

Web Forms for Marketers 8.2 Update-4

Installation Guide

Installation guide for administrators and developers



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Table of Contents

Chapter 1	Installing the Web Forms for Marketers Module	3
1.1	Installation	4
1.1.1	Prerequisites	4
1.1.2	The Installation Process	4
1.2	Multiserver Configuration	5
1.2.1	Configuring the CM Server	5
1.2.2	Configuring the CD server	5
1.2.3	Configuring the Processing server	6
1.2.4	Configuring the Reporting server	6
1.3	Configuring the MVC Form Rendering.....	8

Chapter 1

Installing the Web Forms for Marketers Module

This chapter describes how to install the Web Forms for Marketers module.

This chapter contains the following sections:

- Installation
- Multiserver Configuration

Web Forms for Marketers 8.2 Update-4

1.1 Installation

You can download the Web Forms for Marketers (WFFM) package from the [Sitecore Developer Portal](#).

1.1.1 Prerequisites

- Sitecore XP 8.2 rev. 170614 (Update-4)
- The Web Forms for Marketers 8.2 rev. 170518 (Update-4) package. To download the package, go to the [Sitecore Developer Portal](#).

1.1.2 The Installation Process

The Web Forms for Marketers module is distributed as a Sitecore package.

To install the module:

- On the **Launchpad**, click **Control Panel, Administration, Install a Package**.
- or
- On the **Launchpad**, click **Desktop**, and then click **Sitecore Start** button, **Development Tools, Installation Wizard**.

The Installation Wizard guides you through the installation process. Select the `Web Forms for Marketers 8.2 rev. 170518.zip` Sitecore package. Read and accept the license agreement when prompted.

When the installation is completed, you must perform the following post-installation steps:

1. In the **Restricting Placeholders** wizard, define the list of placeholders that you want to have available when you add the forms to the layouts.
2. Publish the content to the Web database.
3. On the reporting database of your current instance, run the `[site root]\Website\Data\WFFM_Analytics.sql` file. This creates four additional tables in your reporting database.

Note

If you use xDB Cloud, you should skip this step, as the script is run automatically when a new xDB cloud set is created.

4. Add the following nodes to the `Web.config` file under the `configuration\system\webServer\handlers` node

```
<add name="CaptchaImage" verb="*" path="CaptchaImage.axd"
type="Sitecore.Form.Core.Pipeline.RequestProcessor.CaptchaResolver,
Sitecore.Forms.Core" />

<add name="CaptchaAudio" verb="*" path="CaptchaAudio.axd"
type="Sitecore.Form.Core.Pipeline.RequestProcessor.CaptchaResolver,
Sitecore.Forms.Core" />
```

1.2 Multiserver Configuration

To use the Web Forms for Marketers module in multiserver environments, follow the instructions in this section for the Content Management (CM), Content Delivery (CD), Processing and Reporting servers.

1.2.1 Configuring the CM Server

On the CM server, follow the instructions in section The Installation Process to install the Web Forms for Marketers 8.2 rev. 170518.zip package.

1. 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>
```

2. On only one of the CM servers, 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>
```

3. On each CM server, in the `Sitecore.Forms.config` file, in the `<settings>` section, check that it does not contain the following information:

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

1.2.2 Configuring the CD server

To install Web Forms for Marketers on the CD server, use the Web Forms for Marketers CD 8.2 rev.170518.zip package.

Important

This is not a Sitecore package. Do not use the Sitecore Installation Wizard to install this package.

To install the module, unzip the Web Forms for Marketers CD 8.2 rev.170518.zip file to the `[site root]\Website` folder of the CD server.

To configure the module:

1. Add the following nodes to the `Web.config` file under the `configuration\system.webServer\handlers` node.

```
<add name="CaptchaImage" verb="*" path="CaptchaImage.axd"
type="Sitecore.Form.Core.Pipeline.RequestProcessor.CaptchaResolver,
Sitecore.Forms.Core" />

<add name="CaptchaAudio" verb="*" path="CaptchaAudio.axd"
type="Sitecore.Form.Core.Pipeline.RequestProcessor.CaptchaResolver,
Sitecore.Forms.Core" />
```

2. On all the CD servers, in the `\Website\App_Config\Include\Sitecore.Forms.Config` file, remove or disable the following sections:
 - o In the `<sitecore>` section, remove:

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

```
<hooks>
```

- o In the `<events>` section, remove:

```
<!--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>
```

3. In the `\Website\App_Config\Include\Sitecore.Forms.Config` file:

- o Add the following node to the `<settings>` section:

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

- o Configure the following node according to the name of the connection string related to the target database. For example "web".

```
<setting name="WFM.MasterDatabase" value="web" />
```

1.2.3 Configuring the Processing server

To use the Processing server in your environment, add the following files from the Web Forms for Marketers CD 8.2 rev.170518.zip package to the `[site root]\Website\bin` folder:

- `\Website\bin\Sitecore.WFFM.dll`
- `\Website\bin\Sitecore.WFFM.Analytics.dll`
- `\Website\bin\Sitecore.WFFM.Abstractions.dll`

Add the following file to the `[site root]\Website\App_Config\Include` folder:

- `\Website\App_Config\Include\Sitecore.WFFM.Analytics.config`

To configure the module to work with the Processing server, on the CM and CD servers, in the `\Website\App_Config\Include\Sitecore.WFFM.Analytics.config` file, remove or disable the following group:

```
<group groupName="analytics.aggregation">  
  <pipelines>  
    <interactions>  
      <processor  
type="Sitecore.WFFM.Analytics.Aggregation.Processors.FormSummary.FormSummaryProcessor,  
Sitecore.WFFM.Analytics" />  
      <processor  
type="Sitecore.WFFM.Analytics.Aggregation.Processors.FormEvents.FormEventsProcessor,  
Sitecore.WFFM.Analytics" />  
      <processor  
type="Sitecore.WFFM.Analytics.Aggregation.Processors.FormStatisticsByContact.FormStatisticsByC  
ontactProcessor, Sitecore.WFFM.Analytics" />  
    </interactions>  
  </pipelines>  
</group>
```

1.2.4 Configuring the Reporting server

If the Reporting server uses its own Web and Master databases, you must download and install the Web Forms for Marketers package for the Reporting server from the [Sitecore Developer Portal](#).

The Web Forms for Marketers module for Reporting server is distributed as a Sitecore package.

To install the module:

- On the **Launchpad**, click **Control Panel, Administration, Install a Package**.
- or

Installation Guide

- On the **Launchpad**, click **Desktop**, and then on the **Desktop**, click **Sitecore, Development Tools, Installation Wizard**.

The Installation Wizard guides you through the installation process. Select the `Web Forms for Marketers 8.2 Reporting rev.170518.zip` Sitecore package. Read and accept the license agreement when prompted.

When the installation is completed, publish the content to the Web database.

1.3 Configuring the MVC Form Rendering

You can use the following example to configure the MVC Form Rendering:

1. In the `\Website\Views\Shared` folder of your website, create a `_Layout.cshtml` page for the MVC rendering, and add the following code:

```
@using Sitecore.Mvc
@using System.Web.Optimization
@using Sitecore.Mvc.Analytics.Extensions

<!doctype html>
<html>
<head>
  @Html.Sitecore().Placeholder("header")
  <title>@Html.Sitecore().CurrentItem.DisplayName</title>
</head>

<body>
<div class="container">
  @RenderBody()
</div>
</body>
</html>
```

2. Insert the link to this page in each of the layouts that you have:

```
@{
  Layout = "~/Views/Shared/_Layout.cshtml";
}
```