

Web Forms for Marketers 8.1 Upgrade Guide Rev: August 22, 2017

Web Forms for Marketers 8.1

Upgrade Guide

Upgrade guide for administrators and developers



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1.1 Prerequisites

If your solution is based on an earlier version of Sitecore, such as Sitecore CMS 6.x or 7.x, you must first update it to Sitecore 8.1 Initial Release before you can install the WFFM 8.1 upgrade package. You can download all the prerequisite components from the [Sitecore Developer Portal](#).

Prerequisites for running this update:

- Sitecore 8.1 rev. 151003 Initial Release
- Web Forms for Marketers 8.0 rev. 150625
- Web Forms for Marketers 8.1 rev. 151008 Update Package
- Web Forms for Marketers CD 8.1 rev. 151008 Update Package

1.2 Upgrade Process

If you have upgraded to Sitecore 8.1 rev. 151003 Initial Release, you must upgrade the Web Forms For Marketers module to the corresponding version.

1.2.1 Installing the Upgrade Package

To install the upgrade package for the Web Forms for Marketers module, use the Update Installation Wizard.

Note

Before you install the upgrade package, ensure that you have created a back up of your website.

To install the upgrade package:

1. To open the Update Installation Wizard, enter the following URL in your web browser:
`http://<hostname>/sitecore/admin/UpdateInstallationWizard.aspx`
2. Use the Update Installation Wizard to install the Web Forms for Marketers 8.1 Upgrade Package. The wizard guides you through the update process and helps you:
 - o Upload the upgrade package.
 - o Analyze the package.
 - o Install the package.

1.2.2 Updating Configuration Files

After installing the Web Forms for Marketers 8.1 rev. 151008 Upgrade Package, make the following changes to update your configuration files:

1. In the `App_Config\Include` folder disable the `Sitecore.Forms.Mvc.config` file by adding the extension `.disabled`
2. In the `App_Config\Include\Sitecore.Forms.config` file, in the `<events>` section, change the `<!--Remote events handler-->` subsection and extend the next `<event>` with:

```
<event name="wffm:action:remote">
  <handler type="Sitecore.Form.Core.WffmActionHandler, Sitecore.Forms.Core"
method="OnWffmActionEventFired" >
  <param name="actionManager" ref="/sitecore/wffm/wffmActionExecutor" />
  </handler>
</event>
<event name="publish:end">
  <handler type="Sitecore.Form.Core.PublishItemExtension, Sitecore.Forms.Core"
method="PublishFormChildItems" >
  </handler>
</event>
```

3. Find the `<pipelines>` section and replace the entire `<processMessage>` node with the following:

```
<processMessage>
  <processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="ExpandLinks" />
  <processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="ExpandTokens">
  <ItemRepository ref="/sitecore/wffm/itemRepository" />
  <FieldProvider ref="/sitecore/wffm/fieldProvider" />
  </processor>
  <processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="AddHostToItemLink" />
  <processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="AddHostToMediaItem" />
  <processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="AddAttachments">
  <ItemRepository ref="/sitecore/wffm/itemRepository" />
```

```
</processor>
<processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="BuildToFromRecipient" />
<processor type="Sitecore.Forms.Core.Pipelines.ProcessMessage,
Sitecore.Forms.Core" method="SendEmail" />
</processMessage>
```

4. In the `<commands>` section, remove the following node:

```
<command name="forms:datarefresh"
type="Sitecore.Forms.Core.Commands.View.Refresh,Sitecore.Forms.Core" />
<command name="forms:selectfields"
type="Sitecore.Forms.Core.Commands.Fields.SelectFields,Sitecore.Forms.Core" />
<command name="forms:opensession"
type="Sitecore.Form.Core.Commands.OpenSession, Sitecore.Forms.Core" />
```

5. In the same file, in the `<sitecore>` section, remove the entire `<wffm>` node.
6. In the `\App_Config\Include\Sitecore.WFFM.Analytics.config` file, at the end of the `<sitecore>` section, remove the `<wffm>` node.
7. In the `\App_Config\Include\Sitecore.WFFM.Analytics.config` file, at the end of the `<sitecore>` section, add the following `<aggregation>` node:

```
<aggregation>
  <routines>
    <ExecRoutineStatementBuilder>
      <mappings>
        <SqlMappingEntity uid="Fact FormStatisticsByContact"
type="Sitecore.Analytics.Aggregation.SqlMappingEntity, Sitecore.Analytics.Sql">
          <Table>Fact_FormStatisticsByContact</Table>
          <Routine>Add_FormStatisticsByContact</Routine>
        </SqlMappingEntity>
      </mappings>
    </ExecRoutineStatementBuilder>
  </routines>
</aggregation>
```

8. In the `\App_Config\Include\Sitecore.WFFM.Services.config` file, replace the `<controllers>` section with the following:

```
<!-- CONTROLLERS -->
<controllers>
  <controller
type="Sitecore.WFFM.Services.Requests.Controllers.FormReportsController,Sitecore.WFFM.
Services">
    <param name="formsDataProvider" ref="wffm/analytics/formsDataProvider"/>
  </controller>
  <controller
type="Sitecore.WFFM.Services.Requests.Controllers.ExportFormDataController,Sitecore.WF
FM.Services">
    <param name="formsDataProvider" ref="wffm/analytics/formsDataProvider"/>
  </controller>
</controllers>
```

9. On only one of the CM servers, in the `App_Config\Include\Sitecore.Forms.config` file, in the `<sitecore>` section, check that the following node is included:

```
<!--HOOKS-->
<hooks>
  <!--remote events hook-->
  <hook type="Sitecore.Form.Core.WffmActionHook, Sitecore.Forms.Core"/>
</hooks>
```

10. In the `App_Config\Include\Sitecore.Forms.config` file, in the `<events>` section, check that the following node is included:

```
<!--Remote events handler-->
<event name="wffm:action:remote">
  <handler type="Sitecore.Form.Core.WffmActionHandler, Sitecore.Forms.Core"
method="OnWffmActionEventFired" >
  <param name="actionManager" ref="/sitecore/wffm/wffmActionExecutor" />
</handler>
</event>
```

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11. In the `App_Config\Include\Sitecore.Forms.config` file, on the CD server, in the `<settings>` section, add the following node:

```
<setting name="WFM.IsRemoteActions" value="true" />
```

After you have changed the configuration files, you must clear your browser's cache.

To clear the browser cache in Internet Explorer:

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

Note

These steps may vary depending on the browser and version of the browser that you are using.

1.2.3 Rebuilding Search Indexes and the Link Database

To complete the upgrade process, you must rebuild your search indexes.

To rebuild all the `ContentSearch` indexes:

1. In the **Sitecore Control Panel**, in the **Indexing** section, click **Indexing Manager**.
2. In the **Select Search Index** dialog, select all the indexes and then click **Rebuild**.

If you have the *Master* and *Core* databases, rebuild the `Quick search` index and:

1. In the **Sitecore Control Panel**, in the **Database** section, click **Rebuild Search Indexes**.
2. In the **Rebuild Search Indexes** dialog, select the **Quick search index** checkbox and then click **Rebuild**.

To rebuild the link database for the *Master* and *Core* databases:

1. In the **Sitecore Control Panel, Database**, click **Rebuild Link Databases**.
2. In the **Rebuild Link Databases** dialog, select the *Master* and *Core* databases, then click **Rebuild**.
3. Open the Publishing wizard and perform a smart publish.

1.2.4 Upgrading Multiple Instances

For every Sitecore instance in your environment that you want to upgrade, on the CM server repeat all the steps described in this guide.

Note

For CD servers, use the *Web Forms for Marketers CD 8.1 rev. 151008* Upgrade Package and change the `Sitecore.Forms.config` file as described in the *Sitecore WFFM Installation Guide* manual that is available on the [Sitecore Developer Portal](#).