Sitecore WFFM 8.0 Upgrade 1

Web forms for Marketers Upgrade Guide

An administrators guide to upgrading the WFFM module

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1.1　　Prerequisites

If your solution is based on an earlier version of Sitecore, then you must first update to Sitecore 8.0 rev. 141212 or later before you can install the WFFM 8.0 upgrade package. You can download all the prerequisite components from the Sitecore Developer Portal.

Prerequisites for running this update:

- Sitecore XP 8.0 rev. 141212 or later with Web Forms for Marketers 2.5 rev. 141014.

- Web Forms for Marketers 8.0 rev. 141217 Update Package (Sitecore Update, 2.01 MB)

- Web Forms for Marketers CD 8.0 rev. 141217 Update Package (Sitecore Update, 1.3 MB)

Upgrade Process

If you have upgraded to Sitecore 8.0, then you should upgrade the Web Forms Form Marketers module to the corresponding version.

As part of the upgrade process, some solutions might require redesigning. If you need more help and guidance, refer to the administrator and developer documentation on the SDN.

Installing the Upgrade Package

To install the upgrade package to update you Web Forms for Marketers module from version 2.5 to 8.0, use the Update Installation Wizard.

Important
Before you install the upgrade package, you should create a backup of your website.

To install the upgrade package:

1. Open the Update Installation Wizard:

   http://<hostname>/sitecore/admin/UpdateInstallationWizard.aspx

   For more information on how to use the wizard, see the manual Update Installation Wizard on SDN.

2. Use the Update Installation Wizard to install the Web Forms for Marketers 8.0 update package:

   o Upload the update package.

   o Analyze the package.

   o Install the package.

Note
Please ignore the *Version already exists* and *Item has been modified* warnings and continue installing the package. When the upgrade is complete, we recommend that you apply the latest translation to your instance to keep it up to date. For detailed information, see the section *Warnings and Collisions*.

After you have installed the update package, you may encounter several installation errors.

If you encounter an installation error:

1. In the **Content Editor**, on the **View** tab, select the **Standard fields** and the **Raw values** check boxes.

2. In the content tree, navigate to the */sitecore/system/Modules/Web Forms for Marketers/* folder.

3. In all the web form items, in the **Advanced** section, in the **Tracking** field, ensure that the `<event name>` tags contain the `id` parameter.

   For example, the */sitecore/system/Modules/Web Forms for Marketers/Sample forms/Create an Account* item should look like this:

   ```
   <event name="Submit Success Event" id="{xxxxxxxx-xxxx-xxxx-xxxx-
   xxxxxxxxxxxx}" />.
   ```

4. If you find a tag like this: `<event name="Register" />` copy the ID of this event from the corresponding item.

   You can find the ID in the */sitecore/system/Marketing Control Panel/Goals* item or in the */sitecore/system/Settings/Analytics/Page Events* item.

5. If you cannot find the item that you want to copy the `id` parameter from, it means that this event became redundant and you need to delete this event tag from the **Tracking** field.

6. Save the changes in the Content Editor.

7. Execute the `WFFM_Analytics.sql` SQL Server script on the reporting databases.

Warnings and Collisions

The following warnings and collisions are expected:

Message	May apply to the following items or their sub-items:
Version already exists	`/sitecore/system/Settings/Html Editor Profiles/Rich Text Mail/Toolbar 1/Insert Sitecore Link`
Item has been moved	`/sitecore/system/Settings/Analytics/Report Queries/Form Dropout`
	`/sitecore/templates/System/Analytics/ReportQuery/Queries`

Updating Configuration Files

After installing the update package, update the configuration files:

- Apply the configuration file changes described in the manual *Web Forms for Marketers Configuration File Changes* that is available on https://dev.sitecore.net.

After you change the configuration files, you must clear your browser cache.

To clear the browser cache:

1. In **Internet Explorer**, click **Tools**, **Internet Options**.

2. In the **Internet Options** dialog box, in **Browsing history** section, click **Delete**.

3. In the **Delete browsing History** dialog box, select the **Temporary Internet files and website files** check box and then click **Delete**.

These steps may vary depending on which browser you are using.

Converting Forms Data

To convert Forms Data use the *WFFM Analytics Conversion Tool*. You can find this tool in the WFFM 8.0 Update 1 release page, in the *Upgrades* section.

Rebuilding Search Indexes and the Link Database

To complete the upgrade process, rebuild your search indexes.

To rebuild all the content search indexes:

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

To rebuild the Quick search index for the *Master* and *Core* databases, if you have them:

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

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

1. In the Sitecore **Control Panel**, in the **Database** section, click **Rebuild link databases**.
2. In the **Rebuild Link Databases** dialog box, select the **core** and **master** databases and then click **Rebuild**.
3. Open the Publishing wizard and perform a smart publish.

Upgrading Multiple Instances

On the CM server, repeat all the steps described in this chapter for every Sitecore instance in your environment that you want to update.

Note
For CD servers, use the *Web Forms for Marketers CD 8.0 rev. 141217* update package and change the `Sitecore.Forms.config` and `Sitecore.Forms.MVC.config` files as described in the manual *Web Forms for Marketers Configuration File Changes* that is available on https://dev.sitecore.net.

Aggregating the Reporting Database

You must also configure aggregation for the reporting database.

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