Sitecore 9 Upgrade Planning Guide

8 Things to Consider When Planning Your Upgrade to Sitecore 9

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By now, I'm sure you've heard the buzz surrounding Sitecore 9

Sitecore 9 represents another major step forward for the product. There are many things to be excited about, including the new xConnect service and the continued move toward modular services. Sitecore 9 will also support new options for storing xDB data like SQL Server, as well as a newer version of Solr that brings more features to ContentSearch. There's also the all-new Forms module and the improvements in Experience Editor performance—and these are just the tip of the iceberg!

Sitecore maintains that this will be the easiest upgrade ever, and those of us with experience upgrading Sitecore since before the 6.x days can vouch for the truth of that statement. Beginning with the 8.0 release and the introduction of the Express Migration Tool, Sitecore has been working hard to make what was once a very painful process much simpler,.

That being said, your Sitecore solution may not be ready to take advantage of this simplified upgrade process. There are also additional environment- and code-specific issues to consider before embarking on your upgrade. First, take stock of your solution and environment to ensure they are ready for the jump. If you find yourself with a solution that hasn't kept pace with the rapid changes in best practices and Sitecore recommendations, you may need to spend some time catching up.

Here are eight key issues to consider thoroughly, so you can make your Sitecore 9 upgrade as easy and efficient as possible — and get those exciting new features into the hands of your team ASAP.

1. Changes to Supported Database Platforms

Are you actively collecting and using xDB data for analytics and personalization? Does your Sitecore solution currently use Microsoft SQL Server 2014 or older? If so, you should be aware of database platform support changes in Sitecore 9.

Even though support for MongoDB storage of xDB data was re-introduced in Sitecore 9.0.2, now is a good time to evaluate whether you'd like to move your data to a Microsoft solution like SQL Server. However, you'll want to evaluate the budget implications of the change prior to pulling the trigger as there are several variables to consider, including the cost of the MSSQL license, which may make moving away from MongoDB more expensive or more affordable.

Sitecore 9 also drops support for SQL Server 2008 R2 and SQL Server 2012, and will only support SQL Server 2014 in CMS-only mode. If you're using older versions, you'll need to plan to migrate, ideally to SQL Server 2016 SP1 or Azure SQL. This migration may entail spinning up new servers, creating Azure SQL instances, purchasing new MSSQL licenses, and migrating databases.

2. Web Forms for Marketers to Sitecore Forms Transition

Are you using Web Forms for Marketers? For as long as most of us can remember, that venerable old module has allowed content editors to easily create web forms within the familiar Sitecore interface.

In recent years, though, Web Forms for Marketers has begun to show its age. Sitecore 9 introduces a brand-new Sitecore Forms tool, built from the ground up to make it easier than ever to create and manage forms. Web Forms for Marketers still works with Sitecore 9.0, but will not work at all with versions 9.1 and up.

The new Sitecore Forms functionality is not a drop-in replacement for Web Forms for Marketers — so before you upgrade to 9.1, you'll need to migrate to the new forms solution called Sitecore Forms or another forms solution. If you haven't seen the new Sitecore Forms, we recommend requesting a demo—it's a solid option moving forward.

3. Configuration File Reorganization

Sitecore 9 introduces a new layer-based paradigm for organizing patch configuration files. This change is much needed and will greatly simplify managing configuration settings per-environment and per-server.

However, if your solution hasn't been following Sitecore best practices and you have changed settings in your out-of-the-box configuration files, you'll need to spend some time cleaning that up before you'll be ready to upgrade.

4. No More Lucene Support

Okay, that's not totally true — you can use Lucene with a single-instance installation. However, Solr or Azure Search is now a requirement for the xConnect services. If your Sitecore solution is still using Lucene for ContentSearch, you'll need to switch to Solr or some other supported search provider prior to upgrading, like Azure.

Changing your search solution? Learn more about how to plan a successful search implementation for Sitecore.

5. Infrastructure Changes and Planning

Sitecore has recently begun moving towards a service-oriented architecture. Up until now, a single Sitecore instance in your environment would be configured to handle certain tasks such as publishing and analytics processing.

Beginning with 8.2, Sitecore made the optional next-generation publishing service available. With this service, publishing is handled by a web application that is deployed separately from Sitecore, rather than being a process that is part of the Sitecore instance itself.

In 9.0, Sitecore continues this trend with the new xConnect collection and search services. These changes, as well as the new Solr requirement and new database options for xDB, mean that infrastructure changes will be necessary to adequately support a Sitecore 9 upgrade. Take some time and plan accordingly.

6. Codebase Cleanup

Sitecore has done a significant amount of cleanup work in this release and has removed a substantial amount of obsolete and outdated code.

If you have an older Sitecore solution, make sure that all Sitecore API calls are up-to-date before upgrading, and that features previously relying on those obsolete calls function as expected after transitioning.

7. Express Upgrade Considerations

Does your solution have system templates that have been modified? Are any of its out-of-the-box Sitecore configuration files modified?

If you're moving from a Sitecore 8.1 or older solution and want to use the Express Migration tool, those modifications will be roadblocks to successfully concluding your upgrade, so you'll need to address them first.

8. Azure Migration/Subscription Licensing Model

There's never been a better time to consider moving to the cloud and the new subscription licensing model. With this new model, your cost is based on monthly traffic to your site rather than the number of production instances in your environment.

Sitecore's support for Azure Platform-as-a-Service continues to improve. There are many benefits to managing your environment with Azure, including the ability to configure your infrastructure to bring additional Sitecore instances online to handle the demands of increased traffic.

And when you switch to Sitecore's new subscription-based model, your organization can take advantage of automated scaling when your traffic needs require it — rather than spending time and money acquiring licenses for new production instances from Sitecore.

Engagency Can Help You Plan Your Sitecore Upgrade

If you are considering a Sitecore 9 upgrade, the Engagency team is happy to help. For over a decade , we've helped a wide range of clients with Sitecore upgrades, infrastructure planning, data migration, and best practice implementation.

Our upgrade process typically starts with a comprehensive Sitecore Implementation Audit, where we take a deep dive into the state of your code, content, and overall environment — including pre-upgrade issues and optimization opportunities, which can be addressed seamlessly through one of our Sitecore Managed or Dedicated Services plans.

Intrigued? Contact us to find out how Engagency can help your organization reap the full benefits of Sitecore.