

CommonSpot Winter 2012 Upgrade Guide

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Chapter 1 Upgrade Process and Steps

Upgrading to this release of CommonSpot is similar to other CommonSpot upgrades. Depending on which version you are upgrading from, there may be pre-update steps. We recommend that you read through the following sections before upgrading to CommonSpot Winter 2012.

- [Recommended Upgrade Process](#)
- [Winter 2012 Pre-Upgrade Steps](#)
- [Winter 2012 Upgrade Steps](#)
- [Upgrading CommonSpot on a ROPS in a Shared Database Configuration](#)
- [Notes on Upgrading ColdFusion](#)
- Upgrading to Railo

1.1. Recommended Upgrade Process

From a high-level perspective, you should perform the following steps when upgrading CommonSpot:

1. **Read the Release Notes** – Find out what's new in CommonSpot and how it might affect your site and upgrade process.
2. **Read Pre-Upgrade Steps** – Depending on which version you are upgrading from and whether or not your databases support UTF-8, you may need to perform pre-upgrade steps. Read the Pre-Upgrade Steps outlined in this document.
3. **Plan** – Planning is the most important and most overlooked step. Make sure you know the steps you need to take. If you are unsure, PaperThin provides Consulting Upgrade Services to help ensure a successful upgrade.
4. **Back up** – Back up web site files (specifically, any custom CommonSpot files) and all databases for your existing Production site(s).
5. **Set up a Development Environment** – We cannot recommend strongly enough that you perform the upgrade in a development environment first before upgrading of your production environment. Set up a development environment that matches your current production environment. If you have one or more Read-Only Production Servers (ROPS), PaperThin recommends that you set up at least one ROPS in the test configuration. If you do not have development server licenses, contact your Account Representative for temporary or permanent licenses.
6. **Deploy Backups in Development** – For more information on this process, see the CommonSpot KB article <http://www.paperthin.com/support/knowledgebase/articles/How-to-Migrate-a-CommonSpot-Site.cfm>
7. **Test in Development** – Next, test that the development environment is working properly. Check all of your custom script elements and custom render handlers to make sure that they are running as expected in the new CommonSpot environment.
8. **Upgrade in Development** – Perform the actual CommonSpot upgrade in the development environment.

9. **Test** – After you have completed the upgrade, thoroughly test your site. This release of CommonSpot includes significant changes affecting browser use, cache handling, and security. Test your site thoroughly in Development to reduce the chances of issues in Production. If your site receives heavy traffic, or you are near capacity, we recommend that you also include performance testing.
10. **Schedule Production Upgrade** – To minimize down time for the upgrade and to ensure you have the proper support, schedule your upgrade. Make sure the proper resources are available (Database Administrators, Web Administrators, testers, etc.). If your site is mission critical, you can schedule PaperThin Retainer Support for the upgrade period.
11. **Back up Again** – Just before you perform the upgrade on Production, back up your file system and databases again.
12. **Upgrade Production** – Once you complete the preceding steps, upgrade your Authoring Server.
13. **Test Production** – Enable authoring (see “Authoring State” in the *CommonSpot Administrator’s Reference*) and test your Production server(s) to verify a successful upgrade.

Refer to [CommonSpot Upgrade Steps](#) for step-by-step instructions for upgrading your CommonSpot installation.

1.2. CommonSpot Winter 2012 Pre-Upgrade Steps

Before you begin the upgrade process, complete the following steps:

1. [Check System Requirements](#)
2. [Check UTF-8 Support](#)
3. [Check Character Set Configuration \(Oracle Only\)](#)
4. [For Static Site Generation Customers upgrading from 5.1.x or earlier](#)
5. [Check JVM settings & Modules](#)
6. [Check Database Permissions](#)
7. [Download the Archive & License Keys for this release](#)
8. [Replicate / Synchronize Content to ROPS](#)
9. [Replication Customers: Rename \sync\wddx](#)
10. [Stop Authoring](#)
11. [Record Scheduled Job Settings, then Stop Scheduled Jobs](#)
12. [Turn Off Browser Add-ons](#)
13. [Redirect Traffic to a Temporary Page](#)
14. [Manually Clear Cache \(Large Sites\)](#)

If you plan to upgrade to this release of CommonSpot on the Railo platform, see [Deploying on Railo](#).

Upon successful completion, you can perform the upgrade.

1.2.1. Check System Requirements

Before upgrading to the latest release of CommonSpot it is important to understand the system requirements. A full and up-to-date listing of the requirements can be found at:

<http://www.paperthin.com/products/Technical-Specifications.cfm>.

You will need to make sure that you are running supported versions of the following:

- Operating System (Windows, Linux or Solaris)
- ColdFusion
- Database (SQL Server, Oracle or MySQL)
- Browser (Internet Explorer or Firefox)
- JVM

1.2.2. Check UTF-8 Support

Beginning with release version 6.0, all CommonSpot databases must be configured to support UTF-8.

If you are currently running version 6.0, 6.1, or any of the following versions and *all* of your databases are UTF-8, you can upgrade directly to the current release.

- CommonSpot 5.0.3
- CommonSpot 5.1.0
- CommonSpot 5.1.1

Note: We strongly recommend that sites using a version of CommonSpot earlier than 6.0 use the Database Migration Tool to determine whether they are running under UTF-8. This tool will validate, and, if necessary, convert all databases to UTF-8.

If any of your databases are *not* UTF-8, or you are running a version earlier than 5.0.3 or 5.1.1, you must perform additional steps before upgrading to this release. See below for more information on the steps required to upgrade your environment. *If you are running Oracle*, you must upgrade to 5.1.1 and install **Hot Fix 5.1.1.25a** prior to running Data Migration, as described below.

1.2.2.1. Environments running CommonSpot versions *earlier than 5.0.3 or 5.1.1*

If you are running any version of CommonSpot 5 and all of your databases are configured to be UTF-8, you can install this release directly.

Otherwise, you **must** run the Database Migration Tool to convert your databases to UTF-8. The Database Migration Tool is available as a patch for 5.0.3 and 5.1.0 (see next section if you are running these versions) and built into CommonSpot 5.1.1. If you are running a version of CommonSpot earlier than 5.1.1, first upgrade to CommonSpot 5.1.1 so that you can run the Database Migration Tool.

For more information on this process review the related knowledgebase article at <http://community.paperthin.com/articles/2010/02/27/How-to-Migrate-a-CommonSpot-Site.cfm>.

Note: You cannot upgrade directly from any version prior to CommonSpot 5.0.0.

1.2.2.2. Non-Oracle Environments currently running CommonSpot 5.0.3 or 5.1.0

If you are running version 5.0.3 or 5.1.0, and *all* of your CommonSpot databases are configured to be UTF-8, you can install this release directly.

Otherwise, you *must* download and install **Hot Fix 5.0.3.50** or **5.1.0.40** respectively, then run the Database Migration Tool to convert your databases to UTF-8. For more information on this process review the related knowledgebase article at <http://community.paperthin.com/articles/2010/02/27/How-to-Migrate-a-CommonSpot-Site.cfm>. Please note that the hot fixes are separate patches for each version. Make sure to use the correct patch for your version.

1.2.2.3. Oracle Environments

If you are running Oracle and using CommonSpot 5.0.3 or 5.1.0, and you are not using UTF-8, you must upgrade to 5.1.1 and install **Hot Fix 5.1.1.25a** prior to running Data Migration. If you are running Oracle as your database, you must also ensure that at least one of the following database configuration settings is in use:

NLS_CHARACTER_SET = 'AL32UTF8' (primary character set is UTF-8)

NLS_NCHAR_CHARACTER_SET = 'AL16UTF16' ('international' character set is UTF-16)

Note: PaperThin strongly recommends setting the Oracle Initialization value to CHAR for the NLS_Length_Semantics setting. Accepting the default value BYTE for this setting may result in unexpected errors for content containing extended characters.

Determine the current configuration by running the following query:

```
SELECT *
FROM NLS_Database_Parameters
WHERE Parameter IN
('NLS_CHARACTERSET','NLS_NCHAR_CHARACTERSET','NLS_LENGTH_SEMANTICS')
```

1.2.3. For Static Site Generation Customers upgrading from 5.1.x or earlier

Before upgrading to the current release of CommonSpot, sites running Static Content Generation must manually remove the CommonSpot Static Site Generator job from the Debugging & Logging: Scheduled Tasks in the ColdFusion administrator. After you complete the upgrade, verify your static settings in the Site Administration – Static Site Settings dialog and save. Use the Static Content Generation Scheduled Job option to rebuild the background task.

1.2.4. Customers Upgrading from Versions Earlier than 6.2: Review Entries in the AvailableTemplates Table

If you are upgrading from a version earlier than 6.2, remove duplicate pageID entries from the AvailableTemplates table. This table should contain one record for each pageID. A schema update in release 6.2 modified the index to AvailableTemplates, causing the upgrade to fail if duplicate records were found.

In addition, any record in AvailableTemplates that does not have a corresponding pageID should be removed in sitePages.

1.2.5. Check JVM Settings & Modules

Please refer to the Recommended ColdFusion Settings document on the|commons community web site at <http://community.paperthin.com/articles/2010/07/21/Recommended-ColdFusion-Settings.cfm> and check your JVM settings compared to those recommended for this release.

1.2.6. Check Database Permissions

Regardless of the database type (Oracle, SQL Server or My SQL) all CommonSpot databases must have Create View permissions. If you are running Oracle, creating or upgrading sites to the Winter 2012 Release of CommonSpot requires that the owners of each Content, Sites, or Users database have at least *Connect, Resource, and Create View* roles, and have sufficient quota available in default table space. Each CommonSpot data source requires a separate Oracle user on a compliant database instance.

1.2.7. Download the Winter 2012 Archive & License Keys

In order to upgrade to this release, download the new software from the PaperThin Site at <http://www.paperthin.com/support/downloads>. The software is available in.zip file format (for Windows or Linux/Solaris).

Please note that a 2009 Microsoft security enhancement to the native Windows unzip utility disables JavaScript file extraction by default. If your installation uses this utility, you may discover missing, incomplete, or corrupted files after unzipping the CommonSpot archive, or you may find that CommonSpot user interface menus display but do not work. PaperThin recommends that you use an unzip utility that does not block extraction of JavaScript files.

You can usually correct this problem by trying again or using a different unzip utility

This release of CommonSpot also requires that you download new License Keys from the PaperThin Support Site (www.paperthin.com/support/downloads/) in order to certify the keys. These keys are valid for both your current version and the upgrade version. It is a good practice to download these keys into a

new directory outside of CommonSpot for safekeeping before you begin the upgrade. Before starting the upgrade, extract the keys into the /commonspot/keys directory, then restart the ColdFusion Application Server.

1.2.8. Stop Authoring

Disable CommonSpot authoring on all sites to prevent content updates until after the upgrade completes. In version 6.0 and later, click **Change** in the center panel of the Server Administration dashboard to disable all author, edit, and update functions for all sites and subsites using this instance of CommonSpot.

CommonSpot Server Information	
Licensed To:	PaperThin, Inc.
Server Key:	s-507549-550QACF8.cfm
CommonSpot Version:	Internal Build 6.0.99.92
Sites Datasource:	commonspot-sites
Database Version:	SQLServer 9.00.4035
Sites Schema Version:	2010-08-09 13:30:00
Authoring State:	Enabled Change

Your version of the *CommonSpot Administrator's Reference* provides details.

Note: Remember to restore authoring after the upgrade is complete.

1.2.9. Replicate/Synchronize Content to ROPS

If you use CommonSpot Replication, force a manual replication after you disable authoring to make sure that the latest content replicates to all Read-Only Production Servers.

If you are running under a shared database environment, synchronize your content and then make sure that you do not have any pending records in either the RemoteRequests and FileActionQueue tables. This ensures that all content is up to date on all ROPS prior to upgrade.

If you test the new version on authoring while still running the old version on the ROPS, double-check the RemoteRequests and FileActionQueue tables to make sure that both tables contain no records before completing the upgrade.

1.2.10. Replication Customers Only: Rename \wddx\

Before upgrading, rename the commonspot\sync\wddx directory (for example, \wddx_old). After upgrade and before replicating, copy all files from the old commonspot\sync\wddx directory to the new commonspot\sync\wddx directory

1.2.11. Record Scheduled Job Settings, then Stop Scheduled Jobs

If you are upgrading from a version earlier than 6.2, note that this release includes a new scheduled job manager, for creating and managing all CommonSpot jobs from a single authoring server interface, replacing ColdFusion management of CommonSpot jobs.

Before upgrade, note your current settings for CommonSpot jobs inserted in the ColdFusion Administrator.

Before upgrade
review & record settings for all CommonSpot jobs inserted into the ColdFusion Administrator. CommonSpot stale cache & link validation jobs are also recorded here.

After upgrade
remove all CommonSpot jobs from ColdFusion & recreate jobs through the Scheduled Jobs utility for every server running CommonSpot

Actions	Task Name	Duration
	Check inactive incidents	May 20, 2008 - INDEFINITELY
	CommonSpot Content Expiration Reminder (PaperThin)	May 10, 2011 - INDEFINITELY
	CommonSpot Replication Monitor	Jun 3, 2010 - INDEFINITELY
	CommonSpot Static Site Generator	Mar 20, 2012

After upgrade, remove all CommonSpot jobs from the ColdFusion Administrator on *all servers running CommonSpot* and restore them through the CommonSpot Scheduled Job interface on authoring, as described for [post-upgrade tasks](#).

Once you record job settings, stop all CommonSpot scheduled jobs by pausing them in the ColdFusion Administrator.

1.2.12. Turn off Browser Add-ons

Turn off Firebug or any other monitoring or debugging utilities that may interfere with the upgrade.

1.2.13. Redirect Traffic to a Temporary Page

If you wish to display a message that your site is temporarily down, configure your Web Server to redirect all traffic to a temporary page. Note that you need to allow access to /commonspot to run the upgrade. The simplest way may be to redirect traffic based on an IP Address. Consult your Web Server Administrator for how to accomplish this.

1.2.14. Manually Clear Cache on Upgrade Servers (Large Sites)

Because sites with a large number of subsites and cache files have reported ColdFusion timeouts during the final step of the upgrade process (Clearing Cache Files), PaperThin recommends that sites with this profile manually clear cache for CommonSpot servers before starting the upgrade.

Chapter 2 CommonSpot Upgrade Steps

Once you successfully complete the pre-upgrade steps, the follow these steps to upgrade to this release of CommonSpot.

2.1.1. Extract CommonSpot Winter 2012 Modules

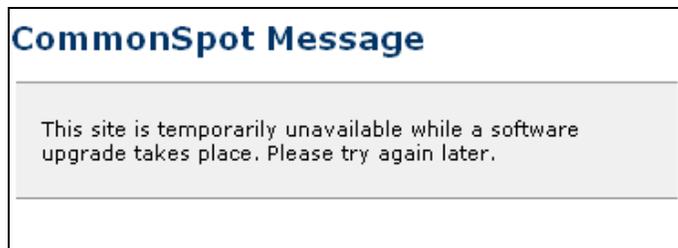
CommonSpot is made up of hundreds of HTML, JavaScript, CSS, ColdFusion, and Java files. You need to extract these from the .zip archive downloaded from <http://www.paperthin.com/support/downloads>.

Follow these steps to properly extract the CommonSpot files:

1. Stop ColdFusion.
2. First rename the current `/commonspot/` directory to `/commonspot_old/`, then create a new `/commonspot` directory and extract the files from the zip or tar archive into this new directory, preserving the directory hierarchy.
3. Verify that the ColdFusion user has proper file permissions to the CommonSpot modules. For example, in a non-Windows environment, issue the following commands, replacing *username* and *groupname* with the values appropriate for your server:

```
chown -R username:groupname *
chmod -R 775 *
```
4. Copy the `commonspot_old/keys` directory (containing the new keys downloaded as part of the [Pre-Upgrade Steps](#)) into the new `/commonspot/keys/` directory. Copy the entire directory, making sure to include `servervars.cfm`.
5. Copy any customized modules from `/commonspot_old/` to `/commonspot/`. For example, make sure to replace the security files `loaderrequest.dat` and `directrequest.dat` in the new `/commonspot/` directory.
6. In addition, copy any other custom files. For example, evaluate the `edit-form-data.cfm` and `delete-form-data.cfm` modules in `{yoursite}/datasheet-modules` directory.
 - *If you have not made changes in these files*, replace them with the files in the `/commonspot/newsite/datasheet` directory for all existing sites.
 - *If you did customize these files*, copy these and any other customized files to their respective directories within the new `/commonspot/` directory or related directory.
7. Start ColdFusion.

Note that once you unzip the CommonSpot Winter 2012 code into the new `/commonspot/` directory, the following message displays to site visitors until the upgrade completes. As described in the pre-upgrade steps, you can optionally redirect traffic to a temporary page.



2.1.2. Run the Upgrade Script

Navigate to http://{your_commonspot_server_name}/commonspot/upgrade/ to begin running the upgrade script.

There are seven (7) steps to the upgrade process:

1. [CommonSpot Upgrade \(Page 1 of 6\)](#)
2. [ColdFusion Administrator Settings \(Page 2 of 6\)](#)
3. [Database Requirements \(Page 3 of 6\)](#)
4. [Upgrades to be Performed \(Page 4 of 6\)](#)
5. [Status \(Page 5 of 6\)](#)
6. [Upgrade Completed \(Page 6 of 6\)](#)
7. [Validate Database Schema](#)

2.1.3. CommonSpot Upgrade (Page 1 of 6)

The first screen of the upgrade process provides a pre-upgrade checklist of steps and requests the ColdFusion Administrator password. You should perform the steps outlined on this page. When complete, enter the ColdFusion password and click **Next** to continue with the upgrade process.

A screenshot of the "CommonSpot Upgrade" screen. The title bar reads "CommonSpot Upgrade". Below the title, the text says: "To perform an upgrade to CommonSpot Winter 2012 Build 7.0.0.179, please review the following steps:". A numbered list of 14 steps follows, detailing the upgrade process from reading guides to entering the password. At the bottom, there is a label "ColdFusion Administrator Password:" followed by a white text input field. Below the input field is a button labeled "Next>>".

CommonSpot Upgrade

To perform an upgrade to CommonSpot Winter 2012 Build 7.0.0.179, please review the following steps:

1. Read the [Upgrade Guide](#).
2. Read the [Release Notes](#).
3. Deny access to all users.
4. Stop the ColdFusion Server.
5. Backup all CommonSpot databases.
6. Backup all site directories.
7. Rename the existing commonspot folder to commonspotOLD.
8. Create a new commonspot folder.
9. Copy the keys folder from the commonspotOLD folder into your new commonspot folder.
10. Obtain the latest release archive file from the [download section](#) of the PaperThin website.
11. Extract the downloaded archive into your new '/commonspot' directory. Be sure to preserve the directory structure when extracting the archive file.
12. Start the ColdFusion Server.
13. Reload this page and confirm the CommonSpot version, which is displayed in the page's title.
14. After all steps have been completed, continue the upgrade by entering the ColdFusion Administrator password below, then click 'Next'.

ColdFusion Administrator Password:

2.1.4. ColdFusion Administrator Settings (Page 2 of 6)

The second screen in the upgrade process displays recommended and current ColdFusion settings. Settings that are out of sync with recommended values are highlighted for your consideration.

Out-of-date settings may be automatically changed to the recommended setting when you click **Next**.

Note: The timeout changes only if the current setting is less than 300 seconds. CommonSpot does not change this if the current setting equals or exceeds the recommended setting.

CommonSpot Upgrade

ColdFusion Administrator Settings:
 The following tables display the recommended and current values for various settings within the ColdFusion Administrator. Those settings that are out of sync with the recommended values are indicated with the  icon. Note that the upgrade process will modify these settings automatically if you click the 'Next >>' button.

Server Settings > Settings Section:

Setting Name	Recommended	Current
Timeout requests after (seconds)	300	300
Enable Whitespace Management	Checked	Checked

Server Settings > Caching Section:

Setting Name	Recommended	Current
Save Class Files	Unchecked	Unchecked
Trusted cache	Unchecked	Unchecked
Maximum number of cached templates	1000	1000

Server Settings > Memory Variables:

Setting Name	Recommended	Current
Enable Session Variables	Checked	Checked
Enable Application Variables	Checked	Checked

Data & Services > Data Sources > Advanced Settings > CLOB:

Data Source	Recommended	Current
commonspot-site-internet	Checked	Checked
commonspot-sites	Checked	Checked
commonspot-users	Checked	 Unchecked

2.1.5. Database Requirements (Page 3 of 6)

The third page verifies your data sources, checking to ensure that they meet the minimum requirements.

Database Requirements:
The following CommonSpot data sources have been checked to ensure that they meet the minimum requirements for CommonSpot Build 6.2.0. If any of the databases or drivers fail the minimal requirements you will not be able to upgrade until the requirements are met.

Data Source	Database Info	Status
commonspot-site-issues	SQLServer (v 9.00.4035)	✔ Meets Requirements
commonspot-users	SQLServer (v 9.00.4035)	✔ Meets Requirements
commonspot-sites	SQLServer (v 9.00.4035)	✔ Meets Requirements
commonspot-users-demo	SQLServer (v 9.00.4035)	✔ Meets Requirements

Next >>

2.1.6. Upgrades to be Performed (Page 4 of 6)

The fourth page details all the upgrades that will occur and prompts for data backup. After checking the information about the upgrades to be performed and verifying that you have backed up your databases, click **Next**.

The following upgrades will be performed:

Name	Datasource	CommonSpot Database Type	Status	Current Timestamp	Upgrade Timestamp
issues	commonspot-site-issues	Content	OK	2011-07-01 15:00:00	2011-07-01 15:00:00
Customer: 510	commonspot-users	Users	OK	2011-05-27 17:00:00	2011-05-27 17:00:00
CommonSpot Server	commonspot-sites	Server	OK	2011-05-27 17:00:00	2011-05-27 17:00:00
Customer: CommonSpot Demo	commonspot-users-demo	Users	OK	2011-05-27 17:00:00	2011-05-27 17:00:00

A backup has been performed of the databases.

Next >>

2.1.7. Status (Page 5 of 6)

CommonSpot displays status for each upgraded entry.

2.1.8. Upgrade Completed (Page 6 of 6)

Once the upgrade completes, the following page displays, reminding you to restart your ColdFusion service. Keep this page open during restart, and then follow instructions for validating your database schemas. You will need to log in again. Additionally, the upgrade process may report key violations, keyword errors, or other conditions (not shown in the image below). See [CommonSpot Post-Upgrade Steps](#) for more details.

CommonSpot Upgrade

The upgrade process has completed. Please review the steps below before continuing.

NOTE: Do not close this browser window. Keep it open for reference.
After you Restart ColdFusion open another browser window to run the appropriate tools listed in the additional steps. The tools are located in the Commonspot Tools section of the Commonspot Administrator.

Required Steps:

- **Restart the ColdFusion service.**
A ColdFusion restart is required *before* performing any additional actions.

Additional Steps:

- **Validate the database schemas**
Verifies that all datasources have been applied with the latest database schema.

2.1.9. Validate Database Schema

Clicking **Validate the database schemas** displays a site-specific version of the screen below for inspecting and verifying your database schemas.

Database Table Validator

Please select one or more 'User' and/or 'Site' databases to validate.

Sites database(s):

- commonspot-sites

Users database(s):

- commonspot-users

Site database(s):

- commonspot-site-internet

After running the upgrade process, you should not see any errors in the status column, as shown below. In any event, review the log files in `/commonspot/logs` folder for any additional information.

Database Table Validator Results					
Data Source	Tables Checked	Schema Date	Updated	Status	Details
commonspot-sites	18	2008-09-25 11:20:00	2009-05-28 18:22:21	OK	
commonspot-users	18	2008-11-24 18:00:00	2009-05-28 18:22:21	OK	
commonspot-site-internet	207	2009-01-31 08:45:00	2009-05-28 18:22:25	OK	

Administrator Module

- CommonSpot Administrator

Version Information

- About this CommonSpot installation

2.2. CommonSpot Post-Upgrade Steps

After completing the CommonSpot Winter 2012 upgrade, perform the following tasks. Note that if you are upgrading from version 6.0, you only need to perform tasks 12 on. Tasks 1–12 are part of the 6.0 upgrade.

1. Review the conversion-warnings.log
2. [Custom Element – Specify Custom Data Type](#)
3. [Custom Datasheet Action Modules](#)
4. [If you maintain custom versions](#) of these modules (/datasheet-modules in the root subsite), test functionality before going live with the new release.
5. Rebuild the CommonSpot Thumbnail Library
6. [Recreate and Reassign Verity Search Collections](#)
7. [Check Default Security Settings](#)
8. [Check Taxonomy Term Delimiters](#)
9. [Validating Users, Content, and Sites Databases](#)
10. [Review the Keyword Conversion Log](#)
11. [Ignore Data Annotation Error](#)
12. [Remove Temporary Page](#)
13. [Optionally Run Check Form Consistency](#)
14. [Re-enable Scheduled Jobs](#)
15. [Enable Stale Cache Handling](#)
16. Re-enable Authoring

17. [Clear Browser Cache](#)
18. [Upgrade to the latest version of the ADF](#)

2.2.1. Review the conversion-warnings.log

This task is required only if upgrading from a version earlier than 6.0. The Winter 2012 upgrade now includes a data normalization process. This process “unescape” previously escaped data in many places, including the SitePages table, with the potential for primary key violations. This can occur when two or more pages have names ending in a space, or in a non-breaking space plus a space, and a page with the same name contains no ending spaces. Depending on the database, the key value may be trimmed of its trailing or leading spaces. The upgrade process writes a special log file (conversion-warnings.log) in the /commonspot/logs directory to record these events and report them on the “Upgrade Finished” page. The log file indicates if any conflicting SitePages records were renamed and includes the names of affected files. These page names contain the Page ID of the conflicting record appended in the form of _currentPageID_Example: Record 200 has a page name of “foo” and record 300 has a page name of “foo ” (with a trailing space). Because trimming the space for “foo ” would produce a page name identical to record 200, CommonSpot renames “foo ” (with a trailing space) to foo_300_. If record 400 also has a page name of “foo;nbsp ” (non-breaking space followed by a space), the data normalization process translates the nbsp entity into a space. Since the trim removes both spaces, again conflicting with record 200, CommonSpot renames “foo;nbsp ” to foo_400_. If you discover these entries in the conversion-warnings log, locate the pages in your live 5.0.3 or 5.1 site and take the appropriate action. In some cases, you may see unnecessary duplicates, which you can delete via the CommonSpot interface, or you may see entries that need renaming. Once you make changes in the live 5.x site, back up the site and databases and migrate them back to your Winter 2012 development environment. If you decide to re-run the upgrade process on the development server to isolate all cases, rename the conversion-warnings.log file before running the upgrade again.

2.2.2. Custom Element – Specify Custom Data Type

This task is required only if upgrading from a version earlier than 6.0. The schema update required for this release affects how custom field type data displays, specifically, the processing and rendering of content containing native HTML characters. This version of CommonSpot gives you the option of specifying one of four HTML data types for each custom field type you have defined. After installation, adjust settings for each of your custom field types through **Site Administration – Elements & Forms | Field Types & Masks**. Sort on Custom field types, and click the edit icon to modify types. See *Add Field Type* in the *CommonSpot Administrators Reference* for details. Note that this only affects sites using custom field types.

Data Type: Specify the data type of the field. This controls how its data is processed for display and editing.

- HTML**
Escapes HTML for editing only.
- HTML Plus**
Escapes HTML for editing, does enhanced whitespace handling for rendering.
- Text**
Escapes HTML for rendering and editing.
- Unprocessed**
No processing for rendering or editing.

 Save  Cancel

2.2.3. Custom Datasheet Action Modules

If you maintain custom versions of these modules (/datasheet-modules in the root subsite), test functionality before going live with the new release.

2.2.4. Rebuild the CommonSpot Thumbnail Library

This task is required only if upgrading from a version earlier than 6.0. This release of CommonSpot includes faster image rendering in search results and reports through the use of thumbnail images. After performing the upgrade, you need to generate the initial thumbnails. Access the Site Administration dashboard and choose **Admin - Site Administration** from the top-level menu bar. Expand **Utilities** in the Site Administration left panel. Click **Site Tools** and select **Build Alternate Image Formats**. Perform this operation for every CommonSpot site.

2.2.5. Recreate and Reassign Verity Search Collections

This task is required only if upgrading from a version earlier than 6.0.

If you are upgrading sites with pre-6.0 Verity search collections, you must create new Full Text Search Collections and then map the appropriate subsites to each new collection.

Perform this task by accessing the Site Administration dashboard by choosing **Site Administration** from the main **Admin** top-level menu bar. Expand the **Utilities** section in the left panel and select **Manage Full Text Search Collections**.

Manage Search Collections

The following table lists the full text-search collections within this site and their respective status. In order for the full text search functionality to work correctly, all collections should have a status of 'OK'

[Select All](#) [Deselect All](#)

Status	Name	Directory	Subsite Count	Items	Actions
OK	cp-demo	C:/commonspot-data/customers /commonspot-users-demo/sites /commonspot-demo/verity/cp-demo /cp-demo	15	3	

[Add Collection](#) [Assign Subsites to Collection](#)

Showing 1 record.

More Actions...
More Actions...
Reindex Selected
Optimize Selected

Go Close

In the **Manage Full Text Search Collections** dialog click the **Add Collection** link and complete the appropriate information.

Create Search Collection

Please specify the following information required to create a new Search Collection.

Collection Name:
Enter a name for the Search Collection.

Collection Parent Directory:
Enter the parent directory name on the server under which the collection is to be created. A directory will be created under this directory named according to the specified collection name. This should be the full directory path from the root of the disk.

[Next](#) [Cancel](#)

We recommend that all new collections be created in the default location pre-populated in the **Create Search Collection** dialog. This provides an additional level of site security. Click **Next**, and then choose the appropriate subsites to assign to this collection by checking the checkboxes in the left-hand column.

Create Collection

The grid below lists each subsite and the collection under which its content is currently indexed. Please select one or more subsites to assign to the new search collection. After saving this dialog you must re-index the new collection, and any other collections in which the assignment changed in order for the content to be properly indexed.

Collection: All [Filter](#)

Subsite:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 All

[Select All](#) [Deselect All](#)

Name	URL	Collection
<input type="checkbox"/> /	/demo/	cp-demo
<input type="checkbox"/> about	/demo/about/	cp-demo
<input type="checkbox"/> academics	/demo/academics/	cp-demo
<input type="checkbox"/> admission	/demo/admission/	cp-demo
<input type="checkbox"/> alumni	/demo/alumni/	cp-demo
<input type="checkbox"/> campuslife	/demo/campuslife/	cp-demo
<input type="checkbox"/> currentstudents	/demo/currentstudents/	cp-demo
<input type="checkbox"/> facultyandstaff	/demo/facultyandstaff/	cp-demo
<input type="checkbox"/> futurestudents	/demo/futurestudents/	cp-demo

Showing 15 records.

[Create Collection](#) [Cancel](#)

Note: If you have a large number of subsites, your UI Scalability settings in Site Admin > Site Properties / Settings > Report Settings dialog for 'Subsite Selection' may limit the number of subsites returned in this report. You may need to change your filter criteria in order to modify the results.

Click **Create Collection** to create the new collection. You will need to do this for each collection. Note this operation does not index the content. It merely creates the collection and associates the selected subsites. After creating and assigning all of the collections, reindex each collection by opening the **Manage Full-Text Search Collections** dialog, and then click the reindex icon . See the *CommonSpot Administrator's Reference* for details. Lastly, you may want to manually delete the old Verity collections by accessing the ColdFusion administrator and deleting the appropriate collection(s).

2.2.6. Check Default Security Settings

This task is required only if upgrading from a version earlier than 6.0. CommonSpot 6.0 introduced many new security permissions at all levels. During the upgrade process, CommonSpot maps existing General Security permissions at the Server, Customer, Site, and Subsite levels to new permissions. Please perform a thorough review of your security settings after the upgrade.

Choose **Admin - Server Administration** from the top-level menu bar. Click to expand **Security** in the Server Administration Dashboard left pane, and then click **General Security** to view the General Security dialog, which will display the permissions assigned to specific users and groups. Verify that these permissions are correct for your security needs.

Similarly review General Security settings for Customer Administration, Site Administration, and Subsite Administration. See the *CommonSpot Administrator's Reference* for details.

2.2.7. Check Taxonomy Term Delimiters

This task is required only if upgrading from a version earlier than 6.0.

The delimiter for taxonomy terms provided via a user-defined expression has changed.

As described in the 6.0 release notes, to resolve problems arising from taxonomy terms containing commas, linefeed, which is Chr(10) in ColdFusion, %0A URL-encoded, and \n in JavaScript, now delimits terms.

Note: If you have page indexes or other components that either hard-code such a list or reference a variable or function that returns one, you will need to convert any hard-coded delimiters for taxonomy terms to be the linefeed character.

2.2.8. Validating Users, Content, and Sites Databases

This task is required only if upgrading from a version earlier than 6.0.

After upgrade, this version of CommonSpot provides the tools used to validate CommonSpot data in the Utilities left panel of the Customer, Site, and Server administration dashboards, as follows:

- *For the Users database*, Choose **Admin - Customer Administration** and expand **Utilities** in the Customer Administration left panel. Choose **Customer Tools - Database Table Validator**.

- For the Site Content database, choose **Admin – Site Administration** and expand **Utilities** in the Site Administration left panel. Choose **Site Tools – Database Table Validator**.
- For the CommonSpot Sites database, choose **Admin –Server Administration** and expand **Utilities** in the Server Administration. Choose **Server Tools – Database Table Validator**.

2.2.9. Review the Keyword Conversion Log

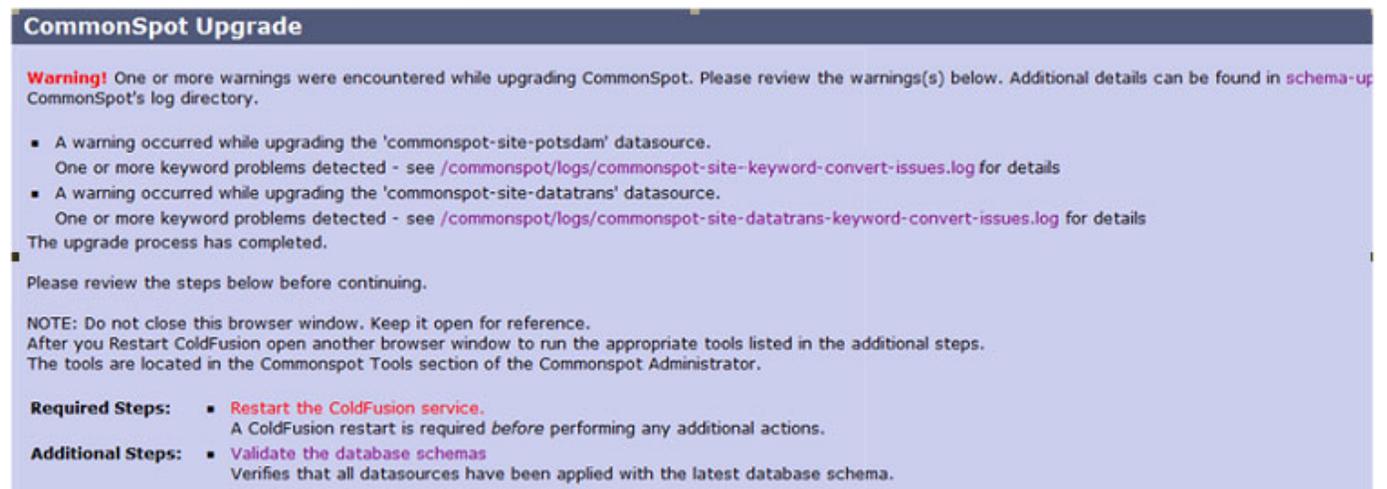
This task is required only if upgrading from a version earlier than 6.0.

As of release 6.0, CommonSpot provides improved keyword support and uses a different structure for internally storing keywords. Because pre-release testing uncovered instances of mistakenly space-delimited lists of default and/or enforced keywords (as opposed to correctly comma-delimited lists), the upgrade process now ensures that keywords are valid under the new storage mechanism.

The upgrade process may also create one or more log files containing warnings about keywords. There are two classes of keyword warnings:

- **Truncation errors** – Keyword length is limited to 255 characters – longer keywords are truncated in the conversion process and added to the log file.
- **Long Keyword warnings** – Keywords longer than three words are flagged. Some of these keywords are OK, but because keywords containing many words are often the result of author error, the upgrade process flags these keywords for review.

The upgrade process outputs log files to `/commonspot/logs/commonspot-site-{siteName}-keyword-convert-issues.log` and displays warnings as shown below.



The screenshot shows a warning message titled "CommonSpot Upgrade". The message states: "Warning! One or more warnings were encountered while upgrading CommonSpot. Please review the warnings(s) below. Additional details can be found in schema-up CommonSpot's log directory." It lists two warnings: one for the 'commonspot-site-potsdam' datasource and one for the 'commonspot-site-datatrans' datasource, both indicating keyword problems detected. It then states "The upgrade process has completed." and "Please review the steps below before continuing." A note follows: "NOTE: Do not close this browser window. Keep it open for reference. After you Restart ColdFusion open another browser window to run the appropriate tools listed in the additional steps. The tools are located in the Commonspot Tools section of the Commonspot Administrator." Finally, it lists "Required Steps" (Restart the ColdFusion service) and "Additional Steps" (Validate the database schemas).

CommonSpot Upgrade

Warning! One or more warnings were encountered while upgrading CommonSpot. Please review the warnings(s) below. Additional details can be found in [schema-up CommonSpot's log directory](#).

- A warning occurred while upgrading the 'commonspot-site-potsdam' datasource.
One or more keyword problems detected - see [/commonspot/logs/commonspot-site-keyword-convert-issues.log](#) for details
- A warning occurred while upgrading the 'commonspot-site-datatrans' datasource.
One or more keyword problems detected - see [/commonspot/logs/commonspot-site-datatrans-keyword-convert-issues.log](#) for details

The upgrade process has completed.

Please review the steps below before continuing.

NOTE: Do not close this browser window. Keep it open for reference.
After you Restart ColdFusion open another browser window to run the appropriate tools listed in the additional steps.
The tools are located in the Commonspot Tools section of the Commonspot Administrator.

Required Steps:

- **Restart the ColdFusion service.**
A ColdFusion restart is required *before* performing any additional actions.

Additional Steps:

- **Validate the database schemas**
Verifies that all datasources have been applied with the latest database schema.

If your site uses long keywords or keyword terms that contain spaces, review entries in this file to confirm items like the following. Note that these keywords may not be invalid, but do require review. Correct any incorrect keywords in the Winter 2012 release after upgrading.

One or more keywords in the converted site exceeds three words in length and may be malformed. Please review the list below and make any needed corrections.

Page keyword for 'opening2010'
(/about/administration/president/opening2010.cfm)
'2010 academic year opening remarks'

Page keyword for 'State of the University Address 2010'
(/about/administration/president/37453_1.pdf)
'2010 state of university'

Page keyword for 'Federal W-4' (/offices/hr/50429_1.pdf)
'2009 Federal Tax form'

Page keyword for 'A Play's the Thing'
(/academics/AAS/Engl/173711_1.pdf)
'A Play's the Thing'

2.2.10. Ignore Data Annotation Error

This task is required only if upgrading from a version earlier than 6.0.

While processing the Data_Annotation table during upgrade, CommonSpot attempts to drop an index for this table. If the index does not exist, CommonSpot reports a non-critical error in the schema-update.log in /commonspot/logs. Because this error does not affect upgrade status, you can safely ignore it.

2.2.11. Remove Temporary Page

If you configured your web server to redirect users to a temporary page, you should remove that configuration so user can now access your site.

2.2.12. Optionally Run the Check Form Record Consistency Utility

If you are upgrading from a version earlier than release 6.0, and experience unexpected results (missing data) from filters previously working for Custom Elements, Simple Forms, Metadata Forms, or XML Publication Definition records, run this utility from **Site Admin – Utilities – Tools**. This tool resolves inconsistencies resulting from fields added to forms already in use. Use this utility to repair form data.

2.2.13. Re-enable Scheduled Jobs

This release includes a new job manager feature for creating and managing all CommonSpot jobs from a single authoring server interface, replacing ColdFusion management of CommonSpot jobs. To use the new job manager features, you must explicitly add jobs as follows.

If you used...

Then ...

These Server Scheduled Jobs

CommonSpot Replication Monitor	From the Server Administration dashboard, expand the Utilities left panel, click Scheduled Jobs , click Add Scheduled Job , then select Check Replication .
--------------------------------	--

Static Site Generator	From the Site Administration dashboard, expand the Utilities left panel, click Scheduled Jobs , click Add Scheduled Job , then select Generate Static Content .
-----------------------	--

These Site Scheduled Jobs

CommonSpot Content Expiration	From the Site Administration dashboard, expand the Utilities left panel, click Scheduled Jobs , click Add Scheduled Job , then select Send Content Freshness Reminders .
-------------------------------	---

CommonSpot Link Validator	From the Site Administration dashboard, expand the Utilities left panel, click Scheduled Jobs , click Add Scheduled Job , then select Send Broken Link Notifications .
---------------------------	---

Stale Cache	If you enabled stale cache for any of your sites you must explicitly schedule the Rebuild Stale Cache job to refresh stale cache. This scheduled job gives you more control over stale cache regeneration and replaces the automated background process for refreshing stale cache in release 6.1. From the Server Administration dashboard, expand the Utilities left panel, click Scheduled Jobs , click Add Scheduled Job , then select Rebuild Stale Cache .
-------------	---

Background Cache Building	You can now explicitly schedule cache rebuilding through the Scheduled Job interface. CommonSpot provides options designed to optimize cache rebuild for sites using Cache Server/Stale Cache features, as well as for those not using these options.
---------------------------	---

If you are running under a single stand-alone environment or a multi-server environment, we recommend scheduling a rebuild of your cache on a nightly-basis on a server that can handle the processing (for example, an authoring server during off hours).

From the Site Administration dashboard, expand the **Utilities** left panel, click **Scheduled Jobs**, click **Add Scheduled Job**, then select **Rebuild Cache**. See "Scheduled Jobs" and "Scheduled Job Definitions" in the *CommonSpot Administrator's Reference*.

Note: Make sure that the Heartbeat job is scheduled to run at the server level for each of your servers. We recommend scheduling this job to run every two minutes on all servers in your configuration.

CommonSpot also allows you to create new scheduled jobs. You can optionally execute any of the 1,000+ CommonSpot "command" API methods. The new Scheduled Job Manager takes care of all the details of inserting jobs and maintaining changes through the ColdFusion Administrator. For details on creating and setting job schedules, see "Scheduled Jobs" in the *CommonSpot Administrator's Reference*. After entering jobs in CommonSpot, remove all CommonSpot jobs from the ColdFusion Administrator on *all servers running CommonSpot*.

2.2.14. Enable Stale Cache

You can improve site performance by enabling CommonSpot Stale Cache handling. This feature addresses the problem of degraded performance sometimes observed when frequent changes to content – particularly for pages with Page Index Elements or Custom Elements in re-use mode – result in wait times during cache regeneration. With this option enabled, you can choose to serve recently expired, or *stale*, cache to reduce or eliminate delays in delivering content to site visitors.

To use this feature, first analyze the performance/content freshness benefits for your site. Then configure whether and how long to serve stale cache at the site, template, or page level. Page-level settings override template settings, and template settings override site settings.

Configure site-wide settings for handling Stale Cache, through **Site Administration – Site Properties / Settings – Cache Properties**. Customize settings at the individual template or page level through **Properties – Cache/Static Settings**. Additional options are available for sites with Static Content Generation installed.

For detailed instructions on using these settings, refer to the *CommonSpot Administrator's Guide*.

For an overview of site performance and cache management options in CommonSpot, see the *CommonSpot Performance Guide*.

2.2.15. Re-enable Authoring

Since authoring was disabled in the pre-upgrade steps, re-enable it now.

2.2.16. Replication Customers: Copy Old wddx Files to New Directory

Once the upgrade completes and before replicating, copy all the files from the old `/commonspot/sync/wddx` directory to the new `/commonspot/sync/wddx` directory.

2.2.17. Clear Browser Cache

Since Web browsers cache JavaScript and other files affected by the upgrade process, all CommonSpot contributors must clear Web browser cache files before using a new version of CommonSpot. Contributors

using more than one browser type must clear cache for each type used. For best results, review browser Help for instructions on how to clear cache.

Below are instructions for browsers popular at the time of release. **Check your browser Help for the most up-to-date instructions.**

For supported versions of Mozilla Firefox, access these options through Tools -> Clear Recent History and select Cache. Versions earlier than Firefox 5, use Tools ->Private Data or Tools -> Options -> Privacy. Review browser Help for more information.

For Microsoft Internet Explorer 9, click the gear  icon in the top right of the browser window, and select Internet Options, or click Tools -> Internet Options. On the General tab, under Browsing History, click the Delete button and uncheck every box except Temporary Internet Files in the Delete Browsing History window. Click Delete, then click OK, and restart the browser.

For Microsoft Internet Explorer 8, press F12 -> Cache -> Clear Browser Cache or click Internet Options -> General ->Settings ->View Files -> Delete .js and .css files

Note: For IE8, CTRL-R does *not* clear .js or .css files.

2.2.18. Upgrade to the latest version of the ADF

If you currently use the CommonSpot Application Development Framework, download the latest version at <http://community.paperthin.com/projects/ADF/>

Chapter 3 Upgrading CommonSpot on a ROPS in a Shared Database Configuration

Note: This information applies to a Read-Only Production Server in a Shared Database configuration, *not a Replication configuration.*

Upgrading CommonSpot in a shared database environment requires synchronizing the Authoring and Read-Only Production Servers through a process identical to that used to synchronize data after you install CommonSpot patches. See “Installing Patches” in the *CommonSpot Shared Database Configuration Guide* for information on using the Synchronize CommonSpot Installation tools for that process.

To complete the upgrade for your current configuration on the Authoring server, perform the following steps:

1. Stop ColdFusion on all Read-Only servers.
2. Synchronize CommonSpot to each ROPS by
 - a. Using the Synchronize **CommonSpot Installation** tool from the Server Administration left panel under **Shared Database**, or
 - b. Manually copying the 'commonspot' directory (and all subdirectories) from the authoring server to each ROPS, or
 - c. Extracting the upgrade zip on each ROPS

Note that it's a best practice to create a new /commonspot/ directory for extracting files as described under [Extract CommonSpot Winter 2012 Modules](#)

3. You should still run the Synchronize CommonSpot Installation utility after any manual file operations to verify that the installations are synchronized. If the files are updated, the process will not take as long.
4. Restart ColdFusion on all Read-Only servers.

Chapter 4 Notes on Upgrading ColdFusion

When upgrading ColdFusion, be sure to read Adobe's Release Notes for specific information regarding the migration. Here are a few points to keep in mind when starting the process:

- If you are running ColdFusion 8.0.1 or 9.0.1, you must configure the ColdFusion administrator to use a password only. Usernames are not supported.
- ColdFusion will automatically convert the mappings from your previous ColdFusion installation. After the migration, ensure that these mappings are active by re-saving the mappings using the ColdFusion Administrator.
- In certain situations, ColdFusion will not reliably convert the data source settings, so you must verify that the converted data source settings are correct. This is especially important with SQL Server and Oracle databases, as the available settings have changed under ColdFusion.
- Verify that your ColdFusion datasource settings *on all CommonSpot servers* have both UTF-8 and CLOB enabled.
- ColdFusion 8 contains native MySQL database support. If you are upgrading from a ColdFusion 7 / MySQL 5 environment to ColdFusion 8, you will need to take the following post-upgrade steps:
 1. Physically delete the JDBC driver so that ColdFusion does not load it.
 2. Recreate each MySQL 5 data source using the native ColdFusion 8 MySQL (4/5) driver.
 - ColdFusion may not convert existing JVM and Java settings. Please review the settings and consult the Recommended ColdFusion Settings document on the PaperThin Website.

Starting with Version 8.0, ColdFusion no longer supports shared Verity Collections. If your current Shared Database environment is configured to share Verity on a single server, you will need to reconfigure the Shared Database configuration for local Verity collections. Contact PaperThin Support for more information on how to accomplish this.

Chapter 5 Deploying on Railo

This release of CommonSpot supports the open source CFML Railo version 3.3.2. For details on supported versions see:

<http://www.paperthin.com/support/tech-specs.cfm>

To upgrade to the latest CommonSpot release on Railo, first upgrade on the non-Railo platform, then migrate the site to Railo.

Note: This release supports Railo on MySQL only.

If you are upgrading to the latest release of CommonSpot from a version earlier than 5.1.1, and deploying CommonSpot on the Railo platform, complete these steps:

1. Upgrade to CommonSpot 5.1.1 on Adobe ColdFusion 8 (you can use the trial version for this step). Refer to the *5.1.1 Upgrade Guide* and release notes, available from paperthin.com/support for details.
2. If you are not already UTF8-enabled, run the database migration tool in CommonSpot 5.1.1 as described under [Check UTF-8 Support](#). Then complete the steps described below.

If you are upgrading to the latest release of CommonSpot from a version later than 5.1.1 and deploying CommonSpot on the Railo platform, complete these steps

1. Install the CommonSpot Winter 2012 Release using Adobe ColdFusion 8.
2. Install the CommonSpot Winter 2012 Release on Railo.
3. Complete site migration *from* the Adobe ColdFusion 8 platform *to* the Railo platform using the standard site migration process described in paperthin.com/support/knowledgebase/articles/How-to-Migrate-a-CommonSpot-Site.cfm
4. After migration, check the Sites database by running Server Administration – Utilities – Server Tools – Database Table Validator.