

Sitecore WFFM Upgrade Guide Rev: June 30, 2015

Web Forms for Marketers 8.0 Update-4

Sitecore WFFM 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 XP 8.0 Update-4 before you can install the WFFM 8.0 upgrade package. You can download all the prerequisite components from dev.sitecore.net.

Prerequisites for running this update:

- Sitecore XP 8.0 rev. 150621
- Web Forms for Marketers 8.0 rev. 141217 or later
- Web Forms for Marketers 8.0 rev. 150625 Update Package
- Web Forms for Marketers CD 8.0 rev. 150625 Update Package

1.2 Upgrade Process

If you have upgraded to Sitecore XP 8.0 Update-4, you must 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 apply the following changes to the `App_Config\Include\Sitecore.WFFM.Services.config` file *before* installing the Web Forms for Marketers 8.0 rev. 150625 Update Package:

1. In the `<pipelines>` section, check that the following lines are included:

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

2. In the `<sitecore>` section, check that the following lines are included:

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

3. In the `<pipelines>` section, remove the following lines if these are included:

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

1.2.1 Installing the Upgrade Package

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

Important

Before you install the upgrade package, ensure that you have backed up 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>
For more information about using the wizard, see the *Update Installation Wizard* guide on [SDN](#).
2. Use the Update Installation Wizard to install the Web Forms for Marketers 8.0 Upgrade Package. The wizard guides you through the update process and helps you:
 - Upload the upgrade package.
 - Analyze the package.
 - Install the package.

1.2.2 Collisions, Warnings and Errors

The following warnings and collisions are expected.

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| Warning | May apply to the following items or their subitems: |
|--------------------------|--|
| "File has been modified" | <ul style="list-style-type: none">• \Website\bin\Sitecore.Forms.Core.dll• \Website\bin\Sitecore.Forms.Custom.dll• \Website\bin\Sitecore.Forms.Mvc.dll• \Website\bin\Sitecore.WFFM.Analytics.dll• \Website\bin\Sitecore.WFFM.Client.dll• \Website\bin\Sitecore.WFFM.dll• \Website\bin\Sitecore.WFFM.Services.dll• \Website\bin\Sitecore.WFFM.Speak.dll• \Website\sitecore\shell\Applications\Modules\Web Forms for Marketers\script\Sitecore.PropertiesBuilder.js |

1.2.3 Updating Configuration Files

After you have installed the upgrade package, you must update the configuration files.

After installing the Web Forms for Marketers 8.0 rev. 150625 Upgrade Package, make the following changes to the `App_Config\Include\Sitecore.Forms.config` file:

1. Remove the following lines from the `<pipelines>` section:

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

2. Remove the following lines from the `<commands>` section:

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

3. On one of the CM servers only:

- o In the `<sitecore>` section, check that the following lines are included:

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

- o In the `<events>` section, check that the following lines are included:

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

4. 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, on the **General** tab, in the **Browsing history** section, click **Delete**.
3. In the **Delete browsing History** dialog box, select **Temporary Internet files and website files** and then click **Delete**.

These steps may vary depending on the type of browser you are using.

1.2.4 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 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**.

1.2.5 Upgrading Multiple Instances

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

Note

For CD servers, use the *Web Forms for Marketers CD 8.0 rev. 150625* 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.