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 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. 160519 (Update-3)
- Web Forms for Marketers 8.1 rev. 160304
- Web Forms for Marketers 8.1 rev. 160523 Update Package
- Web Forms for Marketers CD 8.1 rev. 160523 Update Package

1.2 Upgrade Process

If you have upgraded to Sitecore 8.1 Update-3 rev. 160519, you should 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

To specify the custom delimiter in the exported files for list field types, make the following changes after installing the Web Forms for Marketers 8.1 rev. 160519 Upgrade Package:

- In the `App_Config\Include\Sitecore.Forms.config` file, in the `<settings>` section, add the following node, and specify the exact delimiter in the value:

   ```
   <setting name="WFM.ListFieldItemsDelimiterCharacter" value="," />
   ```

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. 160523* Upgrade Package and change the `Sitecore.Forms.config` file as described in the *Sitecore WFFM Installation Guide* manual that is available on the <u>Sitecore Developer Portal</u>.