Content Central Upgrade Instructions

1. Introduction

This document provides the information needed to perform a Content Central software upgrade. Ademero provides release notes with each software build. Refer to the release notes for information to help you determine if an upgrade should be performed on your machine.

The following sections will be addressed in this document.

Database Backup Creation
Pre-Upgrade Tasks & Checklist
Software Upgrade
Post-Upgrade Tasks & Checklist

2. Database Backup Creation

Content Central employs Microsoft's SQL Server 2005 or SQL Server 2008 database engine. All data, except for documents and search indexes, are stored within a single SQL Server database. For more information, see *SQL Server Background Information*.

We *strongly recommend* you create a database backup before proceeding with the upgrade or modifying Content Central's configuration in any way. Follow these instructions to create a backup using Microsoft's SQL Server Management Studio [Express] (SSMS[E]). If you do not have this tool installed, you can download the *Express* edition by visiting one of the pages below.

SSMSE for SQL Server 2005	http://www.microsoft.com/downloads/en/details.aspx?FamilyID=c243a5ae-4bd1-4e3d-94b8-5a0f62bf7796
SSMSE for SQL Server 2008	http://www.microsoft.com/downloads/en/details.aspx?FamilyID=08e52ac2-1d62-45f6-9a4a-4b76a8564a2b

1. Launch the Content Central Configuration Manager from your computer's desktop or the `Ademero \Content Central` programs folder. Access the **SQL Settings** page and you will find the **Server Name\Instance** path, **Database Name**, and **Admin Login** authentication method needed for the following steps.

2. Launch SQL Server Management Studio Express.

3. Connect to a **Database Engine** containing the Content Central database using the Server Name\Instance Name format for the **Server name** and the appropriate **Authentication** method for administrative access, both obtained in an earlier step.
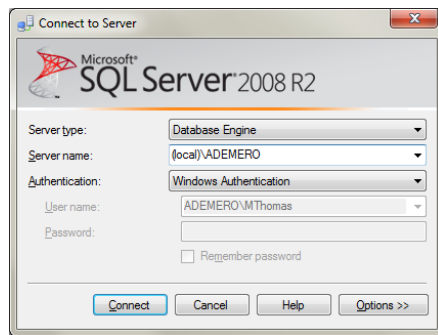
SQL Server Management Studio Connection Window

4. Within the **Object Explorer** pane, expand or double-click the **Databases** object.

   ⓘ **Tip**

   If you do not see the **Object Explorer**, access it by selecting **Object Explorer** from the **View** menu.
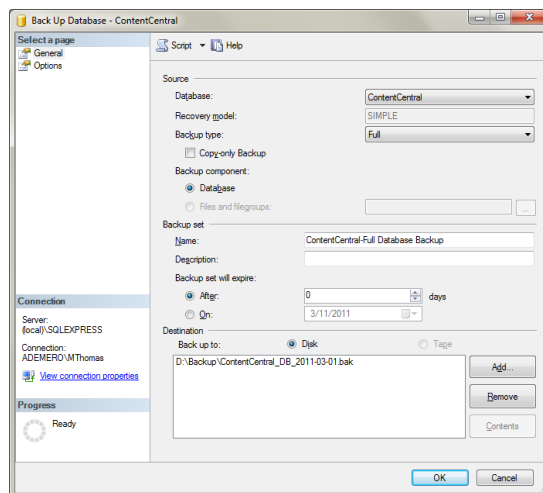
5. Locate the database for Content Central (obtained in an earlier step), and access the context menu by right-clicking the database name.

   🛑 **Warning**

   More than one database may appear to belong to Content Central. Ensure you select the correct database.

6. Select the **Tasks** item, followed by the **Back Up** item.

SQL Server Management Studio Backup Window

7. Verify the **Source Database** name and **Backup type** (**Full**).

8. Ensure the **Destination** contains a single **Disk** location suitable for creating a backup file. If you do not see any destinations listed, click the **Add** button to choose a **File name**.

9. Click the **OK** button at the bottom of the **Back Up Database** page to begin creating the backup file.

10.After the backup file has been created, you can exit SSMSE.

3. Pre-Upgrade Tasks & Checklist

Please enter appropriate information into the text box fields and select the appropriate check boxes below before attempting to upgrade Content Central. This research will be helpful in confirming full functionality after the upgrade. It will be requested by a support technician if you have any issues during the upgrade process.

3.1. Windows Operating System Version

For example: Windows Server 2008 R2. Access this item and the next two items quickly using the **Windows Key**-**Pause/Break** key combo to launch the **System Properties** window.

3.2. Computer Hardware Specifications

Include number of cores, clock speed (in GHz), and total RAM size. This is found in the **System Properties** window.

3.3. Computer Name

Select the **Computer Name** tab from the **System Properties** window.

3.4. Content Central Web Address

All computers (including the server) connect to Content Central using this URL.

3.5. Content Central Current Version

Launch the Content Central Configuration Manager. The current version is located on the title bar.

3.6. Content Central SQL Settings

Select the **SQL Settings** page within the Content Central Configuration Manager for the following items.
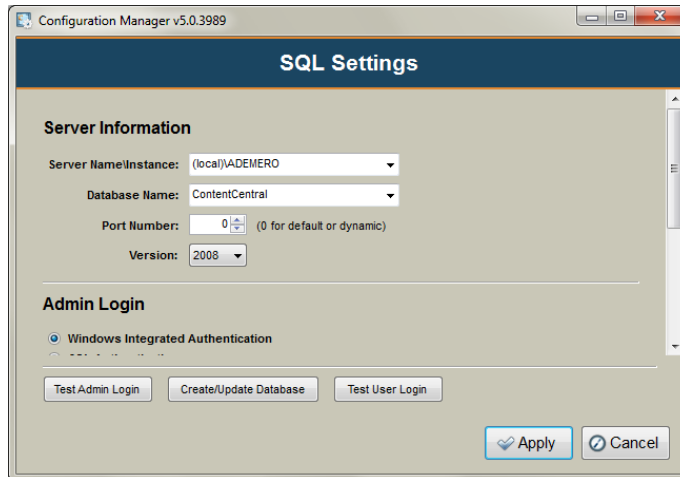
Configuration Manager SQL Settings

3.6.1. SQL-Server Server Name\Instance

3.6.2. Content Central Database Name

Select the **SQL Settings** page within the Content Central Configuration Manager for the **Database Name**, **Version**, and **Test Admin Login** button.

3.6.3. SQL Server Port Number

3.6.4. SQL Server Database Version

3.6.5. + Admin Login Test

Click the button labeled **Test Admin Login**.

🛑 **Warning**

Do not proceed with the upgrade if this step does not succeed! Contact your IT administrator or an Ademero support technician for assistance.

3.7. Content Central Folder Locations

Select **System Folders** from the main page in the Content Central Configuration Manager. Enter the path for each folder in the boxes below.
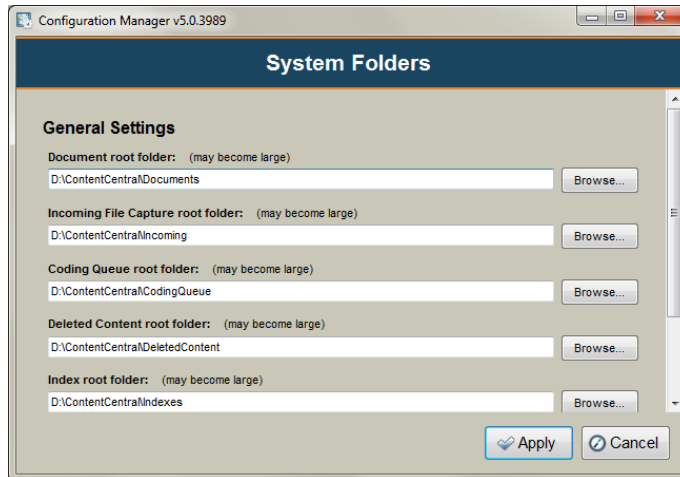
Configuration Manager System Folders

3.7.1. Documents root folder

3.7.2. Incoming File Capture root folder

3.7.3. Coding Queue root folder

3.7.4. Deleted Content root folder

3.7.5. Index root folder

3.7.6. Unprocessed root folder

3.8. Content Central *Program Files* Folder

Example: `C:\Program Files (x86)\Ademero\Content Central\`

ⓘ **Tip**

> Find this location easily by right-clicking any Content-Central application icon on your desktop (such as the Configuration Manager or Catalog Manager) and recording the target path to the application.

3.9. Internet Information Services Application Pool

Access Internet Information Services (IIS) settings by right-clicking any **Computer** or **My Computer** icon on the desktop or in the Windows *Start* menu and clicking **Manage**. The IIS manager is contained within the **Services and Applications** area. Expand the IIS **Connections** tree until you find the **Web Sites** item. Locate the ContentCentral item, which is usually within the *Default Web Site* item. Access its properties or **Basic Settings**. The **Application pool** will be listed here.
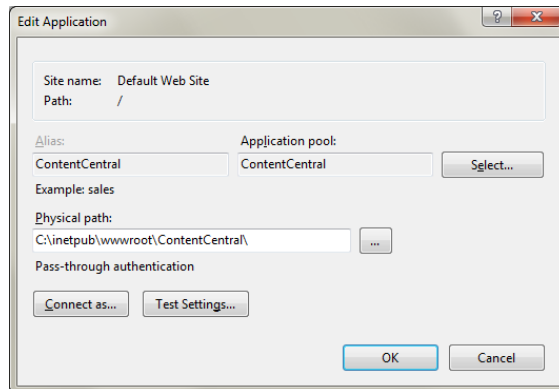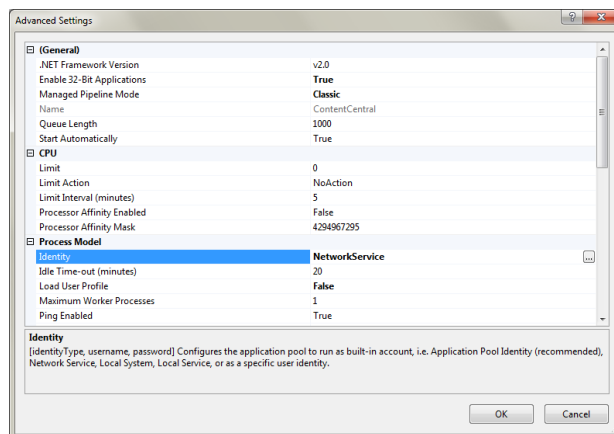

Internet Information Services (IIS) Web-Application Basic Settings

3.10. Application Pool Identity

This section describes application-pool identity information for IIS 7 (Windows Server 2008, Windows 7). For information on IIS 6 (Windows Server 2003, Windows XP) see *IIS 6.0 Application-Pool Identity*.

Locate and expand the **Application Pools** item within the IIS **Connections** tree. Select the appropriate Application Pool determined above. Click on the **Advanced Settings** link in the **Actions** pane. The identity will be listed under the **Process Model** section.

Internet Information Services (IIS) Application-Pool Advanced Settings

3.11. Content Central Service Identities

From the same **Services and Applications** area described above, access the **Services** area for these items. Access the properties of a service by double-clicking it or right-clicking it and selecting **Properties**.The domain and username identity can be found on the **Log On** tab for each service.
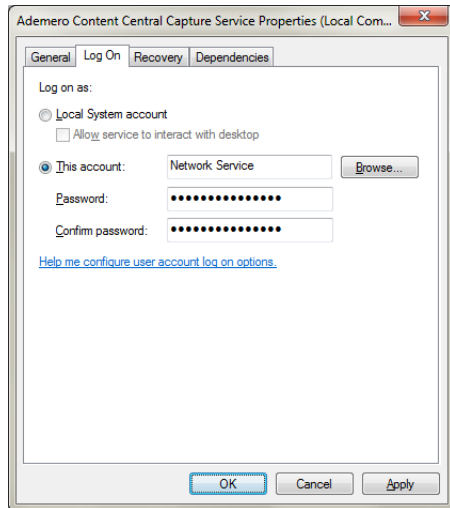
Content Central Service Identity

3.11.1. Content Central Capture Service Identity

3.11.2. Content Central Catalog Service Identity

3.11.3. Content Central Workflow Service Identity

3.12. + Password(s) Confirmed for Services Above

Make sure you have working passwords for the above service accounts before proceeding with the upgrade.

3.13. + All Catalog-Service Indexing Is Completed

If you have used either the **Rebuild selected catalog's index** or **Rebuild all catalogs' indexes** feature in the Content Central Catalog Manager application in the last 72 hours, please wait until at least 72 hours have passed before upgrading to ensure the indexing process has completed.

3.14. + Stop All *Content Central* Services Manually

Click the **Stop** button from the **General** tab for each service window described above.

3.15. + At least 2GB Storage Space Exists on Drive C

The installation program requires at least 2GB storage space free on drive C to complete its tasks even if your program files and document storage area(s) are located in other areas. Do not proceed until you have at least this much available space.

3.16. + Single Content Central Application in Programs

Only one version of Content Central should be listed in Control Panel, Programs, Add/Remove. Uninstall all versions if more than one version is present.

3.17. + Full Database Backup File Created

See Section 2, "Database Backup Creation".

3.18. + All Windows Closed

3.19. + Themes Folder Backed-Up (5.0.3693 & earlier)

If the Current Version is 5.0.3693 or earlier, make a backup copy of the following folder.

`\inetpub\wwwroot\ContentCentral\Themes\`

You must manually uninstall the current version of Content Central before proceeding with the upgrade.

4. Software Upgrade

> ⚠ **Important**
>
> It is strongly recommended to create a database backup before proceeding.

Download the Content Central installation package at the following location.

http://downloads.ademero.com/products/contentcentral_setup.exe

1. Launch the Content Central installation package.

2. If the installation package asks you to uninstall the current version, you can click **Yes**.

> ☞ **Note**
>
> The installation process will not modify your documents or settings.

3. Allow the installation process to complete. Close the application when prompted.

4. Launch the Content Central Configuration Manager from the Desktop or the `Ademero \ContentCentral` programs folder.

5. Click **SQL Settings**.

6. Click the **Create/Update Database** button. Be patient, the software will upgrade your database. You should receive a `Test Succeeded.` message when the upgrade is complete. You can click **OK** to close this message box, and then you can close the Configuration Manager application.

Content Central is now upgraded.

5. Post-Upgrade Tasks & Checklist

Verify the upgrade by completing the following tasks. For any issues, see *Post-Upgrade Troubleshooting*.

5.1. New Content Central Version

Launch the Content Central Configuration Manager. The new version is reported on the title bar. This version should be higher than the previous version reported in the Pre-Upgrade Tasks & Checklist.

5.2. + SQL Settings Remain Unchanged

Ensure the Database Name and SQL Server Version match pre-upgrade values.

5.3. + All Content Central Services Are Running

Access the **Services** area by right-clicking any **Computer** or **My Computer** icon on the desktop or in the Windows *Start* menu and clicking **Manage**. **Services** are contained within the **Services and Applications** area. Verify the running status for each service beginning with the name **Content Central**.

5.4. + Services Set to Automatic (Delayed Start)

For best results, set the **Startup type** for each service to *Automatic (Delayed Start)*, if available. Otherwise, set it to *Automatic*.
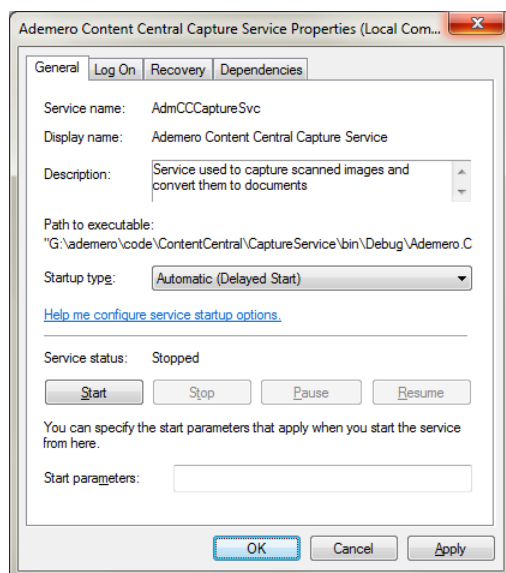
Content Central Service

5.5. + Content Central Web Application Launches

Visit the Content Central Web Address and verify the application starts successfully.

5.6. + Identity & Passwords Recorded

Record all identity and password information (if permitted) for the following areas. These data will be useful for future upgrades.

Content Central Services
Content Central Application Pool
Content Central Web Application (IIS) Anonymous User Authentication (if enabled)

5.7. + Verified Reason(s) for Upgrade (if any)

If the application has been upgraded to fix one or more issues, verify these are fixed. If the application has been upgraded to deliver a new feature, ensure the feature(s) work as expected.

5.8. + Themes Folder Restored

If the Previous Version was 5.0.3693 or earlier, restore the following folder using the backup you created.

`\inetpub\wwwroot\ContentCentral\Themes\`

5.9. + Capture Test Succeeds

The following will test relevant portions of the application to help verify the upgrade succeeded. Login to the Web application and capture a PDF file electronically by following the steps below.

1. Click on the **Capture** button on the menu bar.

2. Select *Electronic* as the **Capture Type**.

3. Select *Post-capture coding* as the **Coding Method**.

4. Choose an appropriate **Catalog** and **Document Type** for testing. Make note of these selections.

5. **Browse** to the location of an existing 1-3 page PDF file for testing. Make note of some unique keywords located within this document for a later full-text searching exercise.

6. When the **PDF Upload Options** page appears in the right pane, select **Convert to a fully-searchable PDF** and click **Apply**. Wait for the **Upload Successful** message before proceeding.

7. Click on the **Folders** button on the menu bar.

8. Click on the **Coding Queue** folder in the left pane.

9. Verify the PDF you captured has arrived.

> ☞ **Note**
>
> It may take a few seconds up to a few minutes for your test file to appear in the Coding Queue. Re-click the **Coding Queue** folder periodically to refresh the list of results.

10. Select the row for the test PDF.

11. Click on the **Modify** menu, followed by the **Code Document(s)** menu item. The **Document Properties** pane will appear on the right.

12. Click **Commit**.

13. Click on the **Search** button on the menu bar.

14. Search for the document using the **Full Text** keywords you recorded earlier. You should be able to find and verify the document in a list of search results.

15. Delete the test file by first clicking the **File** menu followed by the **Delete** menu item. A **Delete Document(s)** window will appear. Click **Delete** to proceed with the deletion.

SQL Server Background Information

1. SQL Server *Instance*

Each SQL Server implementation comprises one or more *instances*, each of which has its own set of system and user databases that are not shared between instances. These instances act as multiple servers running on the same machine.

SQLEXPRESS is the default instance name for a SQL Server Express Edition implementation. *ADEMERO* is the default instance name for a SQL Server Express Edition implementation installed as part of the Content Central installation package.

2. Server Name (Connection Path)

Connect to a SQL Server implementation using the following format.

```
Server Name\Instance Name
```

You can substitute (local) for the server name when you are connecting to a SQL Server implementation on the current machine.

Example 1. Instance on Local Machine

To connect to the *ADEMERO* instance on the current server, the connection path would look like the following.

```
(local)\ADEMERO
```

Example 2. Default *Express Edition* Instance on Network Machine

To connect to the default SQL Server Express Edition instance on a server named *ContentCentral*, the connection path would look like the following.

```
ContentCentral\SQLEXPRESS
```

IIS 6.0 Application-Pool Identity

Locate and expand the **Application Pools** item within the **Internet Information Services** tree. Select the appropriate Application Pool determined above. Right-click the item and select the **Properties** menu item. Select the **Identity** tab for account information.
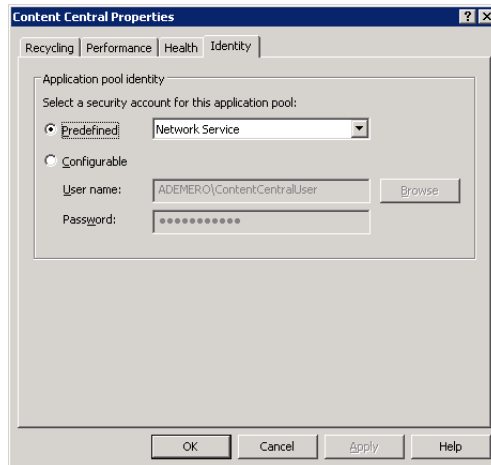
Internet Information Services (IIS) 6.0 Application-Pool Properties

Post-Upgrade Troubleshooting

Use this appendix to troubleshoot connection problems and other issues after performing an upgrade.

1. Relevant Folders Have Proper Permissions

Verify each of the following areas have the proper permissions set to allow reading (and writing where appropriate).

IIS Web Folders

The following folder requires read access for the Domain \Username identity listed in the Application Pool.

`\inetpub\wwwroot\ContentCentral\`

The following subfolders require write access for the Domain \Username identity listed in the Application Pool.

`\inetpub\wwwroot\ContentCentral\App_Data\`
`\inetpub\wwwroot\ContentCentral\Themes\`

System Folders (See Section 3.7, "Content Central Folder Locations")

All root system folders require read and write access provided for each Domain\Username identity listed in the items below.

Application Pool (See Section 3.10, "Application Pool Identity")
Capture Service (See Section 3.11.1, "Content Central Capture Service Identity")
Catalog Service (See Section 3.11.2, "Content Central Catalog Service Identity")
Workflow Service (See Section 3.11.3, "Content Central Workflow Service Identity")

Non-standard Capture Folders

Some capture folders may be located in areas other than the *Incoming File Capture root folder* from the System Folders area above.

All ODBC Folder Locations	Folders that contain data for ODBC field lookups require read access for the Domain\Username identity listed in the Application Pool.

2. Web Application Uses Correct Application Pool

Verify the Application Pool for the Content Central Web application matches the pre-upgrade value.

3. Application Pool Uses Correct Identity

Verify the Application Pool uses the pre-upgrade identity. If any changes are made, click the **Recycle** item in the **Actions** pane.