Web Forms for Marketers 8.0 Update-6

Installation Guide

Installation guide for administrators and developers

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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

1.1 Installation

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

1.1.1 Prerequisites

- Sitecore XP 8.0 Update-4 or Update-5.

- The Web Forms for Marketers 8.0 rev. 150625 package. To download the package, visit 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 on the **Desktop,** click **Sitecore, Development Tools, Installation Wizard**.

The Installation Wizard guides you through the installation process. Select the `Web Forms for Marketers 8.0 rev. 151127.zip` Sitecore package. Read and accept the license agreement when prompted.

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

1. In the **Restricting Placeholders** wizard, define the list of placeholders that you want to be 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.

   > **Important**
   > If you are running xDB Cloud Edition, you do not need to run the SQL script.

4. Add the following nodes to the `Web.config` file:

   ```
           <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" />
   ```

For IIS 6.x, add the nodes under the `configuration\system.web\httpHandlers` node. For IIS 7.x and later, add the notes under the `configuration\system.webServer\handlers` node.

1.2 Multiserver Configuration

To use the WFFM module in multiserver environments, follow the instructions provided in this section for the CM, CD, and Processing servers.

1.2.1 Configuring the CM Server

For the CM server, follow the instructions in section *1.1.2 The Installation Process* to install the `Web Forms for Marketers 8.0 rev.151127.zip` package.

1. On only one of the CM servers, in the `Sitecore.Forms.config` file, check that the following sections are included:

   o The `<sitecore>` section:

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

   o The `<events>` section:

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

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

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

1.2.2 Configuring the CD server

To install WFFM on the CD server, use the `Web Forms for Marketers CD 8.0 rev. 151127.zip` package.

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

To install the module, extract the `Web Forms for Marketers CD 8.0 rev. 151127.zip` file to the `\Website` folder of the CD server.

To configure the module:

1. In `\Website\Web.config`, add the following nodes:

      ```
      <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" />
      ```

   For IIS 6.x, add the nodes under the `configuration\system.web\httpHandlers` node. For IIS 7.x and later, add the nodes under the `configuration\system.webServer\handlers` node.

2. Remove or disable the following sections on all CD servers:

   o The `<sitecore>` section:

      ```
      <!--HOOKS-->
      <hooks>
        <!--remote events hook-->
      ```

```
            <hook type="Sitecore.Form.Core.WffmActionHook, Sitecore.Forms.Core"/>
        </hooks>
```

o The `<events>` section:

```
        <!--Remote events handler-->
        <event name="wffm:action:remote">
            <handler type="Sitecore.Form.Core.WffmActionHandler,
Sitecore.Forms.Core" method="OnWffmActionEventFired" />
        </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 8.0 rev.151127.zip` package to the `[site root]\Website\bin` folder:

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

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

To the `[site root]\Website\App_Config\Include` folder, add this file:

- `\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   Aggregating the Reporting Database

You must also configure aggregation for the reporting database.

For more information about this task, see the following Knowledge Base article:
https://kb.sitecore.net/articles/282795 .

1.3 How to Start Using the MVC Form Rendering

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

1. Create a `_Layout.cshtml` page for the MVC rendering in the folder `\Website\Views\Shared\` 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";
}
```