

Sitecore WFFM 8.0 Update 3

Web Forms for Marketers Upgrade Guide

An administrators guide to upgrading the WFFM module



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Prerequisites

If your solution is based on an earlier version of Sitecore, you should update it to Sitecore XP 8.0 Update 3 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. Update 3
- Web Forms for Marketers 8.0 rev. 141217 or later
- Web Forms for Marketers 8.0 rev. 150429 Update Package
- Web Forms for Marketers CD 8.0 rev. 150429 Update Package

Upgrade Process

If you have upgraded to Sitecore XP 8.0 Update-3, 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's and developer's documentation on [SDN](#).

You must make the following changes to the

`App_Config\Include\Sitecore.WFFM.Services.config` file **before** installing the Web Forms for Marketers 8.0 rev. 150429 upgrade package:

- Check that the following lines exist in the `<pipelines>` section:

```
<exportToAscx>
  <processor type="Sitecore.WFFM.Services.Pipelines.SaveContent,
Sitecore.WFFM.Services" />
</exportToAscx>
```

- Check that the following lines exist in the `<sitecore>` section:

```
<!-- Commands -->
<commands>
  <command name="forms:export:completed"
type="Sitecore.WFFM.Services.Pipelines.ExportCompleted, Sitecore.WFFM.Services" />
</commands>
```

- Remove the following lines from the `<pipelines>` section if they exist:

```
<initialize>
  <processor
type="Sitecore.WFFM.Services.Pipelines.Initialize.RegisterHttpControllerActivator,
Sitecore.WFFM.Services" />
</initialize>
```

Installing the Upgrade Package

To install the upgrade package to update the Web Forms for Marketers module, use the Update Installation Wizard.

Important

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

To install the upgrade package:

1. Open the Update Installation Wizard:

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

For more information about using the wizard, see the *Update Installation Wizard* manual on [SDN](#).

2. Use the Update Installation Wizard to install the Web Forms for Marketers 8.0 upgrade package:
 - o Upload the upgrade package.
 - o Analyze the package.
 - o Install the package.

Updating Configuration Files

After installing the upgrade package, update the configuration files.

Check that the following changes were made to the `App_Config\Include\Sitecore.Forms.config` file after installing the Web Forms for Marketers 8.0 rev. 150429 upgrade package:

- The following lines are removed from the `<pipelines>` section:

```
<exportToAscx>
  <processor type="Sitecore.WFFM.Speak.Pipelines.SaveContent, Sitecore.WFFM.Core" />
</exportToAscx>
```

- The following lines are removed from the `<commands>` section:

```
<command name="forms:export:completed"
type="Sitecore.Forms.Core.Commands.Export.ExportCompleted, Sitecore.Forms.Core" />
```

- On one of the CM servers only:

- o Check that the following lines exist in the `<sitecore>` section:

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

- o Check that the following lines exist in the `<events>` section:

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

- On the CD servers only:

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

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

After you have changed 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 the **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.

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 upgrade.

Note

For CD servers, use the *Web Forms for Marketers CD 8.0 rev. 150429* upgrade package and change the `Sitecore.Forms.config` file as described in the *Sitecore WFFM Installation Guide* manual that is available on 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>.