** screen and double-click the **Urls without HTTP authentication** setting to edit it.

3. In the popup that open, enter the following new value for this setting (on a single line):

```
(CoreService(\d\d\d\d)?\.svc/(streamUpload|wsHttp|wsFederationHttp|mex))|(TemplateBuilder)|
(.*\/SiteEdit\/Views\/Bootstrap\/.*)|(.*\/CME\/Themes\/.*\.png)
```

4. Click **OK** to close the popup and commit your changes.

5. Close the MMC Snap-in.

3.4.7 Configuring SiteEdit and/or Experience Manager on the Content Manager

If you are upgrading from an SDL Tridion implementation with SiteEdit installed, perform a number of tasks to upgrade this setup to Experience Manager .

Restoring cc_SiteEdit2.dll

If you backed up the file `cc_SiteEdit2.dll`, restore this file to complete your upgrade, or to run SiteEdit and the user interface side by side.

Steps to execute

1. Open a command prompt.

2. Navigate to the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`), then to the `bin\` subfolder.

3. Copy `cc_SiteEdit2.dll` from your backup location to this location and run the following command:

   ```
   regsvr32 cc_SiteEdit2.dll
   ```

4. Close the command prompt.

5. From the Windows Start menu, access the **SDL Tridion** group and select **SDL Tridion Content Manager configuration**.

   The MMC Snap-in configuration tool opens.

6. In the tree on the left, navigate to **Console Root** > **SDL Tridion Content Manager** > **Management server settings** > **Script Extensions** .

7. Right-click in an empty part of the content area on the right, and from the context menu that opens, select **New Script Extension**.

   A dialog pops up.

8. Fill in the settings as follows:

   TCM Object Name

   `SiteEdit`

   COM Object Name

   `TCMSiteEdit2.SiteEdit`

Remote Server

Leave this setting 'as is'.

9. Click **OK** to close the dialog and see the item appear in the list of script extensions. Close MMC and apply your changes by restarting the SDL Tridion Content Manager COM+ application and IIS.

Upgrading modular template code

If you want to upgrade modular, SiteEdit-enabled Page Templates and Component Templates to the new user interface, replace the Template Building Blocks.

Steps to execute

1. Access Template Builder.
2. Open each of the Page Templates that contain a Template Building Block called **Enable SiteEdit 2009**.
3. If you have values configured for **Override Page Publication** or **Override Component Publication** or both, note down the value(s) of the parameter(s).
4. Remove the Template Building Block and replace it with the Template Building Block called **Enable inline editing for Page**.
5. Under **SiteEdit Editor URL**, fill in the URL `http://<cme-hostname>/WebUI/Editors/SiteEdit/`, where *<cme-hostname>* is the host name of the Content Manager Explorer Web site.
6. Save and close the Page Template, and move on to the next Page Template.
7. Open each of the Component Templates that contain a Template Building Block called **Enable Inline Editing**, remove it and replace it with the Template Building Block called **Enable inline editing for content**.
8. Save and close the Component Template, and move on to the next Component Template.
9. Republish all Page Templates and Component Templates you modified.

Upgrading VBScript/JScript template code

Only if you are upgrading SiteEdit implemented in VBScript/JScript templating code, add a bootstrap command to the output of your old SiteEdit Page Templates.

Steps to execute

1. Open each of your VBScript/JScript Page Templates in which SiteEdit is enabled.

2. In each Page Template, add the following statement at the bottom of the output:

```
<script type="text/javascript" language="javascript" defer="defer"
src="http://<cme-hostname>/WebUI/Editors/SiteEdit/Views/Bootstrap/Bootstrap.aspx?
mode=js"
id="tridion.siteedit"></script>
```

   where *<cme-hostname>* is the host name of the Content Manager Explorer Web site.

3. Check if your Page Templates sets a value for `ComponentContext` and/or for `PageContext` in the `BluePrinting` section of the `SiteEdit Settings` SiteEdit command. If such values are specified, note them down.

4. Save and republish the Page Templates you modified.

Reapplying your SiteEdit configuration file settings

If you are upgrading or migrating a SiteEdit implementation, reapply the settings of your old SiteEdit configuration in the Dashboard or in the Content Manager Explorer GUI. Some SiteEdit configuration settings have no new equivalent, but your implementation will still continue to run.

`TopLevelConfiguration` versus `Configurations`

Where the old SiteEdit configuration allowed for separate configurations for specific Groups or Users, you can now only apply one set of configuration settings, which applies to all users.

`ComponentStateColors`

The new user interface has fewer border colors for the status of an item, and border colors apply both to Component borders and to Page borders. Also, you can now configure other border properties than just colors. The following old Component statuses do not have an equivalent in the new user interface:

- `Field`
- `FieldHover`
- `InvalidFieldHover`
- `NewerVersionAvailable`
- `Removed`
- `StartedWorkItem`
- `SwapSource`
- `SwapTarget`
- `WorkItem`

The following old Component statuses do have an equivalent, configurable in the Dashboard:

Old Component status name	Dashboard setting name
`Editable`	**Editable**
`Edited`	**Modified**

Old Component status name	Dashboard setting name
`InvalidField`	**Invalid** (this setting also applies to entire Components and Pages, not only to individual fields)
`ReadOnly` or `WorkItem`	**Non-editable** (this setting covers all cases of a Component or Page not being readily editable)

`RegionColor`, `SmartTargetUrl` and `AdministrativeUserId`

The functionality related to these settings is not yet implemented.

`ComponentToolbar`

This section, which let you set the visibility of the entire toolbar of a Component or of individual buttons (in the `ButtonsVisibility` subsection) no longer applies because the Component toolbar no longer exists. It is not possible to remove menu items from the Component context menu (or the new Page context menu), which replaces the Component toolbar.

`PublishStatusPollInterval`

The functionality related to this setting is not implemented.

`TargetTypeID`

This configuration setting created a mapping between publishing destinations in Content Manager and the published staging Web site on which SiteEdit ran. A similar mapping exists in the new user interface, but now you configure it in Content Manager Explorer. To reconfigure this mapping, do the following:

1. Access Content Manager Explorer.
2. Find the Target Type that has the ID configured in this `TargetTypeID` setting.
3. Open each of your Publication Targets in turn and in the **Publication** tab, check if the Target Type is listed in the list of **Allowed Target Types** at bottom right.
4. If this is true, set up publishing for that Publication Target.

`AddAutomaticComponentTypes`

The automatic generation of Component Types for Component creation, based on Components already on the page, is now configured on the Page Template level rather than system-wide. Note that Component Types are now called Content Types. You can switch off automatic generation of Content Types in the Dashboard, under **Content Type Settings**.

NewPageCreation

This section, which configures where new Pages are created and which 'cloned' or reused Components appear on it, is now configured in a Page being used as a Page Type. To reapply this configuration, create a new Page and enable its use as a Page Type.

Override Page Publication and Override Component Publication

If you used modular templating and you had set a value for either or both of these parameters of the **Enable SiteEdit 2009** Template Building Block, reapply these values in **BluePrint Context Settings** in the **Settings** screen of the **Dashboard**.

ComponentContext and PageContext

If you used VBScript/JScript templating and you had set a value for either or both of these properties in the `BluePrinting` section of your `SiteEdit Settings` command, reapply these values in **BluePrint Context Settings** in the **Settings** screen of the **Dashboard**.

Running SiteEdit and Experience Manager side by side

If you chose to migrate your VBScript/JScript templates, you may want to run SiteEdit and Experience Manager side by side. Apart from not uninstalling SiteEdit before applying the update, some additional steps are required after applying the update.

Steps to execute

1. Open IIS on the Content Manager server by doing one of the following:
   - In IIS 7.5, start **Server Manager** and in the window that opens, navigate the tree to the node **Roles** > **Web Server (IIS)** > **Internet Information (IIS) Services** .
2. Add a **SiteEdit** folder to each of the SiteEdit 2009 virtual folders for Models and for Editors:
   a. From the IIS tree, open the current machine, then the **Sites** node and then the **SiteEdit 2009** node.
   b. In this site, navigate to the virtual folder **WebUI** > **Models** .
   c. In this virtual folder, create a new virtual folder and call it **SiteEdit**.
   d. Add a physical path and set it to the `web\WebUI\Models\SiteEdit\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`).
   e. From the site root, now navigate to the virtual folder **WebUI** > **Editors** .
   f. In this virtual folder, create a new virtual folder and call it **SiteEdit**

g. Add a physical path and set it to the `web\WebUI\Editors\SiteEdit\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`).

3. Recycle the Application Pool by doing one of the following:
   - In IIS 7.5, in the IIS tree, select the current machine and select the node **Application Pools**. Select the item **SDL SiteEdit** in the list of **Application Pools** you see. On the right, click **Recycle**.
4. Reset IIS.

Command language API delta

Experience Manager has an API consisting of commands used in the form of HTML comments, but it still recognizes the SiteEdit HTML comment command API. Use this topic if you want to find out which parts of the API are now ignored, or if you want to migrate to the new API.

SiteEdit Settings command

This command is still recognized by its old name, but has been renamed to `Page Settings`.

Property or subcommand	Status in Experience Manager
`PageID`	Unchanged
`PageVersion`	Ignored only if the command property `PageModified` is set.
`PageTemplateID`	New property: the ID of the Page Template with which the Page was rendered to create this Web page.
`PageModified`	New property: the timestamp of the last published version of the Page object.
`PageTemplateModified`	New property: the timestamp of the last published version of the Page Template object.
`TargetTypeID`	Ignored. You can configure mappings between publishing destination and staging Web site as a system-wide setting only in Experience Manager . You configure this in Publication Targets inContent Manager Explorer.
`ComponentPresentationLocatic`	Ignored. You configure this position (for custom Content Types only) per Content Type in the Publication in Content Manager Explorer, on the **Content Types** tab.
`AddAutomaticComponentTypes`	Ignored. You configure this setting in the Page Template in Content Manager Explorer, on the **Content Types** tab.
`FormatAreaCss`	Ignored

Property or subcommand	Status in Experience Manager
`BluePrinting`	Ignored. You configure this setting in the Page Template in Content Manager Explorer, on the **BluePrinting Context** tab.
`ComponentTypes`	Ignored. You configure custom Content Types (as Component Types are now called) in a Publication in Content Manager Explorer, on the **Content Types** tab.
`Colors`	Ignored. You configure border colors (and other border properties) in the Dashboard.

Start SiteEdit Component Presentation command

This command is still recognized by its old name, but has been renamed to `Start Component Presentation`.

Property or subcommand	Status
`ID`	Ignored
`ComponentID`	Unchanged
`ComponentVersion`	Ignored if `ComponentModified` is set.
`ComponentModified`	New property: the timestamp of the last published version of the Component object.
`ComponentTemplateModified`	New property: the timestamp of the last published version of the Component Template object.
`IsRepositoryPublished`	New property: set to `true` if the Component was rendered with a Dynamic Component Template, `false` otherwise. This is regardless of whether the resulting Component Presentation was embedded on the Page or not.
`ComponentTemplateID`	Unchanged
`SwapLabel`	Ignored. The positioning of Component Presentations on the Web page no longer uses swapping, but rather insertion.
`IsQueryBased`	Unchanged
`NewComponent`	Ignored. You configure Component creation and set up entirely in Content Manager Explorer.

Start SiteEdit Component Title Field command

This entire command is ignored. Experience Manager either generates the title of a new Component itself or prompts the user for it.

Start SiteEdit Component Field command

This command is still recognized by its old name, but has been renamed to `Start Component Field`.

Property or subcommand	Status
`ID`	Ignored
`IsMultiValued`	Ignored
`XPath`	Unchanged

Start SiteEdit Promotion Region command

This entire command, and its subcommand "SiteEdit Start Query", are ignored. The functionality related to these commands is not yet implemented.

3.4.8 Optional: Reconfiguring the Content Manager Explorer Web site for HTTPS

If your Content Manager Explorer Web site was originally accessible through HTTPS, you need to perform some additional configuration to make it accessible through HTTPS again. For more information, refer to the installation topics.

3.4.9 Optional: Reconfiguring the Content Manager Explorer Web site for LDAP

If your Content Manager Explorer Web site was configured for LDAP, you need to redo a number of Web site configurations after the upgrade.

Uninstalling your existing version of SDL Tridion removed the existing Content Manager Explorer Web site on your system. The new Content Manager Explorer Web site that SDL Tridion 2011 has installed is configured for non-LDAP use. This means that if you were using LDAP, you need to configure the Web site for LDAP, as explained in the installation instructions.

3.4.10 Hiding workflow-related GUI controls after upgrade

As of SDL Tridion 2013, by default, the Content Manager Explorer and Experience Manager GUIs show a **Things To Do** panel, used for workflow-related functionality. If you do not use, nor intend to use, workflow in your implementation of SDL Tridion, you can hide this panel by setting `enableworkflowinfo` to `false` in the `CME.config` configuration file. Refer to the installation topics for more information.

3.4.11 Configuring and reinstalling compatible add-ons

After upgrading to SDL Tridion 2013, some compatible add-ons will require you to perform additional configuration such as applying hotfixes. In the case of WebForms, you should have uninstalled the product before upgrading so you will need to reinstall WebForms.

3.5 Upgrading your GUI extension implementation

If you built a GUI extension for SDL Tridion, recompile (and possibly modify) your code.

Steps to execute

1. For architectural reasons, two assemblies have been split off of the assembly `Tridion.Web.UI.Models.TCM54.dll`:
   - `Tridion.Web.UI.Models.Interfaces`
   - `Tridion.Web.CMUtils`

   `Tridion.Web.UI.Models.TCM54.dll` is now an internal-only DLL. If your code references the Models assembly, recompile it against these new assemblies. (If your extension does not interact with Content Manager, you do not need `Tridion.Web.CMUtils`.)

2. If your GUI extension contains a customized list view (that is, if you changed the list definition file for one more specific lists in specific views), your custom list view will no longer work, but raise no errors either. To upgrade your list view to work again, refer to the new GUI Extension API (available from SDL Tridion World).

3.6 Content Manager functionality migration

SDL Tridion 2011 Content Manager deprecated a number of old software modules in favor of new ones. In each case, you can choose to continue using the deprecated feature, but because it may be dropped in the next release, you may want to migrate already to the new functionality.

3.6.1 Migrated functionality

A list of Content Manager features or software modules that are now deprecated, and the features that replace them.

Deprecated feature	Replacement feature
TOM-based Event System	TOM.NET-based Event System

Deprecated feature	Replacement feature
Interop assemblies to TOM from TOM.NET API	TOM.NET-only assemblies
SOAP-compliant Business Connector	Core Service Web service

3.6.2 Migrating from TOM Event System to TOM.NET Event System

Migrate from your Event System to .NET by mapping TOM-based event triggers to a Subject, Type and Phase in the new TOM.NET-based Event System. You also need to rewrite your original event handler code in .NET.

Steps to execute

1. Determine the item type that triggers your event. For example, if your event trigger is called `OnKeywordLocalizePost`, the item type is Keyword. In your new event code, set your Event Subject to this value.

2. Determine the operation that triggers your event. For example, if your event trigger is called `OnComponentTemplateUndoCheckOutPre`, the operation is Undo Check Out. In your new event code, set your Event Type to this value followed by `EventArgs`, for example, `SaveEventArgs`. However, note the following exceptions:
   - If the old operation is one of the following: `Assign`, `Restart`, `Start` or `Suspend`, add the string `Activity`. For example, if the original event trigger is called `OnActivityInstanceStartPost`, set the Event Type to `StartActivityEventArgs`.
   - If the old operation is `Finish`, check the item type. If the item type is `ActivityInstance`, set the Event Type to `FinishActivityEventArgs`; if it is `ProcessInstance`, set it to `FinishProcessEventArgs`.
   - If the old operation is `SetPublishedTo`, set the Event Type to `SetPublishStatusEventArgs`.
   - If the old operation is `PasteItem`, set the Event Type to `MoveEventArgs` or `CopyEventArgs`.

3. Determine the phase in which your event code is to be triggered, either Post or Pre. If your event trigger named ends in `Pre`, set the Event Phase to `Initiated`, and if it ends in `Post`, set the Event Phase to `Processed`.

   Using these steps, you would translate an event trigger ending in `SavePost` into an Event Type `SaveEventsArgs` and an Event Phase `Processed`. But depending on your wishes, in some circumstances you may want to set the type to `CheckInEventArgs` and the phase to `TransactionCommitted`. Refer to the documentation about Event Handlers to find out if this combination is more appropriate for your situation.

   The following TOM-based Event Triggers do not have a TOM.NET equivalent:

   `OnSchemaGetInstanceDataPost`

   This event trigger does not exist. You can approximate it by the combination of the Subject `Component`, the Type `SaveEventArgs` and the Phase `Initiated`.

Any event trigger with a `Resolve` or `Render` operation

There are no event triggers for resolve or render operations. You can implement custom resolving and/or rendering behavior by implementing a custom Resolver and/or Renderer.

4. Rewrite your original event handler code in .NET.

Chapter 4 Upgrading the Experience Manager

The Experience Manager user interface for in-context editing replaces SiteEdit if you are upgrading from an SDL Tridion instance with SiteEdit added. If you are upgrading from SDL Tridion 2011 SP1 with the new user interface installed, running the installer updates the user interface. Note that to upgrade Experience Manager , you also need to upgrade the Content Delivery Server Roles (Web service and Web site extension) associated with Experience Manager (called Session Preview previously).

4.1 Changes in prerequisites for Experience Manager

This section explains how the prerequisites for the Experience Manager have changed compared to SiteEdit 2009 SP3 running alongside SDL Tridion, or compared to SDL Tridion 2011 SP1 with the user interface update applied.

4.1.1 Changes to operating system prerequisites for Experience Manager

This topic shows the difference in (client-side) operating system prerequisites between SiteEdit 2009 SP3 and the Experience Manager in SDL Tridion 2013.

Client-side operating systems

In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Operating system	SiteEdit 2009 SP3	User interface update for SDL Tridion 2011 SP1	SDL Tridion 2013
Microsoft Windows Server 2003 SP2 x86	Y	P	N
Microsoft Windows Server 2003 SP2 x64	Y	P	N
Microsoft Windows Server 2003 R2 SP2 x86	Y	P	N
Microsoft Windows Server 2003 R2 SP2 x64	Y	P	N

Operating system	SiteEdit 2009 SP3	User interface update for SDL Tridion 2011 SP1	SDL Tridion 2013
Microsoft Windows Server 2008 SP2 x86	D	Dr	N
Microsoft Windows Server 2008 SP2 x64	D	Dr	N
Microsoft Windows Server 2008 R2 x64	Y	Dr	N
Microsoft Windows Server 2008 R2 SP1 x64	N	N	Y
Microsoft Windows Server 2012 x64	N	N	Y
Microsoft Windows XP Professional SP3 x86	D	Dr	N
Microsoft Windows XP Professional SP2 x64	D	Dr	N
Microsoft Windows 7 x86	Y	Dr	N
Microsoft Windows 7 x64	Y	Dr	N
Microsoft Windows 7 x86 SP1	N	Y	Y
Microsoft Windows 7 x64 SP1	N	Y	Y
Microsoft Windows 8 x86	N	N	Y
Microsoft Windows 8 x64	N	N	Y
MacOS X 10.6 Snow Leopard	Y	Dr	N
MacOS X 10.7 Lion	N	Dr	N
MacOS X 10.8 Mountain Lion	N	N	Y

4.1.2 Changes to Internet browser prerequisites for Experience Manager

This topic shows the difference in Internet browser prerequisites between SiteEdit 2009 SP3 and the Experience Manager in SDL Tridion 2013.

Internet browsers

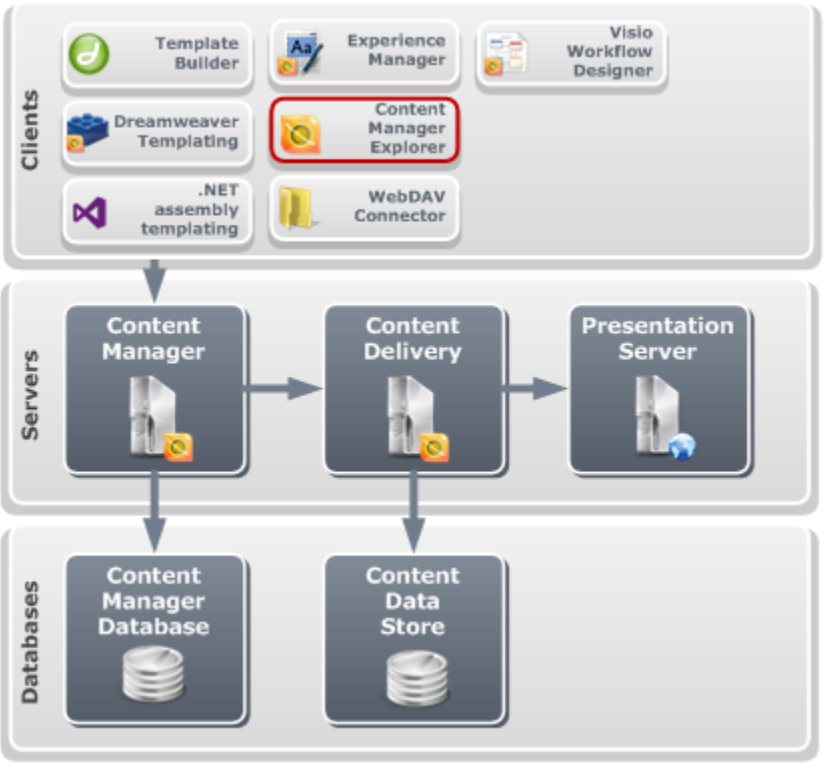
In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the next version release), Dr=Dropped (support is definitely dropped in the next version release):

Internet browser	SiteEdit 2009 SP3	User interface update for SDL Tridion 2011 SP1	SDL Tridion 2013
Microsoft Internet Explorer 7.0	Y	Dr	N

Internet browser	SiteEdit 2009 SP3	User interface update for SDL Tridion 2011 SP1	SDL Tridion 2013
Microsoft Internet Explorer 8.0	Y	Dr	N
Microsoft Internet Explorer 9.0	N	N	Y
Microsoft Internet Explorer 10.0 (for Windows 8 or Windows Server 2012)	N	N	Y
Google Chrome 8	Y	Dr	N
Google Chrome - latest version	N	N	Y
Mozilla Firefox 3.6	Y	N	N
Mozilla Firefox - latest version	N	Y	Y
Safari 5 for Macintosh	Y	N	N
Safari 5.1 for Macintosh	N	Dr	N
Safari 6.0 for Macintosh	N	Y	Y

Chapter 5 Upgrading the Content Manager Explorer client

Upgrade the Web-based Content Manager Explorer client by checking changes prerequisites and clearing the Internet cache.



5.1 Checking changes in prerequisites for the Content Manager Explorer

SDL Tridion 2013 Content Manager Explorer has changed a number of prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

5.1.1 Content Manager Explorer operating system support history

SDL Tridion 2013 Content Manager Explorer has a number of changed operating system prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Operating system	2009 SP1	2011 SP1	2013
Microsoft Windows Server 2003 SP2 x86	Y	P	N
Microsoft Windows Server 2003 SP2 x64	Y	P	N
Microsoft Windows Server 2003 R2 SP2 x86	Y	P	N
Microsoft Windows Server 2003 R2 SP2 x64	Y	P	N
Microsoft Windows Server 2008 SP2 x86	Y	Dr	N
Microsoft Windows Server 2008 SP2 x64	Y	Dr	N
Microsoft Windows Server 2008 R2 x64	N	Dr	N
Microsoft Windows Server 2008 R2 SP1 x64	N	Y	Y
Microsoft Windows Server 2012 x64	N	N	Y
Microsoft Windows XP Professional SP3 x86	Y	Dr	N
Microsoft Windows XP Professional SP2 x64	Y	Dr	N
Microsoft Windows Vista SP1 x86	D	N	N
Microsoft Windows Vista SP1 x64	D	N	N
Microsoft Windows Vista SP2 x86	D	N	N
Microsoft Windows Vista SP2 x64	D	N	N
Microsoft Windows 7 x86	N	Dr	N
Microsoft Windows 7 x64	N	Dr	N
Microsoft Windows 7 x86 SP1	N	Y	Y
Microsoft Windows 7 x64 SP1	N	Y	Y
Microsoft Windows 8 x86	N	N	Y
Microsoft Windows 8 x64	N	N	Y
MacOS X 10.6 Snow Leopard	N	Dr	N
MacOS X 10.7 Lion	N	Y	N
MacOS X 10.8 Mountain Lion	N	N	Y

5.1.2 Content Manager Explorer internet browser support history

SDL Tridion 2013 Content Manager Explorer has a number of changed browser prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the next version release), Dr=Dropped (support is definitely dropped in the next version release):

Internet browser	2009 SP1	2011 SP1	2013
Microsoft Internet Explorer 6.0 SP2	D	N	N
Microsoft Internet Explorer 7.0	Y	Dr	N

Internet browser	2009 SP1	2011 SP1	2013
Microsoft Internet Explorer 8.0	Y	Dr	N
Microsoft Internet Explorer 9.0	N	Y	Y
Microsoft Internet Explorer 10.0 (for Windows 8 and Windows Server 2012)	N	N	Y
Google Chrome 4	N	Dr	N
Google Chrome 5	N	Dr	N
Google Chrome 6	N	Dr	N
Google Chrome 7	N	Dr	N
Google Chrome - latest version	N	Y	Y
Mozilla Firefox 3.6	N	N	N
Mozilla Firefox - latest version	N	Y	Y
Safari 4 for Macintosh	N	N	N
Safari 5 for Macintosh	N	Dr	N
Safari 5.1 for Macintosh	N	Y	N
Safari 6.0 for Macintosh	N	N	Y

5.1.3 Changing browser response to unsupported version

If you want, you can change how Content Manager Explorer responds to a specific browser version after your installation, you need to configure the `system.config` file.

Context

The list of supported browser versions may differ from the list that was known and tested at the time of release, resulting in the Content Manager Explorer displaying a warning saying that your browser version is not supported. This is specifically true for Chrome and Firefox.

If you experience problems using Content Manager Explorer with a new version of Chrome or Firefox, consult the online documentation, the SDL Tridion World Web site at `http://www.sdltridionworld.com/` (requires a login and password), or SDL Customer Support, to see if a hotfix for your browser version exists.

Steps to execute

1. On the Content Manager server, access the `WebUI\WebRoot\Configuration` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`) and open the file `system.config` file you find there in a plain-text or XML editor.

2. At the beginning of this file, you see a list of `browser` elements contained in a `<supportedbrowsers>` section.

3. To stop Content Manager Explorer from issuing a warning for a browser version listed as supported here, add a new `browser` element and set the `name` and `regExp` attributes to values that represent the supported version. This is best done by copying the `browser` element for an earlier version and changing the numbers.

4. To make Content Manager Explorer issue a warning for a browser version that is no longer listed as supported here, remove the `browser` element that has its `name` attribute set to the browser version you want to issue a warning for.

5. Save and close `system.config` and restart IIS.

5.2 Clearing the browser cache

The upgrade to SDL Tridion 2013 means that Content Manager Explorer users must clear their Internet cache before using the new Content Manager Explorer interface.

To clear the cache, do one of the following:

Internet Explorer users

Select the gear icon at top right and **Internet Options** from the menu that opens. The **Internet Options** dialog opens, showing the **General** tab. In the **Browsing History** area, click **Delete**. The **Delete Browsing History** dialog opens. In this dialog, ensure that **Temporary Internet Files** is selected and click **Delete** to delete the files and close the dialog. Click **OK** again to close the **Internet Options** dialog.

Mozilla Firefox users

From the **Firefox** menu at top left, select **Options** > **Options** . In the dialog that opens, select the **Advanced** screen and then the **Network** tab. In the **Cached Web Content** area, click **Clear Now**. Click **OK** to close the dialog and return to Firefox.

Google Chrome users

Open the settings button (three horizontal lines) at top right and select **Tools** > **Clear browsing data** . Ensure that the checkbox labeled **Empty the cache** is selected, then click **Clear browsing data**.

Safari for Mac users

Open the **Safari** menu and select **Empty Cache**. Confirm by clicking the **Empty** button in the confirmation dialog.

5.3 Configuring or reconfiguring your browser for Content Manager Explorer

This section explains how to configure or reconfigure your Web browser for use with Content Manager Explorer after an upgrade.

Requirements

- Before performing this task, you must have already configured Internet Explorer for 2009 SP1 or 2011 SP1 on your client system. If this is not the case, refer to the installation topics to learn how to configure Internet Explorer.
- You must have sufficient rights on the client system in order to be able to perform these tasks.

Steps to execute

1. If you intend to use Mozilla Firefox as your browser, do the following:

   a. While logged in as an end user, launch Firefox and type `about:support` in the address bar.

   b. In the **Application Basics** area, check the **Profile Directory** property and click **Open Containing Folder** next to it.

   Windows Explorer (Windows) or Finder (Mac) opens, showing the Firefox profile folder.

   c. Close Firefox.

   d. In the folder, check for the presence of a file called `user.js`. If it exists, open it in a plain-text editor; if it does not exist, create it in a plain-text editor.

   e. Add the following lines anywhere in the `user.js` file:

   ```
   user_pref("capability.policy.policynames", "allowclipboard");
   user_pref("capability.policy.allowclipboard.sites", "http://<cmsname>");
   user_pref("capability.policy.allowclipboard.Clipboard.cutcopy", "allAccess");
   user_pref("capability.policy.allowclipboard.Clipboard.paste", "allAccess");
   user_pref("browser.link.open_newwindow", 2);
   ```

   in which *<cmsname>* is the domain name of the Content Manager server machine.

   Note: You can also add comments on separate lines. Start these lines with a double forward slash (`//`).

   f. Save and close the `user.js` file.

   g. If you are using Firefox on Mac OS X, also do the following:

   - In the Apple menu, select **System Preferences**, then **Keyboard and Mouse**, then **Keyboard Shortcuts**
   - Under **Full Keyboard Access**, select **All controls**.

   Mozilla Firefox is now properly configured.

2. If you intend to use Google Chrome as your browser, SDL Tridion recommends to disable the auto-update functionality of Chrome.

By default, Google Chrome is configured to auto-update to its latest version. Because this user interface cannot be guaranteed to work with a newer version of Google Chrome,disabling auto-updating is recommended. To disable auto-updating in Google Chrome, refer to this Web page: http://www.chromium.org/administrators/turning-off-auto-updates.

3. If you want to have additional information available about the current state of its window, enable the browser Status Bar (visible at the bottom of the screen):
   - In Mozilla Firefox, select **View** > **Status Bar**
   - In Microsoft Internet Explorer, select **View** > **Toolbars** > **Status Bar**
   - In Google Chrome, this feature is not available
4. For all browsers you intend to use, disable popup-blocking functionality.

5.4 Upgrading Custom Pages

As of SDL Tridion 2011, Custom Pages have a new XML format. If you are upgrading from SDL Tridion 2009 SP1, use the Custom Page Converter tool to convert your existing Custom Page XML files to new ones. You may also need to update the title of the default Custom Page.

Steps to execute

1. If you are upgrading from SDL Tridion 2011 SP1, you can skip this topic.
2. Alternatively, if you are upgrading from SDL Tridion 2009 SP1, open a command prompt, access the `Content Manager\Additional Tools\Upgrade Support` folder of the SDL Tridion installation media and run `CustomPagesConverter.exe` using the following command (without parameters):

```
CustomPagesConverter.exe
```

3. If you run the converter without parameters, it will try to use the registry key `\HKEY_LOCAL_MACHINE\Software\Tridion\Content Manager Web Site\InstallDirWebSite` to locate the source and destination Custom Page XML files:
   - The source is the Custom Page XML file that belongs to your old Content Manager Explorer.
   - The destination XML file is part of Content Manager Explorer 2013 and must exist as well.

   Note: In order for the destination file to exist, at least one user must first have logged on to the new, upgraded Content Manager Explorer.
4. If, for some reason, the registry key cannot be found, you can also run the converter and specify the two mandatory parameters (the old and new Custom Pages files) yourself by typing the following (if you installed the Content Manager in the default folder):

```
CustomPagesConverter.exe "C:\Program Files (x86)\Tridion\web\Library\XML
\CustomPages.xml"
  "C:\Program Files (x86)\Tridion\web\WebUI\Editors\CME\Preferences\CustomPages.xml"
```

You can run also the following command to show the available options for the converter:

```
CustomPagesConverter.exe /?
```

5. Access the Content Manager Explorer Web site.
6. In the **Shortcuts** navigation pane, select thye **Custom Pages** node.

   You see the Custom Pages in your system, including one named **SDL Tridion 2009 SP1**.
7. Select that Custom Page and in the **Home** Ribbon tab, select **Properties**.

   The **Properties** dialog for this Custom Page opens.
8. Change the **Name** field to **SDL Tridion 2013** and click **Save and Close**.

   Your default Custom Page is now up to date.

5.5 Restoring custom Multimedia Type icons

Restore any icons used in custom Multimedia Types that you backed up before performing the upgrade.

Steps to execute

1. Access Content Manager Explorer as an administrator-type user and access the **Administration** tab at bottom left.

   The **Administration** tree appears on the left.
2. Select the node called **Multimedia Types**.

   A list of Multimedia Types appears on the right.
3. Check the list for your custom Multimedia Types. If you prepared for the upgrade by following the instructions, you have a list of these items.
4. Open each of these custom Multimedia Types in turn and do the following:
   - Click **Load from Disk** for the icon marked **48x48**. In the dialog that opens, access the location in which you backed up your custom icons and select the 32x32 icon you saved. The filename is an 'M', followed by the name of the MIME type, followed by `32x32.png`; for example, `Mapplication%2Fpff32x32.png`. (The icon will be resized to 48 by 48 pixels.) Click **Open** to load the icon.

- Click **Load from Disk** for the icon marked **16x16**. Access the location in which you backed up your custom icons and select the 16x16 icon you saved. The filename is an 'M', followed by the name of the MIME type, followed by `16x16.png`; for example, `Mapplication%2Fpff16x16.png`.Click **Open** to load the icon.
- Click **Save and Close** to save this Multimedia Type.

5. Repeat this procedure for each custom Multimedia Type.

Result

You have successfully restored all of your custom icons.

5.6 Reimplementing Web resources used by Custom URLs

If you upgrade from SDL Tridion 2009 SP1, some changes may require you to reimplement the code in Web resources referenced by Custom URLs.

Context

A Custom URL is an optional property of a Schema field. If you set this property to a URL while creating your Schema, then any items based on this Schema (say, Components) display the label of the field name as a clickable link. Clicking the link accesses the Web resource at the URL provided.

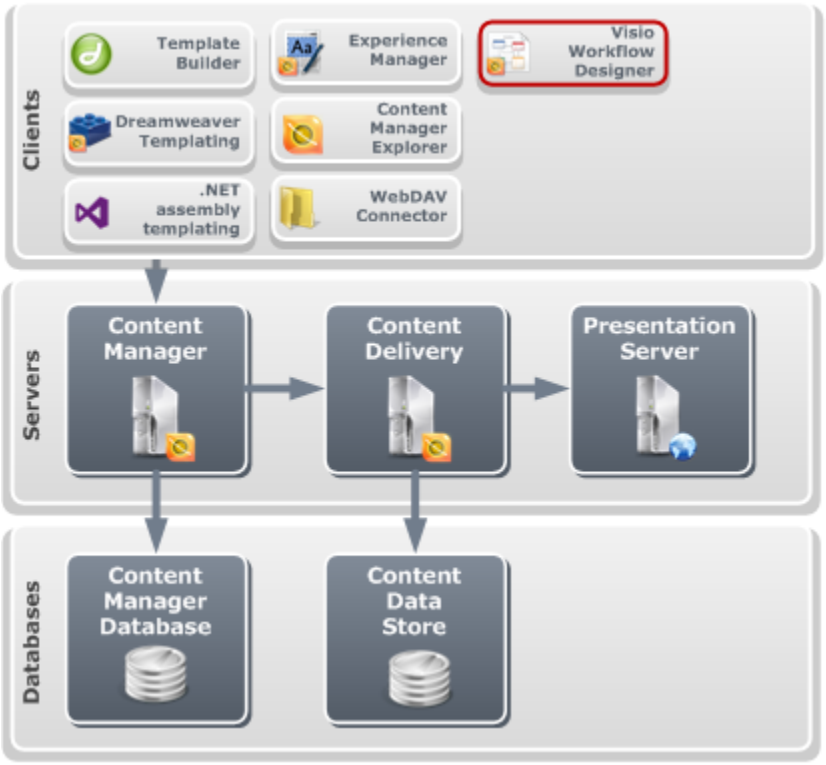
You can make the Custom URL property refer to normal content on a Web page. Such content could contain, for example, hint text explaining what the author should fill in in this field. If you implemented these kinds of Web resources only, your implementation will continue to work normally.

On the other hand, in earlier versions of SDL Tridion it was also possible to access various properties of the field, its container, and a number of other properties. Refer to the topics about Custom URLs in the chapter about Schemas in your old SDL Tridion *Content Management Implementation Manual*. These properties were available in the Web page through the `window.dialogArguments` property. You could also set the values of the various field properties from the Web resources in the `window.returnValue` property.

As of SDL Tridion 2011, these properties can still be accessed and manipulated, but your original script code will no longer work. Not only does the new GUI framework no longer support ASP, there is now also a specific API for manipulating these values. Refer to the Content Manager implementation documentation for details.

Chapter 6 Upgrading the Workflow Designer client

Upgrade Workflow Designer by uninstalling and reinstalling the product on each client machine.



6.1 Workflow Designer support history

SDL Tridion 2013 Workflow Designer has a number of changed third-party software prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Microsoft Visio	2009	2009 SP1	2011	2011 SP1	2013
Microsoft Visio 2003 SP3	Y	D	N	N	N
Microsoft Visio 2007 SP1	Y	D	N	N	N
Microsoft Visio 2007 SP2	N	Y	Y	Dr	N

Microsoft Visio	2009	2009 SP1	2011	2011 SP1	2013
Microsoft Visio 2007 SP3	N	N	N	P	N
Microsoft Visio 2010 (32-bit)	N	N	Y	Dr	N
Microsoft Visio 2010 SP1 (32-bit)	N	N	N	Y	Y

Microsoft XML	2009	2009 SP1	2011	2011 SP1	2013
Microsoft XML 4.0 SP3	Y	Y	Y	Y	N
Microsoft XML 6.0	N	N	N	N	Y

6.2 Upgrading Workflow Designer client

If you have upgraded your Content Manager databases and Content Manager server, and if you are logged on to the client machine as an administrator user, uninstall your existing client, then install the new one.

6.2.1 Uninstalling the existing Workflow Designer client

Uninstall your existing client from the Windows Control Panel before you install the new client.

Steps to execute

1. On a client machine that has the Designer installed, ensure that you are logged in as an administrator-type user and access the **Windows Control Panel** and select to see the installed software on this machine.
2. From this list, select **Visio Workflow Designer 2009**, **Visio Workflow Designer 2009 SP1**, **Visio Workflow Designer 2011**, **Visio Workflow Designer 2011 SP1** and select to remove it. Uninstall Workflow Designer by following the instructions on the screen.
3. If Windows prompts you to restart, restart the machine.

6.2.2 Installing the SDL Tridion Workflow Designer client

Install the new Workflow Designer on a client system to be able to design Content Manager Workflow Process Definitions.

Steps to execute

1. Log on to the client machine as a user who will be designing Workflow Process Definitions.
2. On the SDL Tridion 2013 installation media, access the folder `Content Manager\Additional Products\Visio Workflow Designer` and run `Install Visio Workflow Designer Client 2013`.

3. Follow the instructions on the screen to install the client.
4. Log off and, if necessary, repeat the same procedure for another user.
5. Navigate to the `Content Manager\Additional Products\Visio Workflow Designer` folder.
6. Double-click the shortcut **Install Visio Workflow Designer Client**.

   The Visio Workflow Designer client application installer starts up.
7. Follow the instructions to install Visio Workflow Designer.

6.3 Upgrading existing default Workflow Process Definitions

If you are upgrading from a release earlier than SDL Tridion 2011, you must update any existing Page Process and Component Process that are in use. This is because SDL Tridion 2011 changed these items.

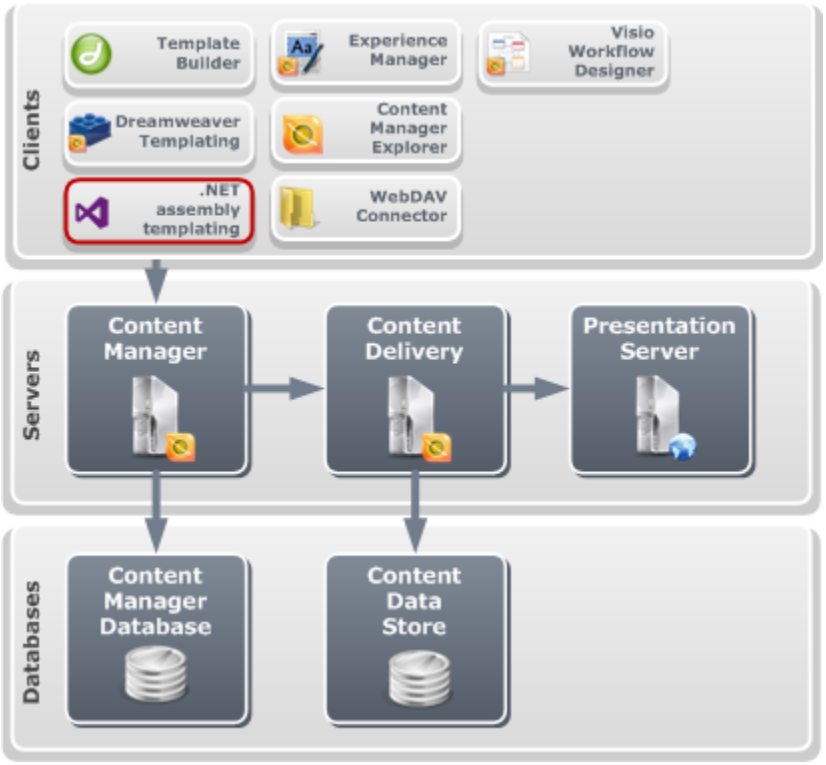
Steps to execute

1. Open each Page Process or Component Process in your Content Manager installation in Workflow Designer in turn.
2. In the Page Process or Component Process you see, find the Workflow Activity called Approve for Publish and double-click it to edit it.
3. Set **Approval Status** (now set to 'Default_Live') to an empty value.
4. Save and close the Workflow Process Definition.
5. Repeat these steps for all Page Process or Component Process items.

Chapter 7 Upgrading or setting up .NET assembly templating

Upgrade (or install) .NET assembly templating by copying resource files. You can install .NET assembly templating on the same machine as Template Builder.

Context



7.1 Copying .NET assembly templating resources

Copy .NET assembly templating resources to upgrade or set up .NET assembly templating on a client machine.

Steps to execute

1. On the Content Manager server machine, navigate to the `bin\client\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`).

2. From this location, copy the following files to a folder to your liking on your client machine:
   - `Tridion.Common.dll`
   - `Tridion.Common.xml`
   - `Tridion.ContentManager.Common.dll`
   - `Tridion.ContentManager.Common.xml`
   - `Tridion.ContentManager.dll`
   - `Tridion.ContentManager.xml`
   - `Tridion.ContentManager.Publishing.dll`
   - `Tridion.ContentManager.Publishing.xml`
   - `Tridion.ContentManager.Queuing.dll`
   - `Tridion.ContentManager.Queuing.xml`
   - `Tridion.ContentManager.TemplateTypes.dll`
   - `Tridion.ContentManager.TemplateTypes.xml`
   - `Tridion.ContentManager.Templating.dll`
   - `Tridion.ContentManager.Templating.xml`
   - `Tridion.ContentManager.TypeRegistration.dll`
   - `Tridion.ContentManager.TypeRegistration.xml`
   - `Tridion.Logging.dll`
   - `Tridion.Logging.xml`
   - `TcmUploadAssembly.exe`
   - `TcmUploadAssembly.exe.config`

   When you create a .NET assembly to use in a Compound Template, you add these .NET assemblies (DLL files) to your project, and upload your compiled .NET assembly using the `TcmUploadAssembly.exe` tool.

Note: Do *not* add these .NET assembly to the Global Assembly Cache. This is not necessary.

7.2 .NET Templating .NET support history

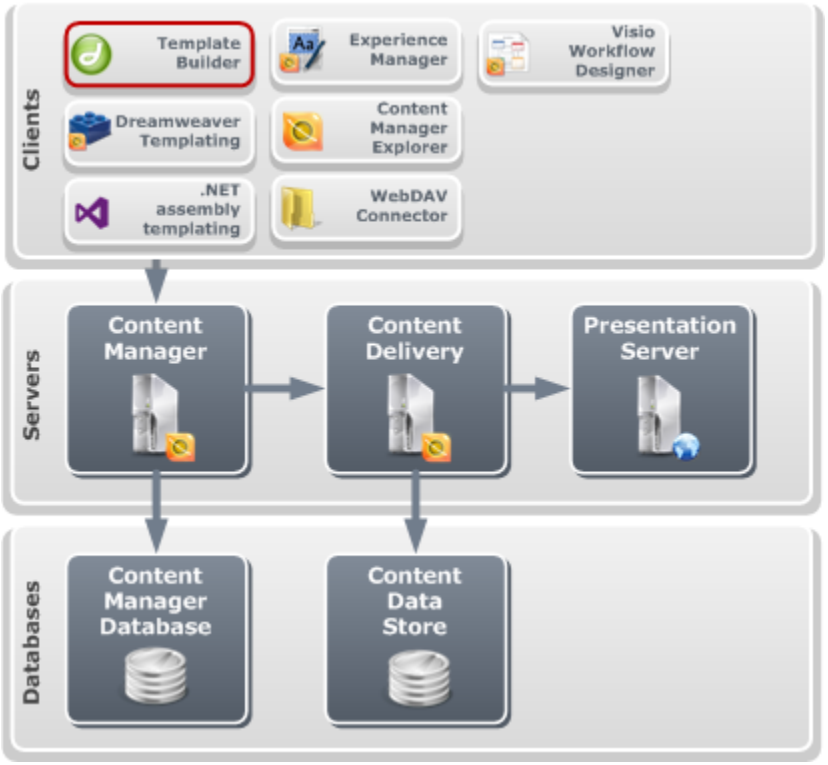
SDL Tridion 2013 .NET assembly templating has a number of changed .NET prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, Dr=dropped (definitely dropped in the following version release):

.NET Framework	2009 SP1	2011 SP1	2013
Microsoft .NET Framework 2.0	Y	N	N
Microsoft .NET Framework 3.5 SP1	Y	Dr	N
Microsoft .NET Framework 4.0	N	Y	Y
Microsoft .NET Framework 4.5	N	N	Y

Chapter 8 Upgrading or setting up Template Builder

Upgrade (or install) Template Builder on a client machine by running the installer from the **Tools** tab of Content Manager Explorer.



8.1 Checking changes in prerequisites for Template Builder

SDL Tridion 2013 Template Builder has changed a number of prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

8.1.1 Template Builder operating system support history

SDL Tridion 2013 Template Builder has a number of changed operating system prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Operating system	2009 SP1	2011 SP1	2013
Microsoft Windows Server 2003 SP2 x86	Y	P	N
Microsoft Windows Server 2003 SP2 x64	Y	P	N
Microsoft Windows Server 2003 R2 SP2 x86	Y	P	N
Microsoft Windows Server 2003 R2 SP2 x64	Y	P	N
Microsoft Windows Server 2008 SP2 x86	Y	Dr	N
Microsoft Windows Server 2008 SP2 x64	Y	Dr	N
Microsoft Windows Server 2008 R2 x64	N	Dr	N
Microsoft Windows Server 2008 R2 SP1 x64	N	Y	Y
Microsoft Windows Server 2012 x64	N	N	Y
Microsoft Windows XP Professional SP3 x86	Y	Dr	N
Microsoft Windows XP Professional SP2 x64	Y	Dr	N
Microsoft Windows Vista SP1 x86	D	N	N
Microsoft Windows Vista SP1 x64	D	N	N
Microsoft Windows Vista SP2 x86	D	N	N
Microsoft Windows Vista SP2 x64	D	N	N
Microsoft Windows 7 x86	N	Dr	N
Microsoft Windows 7 SP1 x86	N	Y	Y
Microsoft Windows 7 x64	N	Dr	N
Microsoft Windows 7 SP1 x64	N	Y	Y
Microsoft Windows 8 x86	N	N	Y
Microsoft Windows 8 x64	N	N	Y

8.1.2 Template Builder .NET support history

SDL Tridion 2013 Template Builder has a number of changed .NET prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=Not Supported, Y=Supported, Dr=Dropped (definitely dropped in the following version release):

.NET Framework	2009 SP1	2011 SP1	2013
Microsoft .NET Framework 2.0	Y	N	N
Microsoft .NET Framework 3.5 SP1	Y	Dr	N
Microsoft .NET Framework 4.0	N	Y	Y
Microsoft .NET Framework 4.5	N	N	Y

8.2 Upgrading or installing Template Builder

Upgrade (or install) Template Builder by running the installer from the **Tools** tab of Content Manager Explorer.

Requirements

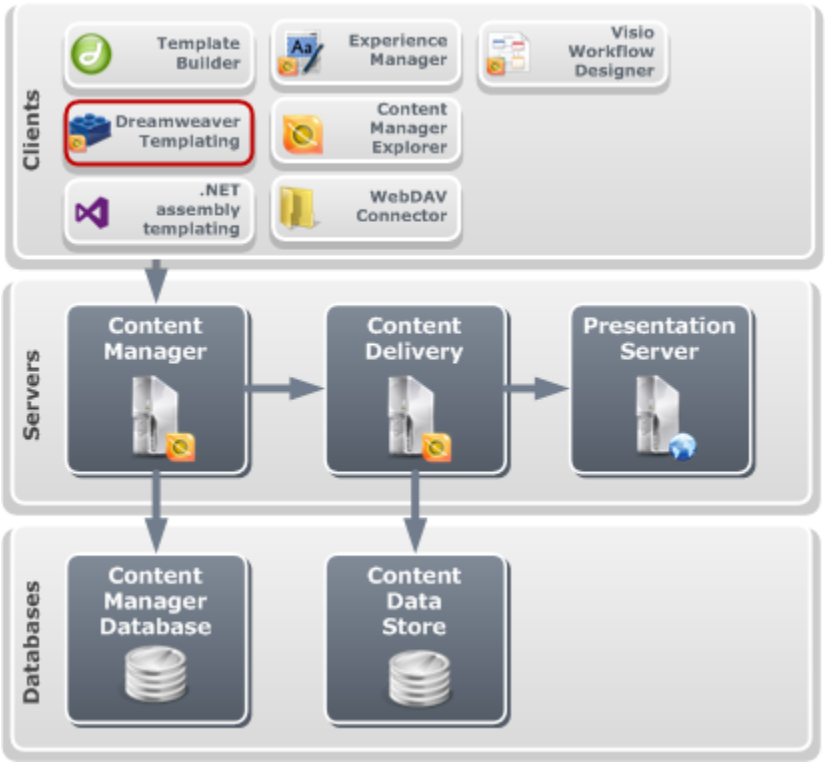
Before upgrading Template Builder, upgrade your Content Manager Explorer.

Steps to execute

1. Access the client machine on which you want to install or upgrade Template Builder.
2. If you are upgrading Template Builder, access the Windows Control Panel and uninstall the software item called **SDL Tridion Template Builder**.
3. Use Internet Explorer (not Mozilla Firefox or Google Chrome) to access the Content Manager Explorer Web site. Select the **Tools** tab from the Ribbon toolbar.
4. Click the item **Template Builder**. This automatically pops up a dialog prompting you to install Template Builder on the client machine. Confirm that you wish to install Template Builder and follow the instructions of the installer.

Chapter 9 Upgrading or setting up Dreamweaver Templating

Upgrade (or install) Dreamweaver Templating by connecting to the Content Manager from Adobe Dreamweaver using WebDAV. This is explained as part of the installation documentation.



9.1 Dreamweaver Templating Adobe Dreamweaver support history

SDL Tridion 2013 Dreamweaver Templating has a number of changed Adobe Dreamweaver prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

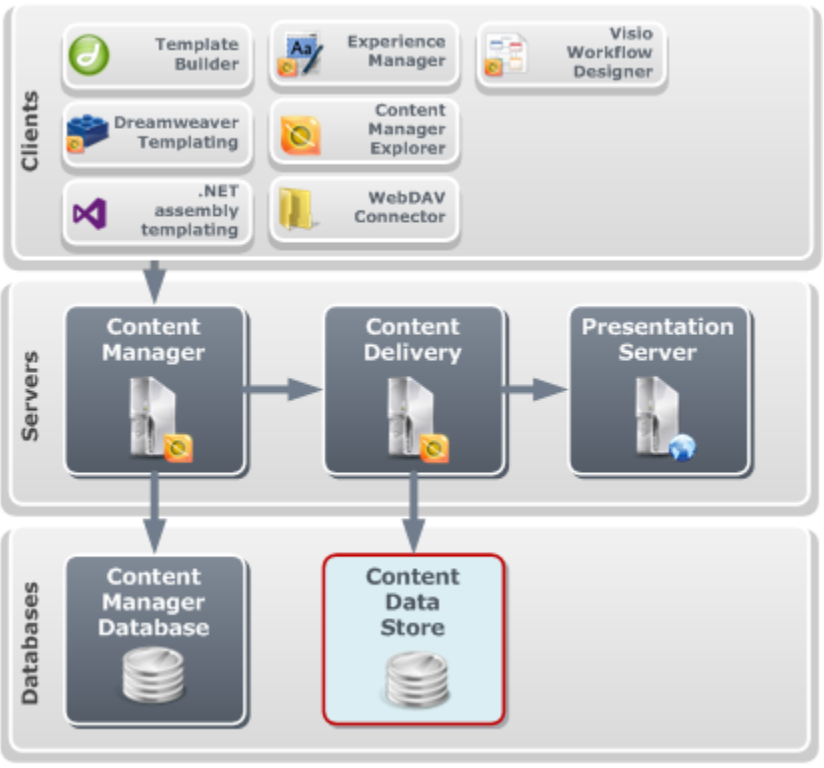
In the following table: N=Not Supported, Y=Supported, D=Deprecated (support may be dropped in the following version release):

Third-party application	2009 SP1	2011 SP1	2013
Adobe Dreamweaver 8	D	N	N
Adobe Dreamweaver CS3	Y	N	N

Third-party application	2009 SP1	2011 SP1	2013
Adobe Dreamweaver CS4	Y	Y	N
Adobe Dreamweaver CS5	N	Y	Y
Adobe Dreamweaver CS6	N	N	Y

Chapter 10 Upgrading your Content Delivery databases

Upgrade your Content Delivery databases (Content Data Store and Experience Manager database, if using) by running a PowerShell script (for Oracle or Microsoft SQL Server on Windows) or manually running scripts (for non-Windows or IBM DB2). You can skip this step if you only use a file system for storage.



10.1 Content Delivery database server support history

The SDL Tridion 2013 Content Delivery databases (Content Data Store and Experience Manager database) have changed software prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1. If your current version of Oracle or SQL Server is not supported, upgrade it before upgrading the databases.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Database server	2009 SP1	2011 SP1	2013
Microsoft SQL Server 2005 SP3	Y	Dr	N
Microsoft SQL Server 2005 SP4	N	P	N
Microsoft SQL Server 2008 SP1	Y	N	N
Microsoft SQL Server 2008 R2	N	Dr	N
Microsoft SQL Server 2008 R2 SP2	N	Y	Y
Microsoft SQL Server 2012 SP1	N	N	Y
Oracle Database 10*g* Release 2 patch set 10.2.0.4	Y	N	N
Oracle Database 10*g* Release 2 patch set 10.2.0.5	N	Y	Y
Oracle Database 11*g* Release 2 patch set 11.1.0.7	Y	N	N
Oracle Database 11*g* Release 2 patch set 11.2.0.1	N	Dr	N
Oracle Database 11*g* Release 2 patch set 11.2.0.2	N	Y	N
Oracle Database 11*g* Release 2 patch set 11.2.0.3 with one of the following patches applied: • For Linux/UNIX systems: PSU 11.2.0.3.2 • For Windows systems: 11.2.0.3 Patch 2 or higher (for Windows)	N	N	Y
IBM DB2 Server 9.5	Y	N	N
IBM DB2 Server 9.7	N	P	P

10.2 Upgrading your Content Delivery databases using PowerShell

On a Windows machine, upgrade your existing Oracle or Microsoft SQL Server Content Delivery databases (Content Data Store and Experience Manager database) by running a PowerShell script.

Requirements

To install SDL Tridion databases on a Windows machine requires Windows PowerShell 3.0 and Microsoft .NET Framework 4.0 or higher.

If you upgraded your database server to a supported version, close all connections to your database server before upgrading your Content Delivery databases.

To upgrade the Content Delivery databases, you need details of DBA and user credentials and the names of the databases. Perform these steps once for each database.

Steps to execute

1. Open Windows PowerShell from the Windows Start Menu.

2. In PowerShell, depending on your database navigate to one of the following folders on the installation media:
   - `Database\MSSQL\` or
   - `Database\Oracle\`
3. Type the following command to upgrade your Content Data Store:

```
& '.\Upgrade Content Data Store.ps1'
```

4. Follow the instructions in the PowerShell console to upgrade the database.

Next steps

If you encounter problems during upgrade, consult SDL Customer Support for assistance. Do not attempt to fix the database.

10.3 Upgrading the Content Delivery databases manually

Upgrade your Oracle or SQL Server databases manually by running a number of SQL scripts. (If you upgrade SQL Server, close all your connections to the database server before you upgrade.) Upgrade your IBM DB2 databases by manually running a number of SQL scripts.

10.3.1 Upgrading your Oracle databases manually

After you have upgraded your database server to a supported version, run a number of SQL scripts to upgrade your Oracle databases (Content Data Store and Experience Manager database, if using). Run these scripts for each database your are upgrading.

Upgrading your SDL Tridion 2009 SP1 Oracle database manually

If you are upgrading from version 2009 SP1 of SDL Tridion, access your SDL Tridion 2013 installation media, navigate to `Database\Scripts\Oracle\`, and run the following database scripts located in the relative paths provided, in the order given:

1. `Shared\60\TCD_GRANT.sql` (run this script as an administrator)
2. `Shared\60\TCM_SYSTEM.sql`
3. `Shared\60\GENERAL_SET_VERSION.sql`
4. `Upgrade\54SP1_60\TCD_ITEMMETA.sql`
5. `Upgrade\54SP1_60\TCD_TAXONOMIES.sql`

6. Upgrade\54SP1_60\TCD_METADATA.sql
7. Upgrade\54SP1_60\TCD_WAICONSTRAINTS.sql
8. Upgrade\54SP1_60\TCD_TRACKING.sql
9. Shared\60\CD_TRACKING_PROCEDURES.sql
10. Upgrade\54SP1_60\TCD_CUSTOMMETA.sql
11. Upgrade\54SP1_60\TCD_INDEXES.sql
12. Shared\60\TCD_REVOKE.sql (run this script as an administrator)
13. Shared\61\TCD_GRANT.sql (run this script as an administrator)
14. Shared\61\TCM_SYSTEM.sql
15. Shared\61\GENERAL_SET_VERSION.sql
16. Upgrade\60_61\TCD_SEQUENCE_ITC.sql
17. Upgrade\60_61\TCD_TRACKING.sql
18. Upgrade\60_61\TCD_COMPONENT_PRES_META_DATA.sql
19. Upgrade\60_61\TCD_BINARYVARIANTS.sql
20. Upgrade\60_61\TCD_PREVIEW.sql
21. Shared\61\CD_TRACKING_PROCEDURES.sql
22. Shared\61\TCD_REVOKE.sql (run this script as an administrator)
23. Shared\70\TCD_GRANT.sql (run this script as an administrator)
24. Shared\70\TCM_SYSTEM.sql
25. Shared\70\GENERAL_SET_VERSION.sql
26. Upgrade\61_70\TCD_UPDATE_TABLES.sql
27. Upgrade\61_70\TCD_UNDO.sql
28. Shared\70\TCD_REVOKE.sql (run this script as an administrator)

Upgrading your SDL Tridion 2011 SP1 Oracle database manually

If you are upgrading from version 2011 SP1 of SDL Tridion, access your SDL Tridion 2013 installation media, navigate to Database\Scripts\Oracle\, and run the following database scripts located in the relative paths provided, in the order given:

1. `Shared\70\TCD_GRANT.sql` (run this script as an administrator)
2. `Shared\70\TCM_SYSTEM.sql`
3. `Shared\70\GENERAL_SET_VERSION.sql`
4. `Upgrade\61_70\TCD_UPDATE_TABLES.sql`
5. `Upgrade\61_70\TCD_UNDO.sql`
6. `Shared\70\TCD_REVOKE.sql` (run this script as an administrator)

10.3.2 Upgrading your Microsoft SQL Server databases manually

After you have upgraded your database server to a supported version, run a number of SQL scripts to upgrade your SQL Server Content Delivery databases (Content Data Store and Experience Manager database, if using). Run these scripts for each database your are upgrading.

Closing open connections

Regardless of the version from which you are upgrading, you must close all connections to your SQL Server database server before starting the upgrade.

Upgrading your SDL Tridion 2009 SP1 SQL Server database manually

If you are upgrading from version 2009 SP1 of SDL Tridion, access your SDL Tridion 2013 installation media, navigate to `Database\Scripts\MSSQL\`, and run the following database scripts located in the relative paths provided, in the order given:

1. `Shared\60\GENERAL_SET_VERSION.sql`
2. `Upgrade\54SP1_60\TCD_ITEMMETA.sql`
3. `Upgrade\54SP1_60\TCD_METADATA.sql`
4. `Upgrade\54SP1_60\TCD_WAICONSTRAINTS.sql`
5. `Upgrade\54SP1_60\TCD_TAXONOMIES.sql`
6. `Upgrade\54SP1_60\TCD_CUSTOMMETA.sql`
7. `Upgrade\54SP1_60\TCD_TRACKING.sql`
8. `Shared\60\CD_TRACKING_PROCEDURES.sql`
9. `Shared\61\GENERAL_SET_VERSION.sql`
10. `Upgrade\60_61\TCD_TRACKING.sql`

11. `Upgrade\60_61\TCD_BINARYVARIANTS.sql`
12. `Upgrade\60_61\TCD_COMPONENT_PRES_META_DATA.sql`
13. `Upgrade\60_61\TCD_PREVIEW.sql`
14. `Shared\61\CD_TRACKING_PROCEDURES.sql`
15. `Shared\70\GENERAL_SET_VERSION.sql`
16. `Upgrade\61_70\TCD_UPDATE_TABLES.sql`
17. `Upgrade\61_70\TCD_UNDO.sql`

Upgrading your SDL Tridion 2011 SP1 SQL Server database manually

If you are upgrading from version 2011 SP1 of SDL Tridion, access your SDL Tridion 2013 installation media, navigate to `Database\Scripts\MSSQL\`, and run the following database scripts located in the relative paths provided, in the order given:

1. `Shared\70\GENERAL_SET_VERSION.sql`
2. `Upgrade\61_70\TCD_UPDATE_TABLES.sql`
3. `Upgrade\61_70\TCD_UNDO.sql`

10.3.3 Upgrading your IBM DB2 databases

Run a number of SQL scripts to upgrade your SQL Server Content Delivery databases (Content Data Store and Experience Manager database, if using). Run these scripts for each database your are upgrading.

Accessing the DB2 Command Center

To start upgrading the DB2 database, open the DB2 Command Center. Select your Content Delivery database node in the tree. A number of options appears at bottom right. From these options, select **Query**. A new **Command Editor** tab opens in the Control Center, with **Target** set to your new database. At the bottom of your screen, enter an exclamation mark ('!') next to **Statement termination character**. From the toolbar, click **Open** to access scripts to run.

Upgrading your SDL Tridion 2009 SP1 IBM DB2 database manually

If you are upgrading from version 2009 SP1 of SDL Tridion, access your SDL Tridion 2013 installation media, navigate to `Database\Scripts\DB2\`, and run the following database scripts located in the relative paths provided, in the order given:

1. Shared\60\GENERAL_SET_VERSION.db2
2. Upgrade\54SP1_60\TCD_ITEMMETA.sql
3. Upgrade\54SP1_60\TCD_METADATA.sql
4. Upgrade\54SP1_60\TCD_WAICONSTRAINTS.sql
5. Upgrade\54SP1_60\TCD_TAXONOMIES.sql
6. Upgrade\54SP1_60\TCD_CUSTOMMETA.sql
7. Upgrade\54SP1_60\TCD_TRACKING.sql
8. Shared\60\CD_TRACKING_PROCEDURES.sql
9. Shared\61\GENERAL_SET_VERSION.db2
10. Upgrade\60_61\TCD_TRACKING.sql
11. Upgrade\60_61\TCD_BINARYVARIANTS.sql
12. Upgrade\60_61\TCD_COMPONENT_PRES_META_DATA.sql
13. Upgrade\60_61\TCD_PREVIEW.sql
14. Shared\61\CD_TRACKING_PROCEDURES.sql
15. Shared\70\GENERAL_SET_VERSION.db2
16. Upgrade\61_70\TCD_UPDATE_TABLES.sql
17. Upgrade\61_70\TCD_PUBLICATION_MAPPINGS.sql

Upgrading your SDL Tridion 2011 SP1 IBM DB2 database manually

If you are upgrading from version 2011 SP1 of SDL Tridion, access your SDL Tridion 2013 installation media, navigate to `Database\Scripts\DB2\`, and run the following database scripts located in the relative paths provided, in the order given:

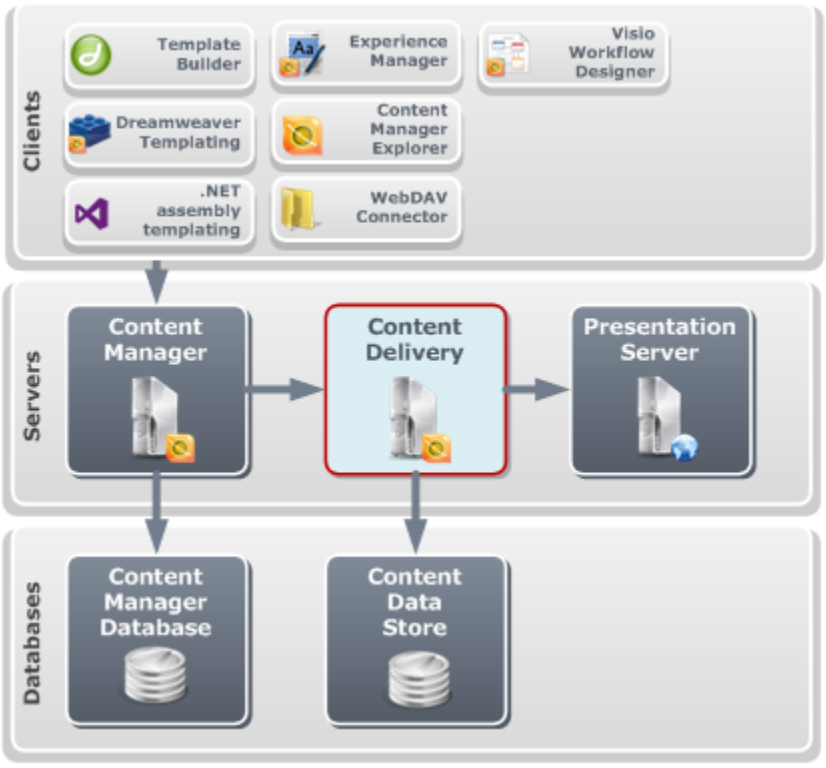
1. Shared\61\CD_TRACKING_PROCEDURES.sql
2. Shared\70\GENERAL_SET_VERSION.db2
3. Upgrade\61_70\TCD_UPDATE_TABLES.sql
4. Upgrade\61_70\TCD_PUBLICATION_MAPPINGS.sql

Finishing the DB2 upgrade

To finalize your upgrade, exit the DB2 Command Center.

Chapter 11 Upgrading Content Delivery

Content Delivery consists of various Server Roles that run as a Web application, Windows service or Java process. Upgrade your Server Roles by removing obsolete JAR files, updating JAR files, adding resources, downloading and (re)installing third-party libraries, updating configuration files and migrating Content Delivery functionality.



11.1 Checking changes in prerequisites for Content Delivery

SDL Tridion 2013 Content Delivery has changed a number of prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

11.1.1 Content Delivery operating system support history

SDL Tridion 2013 Content Delivery has a number of changed operating system prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following tables: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Windows operating systems:

Microsoft Windows Operating system	2009 SP1	2011 SP1	2013
Windows 2003 SP2 (x86)	Y	P	N
Windows 2003 SP2 (x64)	Y	P	N
Windows 2003 R2 SP2 (x86)	Y	P	N
Windows 2003 R2 SP2 (x64)	Y	P	N
Windows 2008 SP2 (x86)	Y	Dr	N
Windows 2008 SP2 (x64)	Y	Dr	N
Windows 2008 R2 (x64)	N	Dr	N
Windows 2008 R2 SP1 (x64)	N	Y	Y
Windows Server 2012 (x64)	N	N	Y

Non-Windows operating systems:

Vendor	Operating system	2009 SP1	2011 SP1	2013
HP	UX 11i V2	Y	Y	Y
HP	UX 11i V3	Y	Y	Y
IBM	AIX 5.3	Y	Dr	N
IBM	AIX 6.1	Y	Y	Y
IBM	AIX 7.1	N	Y	Y
Redhat	Linux 7.2	D	N	N
Redhat	Enterprise Linux 4.0	Y	N	N
Redhat	Enterprise Linux 5.3	Y	N	N
Redhat	Enterprise Linux 5.5	N	Dr	N
Redhat	Enterprise Linux 5.7	N	Y	N
Redhat	Enterprise Linux 5.9	N	N	Y
Redhat	Enterprise Linux 6.0	N	Dr	N
Redhat	Enterprise Linux 6.1	N	Y	N
Redhat	Enterprise Linux 6.4	N	N	Y
Sun	Solaris 9	Y	Y	Y
Sun	Solaris 10	Y	Y	Y

11.1.2 Content Delivery database client support history

SDL Tridion 2013 Content Delivery has a number of changed database client prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release):

Database client	2009 SP1	2011 SP1	2013
IBM DB2 9.5 JDBC Client	Y	N	N
IBM Data Server Driver for JDBC and SQLJ (9.7 GA)	N	D	D
Microsoft SQL Server 2005 JDBC 1.2	Y	N	N
Microsoft SQL Server JDBC Driver 3.0	N	Y	N
Microsoft JDBC Driver 4.0 for SQL Server	N	N	Y
Oracle JDBC driver 10.2.0.4	Y	N	N
Oracle JDBC driver 11.1.0.7	Y	N	N
Oracle JDBC driver 11.2.0.1	N	Dr	N
Oracle JDBC driver 11.2.0.2	N	Y	N
Oracle JDBC driver 11.2.0.3	N	N	Y

11.1.3 Content Delivery Web application server support history

SDL Tridion 2013 Content Delivery has a number of changed Web and application server prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Web application server	2009 SP1	2011 SP1	2013
Apache Tomcat 5.5	Y	Dr	N
Apache Tomcat 6.0	Y	Y	Y
Apache Tomcat 7.0	N	Y	Y
BEA WebLogic 9.2	Y	N	N
IBM WebSphere 6.1	Y	Dr	N
IBM WebSphere 7.0	Y	Y	Y
IBM WebSphere 8.0	N	Y	N
IBM WebSphere 8.5	N	N	Y
JBoss Enterprise Application Framework 4.3	Y	Y	N
JBoss Enterprise Application Framework 5.0	N	Dr	N
JBoss Enterprise Application Framework 5.1	N	Y	Y
JBoss Enterprise Application Framework 6.0	N	N	Y
Microsoft IIS 6	Y	P	N
Microsoft IIS 7.0	Y	Dr	N
Microsoft IIS 7.5	N	Y	Y
Microsoft IIS 8.0	N	N	Y
Oracle AppServer 10g R3	Y	Dr	N

Web application server	2009 SP1	2011 SP1	2013
Oracle WebLogic Server 10g R3	Y	Y	N
Oracle WebLogic Server 11g R1	N	Y	Y
Oracle WebLogic Server 12c	N	N	Y
Oracle GlassFish Server v3	Y	Y	Y
Sun Java System AppServer 9.1	Y	Dr	N

- If you use JBoss 5.1, add the following JVM property-value pair to your `JAVA_OPTS` variable: `-Dorg.jboss.logging.provider=slf4j`
- If you use IBM WebSphere 7.0, you must also have Feature Pack for OSGi Applications and Java Persistence API (JPA) 2.0 installed.

11.1.4 Content Delivery Java and .NET support history

SDL Tridion 2013 Content Delivery has a number of changed Java and .NET prerequisites compared to SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

In the following table: N=not supported, Y=supported, D=Deprecated (support may be dropped in the following version release), Dr=Dropped (support is definitely dropped in the following version release), P=Probably dropped (support is probably dropped in the following version release):

Java instance or .NET Framework	2009 SP1	2011 SP1	2013
Microsoft .NET Framework 2.0 SP2	D	Dr	N
Microsoft .NET Framework 3.5 SP1	Y	Y	P
Microsoft .NET Framework 4.0	N	Y	Y
Microsoft .NET Framework 4.5	N	N	Y
J2SE 5.0	Y	Dr	N
Java 6.0	Y	Y	P
Java 7.0	N	N	Y

If you intend to upgrade your environment to a 64-bit architecture, while continuing to use your 32-bit implementation, install a 32-bit JVM in your 64-bit Content Delivery environment. The Content Delivery installer will then take care of setting up the appropriate options on the system to accommodate this scenario.

If you intend to run Java on Windows, note that you also require the Microsoft Visual C++ 2010 Redistributable SP1. Refer to the `Readme.htm` Web page on the installation media for more information.

11.2 Upgrading the Content Delivery Server Roles

Upgrade your Server Roles by removing obsolete JAR files, updating JAR files, adding resources and by downloading and (re)installing third-party libraries.

11.2.1 Removing dropped JAR files from Server Roles

As part of the upgrade to SDL Tridion 2013, remove a number of JAR files which SDL Tridion no longer requires.

Steps to execute

1. If you are upgrading from SDL Tridion 2009 SP1, then for each Server Role, access the location of your JAR files for that Server Role. (Transport Service on the Content Manager server is not a Server Role.)
2. Remove all of the following JAR files from that location:
   - `cd_link.jar`
   - `cd_servlet.jar`
   - `commons-logging.jar`
   - `cos.jar`
   - `ezlicrun.jar`
   - `ftp.jar`
   - `j2ssh-core.jar`
   - `jakarta-oro.jar`
   - `jdbc2_0-stdext.jar`
   - `jndi.jar`
   - `sftp.jar`
   - `xercesImpl.jar`
   - `xmlParserAPIs.jar`
3. In addition, depending on the Server Role, also remove the following JAR files:

JAR file	API	Content Deployer	HTTP Upload	UGC	Content Delivery Web service	Monitoring	Experience Manager (all parts)
`cd_webservice`	no	no	no	yes	yes	no	no
`commons-httpclient.ja`	no	no	no	no	no	yes	no
`ejb3-persistence.j`	yes	yes	yes	yes	yes	no	no
`footprint_car`	no	no	no	no	no	no	yes
`hibernate-annotations.j`	yes	yes	yes	yes	yes	no	no

JAR file	API	Content Deployer	HTTP Upload	UGC	Content Delivery Web service	Monitoring	Experience Manager (all parts)
hibernate-validator.jar	yes	yes	yes	yes	no	no	no
jsr311-api.jar	no	no	no	no	yes	no	no
jta.jar	yes	yes	yes	yes	yes	no	no
persistence-api.jar	yes	yes	yes	yes	yes	no	no
se_ambientpre	no	no	no	no	no	no	yes

11.2.2 Updating existing JAR files

Update existing JAR files in your Web application or file system directory used by Windows services or Java processes to bring your JAR files up-to-date.

Steps to execute

1. Access the folder in your Web application or file system directory that contains your JAR files.
2. Access the SDL Tridion installation media and navigate to the folder `Content Delivery\roles\`.
3. Check for the presence of the following JAR files and overwrite them with the JAR file from the installation media subfolder indicated:

If you have a file called...	...overwrite it with the same file from...
cd_broker.jar	api\java\lib
cd_core.jar	api\java\lib
cd_deployer.jar	deployer\java\lib
cd_monitor.jar	monitoring\java\lib
cd_wai.jar	api\java\lib
commons-codec.jar	monitoring\java\third-party-lib
commons-dbcp.jar	api\java\third-party-lib
commons-pool.jar	api\java\third-party-lib
xalan.jar	api\java\third-party-lib (If you use JBoss, do not copy this file, but remove your original instead.)

4. If you are upgrading from SDL Tridion 2011, also check for the presence of the following JAR files and overwrite them with the JAR file from the installation media subfolder indicated:

If you have a file called...	...overwrite it with the same file from...
cd_ambient.jar	webservice\java\lib
cd_cache.jar	api\java\lib
cd_datalayer.jar	api\java\lib
cd_dynamic.jar	api\java\lib
cd_linking.jar	api\java\lib
cd_model.jar	api\java\lib
cd_tcdl.jar	api\java\lib
cd_upload.jar	upload\java\lib
activation.jar	api\java\third-party-lib
antlr.jar	api\java\third-party-lib
aopalliance.jar	api\java\third-party-lib
axis.jar	monitoring\java\third-party-lib
axis-jaxrpc.jar	monitoring\java\third-party-lib
commons-collections.jar	api\java\third-party-lib
commons-fileupload.jar	upload\java\third-party-lib
commons-io.jar	upload\java\third-party-lib
dom4j.jar	api\java\third-party-lib
easylicense.jar	api\java\third-party-lib
hibernate-commons-annotations.jar	api\java\third-party-lib
hibernate-core.jar	api\java\third-party-lib
hibernate-entitymanager.jar	api\java\third-party-lib
jackson-core-asl.jar	webservice\java\third-party-lib
javassist.jar	api\java\third-party-lib
jaxb-api.jar	api\java\third-party-lib
jaxb-impl.jar	api\java\third-party-lib
jcl-over-slf4j.jar	api\java\third-party-lib
jdbcpool.jar	api\java\third-party-lib
jersey-core.jar	webservice\java\third-party-lib
jersey-json.jar	webservice\java\third-party-lib
jersey-server.jar	webservice\java\third-party-lib
jettison.jar	webservice\java\third-party-lib

If you have a file called...	...overwrite it with the same file from...
log4j-over-slf4j.jar	monitoring\java\third-party-lib
logback-classic.jar	api\java\third-party-lib
logback-core.jar	api\java\third-party-lib
serializer.jar	api\java\third-party-lib (If you use JBoss, do not copy this file, but remove your original instead.)
slf4j-api.jar	api\java\third-party-lib
spring-aop.jar	api\java\third-party-lib
spring-asm.jar	api\java\third-party-lib
spring-beans.jar	api\java\third-party-lib
spring-context-support.jar	api\java\third-party-lib
spring-context.jar	api\java\third-party-lib
spring-core.jar	api\java\third-party-lib
spring-expression.jar	api\java\third-party-lib
spring-jdbc.jar	api\java\third-party-lib
spring-orm.jar	api\java\third-party-lib
spring-tx.jar	api\java\third-party-lib
stax-api.jar	api\java\third-party-lib

11.2.3 Adding new JARs to Server Roles

Add a number of new JAR files to your Content Delivery Web applications or file system directories for Windows services or Java processes.

Steps to execute

1. Access the location of the JAR files of your Content Delivery Web application, Windows service or Java process.
2. Access the SDL Tridion installation media and navigate to the folder `Content Delivery\roles\<role>\java\lib\` where *<role>* is one of the following Content Delivery Server Roles contained in the Web application or directory you are upgrading:
   - API
   - Cache Channel Service
   - Content Deployer
   - HTTP Upload
   - Monitoring
3. Only if you are upgrading from SDL Tridion 2009 SP1, use the following table to add new JARs to this location, depending on the Server Role:

Filename	API	Cache Channel Service	Content Deployer	HTTP Upload	Monitoring	UGC	Content Delivery Web service
cd_ambient.ja	yes	no	no	no	no	no	no
cd_cache.jar	yes	yes	yes	yes	yes	no	no
cd_datalayer.j	yes	no	yes	yes	no	no	no
cd_dynamic.ja	yes	no	no	no	no	no	no
cd_linking.ja	yes	no	yes	yes	no	no	no
cd_model.jar	yes	no	yes	yes	no	no	no
cd_odata.jar	no	no	no	no	no	yes	yes
cd_odata_type	no	no	no	no	no	no	yes
cd_tcdl.jar	yes	no	yes	yes	no	no	no
cd_upload.jar	no	no	no	yes	no	no	no
activation.ja	yes	yes	yes	yes	yes	no	no
antlr.jar	yes	no	yes	yes	no	no	no
aopalliance.j	yes	no	yes	yes	no	no	no
axis-jaxrpc.jar	no	no	no	no	yes	no	no
commons-collections.j	yes	no	yes	yes	no	no	no
commons-fileupload.ja	no	no	no	yes	no	no	no
commons-io.jar	no	no	no	yes	no	no	no
dom4j.jar	yes	no	yes	yes	no	no	no
easylicense.j	yes	yes	yes	yes	yes	no	no
hibernate-commons-annotations.j	yes	no	yes	yes	no	no	no
hibernate-core.jar	yes	no	yes	yes	no	no	no
hibernate-entitymanager	yes	no	yes	yes	no	no	no
hibernate-jpa-2.0-api.jar	yes	no	yes	yes	no	yes	yes
jackson-jaxrs.jar	no	no	no	no	no	no	yes
jackson-mapper-asl.jar	no	no	no	no	no	no	yes

Filename	API	Cache Channel Service	Content Deployer	HTTP Upload	Monitoring	UGC	Content Delivery Web service
jackson-xc.jar	no	no	no	no	no	no	yes
javassist.jar	yes	no	yes	yes	no	no	no
jaxb-api.jar	yes	yes	yes	yes	yes	no	no
jaxb-impl.jar	yes	yes	yes	yes	yes	no	no
jboss-logging.jar	yes	no	yes	yes	no	yes	yes
jboss-transaction-api_1.1_spec.	yes	no	yes	yes	no	yes	yes
jcl-over-slf4j.jar	yes	no	yes	yes	yes	no	no
jdbcpool.jar	yes	no	yes	yes	no	no	no
jersey-servlet.jar	no	no	no	no	no	yes	yes
log4j-over-slf4j.jar	no	no	no	no	yes	no	no
logback-classic.jar	yes	yes	yes	yes	no	no	no
logback-core.jar	yes	yes	yes	yes	no	no	no
serializer.ja (do not use if using JBoss)	yes	no	yes	yes	no	no	no
slf4j-api.jar	yes	yes	yes	yes	no	no	no
spring-aop.jar	yes	no	yes	yes	no	no	no
spring-asm.jar	yes	no	yes	yes	no	no	no
spring-beans.jar	yes	no	yes	yes	no	no	no
spring-context-support.jar	yes	no	yes	yes	no	no	no
spring-context.jar	yes	no	yes	yes	no	no	no
spring-core.jar	yes	no	yes	yes	no	no	no

Filename	API	Cache Channel Service	Content Deployer	HTTP Upload	Monitoring	UGC	Content Delivery Web service
`spring-expression.ja`	yes	no	yes	yes	no	no	no
`spring-jdbc.jar`	yes	no	yes	yes	no	no	no
`spring-orm.jar`	yes	no	yes	yes	no	no	no
`spring-tx.jar`	yes	no	yes	yes	no	no	no
`stax-api.jar` (do not use if using JBoss or WebLogic)	yes	no	yes	yes	yes	no	no

If your Web application combines multiple Server Roles, copy the files marked 'yes' for all of those Server Roles.

4. Always use the following table to add new JARs to this location, depending on the Server Role:

Filename	API	Cache Channel Service	Content Deployer	HTTP Upload	Monitor	UGC	Content Delivery Web service
`json-smart.jar`	yes	no	no	no	no	yes	yes

If your Web application combines multiple Server Roles, copy the files marked 'yes' for all of those Server Roles.

11.2.4 Updating database client software

As part of your upgrade, replace your JDBC driver with a new one. You must download the new driver rather than copy them from the installation media, for legal reasons.

Steps to execute

1. Access the Web application or file system location used by your Web service or Java process, and go to the location of your JAR files.
2. Remove your existing JDBC driver.
3. On the SDL Tridion installation media, open the Web page `Readme.htm` in the `Redistributables\` folder.

4. Follow the link for your database vendor and download the JDBC driver JAR file suited for your Java version from the target location:

Database vendor	JDBC Driver	File to download
Microsoft SQL Server	Microsoft JDBC Driver 4.0 for SQL Server	`sqljdbc4.jar`
Oracle	Oracle JDBC driver 11.2.0.3	`ojdbc6.jar`
IBM DB2	IBM Data Server Driver for JDBC and SQLJ (9.7 GA)	`db2jcc.jar`

11.2.5 New Server Roles

Between SDL Tridion 2009 SP1 and SDL Tridion 2013, a number of new Server Roles were added to SDL Tridion, which you may want to install. Refer to the installation documentation to learn how to install these new Server Roles.

Content Delivery Web service

The Content Delivery Web service, which enables third-party access to Content Delivery functionality, was added as a Java Web application in SDL Tridion 2011 and as a .NET Web application in SDL Tridion 2011 SP1.

User Generated Content

User Generated Content, which adds commenting and rating functionality to the Web site, was originally released as a standalone product, but is an integrated part of SDL Tridion as of SDL Tridion 2011 SP1.

Experience Manager

Experience Manager, the new authoring interface first introduced as an user interface update to SDL Tridion 2011 SP1, is now a core feature of SDL Tridion. Part of this feature is installed as part of Content Manager, and another part as a Content Delivery Server Role.

11.3 Upgrading the Content Delivery Web service configuration

If you use the Content Delivery Web service on its own, as part of the session preview feature, and/or as part of User Generated Content, some configuration changes are required to make it work with SDL Tridion 2013.

11.3.1 Upgrading the configuration of a Java/JSP Content Delivery Web service

Update the `web.xml` file of all Java Web applications that contain the Content Delivery Web service. That includes the session preview Web application and UGC Web applications.

Steps to execute

1. In the root folder of a Java Web application that contains the Content Delivery Web service, open the file `web.xml` for editing.
2. Find the `<init-param>` section that has its `<param-name>` subelement set to the value `com.sun.jersey.config.property.classnames`.
3. Change the value of the `<param-value>` subelement from its old value, `com.tridion.webservices.odata.ODataWebservice;com.tridion.webservices.link` to the following new value:

```
com.tridion.webservices.odata.ODataWebservice;com.tridion.webservices.linking.LinkingService
```

4. Save and close `web.xml` and restart the Web application.
5. Continue with the next Web application that contains the Content Delivery Web service.

11.4 Upgrading the User Generated Content (UGC) Server Role configuration

Some configuration changes are required to make an existing UGC Server Role work in SDL Tridion 2013.

11.4.1 Upgrading the configuration for UGC

The User Generated Content Server Role (also known as UGC) requires some changes to its configuration.

Steps to execute

1. Access the configuration folder of the User Generated Content Community Web Service Web application (the Web service for visitors). The folder is `bin\config` for .NET, or `WEB-INF/classes/` for Java.
2. In this location, open the Ambient Data Framework configuration file `cd_ambient_conf.xml` for editing.
3. If you currently do not have a `Security` section in the file, insert it now, directly below the `Configuration` opening tag.
4. In the `Security` section, directly above the `</Security>` closing tag, add the following elements:

```
<WhiteList>
  <IPAddresses>
    <Ip>WEBSITE_IP_ADDRESS</Ip>
  </IPAddresses>
</WhiteList>
<GloballyAcceptedClaims>
  <Claim Uri="taf:tracking:id"/>
</GloballyAcceptedClaims>
```

where *WEBSITE_IP_ADDRESS* is the IP address of the Web site on which your visitors can leave comments.

5. Save and close `cd_ambient_conf.xml` and restart the Web service Web application.

11.4.2 Adding the UGC cartridge to the Presentation Server

The User Generated Content cartridge for the Ambient Data Framework takes care of, amongst others, the Content Delivery side of a User Generated Content-Audience Manager integration. You need to configure a different Claim Processor for your Presentation Server than for your User Generated Content Web services.

Requirements

You need to have the Ambient Data Framework enabled on your Presentation Server.

Steps to execute

1. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.
2. Navigate to the `Content Delivery\resources\configurations\` folder.
3. Copy `ugc_ambient_cartridge_sample.xml` to the clipboard.
4. Access your Presentation Server and copy `ugc_ambient_cartridge_sample.xml` to the following location on your Web site:
   - the `WEB-INF/classes/` directory in a JSP Web application.
   - the `bin\config\` subfolder in a .NET Web application.
5. Rename `ugc_ambient_cartridge_sample.xml` to `ugc_ambient_cartridge.xml`.
6. Find the `ClaimProcessorDefinition` element that has an `ImplementationClass` element ending in `AllowAnonymousPostClaimProcessor`, and remove the comment tags around it.
7. Find the `ClaimProcessorDefinition` element that has an `ImplementationClass` element ending in `PostAllowedByOwnerClaimProcessor`, and enclose this element in comment tags.
8. Find the `ClaimProcessorDefinition` element that has an `ImplementationClass` element ending in `PostAllowedByEveryoneClaimProcessor`, and enclose this element in comment tags.
9. Save and close the file.
10. Open the file `cd_ambient_conf.xml` in the same location.
11. In the `<Cartridges>` section, add the following `Cartridge` element:

```
<Cartridge File="ugc_ambient_cartridge.xml" />
```

12. Save and close `cd_ambient_conf.xml`.
13. Restart your Presentation Server Web application.

11.5 Upgrading Content Delivery .NET Server Roles

To upgrade a .NET Server Role, first follow the universal procedure for upgrading a Server Role. Next, depending on the SDL Tridion release from which you are upgrading, perform one or more additional steps to upgrade your .NET Server Roles.

11.5.1 Content Delivery .NET upgrade impact overview

This topic shows, for each release from which you are upgrading, the impact of upgrading to SDL Tridion 2013.

Upgrading from SDL Tridion 2011 SP1

No impact.

Upgrading from SDL Tridion 2009 SP1

Upgrading the API Server Role

If you already use the new ASP.NET API introduced in SDL Tridion 2009, update your .DLL files and add two new DLLs, `Tridion.ContentDelivery.AmbientData.dll` and `Tridion.ContentDelivery.Interop.dll`.

Upgrading the HTTP Upload Server Role

Because the Web page `HTTPUpload.aspx` changed in SDL Tridion 2011, you must update this file.

Server Controls

If you have not done so already, you can register Server Controls in the Content Deployer configuration, and configure them in your Web application.

Uninstalling Content Delivery Web services

If you still use the classic ASP API or the 5.3 version of the ASP.NET API, uninstall the following Windows services:

- `cd_broker.exe`
- `cd_link.exe`
- `cd_wai.exe`

11.5.2 Making your 32-bit .NET Web application using Java 6 work

To make your 32-bit .NET Web applications that uses Java 6 work in SDL Tridion 2013, ensure the presence of the `bin\` subdirectory of your Java instance in your `PATH` variable.

Steps to execute

1. Access a machine on which you have Content Delivery software running as one or more 32-bit .NET Web applications.
2. In the advanced system properties of your machine, select **Environment Variables** to see and edit your environment variables, and ensure that your `PATH` variable contains the `bin\` subfolder of the Java instance you are using. This location contains the file `MSVCR71.DLL`.
3. Repeat these steps for all other machines on which you have Content Delivery software running as one or more .NET Web applications.

11.5.3 Turning on HTTP Activation

The Windows HTTP Activation feature must be switched on under certain conditions.

Requirements

Perform this task for each Server Role you have installed that runs as a .NET Web service, that is, each of the following:

- Experience Manager Web service
- Content Delivery Web service
- UGC Moderation Web service
- UGC Community Web service

Steps to execute

1. If you use Windows 2012, do the following:
    a. Start up the Server Manager and **Add Roles and Features Wizard**. Step through the wizard until you reach the **Features** screen.
    b. If you use .NET 4.5, expand the item **.NET Framework 4.5 Features** and the subitem **WCF Services**. If the option **HTTP Activation** is not listed as installed, select it.
    c. Alternatively, if you use .NET 3.5, expand the item **.NET Framework 3.5 Features**. If the option **HTTP Activation** is not listed as installed, select it.
    d. Click **Next** and **Install** to install the feature.

2. Alternatively, if you use Windows 2008 R2 SP1, do the following:

    a. Start up the Server Manager and under **Features Summary**, select **Add Features**.

    b. In the **Add Features** dialog that opens, expand the item **.NET Framework 3.5.1 Features** and the subitem **WCF Activation**. If the option **HTTP Activation** is not listed as installed, select it.

    c. Click **Next** and **Install** to install the feature.

11.5.4 Upgrading .NET assemblies for the API Server Role

If your Web application interacts with the Content Delivery .NET API, remove old DLLs, update existing DLLs, and add new DLLs.

Steps to execute

1. Access the location of the SDL Tridion DLL files of your Content Delivery .NET Web application that interacts with Content Delivery through the API.
2. If you are upgrading from SDL Tridion 2009 SP1, update your existing DLLs as follows:

    a. Access the SDL Tridion installation media and navigate to the folder `Content Delivery\roles\api\dotNet\`.

    b. On a 32-bit system, access the `x86\` subfolder; on a 64-bit system, access `x86_64\`.

    c. Update the following DLL files by copying them from the installation media to your server, overwriting the files already there:

        - `netrtsn.dll`
        - `xmogrt.dll`
        - `Tridion.ContentDelivery.dll`
        - `Tridion.ContentDelivery.Configuration.dll`
        - `Tridion.ContentDelivery.AmbientData.dll` (upgrade from 2011 only)

    d. Copy the following new DLL files from the installation media to your server:

        - `Tridion.ContentDelivery.AmbientData.dll` (upgrade from 2009 or 2009 SP1 only)
        - `Tridion.ContentDelivery.Interop.dll`

    e. Restart your Web application.

11.5.5 Upgrading the HTTP Upload Server Role

If you are upgrading from SDL Tridion 2009 SP1, then in addition to performing the universal Server Role upgrade, you must also upgrade the Web page `HTTPUpload.aspx` in the HTTP Upload Server Role (now called the Content Deployer (HTTP or HTTPS) Server Role).

Steps to execute

1. Go to the location where your HTTP Upload Server Role is installed, and go to the location of the HTTP upload Web page, `HTTPUpload.aspx`.
2. On the SDL Tridion installation media, access the folder `Content Delivery\roles\upload\dotNET\`.
3. From this location, copy `HTTPUpload.aspx` to the location of your existing file.

11.5.6 Upgrading .NET assemblies for UGC Server Role

You need to upgrade the DLLs required for Web applications that use User Generated Content.

Steps to execute

1. Access the following machines on which you have a .NET Web application running with User Generated Content installed:
   - A .NET Web site for which User Generated Content is enabled
   - A .NET Web application for **Visitors** that contains User Generated Content and the Content Delivery Web service with Ambient Data Framework enabled.
   - A .NET Web application for **Moderators** that contains User Generated Content and the Content Delivery Web service with Ambient Data Framework enabled.
2. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.
3. From the `Content Delivery\roles\ugc\dotNet\` folder, copy the following files to the `bin\` subfolder of your .NET Web application:
   - `Tridion.ContentDelivery.Interop.dll`
   - `netrtsn.dll`
4. Restart the .NET Web application.
5. Repeat these steps for other .NET Web applications that use User Generated Content.

11.5.7 Updating namespaces

Context

Note: You only need to perform this step if you intend to migrate from the old 5.3 ASP.NET API to the new ASP.NET API introduced in SDL Tridion 2009.

The following list provides a summary of the namespace changes:

Steps to execute

1. In all of your code, search and replace `Tridion.ContentDelivery.Broker` with `Tridion.ContentDelivery.Meta`, except in the following cases:
   - `Query` class has moved to the `Tridion.ContentDelivery.DynamicContent.Filters` namespace
   - `SearchFilter` class has moved to the `Tridion.ContentDelivery.DynamicContent.Filters` namespace
   - `ComponentPresentation` class has moved to the `Tridion.ContentDelivery.DynamicContent` namespace
   - `ComInteroperability` class (defunct)

2. In all of your code, search and replace `Tridion.ContentDelivery.WAI` with `Tridion.ContentDelivery.Web.WAI`, except for the following cases:
   - `ComponentPresentationAssembler` class has moved to the `Tridion.ContentDelivery.DynamicContent` namespace
   - `DynamicComponentLink` class has moved to the `Tridion.ContentDelivery.Web.Linking` namespace
   - `Link` class moved to the `Tridion.ContentDelivery.Web.Linking` namespace

3. In all of your code, search and replace `Tridion.ContentDelivery.Linking` with `Tridion.ContentDelivery.Web.Linking`. Note also that the methods in this API that used to return objects of type `ILink` now return objects of type `Link`.
   - `ILink` interface (defunct)

   Note: The method signature of the linking classes has been altered.

4. In all of your code, search and replace `Tridion.ContentDelivery.WebControls` with `Tridion.ContentDelivery.Web.UI`.

5. The method signature of the factory classes has been altered:
   - `Tridion.ContentDelivery.Meta.BinaryMetaFactory`
   - `Tridion.ContentDelivery.DynamicContent.ComponentPresentationFactory`
   - `Tridion.ContentDelivery.Meta.PageMetaFactory`

New factory class methods	Description
`GetTaxonomyComponentPresentations`	Retrieves all Component Presentations for the specified taxonomy Keyword
`GetTaxonomyKeywords`	Retrieves the taxonomy Keywords for a specific Component Presentation and applies a taxonomy filter to retrieve more related Keywords

11.5.8 Installing new versions of deprecated Windows services

Only if you intend to keep using the classic ASP API or the 5.3 ASP.NET API, copy and install the deprecated Windows services for the Broker, Linking and the WAI.

Steps to execute

1. From each machine that runs a Content Delivery Server Role, open a Windows command prompt, access the SDL Tridion 2013 installation media, navigate to the folder `Content Delivery\roles\api\windows\`.
2. Install the deprecated Windows services by running the following commands:

```
cd_broker.exe -install
cd_wai.exe -install
cd_link.exe -install
```

11.6 Upgrading Content Delivery Server Roles running as Windows services

To upgrade Content Delivery Server Roles that run as Windows services (that is, Content Deployer, Monitoring, or the Cache Channel Service), stop the service you want to upgrade and run the installer.

Context

Note that as of SDL Tridion 2013, all Server Roles that run as Windows services are 64-bit processes that require a 64-bit JVM.

Steps to execute

1. Open a command prompt.
2. If one or more of the Server Roles you want to upgrade are running as 32-bit Windows services, access the location of each Server Role and uninstall the Windows service by typing the following:

   ```
   <servicename>.exe --remove
   ```

   where *<servicename>* is one of the following:

   - `cd_deployer`
   - `cd_cacheservice`
   - `cd_monitor`

3. Access the SDL Tridion installation media, navigate to the `Content Delivery\installer\` folder and run the file `startCDinstaller.bat`.
4. Follow the instructions on the screen and select to install the Windows service you wish to upgrade. Choose the location in which the Windows service was previously installed.

11.7 Upgrading your Content Delivery configuration

Upgrade your Server Roles' configuration files to make your Server Roles work with SDL Tridion again.

Context

Reconfiguring logging

Before SDL Tridion 2011, Content Delivery logging was configured in the individual configuration files of the various software components, such as `cd_transport_conf.xml`, `cd_deployer_conf.xml`, and so on. SDL Tridion 2013 Content Delivery arranges logging using the Logback framework and lets you configure logging settings in a separate configuration file called `logback.xml`.

Upgrading Content Deployer Modules

The Content Deployer configuration requires additional Modules.

Storage Layer

If you are upgrading from a release before SDL Tridion 2011, content storage is now arranged through the Storage Layer (previously using the Content Broker configuration). SDL Tridion 2013 ships with an XSLT stylesheet that transforms the old Content Broker to a new Storage Layer configuration, but it is recommended to upgrade the configuration yourself by hand. For more information, refer to Deprecation of old storage framework (see page 88).

If you are upgrading from SDL Tridion 2011, metadata (including binary variants and link information) must now all be stored in the same data repository (either a database or the file system). This means that the following type mapping values are replaced with a single, new type mapping called `Metadata`:

- `BinaryVariant`
- `BinaryMeta`
- `ComponentMeta`
- `ComponentPresentationMeta`
- `ItemMeta`
- `PageMeta`
- `Publication`
- `Reference`
- `Schema`
- `LinkInfo`

If your Storage Layer contains type mappings for these values, Content Delivery will accept the settings but log a warning that you should replace them with a `Metadata` type mapping. If you do not do this, and if you store the various item types in multiple content repositories, your database may experience inconsistencies.

Content Deployer configuration file

The Content Deployer configuration file contains a new element `Queue`, used for the configuration of the new feature: scalable deployment. This element replaces the `Receivers` element in the old configuration. SDL Tridion 2013 ships with an XSLT stylesheet that transforms the old Content Deployer configuration to a new one. You can also apply the XSLT stylesheet yourself by hand. The file is located on the SDL Tridion installation media in the folder `Content Delivery\resources\xslt` and is called `cd_deployer_conf.xsl`.

New Dynamic configuration file

SDL Tridion 2011 introduces a new configuration file, `cd_dynamic_conf.xml`, which you need to add if you want to upgrade.

New `weblogic.xml` file for HTTP upload in Java

If your Web application server is WebLogic, add a `weblogic.xml` file if you use HTTP upload.

Steps to execute

1. If you upgrade from a release earlier than SDL Tridion 2011, reconfigure logging by manually reapplying the settings specified in the various configuration files in a single configuration file called `logback.xml`. Refer to the installation documentation for more information on how to configure logging.

2. Optionally, after you have moved your logging settings into the `logback.xml` file, you can remove the `<Logging>` sections from all of your XML configuration files. This is not required: Content Delivery ignores any logging settings in your existing configuration files.

3. If you upgrade from a release earlier than SDL Tridion 2011, then in you Content Deployer Web application, Windows service file location or Java process file location, locate your Content Deployer configuration file and open it in a plain-text or XML editor. Now upgrade your Modules by doing the following:
    - In the `<Processors>` section, find the `Processor` element with its `Action` attribute set to the value `Deploy` and its `Class` set to `com.tridion.deployer.Processor`. You see a number of `Module` elements in this element. Add the following at the bottom of this list:

```
<Module Type="PublicationDeploy" Class="com.tridion.deployer.modules.PublicationDeploy" />
<Module Type="StructureGroupDeploy" Class="com.tridion.deployer.modules.StructureGroupDeploy" />
```

    - Next, find the `Processor` element with its `Action` attribute set to the value `Undeploy` and its `Class` set to `com.tridion.deployer.Processor`. You again see a number of `Module` elements in this element. Add the following at the bottom of this list:

```
<Module Type="StructureGroupUndeploy" Class="com.tridion.deployer.modules.StructureGroupUndeploy" />
```

4. Save and close the Content Deployer configuration file.
5. On the SDL Tridion installation media, access the folder `Content Delivery\resources\configurations\` and copy the file `cd_dynamic_conf_sample.xml` to the location where your existing configuration files are stored. Then rename the file to `cd_dynamic_conf.xml`.
6. If your Web application server is WebLogic, ensure that the `WEB-INF` folder of all of your Web applications contains a file called `weblogic.xml` with the following contents:

```
<weblogic-web-app xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://www.bea.com/ns/weblogic/weblogic-web-app http://www.bea.com/ns/weblogic/weblogic-
web-app/1.0/weblogic-web-app.xsd"
  xmlns="http://www.bea.com/ns/weblogic/weblogic-web-app">
  <container-descriptor>
    <prefer-application-packages>
      <package-name>javax.persistence.**</package-name>
      <package-name>antlr.*</package-name>
      <package-name>org.slf4j.**</package-name>
      <package-name>org.apache.log4j.**</package-name>
      <package-name>org.apache.xml.serializer.**</package-name>
    </prefer-application-packages>
  </container-descriptor>
</weblogic-web-app>
```

7. Finally, do one of the following:
    - If your Content Deployer runs as a Windows service, access your Windows **Services** and restart the service called **Tridion Content Deployer**.
    - If your Content Deployer runs as a Java Web application, restart the Web application as per the instructions of your Web application server.

11.8 Restarting Server Roles

Finalize the Content Delivery upgrade by restarting all Web applications, Windows services and Java processes that use Content Delivery functionality.

11.9 Migrating Content Delivery functionality

As of SDL Tridion 2011, a number of existing features has been deprecated and replaced with equivalent new features. Because the old feature was deprecated, you can continue using it. But because the feature may be dropped in the next release, you may want to migrate already to the new functionality.

11.9.1 Deprecation of old storage framework

As of the 2011 release, SDL Tridion release replaces the Content Broker configuration file, `cd_broker_config.xml`, with a Storage Layer configuration file, `cd_storage_conf.xml`, which configures how and where Content Delivery stores items. This also affects custom storage home classes.

Content Delivery automatically transforms your existing deprecated Content Broker configuration into a Storage Layer configuration. In most cases, this results in a working Storage Layer configuration that works the same way as your Content Broker configuration. But in some cases, you may need to update the configuration manually. The documentation topics about upgrading Content Delivery explain how.

The most important differences between the Content Broker configuration and the Storage Layer configuration are:

- In the Storage Layer configuration, you can configure multiple storage media and store various types of content in different media.
- The Storage Layer configuration no longer requires you to use Broker bindings.
- The Storage Layer configuration no longer requires you to configure a `QueryGenerator` element.

To support backward compatibility, SDL Tridion 2011 SP1 automatically detects your existing Content Broker configuration file and applies an XSLT to transform the file into an equivalent Storage Layer configuration. It uses this configuration and saves the result of the transformation to a file called `cd_storage_conf.xml.transformed`.

You can choose to continue using your old Content Broker file and having it transformed, or you can rename `cd_storage_conf.xml.transformed` to `cd_storage_conf.xml`, and use it instead. However, the Storage Layer configuration that the XSLT produces is by no means optimal, and it is recommended that you check and improve the transformed file yourself. Refer to the installation documentation for more information.

If you have created your own custom home storage classes for several Content Broker bindings, SDL Tridion 2011 will be able to upgrade them only if they implement one of the following home storage bindings (the strings you see are the values of the `Name` attribute in the `Binding` element in your Content Broker configuration):

- `Page`
- `Binary`
- `ComponentPresentation`
- `PageMeta`
- `BinaryMeta`
- `ComponentPresentationMeta`

In the event that your Content Broker configuration file contains customizations that the XSLT does not transform correctly, there are several ways to upgrade your configuration:

- Reimplement your customization using the Storage Layer framework. Refer to the installation documentation for more information.
- Change the XSLT. For your convenience, SDL Tridion also ships with a separate `.xsl` file that contains the XSLT being applied. This file is called `cd_storage_conf.xsl` and is located on the installation media in the folder `Content Delivery\resources\xslt\`. If you want, you can try and modify this file to transform your customizations properly. For more information about the Storage Layer configuration, refer to the installation documentation.
- Extend the Storage Layer. Refer to the Content Delivery implementation topics for details.
- Present your scenario to the SDL Tridion community in SDL Tridion World (http://www.sdltridionworld.com).
- Contact SDL Tridion Customer Support.

11.9.2 Deprecation of Search Filter API

As of the 2011 release, SDL Tridion uses the Content Broker Query API for search filtering functionality . Before 2011, Content Delivery offered a separate API for this in `Tridion.ContentDelivery.DynamicContent.Filters`.

The old Search Filter API still exists, but is deprecated. However, you may wish to migrate your Search Filter code to new Content Broker Query code for the following reasons:

- The Search Filter API may no longer be supported in the next release of SDL Tridion.
- The Broker Query API for filtering offers new functionality for querying custom metadata easily.

To perform such a migration, you will need to rewrite your filtering code. The Content Broker Query classes are in one of the following locations:

- .NET: `Tridion.ContentDelivery.DynamicContent.Query`
- Java: `com.tridion.broker.querying`

The following list provides an overview of the Content Broker Query classes you should use and their old Search Filter equivalents:

- The Broker Query class `ItemCreationDateCriteria` replaces the Search Filter call `Query.AddCriteria(creationdate, ...)`

- The Broker Query class `ItemModificationDateCriteria` replaces the Search Filter call `Query.AddCriteria(modifieddate, ...)`
- The Broker Query class `ItemInitialPublishDateCriteria` replaces the Search Filter call `Query.AddCriteria(initialpublishdate, ...)`
- The Broker Query class `CustomMetaKeyCriteria` replaces the Search Filter call `Query.AddCustomMetaQuery("KEY_NAME")`
- The Broker Query class `CustomMetaValueCriteria` replaces the Search Filter call `Query.AddCustomMetaQuery("KEY_NAME=VALUE")`

For more detailed information on the Content Broker Query API, refer to the implementation topic about Dynamic content querying and filtering.

11.10 Making custom code work with new Content Delivery .NET assemblies

If you created custom code that interacts with (parts of) Content Delivery running as a .NET Web application, then in order to work with Content Delivery 2013, your custom code requires policy files that resolve DLL versioning conflicts. Copy these policy files (and the new Content Delivery DLLs) to your Windows assembly on the machine that runs your custom code.

Steps to execute

1. Access the Windows machine on which your custom code runs.
2. On the SDL Tridion installation media, navigate to the folder `Content Delivery\roles\api\dotNet\x86_64\publishpolicies\` (for 64-bit systems) or `Content Delivery\roles\api\dotNet\x86\publishpolicies\` (for 32-bit systems).
3. If your custom code currently interacts with SDL Tridion 2011 SP1, then copy the following files to the `c:\Windows\assembly\` folder on your Windows machine:
   - `policy.6.1.Tridion.ContentDelivery.dll`
   - `policy.6.1.Tridion.ContentDelivery.Configuration.dll`
   - `policy.6.1.Tridion.ContentDelivery.Interop.dll` (only if your custom code interacts with `Tridion.ContentDelivery.Interop.dll`)
   - `policy.6.1.Tridion.ContentDelivery.AmbientData.dll` (only if your custom code interacts with `Tridion.ContentDelivery.AmbientData.dll`)
4. If your custom code currently interacts with SDL Tridion 2011, then copy the following files to the `c:\Windows\assembly\` folder on your Windows machine:
   - `policy.6.0.Tridion.ContentDelivery.dll`
   - `policy.6.0.Tridion.ContentDelivery.Configuration.dll`
   - `policy.6.0.Tridion.ContentDelivery.AmbientData.dll` (only if your custom code interacts with `Tridion.ContentDelivery.AmbientData.dll`)
5. Alternatively, if your custom code currently interacts with SDL Tridion 2009 or SDL Tridion 2009 SP1, then copy the following files to the `c:\Windows\assembly\` folder on your Windows machine:

- `policy.5.4.Tridion.ContentDelivery.dll`
- `policy.5.4.Tridion.ContentDelivery.Configuration.dll`

6. On the installation media, move up one folder, to `Content Delivery \roles\api\dotNet\x86_64\`, and copy the following files to the `c:\Windows\assembly\` folder on your Windows machine:
   - `Tridion.ContentDelivery.dll`
   - `Tridion.ContentDelivery.Configuration.dll`
   - `Tridion.ContentDelivery.AmbientData.dll` (only if your custom code interacts with this DLL)

11.11 Making custom code work with the new Content Delivery Web service

As of SDL Tridion 2013, the `ComponentPresentation` entity returned by the Content Delivery Web service contains a new property called `Encoding`.

Context

If you created any custom code that interacts with the Content Delivery Web service, you will need to make your client code work with the SDL Tridion 2013 Web service.

You can accomplish this by doing one of the following:

- You can ignore the new property. In your .NET client, you can accomplish this by setting `IgnoreMissingProperties` to `true` in your `DataContext`, then recompliling your code.
- You can regenerate the proxy and update your code to handle the new property, then recompile your code.

Chapter 12 Upgrading the UGC database

If you have UGC (User-Generated Content) installed as a standalone product alongside SDL Tridion 2011 SP1, upgrade your existing Oracle or Microsoft SQL Server UGC database by running a PowerShell script.

Requirements

To install SDL Tridion databases on a Windows machine requires Windows PowerShell 3.0 and Microsoft .NET Framework 4.0 or higher.

If you upgraded your database server to a supported version, close all connections to your database server before upgrading your UGC database.

To upgrade the UGC database, you need details of DBA and user credentials and the name of the database.

Steps to execute

1. Open Windows PowerShell from the Windows Start Menu.
2. In PowerShell, depending on your database navigate to one of the following folders on the installation media:
   - `Database\MSSQL\` or
   - `Database\Oracle\`
3. Type the following command to upgrade your UGC database:

   ```
   & '.\Upgrade User Generated Content database.ps1'
   ```

4. Follow the instructions in the PowerShell console to upgrade the database.

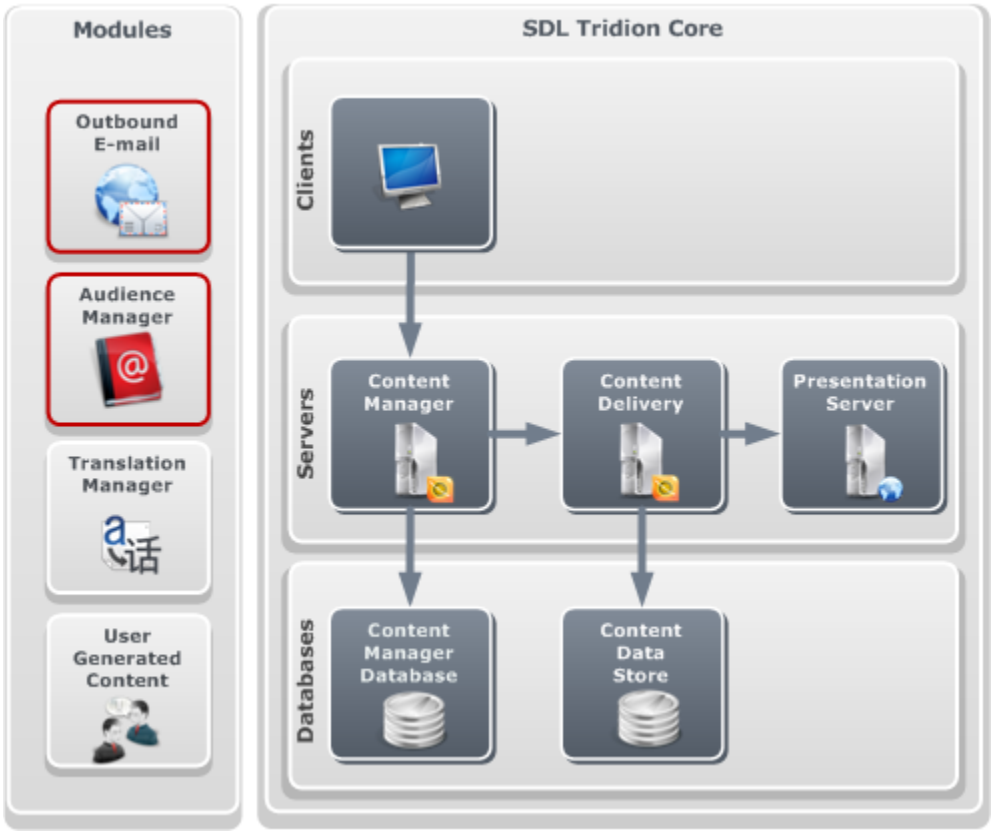
Next steps

If you encounter problems during upgrade, consult SDL Customer Support for assistance. Do not attempt to fix the database.

Chapter 13 Upgrading Audience Manager and Outbound E-mail

Upgrade the various Audience Manager and Outbound E-mail databases by running a PowerShell script, upgrade the Content Manager Server side by running the installer, and upgrade Synchronization Server and Presentation Server by updating the JAR files (and DLLs for .NET) and other resources used in these Web applications.

The following diagram shows the system architecture of Audience Manager and Outbound E-mail:



13.1 Upgrading Audience Manager database

Upgrade your existing Audience Manager database by running a PowerShell script.

Requirements

To install SDL Tridion databases on a Windows machine requires Windows PowerShell 3.0 and Microsoft .NET Framework 4.0 or higher.

To upgrade the Audience Manager database you need details of DBA and user credentials and the names of the Audience Manager database.

Make a back-up of your database before upgrading.

Steps to execute

1. Open Windows PowerShell from the Windows Start Menu.
2. In PowerShell, depending on your database navigate to one of the following folders on the installation media:
   - `Database\MSSQL\` or
   - `Database\Oracle\`
3. Type the following command to upgrade your Audience Manager database:

   ```
   & '.\Upgrade Audience Manager database.ps1'
   ```

4. Follow the instructions in the PowerShell console to upgrade the database.

Result

The database upgrade modifies the structure of the database tables.

Next steps

If you encounter problems during upgrade, consult SDL Tridion Customer Support for assistance. Do not attempt to fix the database.

13.2 Upgrading Audience Manager and Outbound E-mail on Content Manager Server

Upgrading Audience Manager and Outbound E-mail on Content Manager Server involves running the Content Manager installer. The installer automatically updates your `OutboundEmail.xml` configuration file when you upgrade to 2013.

Steps to execute

1. Make a back-up of your `OutboundEmail.xml` configuration file located by default in the `config` subdirectory of your Content Manager root location.
2. Upgrade Audience Manager and Outbound E-mail as part of the procedure for Upgrading Content Manager server (see page 20).

3. Upgrade your Outbound E-mail Dreamweaver Templates: if you use the `GetLinkBinary()` method to create a link to a Multimedia Component (image), rename the method `GetLinkBinaryURL()`.

Note: Using `GetLinkBinary()` will still work, but support for this method is deprecated. It is therefore recommended to use the renamed method.

Result

Audience Manager and Outbound E-mail are upgraded, including your `OutboundEmail.xml` configuration file.

Next steps

For information about changes made to your `OutboundEmail.xml` during upgrade, see the Release Notes. The Release Notes describe the *Changes to configuration* made in SDL Tridion 2009 SP1, SDL Tridion 2011 SP1 or SDL Tridion 2011 SP1 HR1.

During upgrade, the password in the database settings section is encrypted automatically. For more information on *Encrypting sensitive strings for Audience Manager*, see the installation documentation.

13.3 Upgrading the Tracking and Subscription databases

Upgrade your existing Tracking and Subscription databases for Outbound E-mail and Audience Manager by running a PowerShell script.

Requirements

To install SDL Tridion databases on a Windows machine requires Windows PowerShell 3.0 and Microsoft .NET Framework 4.0 or higher.

To upgrade the Tracking and Subscription database you need details of DBA and user credentials and the names of these databases.

Make a back-up of your database before upgrading.

Steps to execute

1. Open Windows PowerShell from the Windows Start Menu.
2. In PowerShell, depending on your database navigate to one of the following folders on the installation media:
   - `Database\MSSQL\` or
   - `Database\Oracle\`
3. Type the following command to upgrade your Tracking database:

```
& '.\Upgrade Outbound E-mail Tracking database.ps1'
```

4. Type the following command to upgrade your Subscription database:

```
& '.\Upgrade Outbound E-mail Subscription Management database.ps1'
```

5. Follow the instructions in the PowerShell console to upgrade the database. Repeat this procedure as needed.

Result

The database upgrade modifies the structure of the database tables.

Next steps

If you encounter problems during upgrade, consult SDL Tridion Customer Support for assistance. Do not attempt to fix the database.

Note: After upgrading all your databases, make sure the size of your Contact extended detail fields in your Subscription database (on the Presentation Server) and Audience Manager database (on the Content Manager Server) are identical.

13.4 Upgrading Synchronization Server (Contacts)

Upgrade the components in your .NET or Java Web application that synchronize Contact and Segment data for Audience Manager.

Steps to execute

1. Go to your Web site running your Synchronization Server components for Contact Synchronization.
2. Upgrade your Content Delivery—the files you need to upgrade are delivered as part of the Content Delivery API Server Role:
   - In a .NET Web application, replace your JAR files and DLLs
   - In a Java Web application, replace your JAR files
3. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.
4. In a .NET Web application:
   a. Update the DLLs for Contact Synchronization, Tracking and Tracking retrieval: navigate to `Outbound E-Mail\Presentation System\NET\Synchronization\bin` and copy and replace the existing DLLs in the `\bin` folder of your Web site.
   b. Update ASPs for Contact Synchronization: navigate to `Outbound E-Mail\Presentation System\NET\Synchronization\` and copy and replace your existing `Profilesync.aspx` and `Profilesync.aspx.cs` pages.

c. Update JARs: navigate to `Outbound E-Mail\Presentation System \NET\lib` and copy and replace the existing JAR files in your Web site `\lib` directory.

5. In a Java Web application:

   a. Update JARs for Tracking and Tracking retrieval: navigate to the `Outbound E-Mail\Presentation System\Java\Tracking` directory and copy and replace the existing JAR files in your Web site `\lib` directory.

   b. Update the JSP for Contact Synchronization: navigate to `Outbound E-Mail\Presentation System\Java\Subscription\Web` and copy and replace your existing `profilesync.jsp` page.

6. If you are upgrading from version 2009 SP1 or older, you need to perform Upgrading OutboundEmail.properties (see page 100).

7. Test the installation by opening a browser and running the `profilesync` page.

13.5 Upgrading Synchronization Server (Tracking retrieval)

Upgrade the components in your .NET or Java Web application that synchronize e-mail tracking data for Outbound E-mail.

Steps to execute

1. Go to your Web site running your Synchronization Server components for Tracking.

2. Upgrade your Content Delivery—the files you need to upgrade are delivered as part of the Content Delivery API Server Role:
   - In a .NET Web application, replace your JAR files and DLLs
   - In a Java Web application, replace your JAR files

3. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.

4. In a .NET Web application:

   a. Update the DLLs for Contact Synchronization, Tracking and Tracking retrieval: navigate to `Outbound E-Mail\Presentation System\NET\Synchronization\bin` and copy and replace the existing DLLs in the `\bin` folder of your Web site.

   b. Update ASPs for Tracking retrieval: navigate to `Outbound E-Mail\Presentation System\NET\Synchronization\` and copy and replace your existing `Trackingsync.aspx` and `Trackingsync.aspx.cs` pages.

c. Update JARs: navigate to `Outbound E-Mail\Presentation System \NET\lib` and copy and replace the existing JAR files in your Web site `\lib` directory.

5. In a Java Web application:

   a. Update JARs for Tracking and Tracking retrieval: navigate to the `Outbound E-Mail\Presentation System\Java\Tracking` directory and copy and replace the existing JAR files in your Web site `\lib` directory.

   b. Update the JSP for Tracking retrieval: navigate to `Outbound E-Mail \Presentation System\Java\Tracking\Web` and copy and replace your existing `trackingsync.jsp` page.

6. Test the installation by opening a browser and running the `trackingsync` page.

13.6 Upgrading Presentation Server (Contact Subscription)

Upgrade the components in your .NET or Java Web application where your Tracking and Contact subscription Web pages are running.

Steps to execute

1. Go to your Web site running your Synchronization Server components for Tracking.
2. Upgrade your Content Delivery—the files you need to upgrade are delivered as part of the Content Delivery API Server Role:
   - In a .NET Web application, replace your JAR files and DLLs
   - In a Java Web application, replace your JAR files
3. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.
4. In a .NET Web application:

   a. Update DLLs for Contact Subscription: navigate to `Outbound E-Mail\Presentation System\NET\Samples\bin` and copy and replace the existing DLLs in the `\bin` folder of your Web site.

   b. Update ASPXs for Contact Subscription: navigate to `Outbound E-Mail\Presentation System\NET\Samples` and copy and replace your existing ASPXs.

   c. Update JARs: navigate to `Outbound E-Mail\Presentation System \NET\lib` and copy and replace the existing JAR files in your Web site `\lib` directory.

Note: An additional JAR file—`jasypt.jar`—is included in SDL Tridion 2013 for password encryption.

5. In a Java Web application:

    a. Update JARs for Contact Subscription and Contact Synchronization: navigate to `Outbound E-Mail\Presentation System\Java \Subscription` and copy and replace the existing JAR files in your Web site `\lib` directory.

    Note: An additional JAR file—`jasypt.jar`—is included in SDL Tridion 2013 for password encryption.

    b. Update JSPs for Contact Subscription: navigate to `Outbound E-Mail \Presentation System\Java\Subscription\Web` and copy and replace your existing JSPs.

13.7 Upgrading Presentation Server (Tracking)

Upgrade the components in your .NET or Java Web application where your Tracking and Contact subscription Web pages are running.

Steps to execute

1. Go to your Web site running your Synchronization Server components for Tracking.
2. Upgrade your Content Delivery—the files you need to upgrade are delivered as part of the Content Delivery API Server Role:
    - In a .NET Web application, replace your JAR files and DLLs
    - In a Java Web application, replace your JAR files
3. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.
4. In a .NET Web application:

    a. Update the DLLs for Contact Synchronization, Tracking and Tracking retrieval: navigate to `Outbound E-Mail\Presentation System\NET\Synchronization\bin` and copy and replace the existing DLLs in the `\bin` folder of your Web site.

    b. Update ASPs for Tracking: navigate to `Outbound E-Mail \Presentation System\NET\Synchronization\` and copy and replace your existing `Tracking.aspx` and `Tracking.aspx.cs` pages.

c. Update JARs: navigate to `Outbound E-Mail\Presentation System \NET\lib` and copy and replace the existing JAR files in your Web site `\lib` directory.

5. In a Java Web application:

a. Update JARs for Tracking and Tracking retrieval: navigate to the `Outbound E-Mail\Presentation System\Java\Tracking` directory and copy and replace the existing JAR files in your Web site `\lib` directory.

b. Update the JSP for Tracking: navigate to `Outbound E-Mail \Presentation System\Java\Tracking\Web` and copy and replace your existing `tracking.jsp` page.

13.8 Upgrading `OutboundEmail.properties`

If you are upgrading from 2009 SP1 or older, you need to migrate values in `OutboundEmail.properties` to the XML configuration file used in Audience Manager and Outbound E-mail 2011 onwards (`cd_audience_manager_conf.xml`).

Steps to execute

1. Open `OutboundEmail.properties` in a text editor.
2. Access the SDL Tridion installation media and navigate to the `Content Delivery\roles\` folder.
3. Navigate to the `Outbound E-Mail/Presentation System/Java/config/` directory.
4. Copy `cd_audience_manager_conf.xml` to the `config` (.NET) or `classes` (Java) directory of your Web application.
5. Migrate values in `OutboundEmail.properties`:

a. E-mail fields and extended detail fields:

```
<Configuration>
  <Email>
     <OpenImage>MailOpened.gif</OpenImage>
  </Email>
  <Redirect>
     <ErrorResolvingLink>Resolve.html</ErrorResolvingLink>
     <ErrorResolvingBinary>Empty.gif</ErrorResolvingBinary>
     <GeneralError>Error.html</GeneralError>
     <AppendTrackingInfo>false</AppendTrackingInfo>
  </Redirect>
  <ExtendedDetails>
     <EmailAddressFieldName>MAIL</EmailAddressFieldName>
        <ContactIdentification>
            <Field>IDENTIFICATION_KEY</Field>
            <Field>IDENTIFICATION_SOURCE</Field>
        </ContactIdentification>
  </ExtendedDetails>
</Configuration>
```


b. Save and close `cd_audience_manager_conf.xml`.

c. Navigate to `Outbound E-Mail\Presentation System\NET\config` or `Outbound E-Mail\Presentation System\Java\config`.

d. Copy `cd_storage_conf.xml` to the `config` (.NET) or `classes` (Java) directory of your Web application.

e. Move your database configuration into the `cd_storage_conf.xml` configuration file.

f. If you encrypted your passwords in 2009, you need to encrypt them again using the new Content Delivery command line available as of 2011. For example:

```
java -cp cd_core.jar com.tridion.crypto.Encrypt mysensitivestring
```

For information on encrypting sensitive strings, see the installation documentation manual.

g. Save and close `cd_storage_conf.xml`.

6. Add Audience Manager to `logback.xml` file. For more information, see the installation documentation.

13.9 Upgrading to hashed passwords

Audience Manager ships with sample Web pages that implement a simple subscription model. The sample Web pages in the previous version stored passwords in plain text. Since it is not best practice to store passwords in plain text, in Audience Manager 2013 new utility methods have been added to the APIs so that you can encrypt passwords using one-way hash values. The sample Web pages have been updated to use these methods.

Converting plain text passwords to hash values

The Audience Manager API (.NET) provides access to Audience Manager item types (Contacts and Segments) on the Content Manager. If you already have Contacts with plain text passwords, you can convert these passwords to one-way hash values using the `DigestPassword()` and `CheckPassword()` methods in the `Tridion.AudienceManagement.API` namespace.

To upgrade Contacts that have a password (and ignore passwords that are empty):

```
var someAddressBook = new StaticAddressBook(new TcmUri(addressBookId), userContext);
IEnumerable<Contact> contacts = Contact.GetContacts(userContext, new ContactFilter(userContext),
 someAddressBook);
foreach (var contact in contacts)
{
    contact.ReloadReadOnlyContact(); // Fully load the contact
    string password = (string)contact.ExtendedDetails["password"].Value;

    if (password == null) continue;

    password = Digests.DigestPassword(password);
    contact.ExtendedDetails["password"].Value = password;
    contact.Save();
}
```


Encrypting passwords to hash values

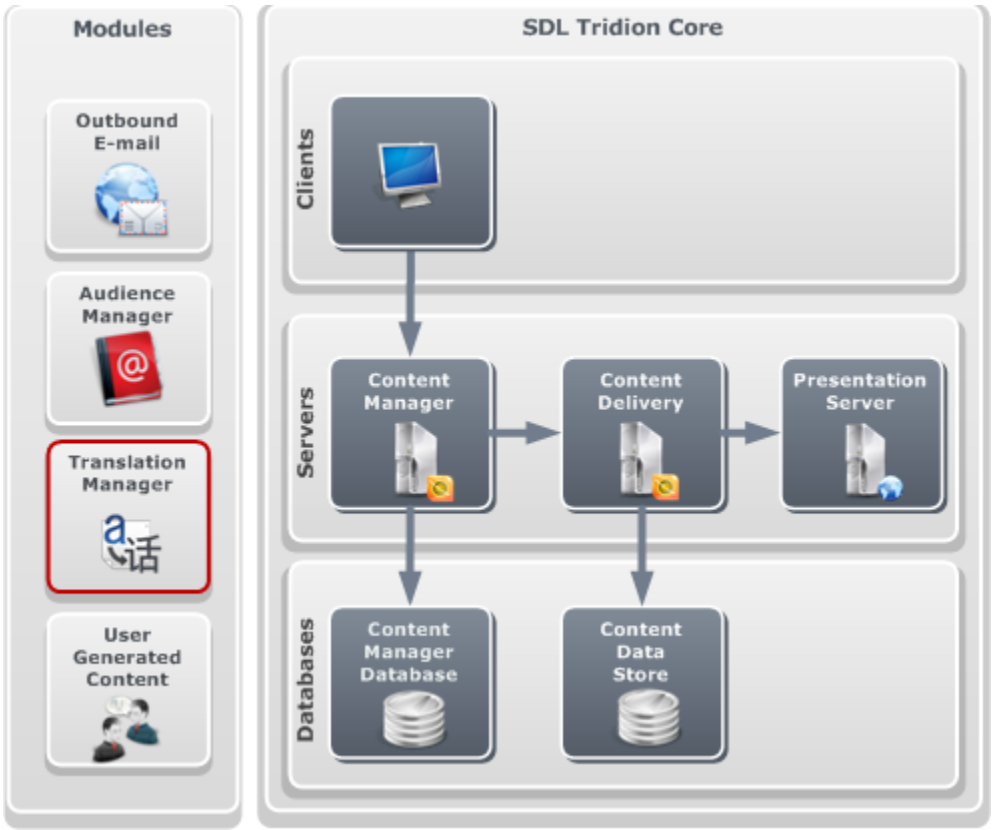
If your Web site uses Java, encrypt passwords using the `DigestPassword()` and `CheckPassword()` methods in the `com.tridion.marketingsolution.utilities` package (Outbound E-mail Content Delivery (Java) API).

If your Web site uses .NET, encrypt passwords using the `DigestPassword()` and `CheckPassword()` methods in the `Tridion.OutboundEmail.ContentDelivery.Utilities` namespace (Outbound E-mail Content Delivery (.NET) API).

Chapter 14 Upgrading Translation Manager

You can upgrade to Translation Manager 2013 from Translation Manager 2011 SP1 or Translation Manager 2.0 SP1. From SDL Tridion 2011 SP1 onwards, Translation Manager is integrated in the suite. If you are upgrading from 2011 SP1, you just need to upgrade the Translation Manager database and run the Content Manager installer. If you are running Translation 2.0 SP1, you need to perform all the steps described in this section.

Note: Read the Translation Manager support history and check whether you are running a supported version of **SDL TMS** or **SDL WorldServer**.



14.1 Translation Manager support history

Translation Manager in SDL Tridion 2013 has a number of changes to prerequisites compared to previous versions. If the current version of your translation system is not supported, upgrade it before upgrading Translation Manager.

Translation system support

Translation Manager requires connection to a translation system. Translation Manager supports **SDL Translation Management System** (SDL TMS) and **SDL WorldServer**.

SDL WorldServer support history

The following table shows the SDL WorldServer version support history:

Version	SDL WorldServer 10.1
Translation Manager in SDL Tridion 2011 SP1	Yes
Translation Manager in SDL Tridion 2013	Yes

SDL TMS support history

The following table shows which versions of the SDL TMS are supported for which versions of Translation Manager:

	SDL Translation Management System version							
Version	**2007**	**2007 SP1**	**2007 SP2**	**2007 SP3**	**2007 SP4**	**2011 SP1**	**2011 SP2**	**2011 SP3**
Translation Manager 2.0 SP1	Yes	Yes	No	No	No	Yes	Yes	Yes
Translation Manager in SDL Tridion 2011 SP1	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Translation Manager in SDL Tridion2013	No	No	No	No	Yes[1]	No	Dep[2]	Yes

Note:

- [1] SDL TMS 2007 SP4 with latest patch applied
- [2] support may be dropped in the next release

You can use SDL TMS version 2007 SP4 on all Translation Manager versions provided you set `compression="false"`. You configure compression in the `<TmsServer>` element in the `TranslationManager.xml` configuration file, for example:

```
<TmsServer port="80" compression="false" ssl="false">http://tridion.sdlproducts.com</TmsServer>
```

Content Manager Server version support history

The following table shows which versions of Content Manager Server are supported for which versions of Translation Manager:

Translation Manager version	Content Manager 2009 SP1	Content Manager 2011 SP1	Content Manager 2013
Translation Manager 2.0 SP1	Yes	No	No

Translation Manager version	Content Manager 2009 SP1	Content Manager 2011 SP1	Content Manager 2013
Translation Manager in SDL Tridion 2011 SP1	No	Yes	No
Translation Manager in SDL Tridion 2013	No	No	Yes

Note: From SDL Tridion 2011 SP1 onwards, Translation Manager is delivered as part of the SDL Tridion suite.

14.2 Upgrading Translation Manager database

Upgrade your existing Translation Manager database by running a PowerShell script.

Requirements

To install SDL Tridion databases on a Windows machine requires Windows PowerShell 3.0 and Microsoft .NET Framework 4.0 or higher.

To upgrade the Translation Manager database you need details of DBA and user credentials and the name of the Translation Manager database.

Steps to execute

1. Open Windows PowerShell from the Windows Start Menu.
2. In PowerShell, depending on your database navigate to one of the following folders on the installation media:
   - `Database\MSSQL\` or
   - `Database\Oracle\`
3. Type the following command to upgrade your Translation Manager database:

```
& '.\Upgrade Translation Manager database.ps1'
```

4. Follow the instructions in the PowerShell console to upgrade the database.

Result

The database upgrade modifies the structure of the database tables.

Next steps

If you encounter problems during upgrade, consult SDL Tridion Customer Support for assistance. Do not attempt to fix the database.

14.3 Uninstalling Translation Manager 2.0 SP1

If you are upgrading from Translation Manager 2.0 SP1, it is important that you uninstall the Translation Manager add-on BEFORE you uninstall the SDL Tridion suite via the Microsoft Windows **Start > Settings > Control Panel > Add or Remove Programs** menu.

Steps to execute

1. Create a copy of your Translation Manager configuration file —`TranslationManager.xml`—located by default in your Tridion installation `\config` directory.
2. Access the **Add/Remove Programs** options in your Windows Control Panel.
3. Select your version of **Translation Manager** and click **Remove**.

Result

You have uninstalled the Translation Manager.

14.4 Installing Translation Manager

Install the Translation Manager using the Content Manager installer.

Steps to execute

1. Access the SDL Tridion installation media.
2. Navigate to the `Content Manager\` directory.
3. Double-click the executable `SDLTridion2013CM.exe`.
4. Follow the instructions on the screen:
   - You can select individual software components to install by choosing the **Advanced** option (by default, the installer installs all software components).
   - You can install software components you choose not to install by running the installer again and selecting the **Modify** option.
5. After the installer finishes, if the installer does not prompt you to restart your machine, perform a manual reboot.

Result

The installer creates a log file in the following location:

- the subdirectory `SDL\Tridion\Logs\` of the path indicated by the `%PROGRAMDATA%` environment variable (defaults to `c:\ProgramData\`).

Upgrading from Translation Manager 2.0 SP1

If you are upgrading from Translation Manager 2.0 SP1, the installer updates your the `TranslationManager.xml` configuration file. The following elements are added:

- `<WorldServer>`
- `<MaximumTridionItemsPerAggregatedTmsFile>`
- `<MaximumTridionItemsPerTmsJob>`

The following element is removed:

- `<CancelTerminatedJobsInterval>`—each Translation Job is now polled for the status of its items using the setting in the `<TmsPollingInterval>`.

14.5 Upgrading the Publication translation configuration

If you are upgrading from Translation Manager 2.0 SP1, upgrade your Publication translation configuration data by running the upgrade utility tool.

Context

The upgrade utility tool migrates Translation Manager rights previously defined in the Translation Authorization Group.

Steps to execute

1. Open a Command Prompt.
2. Navigate to your Translation Manager installation directory, that is, the `Translation Manager\` subfolder of the Content Manager root location (defaults to `C:\Program Files (x86)\Tridion\`):
3. Run the following command:

```
Tridion.TranslationManager.ConfigurationMigration.exe
```

Result

The upgrade utility tool:

- migrates your Publication translation configuration data from the Translation Manager database to Application Data in the Content Manager database.
- extracts the User Group configured in the `<TranslationAuthorizationGroupUri>` setting in the `TranslationManager.xml` file and grants the new Translation Management right to members of this User Group (in Publications which are in scope of this Group).

Note: If you did not have a configured user group for translation—in the <TranslationAuthorizationGroupUri> element—all users in the system had rights to send content to translation.

Next steps

After running the tool, remove the <TranslationAuthorizationGroupUri> element from the TranslationManager.xml.

14.6 Upgrading TranslationManager.xml file

If you are upgrading from Translation Manager 2.0 SP1, configure settings that have changed in the TranslationManager.xml file.

Requirements

When you run the installer, it updates the TranslationManager.xml file with new and changed settings.

Steps to execute

1. Open the TranslationManager.xml file in a text editor.
2. After running the upgrade utility tool to upgrade your Publication translation configuration and the Translation Manager User Group, it is recommended to delete the <TranslationAuthorizationGroupUri> element as this is no longer used.
3. Configure <MaximumTridionItemsPerAggregatedTmsFile>—the setting specifies the number of SDL Tridion items that can be combined into a single file send to the translation management system. If the value is exceeded, multiple files containing aggregated items are added to the Translation Job on the translation management system.

   The setting affects server memory usage as well as how manageable the file is for the translator.
4. Configure <MaximumTridionItemsPerTmsJob>—the setting specifies the *maximum number of Content Manager items* that can be combined into a single Translation Job on the translation management system.

   The setting affects database transaction time (the number of operations that are performed inside each transaction when the job is send to the translation management system, as well as how manageable the job is for the translator. If the value is exceeded, several jobs are create on the translation management system for the single Translation Job on the Content Manager. The Translation Job will still be managed as a single job in Tridion.
5. If you are using SDL WorldServer 10.1 or SDL TMS 2011 SP1, disable the <ItemTypes> element. For more information, see Upgrading Schemas (translatable items) (see page 109).
6. Save and close TranslationManager.xml.

14.7 Upgrading Schemas (translatable items)

If you are upgrading from Translation Manager 2.0 SP1, after upgrading open your Schemas and select the **Translatable** check box for each Text field or External Link field you want to send to translation.

Requirements

The supported versions of SDL WorldServer and SDL TMS support ITS (Internationalization Tag Set) on which translatable fields depend. Make sure you have upgraded to a supported translation management system.

Context

In version 2.0 SP1 of Translation Manager you used ANL files, Content Types and `<ItemTypes>` and in the `TranslationManager.xml` file to filter your translation content. After upgrading your Schemas, you also need to disable the `<ItemTypes>` element in the `TranslationManager.xml` file and, if you are using SDL TMS, add a Content Type to this translation system.

Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the Publication and Folder in which your Schemas are located.
3. Select a Schema and choose **Open** in the context menu.
4. In the **General** tab:
   - Select **Translate Name** if you want the name of the Component to be translated (the option is available for Simple Schemas only).
   - Select **Aggregate Translation Items** if you want to add Content Manager items included in a Translation Job into a single item on the translation management system instead of in separate files for each item.
5. In the **Design** tab or **Metadata Design** tab, select the **Translatable** check box for fields that you want to be translated:

   You can send the following fields for translation:

   - Text fields (but not if the values are selected from a list)
   - External links (for example, if you want to translate a URL such as `google.co.uk` to `google.nl`)
6. Click **Save and Close**.
7. Disable the `<ItemTypes>` element:

   a. Open the `TranslationManager.xml` file in a text editor.

   b. Set the `enabled="false"` attribute, for example:

```
<ItemTypes enabled="false" xmlns:tcm="http://www.tridion.com/ContentManager/5.0">
```


```
          <ItemType type="2" fileExtension="FOL">
            <Includes>
              <Include id="title" aggregate="true">/tcm:Folder/tcm:Data/tcm:Title</Include>
            </Includes>
          </ItemType>
</ItemTypes>
```

The `<ItemTypes>` element is now disabled for new translations but is still available for translations sent using Translation Manager 2.0 SP2 and earlier that are awaiting retrieval from SDL TMS.

c. Save and close `TranslationManager.xml`.

8. If you are using version SDL TMS 2011 SP2 or onwards:

a. Open SDL Translation Management System (SDL TMS).

b. In your organization `Content Types` Folder, click **Add Content Type**.

c. Add a Content Type called **ITS**.

d. Make sure that your configuration has this Content Type selected and no other Tridion Content Types.

e. You can consequently delete any Analysis (ANL) files you were previously using to identify or ignore content for translation.

Adding a Content Type in SDL TMS **ITS** to instruct the configuration to use the ITS filter for each translatable Content Manager item type.