

WebForms for Marketers 8.0 Update 3

# Sitecore WFFM 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	Aggregating the Reporting Database.....	7
1.3	How to Start Using 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

## 1.1 Installation

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

### 1.1.1 Prerequisites

- An instance running Sitecore XP 8.0 Update 3.
- The Web Forms for Marketers 8.0 Update 3 package. To download the package, visit <http://dev.sitecore.net/>.

### 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 will guide you through the installation process. Select the `Web Forms for Marketers 8.0 rev. 150429.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 which will be available when adding forms on layouts.
2. Publish content to the Web database.
3. Run the `[site root]\Website\Data\WFFM_Analytics.sql` file on the Reporting database of your current instance. This will create 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:

```
<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.150429.zip package.

Check that the following sections in `Sitecore.Forms.config` exist on only one of the CM 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>
```

Check that the following section in `Sitecore.Forms.config` is absent on every CM server:

- o The `<settings>` section:

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

To use the Processing server for your website, follow the instructions in section 1.2.3 *Configuring the Processing server*.

### 1.2.2 Configuring the CD server

To install WFFM on the CD server, use the Web Forms for Marketers CD X.X rev. 150429.zip package.

#### Note

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

To install the module, extract Web Forms for Marketers CD X.X rev. 150429.zip to the `\Website` folder of the CD server.

To configure the module, perform the following steps:

5. 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.

6. 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>
```

7. 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" />
```

To use the Processing server for your website, follow the instructions in section 1.2.3 *Configuring the Processing server*.

## 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. 150429.zip" package to the `[site root]\Website\bin` folder:

- `\Website\bin\Sitecore.WFFM.dll`
- `\Website\bin\Sitecore.WFFM.Analytics.dll`
- `\Website\App_Config\Include\Sitecore.WFFM.Aanalytics.config`

Remove the following sections from the `Sitecore.Forms.config` file:

- 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>
```

- o The `<settings>` section:

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

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

To make the MVC form rendering work, before you start using it:

1. In the main layout, in the <head> section, add the following scripts.

```
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/jquery-1.8.2.min.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/jquery-ui-1.8.24.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/jquery.validate.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/jquery.validate.unobtrusive.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/Fields/sc.fields-unobtrusive.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/Fields/sc.fields-events-tracking.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/Fields/sc.fields-date.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/Fields/sc.fields-captcha.js"></script>
<script src="~/sitecore modules/Web/Web Forms for Marketers/scripts/mvc/Fields/sc.ajax-form.js"></script>
```

2. In the main layout, in the <head> section, add the following styles.

```
<link href="~/sitecore modules/Shell/Web Forms for Marketers/Themes/mvc/Fields/Default.css" rel="stylesheet">
<link href="~/sitecore modules/Shell/Web Forms for Marketers/Themes/mvc/Fields/Colors/Default.css" rel="stylesheet">
<link href="~/sitecore modules/Shell/Web Forms for Marketers/Themes/mvc/Fields/Custom.css" rel="stylesheet">
<link href="~/sitecore modules/Shell/Web Forms for Marketers/Themes/mvc/base/jquery.ui.all.css" rel="stylesheet">
```