This CommonSpot Product Upgrade Guide, as well as the software described with it, is provided under the CommonSpot License Agreement and may be used, copied and distributed only in accordance with the terms of the license. The content outlined in this manual is for informational purposes only and is subject to change without notice. By no means should the information contained herein be construed, as a commitment by PaperThin, Inc. PaperThin assumes no responsibilities or liability for errors or inaccuracies found in this documentation.

ColdFusion, Acrobat, and Flash are registered trademarks of Adobe Systems Incorporated. Microsoft, Windows, Microsoft SQL Server, Microsoft Word, Excel and PowerPoint, FrontPage and Windows NT are all registered trademarks of Microsoft Corporation. Solaris is a trademark of Sun Microsystems, Inc. Oracle is a registered trademark of Oracle Corporation, and Verity is a trademark of Autonomy, Inc. This document was last updated February 14, 2011.
Chapter 1 Upgrade Process and Steps ................................................................. 4
  1.1. Recommended Upgrade Process .............................................................. 4
  1.2. Pre CommonSpot 6.1 Upgrade Steps ....................................................... 5
    1.2.1. Check System Requirements .......................................................... 6
    1.2.2. Check UTF-8 Support ................................................................... 6
      1.2.2.1. Environments running CommonSpot versions earlier than 5.0.3 or 5.1.1 ... 6
      1.2.2.2. Environments currently running CommonSpot 5.0.3 or 5.1.0 ......... 7
    1.2.3. Check Character Set Configuration (Oracle Only) .............................. 7
    1.2.4. Check JVM Settings & Modules ...................................................... 7
    1.2.5. Check Database Permissions .......................................................... 8
    1.2.6. Download 6.1 Archive & License Keys ........................................... 8
    1.2.7. Stop Authoring ........................................................................... 8
    1.2.8. Replicate / Synchronize Content to ROPS ...................................... 8
    1.2.9. Stop Scheduled Jobs ................................................................... 9
    1.2.10. Turn off Browser Add-ons ............................................................ 9
    1.2.11. Redirect Traffic to a Temporary Page .......................................... 9
  1.3. CommonSpot 6.1 Upgrade Steps ............................................................. 9
    1.3.1. Extract CommonSpot 6.1 Modules ............................................... 9
    1.3.2. Run the Upgrade Script ................................................................. 10
    1.3.3. Pre–Upgrade Steps (Page 1 of 6) .................................................... 10
    1.3.4. ColdFusion Administrator Settings (Page 2 of 6) ............................ 11
    1.3.5. Database Requirements (Page 3 of 6) ........................................... 12
    1.3.6. Upgrades to be Performed (Page 4 of 6) ....................................... 12
    1.3.7. Status (Page 5 of 6) ................................................................... 12
    1.3.8. Upgrade Completed (Page 6 of 6) ................................................ 12
    1.3.9. Validate Database Schema ............................................................ 13
  1.4. Post CommonSpot 6.1 Upgrade Steps .................................................... 14
    1.4.1. Review the conversion–warnings.log ........................................... 14
    1.4.2. Custom Element – Specify Custom Data Type ............................... 15
    1.4.3. Rebuild the CommonSpot Thumbnail Library .................................. 16
    1.4.4. Recreate and Reassign Verity Search Collections ......................... 16
    1.4.5. Check Default Security Settings ................................................... 18
    1.4.6. Check Taxonomy Term Delimiters ............................................... 18
    1.4.7. Validate the Users, Content, and Sites Databases ......................... 18
    1.4.8. Review the Keyword Conversion Log .......................................... 19
    1.4.9. Ignore Data Annotation Error ....................................................... 20
    1.4.10. Remove Temporary Page ............................................................ 20
    1.4.11. Restart Scheduled Jobs ............................................................... 20
    1.4.12. Re–enable Authoring ................................................................ 20
    1.4.13. Clear Browser Cache ................................................................. 21

Chapter 2 Upgrading CommonSpot on a ROPS in a Shared Database Configuration ............................................. 22
Chapter 3 Notes on Upgrading ColdFusion ..................................................... 23
Chapter 1 Upgrade Process and Steps

Upgrading to CommonSpot 6.1 is similar to other CommonSpot upgrades. Depending on your current version, you may need to perform pre-update steps. We recommend that you read through the following sections before upgrading to CommonSpot 6.1.

- **Recommended Upgrade Process**
- **Pre 6.1 Upgrade Steps**
- **6.1 Upgrade Steps**
- **Upgrading CommonSpot on a ROPS in a Shared Database Configuration**
- **Notes on Upgrading ColdFusion**

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, specifically review features not supported in this initial release. If you rely on any currently unavailable or deprecated features, do not install in a production environment. **Read Pre–6.1 Upgrade Steps** – Depending on your current version and whether or not your databases support UTF-8, you may need to perform pre–6.1 upgrade steps. Read the **Pre–6.1 Upgrade Steps** outlined in this document.

2. **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.

3. **Back up** – Back up both file system files and the database for your existing Production site(s). **Set up a Development Environment** – We cannot recommend strongly enough that you perform the upgrade in a development environment first before performing an upgrade of your production environment. Set up a development environment that matches your 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 development environment. If you do not have development server licenses, contact your Account Representative for temporary or permanent licenses.

4. **Deploy Backups in Development** – After you set up the development environment, deploy the backups in this environment. For more information on site migration, please see the CommonSpot KB article [http://www.paperthin.com/support/knowledgebase/articles/How-to-Migrate-a–CommonSpot–Site.cfm](http://www.paperthin.com/support/knowledgebase/articles/How-to-Migrate-a–CommonSpot–Site.cfm)

5. **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.

6. **Upgrade in Development** – Perform the actual CommonSpot upgrade in the development environment.
7. **Test** – After you have completed the upgrade, thoroughly test your site. CommonSpot 6.1 includes significant changes affecting stored text and image data, keywords, and security settings. 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.

8. **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 to be available during the upgrade period.

9. **Back up Again** – Just before you perform the upgrade on Production, back up your file system and databases again.

10. **Upgrade Production** – Once you complete the preceding steps, perform the upgrade on your Authoring Server.

11. **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 the *Error! Reference source not found.* step-by-step instructions for upgrading your CommonSpot installation.

### 1.2. Pre CommonSpot 6.1 Upgrade Steps

Prior to copying CommonSpot 6.1 over your current CommonSpot version and running the upgrade process, complete the following steps.

1. **Check System Requirements**
2. **Check UTF-8 Support**
3. **Check Character Set Configuration (Oracle Only)**
4. **Check JVM settings & Modules**
5. **Check Database Permissions**
6. **Download 6.1 Archive & License Keys**
7. **Stop Authoring**
8. **Replicate / Synchronize Content to ROPS**
9. **Stop Scheduled Jobs**
10. **Turn Off Browser Add-ons**
11. **Redirect Traffic to a Temporary Page**

Upon successful completion you can perform the 6.1 upgrade.
1.2.1. Check System Requirements

Before upgrading to CommonSpot 6.1 it is important to understand the system requirements. A full and up-to-date listing of 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

Versions of CommonSpot starting with version 6.0, require that all CommonSpot databases be configured to support UTF-8.

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

- CommonSpot 5.0.3
- CommonSpot 5.1.0
- CommonSpot 5.1.1

Note: We strongly recommend that if you are running a version prior to 6.0, and you are unsure if your databases are UTF-8, that you run the Database Migration Tool. This tool validates that your databases are UTF-8 and converts, if necessary.

If any of your databases are not UTF-8, or you are running a version prior to 5.0.3 or 5.1.1, you must perform additional steps before upgrading to 6.1. See the appropriate section below for more information on the steps needed to upgrade to 6.1, based on the version you are currently running.

1.2.2.1. Environments running CommonSpot versions earlier than 5.0.3 or 5.1.1

If you are running CommonSpot 5.0.0, 5.0.1, 5.0.2 or 5.1.0, and all of your CommonSpot databases are configured to be UTF-8, you can install 6.1 directly.

Otherwise, you must first upgrade to 5.1.1 and run the Database Migration Tool to convert your databases to UTF-8. For more information on this process, review the related knowledgebase article at:

1.2.2.2. 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 6.1 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://www.paperthin.com/support/knowledgebase/articles/Database-Migration-Tools.cfm.

Please note that the hot fixes are separate patches for each version. Make sure to use the correct patch for your version.

1.2.3. Check Character Set Configuration (Oracle Only)

If you are running Oracle as your database, you must 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')
```

1.2.4. Check JVM Settings & Modules

Please refer to the Recommended ColdFusion Settings document on the CommonSpot community site, the commons at:

http://community.paperthin.com/articles/2010/07/21/Recommended-ColdFusion-Settings.cfm

and compare your JVM settings to those recommended for 6.1.
1.2.5. Check Database Permissions

Regardless of the database type (Oracle, SQL Server or MySQL), all CommonSpot databases must have ‘Create View’ permissions.

If you are running Oracle, creating or upgrading sites in CommonSpot 6.1 requires that the owners of each Content, Sites, or Users database have at least Connect and Resource roles, with sufficient quota available in default table space. Each CommonSpot data source requires a separate Oracle user on a compliant database instance.

1.2.6. Download 6.1 Archive & License Keys

In order to upgrade to 6.1, you must obviously download the new software from the PaperThin Site at http://www.paperthin.com/support/downloads. The software is available in either zip file (for Windows) or tar file (for Linux/Solaris) format.

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.

CommonSpot 6.1 also requires that you download License Keys from the PaperThin Support Site (www.paperthin.com/support/downloads/) again in order to certify the keys for use with CommonSpot 6.1. 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 safe keeping before you begin the upgrade. Before starting the upgrade, extract the keys into the /commonspot/keys directory, then restart the ColdFusion Application Server.

1.2.7. Stop Authoring

Disable CommonSpot authoring on all sites to prevent content updates until after the upgrade process is complete. See the CommonSpot Administrators Guide for instruction on how to disable authoring.

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

1.2.8. Replicate / Synchronize Content to ROPS

If you are using CommonSpot’s replication facilities, force a manual replication after disabling authoring to ensure content is replicated 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 both the RemoteRequests and FileActionQueue tables.

This will ensure that all content is up to date on all ROPS, prior to the upgrade.
1.2.9. Stop Scheduled Jobs

You should stop all CommonSpot scheduled jobs by pausing them in the ColdFusion Administrator.

1.2.10. Turn off Browser Add-ons

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

1.2.11. 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 do this.

1.3. CommonSpot 6.1 Upgrade Steps

Once you have successfully performed the pre-6.1 upgrade steps, upgrade to CommonSpot 6.1 by following the steps in the following sections.

1.3.1. Extract CommonSpot 6.1 Modules

CommonSpot is made up a hundreds of HTML, JavaScript, CSS, ColdFusion and Java files. These files need to be extracted from the zip or tar archive that was downloaded from paperthin.com/support/downloads.

Follow these steps to properly extract the CommonSpot files:

1. First create a new /commonspot_61/ directory and extract the files from the zip or tar archive into this new directory, preserving the directory hierarchy.
2. If any hot fixes are available that you wish to apply, copy those into the appropriate location under the /commonspot/ directory.
3. Copy the new 6.1 license keys that were downloaded as part of the pre-6.1 Upgrade steps into /commonspot_61/keys directory.
4. Stop ColdFusion.
5. Rename the /commonspot/ directory to /commonspot_old/, then rename /commonspot_61/ to /commonspot/
6. Copy any customized modules from /commonspot_old/ to /commonspot/
7. Start ColdFusion.

Note that once the CommonSpot 6.1 code is unzipped into the /commonspot/ directory, the following message displays to site visitors and normal page viewing is suspended until the upgrade completes. As described in the pre-61 Upgrade steps, you can optionally redirect traffic to a temporary page.
1.3.2. 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. Pre-Upgrade Steps (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

1.3.3. Pre-Upgrade Steps (Page 1 of 6)

The first page provides a pre-upgrade checklist of steps and requests the ColdFusion Administrator password. Complete the steps outlined on this page. When finished, enter the ColdFusion password and click Next to continue.

CommonSpot Upgrade
To perform an upgrade to CommonSpot Build 6.1.0.210, 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.
7. Renamse 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. Read 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: 

Next>>
1.3.4. ColdFusion Administrator Settings (Page 2 of 6)

The second page displays recommended and current ColdFusion settings. Settings that are out of sync with recommended values are highlighted for your review; however, any out-of-date settings are automatically changed to the recommended setting when you click Next.

### 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:

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Recommended</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeout requests after (seconds)</td>
<td>300</td>
<td>300</td>
</tr>
<tr>
<td>Enable Whitespace Management</td>
<td>Checked</td>
<td>Checked</td>
</tr>
</tbody>
</table>

#### Server Settings > Caching Section:

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Recommended</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save Class Files</td>
<td>Unchecked</td>
<td>Unchecked</td>
</tr>
<tr>
<td>Trusted cache</td>
<td>Unchecked</td>
<td>Unchecked</td>
</tr>
<tr>
<td>Maximum number of cached templates</td>
<td>1000</td>
<td>1000</td>
</tr>
</tbody>
</table>

#### Server Settings > Memory Variables:

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Recommended</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Session Variables</td>
<td>Checked</td>
<td>Checked</td>
</tr>
<tr>
<td>Enable Application Variables</td>
<td>Checked</td>
<td>Checked</td>
</tr>
</tbody>
</table>

#### Data & Services > Data Sources > Advanced Settings > GLOB:

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Recommended</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>commonspot-site-internet</td>
<td>Checked</td>
<td>Checked</td>
</tr>
<tr>
<td>commonspot-sites</td>
<td>Checked</td>
<td>Checked</td>
</tr>
<tr>
<td>commonspot-users</td>
<td>Checked</td>
<td>Unchecked</td>
</tr>
</tbody>
</table>
1.3.5. Database Requirements (Page 3 of 6)

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

![Database Requirements](image1)

1.3.6. 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 these details and verifying that you have backed up your databases, click Next.

![Upgrades to be Performed](image2)

1.3.7. Status (Page 5 of 6)

CommonSpot displays status for each upgraded entry.

1.3.8. 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 Review the Keyword Conversion Log Error! Reference source not found. for more details.
1.3.9. 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

[Validate Schema]

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.
1.4. Post CommonSpot 6.1 Upgrade Steps

Once the CommonSpot 6.1 upgrade is complete, perform the tasks described below. Note that if you are upgrading from version 6.0, you only need to perform the tasks starting with number 10, Remove Temporary Page, below. All other tasks are part of the 6.0 upgrade.

1. Review the conversion-warnings.log
2. Custom Element – Specify Custom Data Type
3. Rebuild the CommonSpot Thumbnail Library
4. Recreate and Reassign Verity Search Collections
5. Check Default Security Settings
6. Check Taxonomy Term Delimiters
7. Validate the Users, Content, and Sites Databases
8. Review the Keyword Conversion Log
9. Ignore Data Annotation Error
10. Remove Temporary Page
11. Restart Scheduled Jobs
12. Re-enable Authoring
13. Clear Browser Cache

1.4.1. Review the conversion-warnings.log

This task is only required if upgrading from a version earlier than 6.0.
The 6.x 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 reports 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 _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 6.1 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.

### 1.4.2. Custom Element – Specify Custom Data Type

This task is only required 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.
1.4.3. Rebuild the CommonSpot Thumbnail Library

This task is only required 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.

1.4.4. Recreate and Reassign Verity Search Collections

This task is only required 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 from the Site Administration dashboard (choose 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'.

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Directory</th>
<th>Subsite Count</th>
<th>Items</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>cp-dem</td>
<td>C:/commonspot-data/customers /commonspot-users-demo/sites /cmanspot-demo/verity/cp-demo</td>
<td>12</td>
<td>0</td>
<td>![Manage Actions]</td>
</tr>
</tbody>
</table>

Add Collection Assign Subsites to Collection

Showing 1 record.

Copyright 1998–2011 PaperThin, Inc. All rights reserved
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.

Click **Next** and then choose the appropriate subsites to assign to this collection by checking the checkboxes in the left-hand column.

We recommend that you create all new collections 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.

<table>
<thead>
<tr>
<th>Name</th>
<th>URL</th>
<th>Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>/</td>
<td>/demo/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>about</td>
<td>/demo/about/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>academics</td>
<td>/demo/academics/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>admission</td>
<td>/demo/admission/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>alumni</td>
<td>/demo/alumni/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>campuslife</td>
<td>/demo/campuslife/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>currentstudents</td>
<td>/demo/currentstudents/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>facultyandstaff</td>
<td>/demo/facultyandstaff/</td>
<td>cp-demo</td>
</tr>
<tr>
<td>futurestudents</td>
<td>/demo/futurestudents/</td>
<td>cp-demo</td>
</tr>
</tbody>
</table>

**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 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 it with the selected subsites.
After creating and assigning all of the collections, reindex each collection by opening the Manage Full-Text Search Collections dialog, and clicking the reindex icon 🔄. See the CommonSpot Administrator’s Reference for details.

Lastly, you can manually delete the old Verity collections by accessing the ColdFusion administrator and removing the appropriate collection(s).

### 1.4.5. Check Default Security Settings

This task is only required 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 displays 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.

### 1.4.6. Check Taxonomy Term Delimiters

This task is only required 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, the linefeed character now delimits terms. Note that the linefeed character is Chr(10) in ColdFusion, %0A URL–encoded, and \n in JavaScript.

**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 to the linefeed character.

### 1.4.7. Validate the Users, Content, and Sites Databases

This task is only required 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.

1.4.8. Review the Keyword Conversion Log

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

CommonSpot 6.0 provides improved keyword support and internally stores keywords differently than in previous versions. Pre-release testing uncovered several instances of mistakenly space-delimited lists of default and/or enforced keywords (versus correctly comma-delimited lists). As a result, 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** – Keywords are limited to 255 characters in length – longer keywords are truncated in the conversion process and added to the log file.

- **Long Keyword warnings** – Keywords longer than three words in length are flagged for review. Some such keywords are correct, but often keywords containing many words are the result of author error.

The log file names are in the format /commonspot/logs/commonspot-site-{siteName}-keyword-convert-issues.log.

Warnings display as shown below.

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 6.1 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 'opening2006' (/about/administration/president/opening2006.cfm)
  '2006 academic year opening remarks'

Page keyword for 'State of the University Address 2008' (/about/administration/president/37453_1.pdf)
  '2008 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'

1.4.9. Ignore Data Annotation Error

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

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

1.4.10. Remove Temporary Page

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

1.4.11. Restart Scheduled Jobs

From the ColdFusion Administrator, restart any CommonSpot Scheduled Jobs that were paused during the upgrade.

1.4.12. Re-enable Authoring

Since authoring was disabled in the pre-upgrade steps, it should now be re-enabled.
1.4.13. Clear Browser Cache

Since Web browsers cache JavaScript and other files affected by the upgrade process, all CommonSpot contributors must clear their Web browser cache files before accessing 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**, you can access these options through Tools -> Clear Private Data or Tools -> Options -> Privacy. Review browser Help for more information.

- **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.

- **For Microsoft Internet Explorer 7**, use CTRL–F5 or click Tools -> Internet Options. Under the General tab – Browsing History, click **Delete**. Review browser Help for more information.
Chapter 2 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 6.1 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 3 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 greater, 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.

- ColdFusion 8 contains native MySQL databases 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:
  - Physically delete the JDBC driver so that ColdFusion does not load it.
  - 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.