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## **Contour 3 Installation and Upgrade Guide**

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## 1 Welcome to Contour

# CONTOUR 3.0.0

## Production Installation and Upgrade Guide

### OVERVIEW

#### **Welcome to Contour.**

Jama Contour is designed to provide you and your entire team a centralized, light-weight application for managing requirements. This installation guide is written to help you get Contour installed in either an evaluation or production environments.

Installation is relatively straightforward, but we are happy to remotely install and configure Contour for you if you'd prefer. If you run into trouble, give us a call (Technical Support) at 1-800-679-3058 or [support@jamasoftware.com](mailto:support@jamasoftware.com) Thanks for choosing Contour. Enjoy the freedom of collaborative requirements management.

503.922.1058 | [success@jamasoftware.com](mailto:success@jamasoftware.com) | [www.jamasoftware.com](http://www.jamasoftware.com)

## 2 Production Installation Guide

### Administrators Guide to Installing Contour on Production Servers

This guide covers all operating systems and is designed for production installations of Jama Contour. In addition, this guide is appropriate for users wishing to evaluate Contour on Linux, Unix or Mac operating systems.

#### Other Resources

**Windows Trial** - If your goal is to quickly evaluate Contour on your Windows (32bit) desktop, we recommend the Windows trial. which includes a self extracting installer available at <http://www.jamasoftware.com/contour/trial.php>

**Upgrading** - If you have an existing version of Contour and are looking to upgrade please follow the [upgrade guide](#).

### 2.1 Installation Overview

This installation guide is designed to provide everything needed to get up and running though Contour is an enterprise web-application with multiple supported configurations. If you have questions or run into trouble please contact our support team.

**Technical Support**

[support@jamasoftare.com](mailto:support@jamasoftare.com)

1-800-679-3058

#### Installation Overview

1. Java Installation
2. Apache Tomcat Application Server Installation
3. Database Installation
4. Download, unzip and configure Contour

## 2.2 Production System Requirements

### Server Requirements

To install and run Contour, you'll need administrative rights to the computer along with the following:

- Hardware
  - Recent CPU, 1.5GHz or higher.
  - 3-4GB RAM recommended for a production server, 1GB RAM minimum if running locally.
  - 100MB disk space for Contour files, additional space for file attachments.
- Operating System
  - Windows 2000, XP, 2003 Server, 2008 Server, Vista, 7.
  - MAC OS X
  - Linux or UNIX
- Software
  - Java JDK.
  - Apache Tomcat Application Server
  - A database (We include HSQL in the download). We support MySQL, Microsoft SQL Server 2005 & 2008 and Oracle.

### Client Requirements

Contour runs in a standard web browser - no client software is required. Supported browsers include:

- Microsoft Internet Explorer 7.0/8.0.
- Mozilla Firefox 3.x.

## 2.3 Installation Steps

### Installation Steps

1. Download and Install Java Developers Kit (JDK) v1.5 or later (if not already installed)
2. Download and Install Apache Tomcat 5.5 or later Application Server Installation (if not already installed)
3. Download and install MySQL 5.5 or other Database (if not already installed)
4. Download, unzip and configure Contour

**64bit installs:** We strongly recommend installing Java 6 and Tomcat 6. Notes are included within this guide specific to your installation.

### 2.3.1 Java JDK Installation

Contour is a J2EE application and requires the Java Development Kit (JDK) 1.5 or higher. The good news is that [you may already have Java installed](#) – if so, you may skip this; otherwise follow these steps to install Java.

## Download and Install Java

The Java installation is very straight forward but finding the download can be tricky. The sun website changes often so you may find that the steps below are not exact. (Here is that support number again... just in case: **1-800-679-3058**)

- Download from: <http://java.sun.com/javase/downloads/index.jsp> (If you can't find it do a google search for "Java 1.6 jdk download")
- Select your platform (OS) and language.

**64bit systems:** You'll want to select the specific 64bit download.

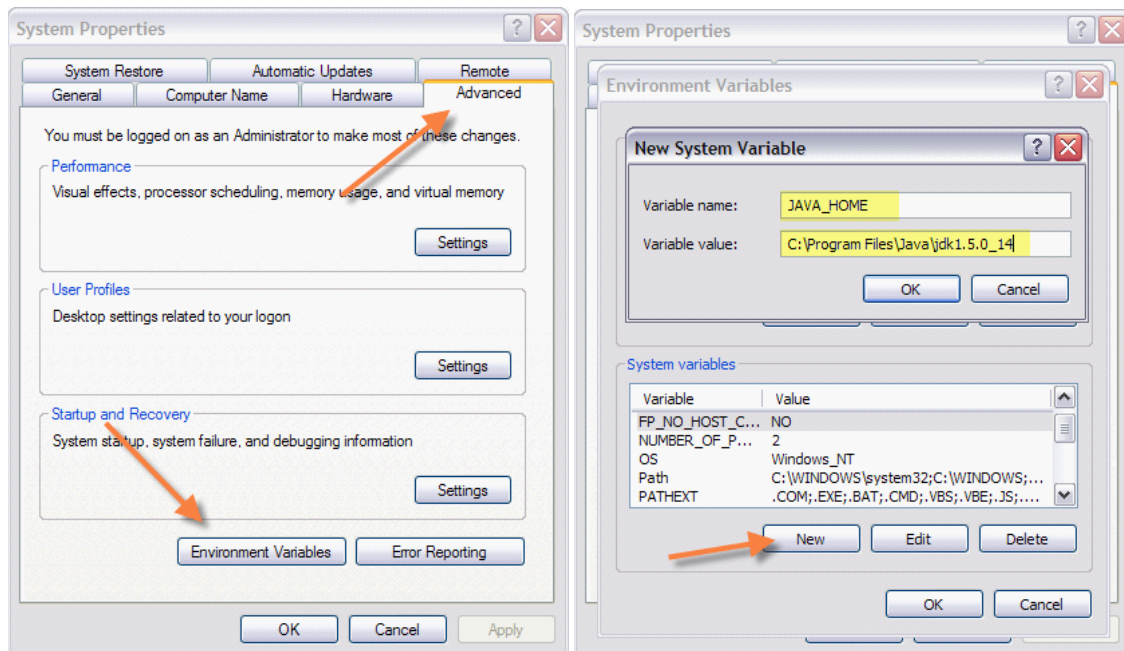
- Check the "I agree to license" checkbox.
- We recommend choosing the Offline installation (if available)
- Install Java on your system.

## Set JAVA\_HOME SYSTEM VARIABLE

Next, you'll need to create an environment variable that tells Apache Tomcat, the server that is included with Contour, where Java is installed. Unfortunately, Apache can't find Java on its own.

## Windows Environments

1. Open your System Properties, press the Windows key + Pause/Break key together OR click Start -> Control Panel -> System.
2. Select the Advanced tab and click on the Environment Variables button.
3. In the System Variables section, click New.
4. Enter "JAVA\_HOME" as the variable name.
5. Enter or paste the path to the root of your java install directory into the Variable Value field the path. Default installations are typically found at "C:\Program Files\Java\{version Name}".
6. Accept the new variable by clicking OK and close the System Properties window.



## Linux & UNIX & MAC Environments

Set the JAVA\_HOME Environment variable to the path of your Java installation

1. Edit the ".profile" file in your home directory (or corresponding file for your shell).
2. Set the JAVA\_HOME environment variable by adding the following line to the file:  
"export JAVA\_HOME=<java install home"
3. Be sure there are no spaces after the end of the directory name.
4. Do not add an extra slash after the directory name.
5. Save changes to the file and run a command script to configure the new environment variables by entering "source .profile".

### 2.3.2 Tomcat Application Server Installation

This section is for organizations that have opted to install the Contour configuration that does NOT include Tomcat application. For this you will need to download and configure the Apache Tomcat server separately.

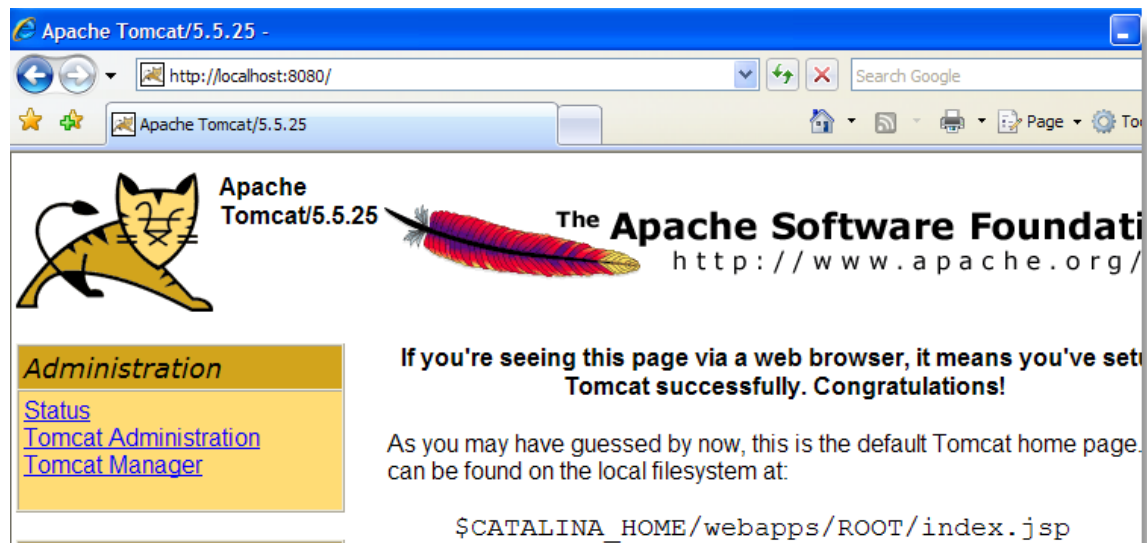
#### Install Apache Tomcat

1. Download and Install from <http://tomcat.apache.org/download-60.cgi> (Choose from the Core section)

<b>Zip</b>	<b>Tar.gz</b>	<b>Windows Service Installer</b>
------------	---------------	----------------------------------

<p>For Windows environments</p> <p><b>Windows 64bit:</b> Select this option</p> <p>Unzip / extract the compressed set of directories to your desired location for Contour.</p> <p>i.e. c:\apache tomcat\</p> <p>To startup Apache Tomcat, locate and run the startup batch file &lt;tomcat dir&gt;/bin/startup.bat</p> <p>When Windows restarts, you will need to restart Tomcat using this script or configure to run at startup.</p>	<p>For Linux, Unix &amp; Mac environments</p> <p>Extract the compressed set of directories to your desired location for Contour</p> <p>To startup Apache Tomcat, locate and run the startup batch file &lt;tomcat dir&gt;/bin/startup.sh</p> <p>When restarting the server, you will need to restart Tomcat or configure to run automatically at startup.</p>	<p>For Windows environments - installs Tomcat as a service which will automatically start Tomcat when Windows starts or reboots.</p> <p><b>64bit:</b> This option is not available, use the Zip file</p> <p>The Apache Tomcat service should start automatically. There is no need to run the startup batch files.</p>
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2. Ensure that Tomcat is running properly by opening a web browser to: <http://localhost:8080> and confirm you see the Tomcat welcome page.



## Configure Tomcat's memory settings.

Tomcat needs to have its memory settings properly configured so Contour runs smoothly.

**Note:** Do not copy and paste the following options. Character encoding does not always transfer correctly. Be sure to manually type in all options.

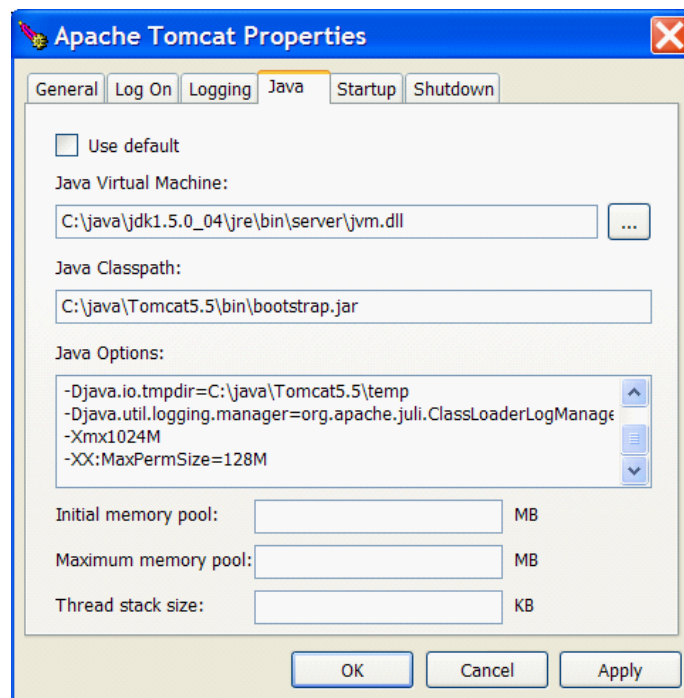
## Windows Environments

1. If running Tomcat as a service, Open up the Tomcat Monitor (TOMCAT\_HOME/bin/tomcat5w.exe).
2. Navigate to Configure -> Java -> Java Options and append:
  - "-Xmx1024M"
  - "-XX:MaxPermSize=256M"

**64bit:** The memory setting is dependent on your available RAM. We recommend maximizing this setting by taking half of what is available. So a 2G system is set to 1024, a 8G could be 4096.

3. Click on OK.

**Note:** Make sure there are no spaces after each line, otherwise Tomcat will not start.



## Configure on Linux / Unix / Mac Environments

1. Set up environment variable CATALINA\_OPTS=-Xmx1024M -XX:MaxPermSize=256M.
2. Add the following line to .bashrc file in the home directory of the user who runs Tomcat:  

```
export CATALINA_OPTS="-Xmx1024M -XX:MaxPermSize=256M"
```
3. Run "% source .bashrc".
4. Restart Tomcat.

### 2.3.3 Database Installation

## Production Installations

For production installations, you'll want to install a supported database such as MySQL and create a schema for Contour.

Jama supports:

- MySQL 5.
- Microsoft SQL Server 2005 & 2008.
- HSQL - An embedded database included with the Contour download.
- Oracle 10g.

Contour uses Hibernate which enables support for most all common database platforms. If you are interested in finding out about custom support for other databases, please contact support.

## MySQL Installation

MySQL is Jama's recommended database server for Contour.

1. Download and install MySQL 5.0 for your operating system <http://dev.mysql.com/downloads/mysql/5.1.html>.
2. Create an empty Contour schema / database. This can be done either from the MySQL command line client or from the downloadable MySQL Administrator. From the command line client after logging in, enter the following statement:

```
create database contour character set utf8;
```

3. Create a user such as "root" or "contouruser" with read/write access to the database contour. The database user and password will need to be used when Contour is configured.

## Microsoft SQL Server 2005 & 2008

1. Configure SQL Server 2005 & 2008 for Contour.
  - SQL Server should be operating in the mixed mode for authentication, the option is referred to as SQL Server and Windows Authentication. Microsoft has created a document about how to [change server authentication mode](#).
  - Make sure TCP/IP is enabled for SQL server and you know the port that is configured. The default port is 1433. Here are links to Microsoft documents, [how to enable a network protocol \(TCP/IP\)](#) and how to [configure SQL server to listen on a specific port](#).
  - Create a new login with SQL Server authentication, such as "contouruser".
2. Create a new database called "contour". The name is not important however you will need to remember it during configuration of Contour if it is different than the default.
3. Add the user you created above, "contouruser", to have db\_owner permissions on the new Contour database.

## Oracle 10g

1. Install Oracle Server.
2. Download Oracle JDBC driver from: [http://www.oracle.com/technology/software/tech/java/sqlj\\_jdbc/index.html](http://www.oracle.com/technology/software/tech/java/sqlj_jdbc/index.html)

The name of the JDBC driver file is usually = ojdbc14.jar

2. Copy the JDBC driver file into common library folder in your tomcat: "{tomcat}/common/lib".
3. Create a database for Contour, for example "contourDb".
4. Create a user/schema for contour, for example "contour".
5. Grant the following roles to the newly created user "contour".

```
CONNECT
RESOURCE
```

6. Configure Oracle database during setup:

```
Connection String = jdbc:oracle:thin:@localhost:1521:contourDb
```

```
User = contour
```

```
Password = password
```

**Note:** If you are moving existing Contour data from another database and using the [XML data import](#), you will need to manually configure the sequence numbers. The default sequence number starts at 1000. After importing data, you will need to query the MAX sequence number and configure it to 1 higher using the following scripts.

```
DROP SEQUENCE HIBERNATE_SEQUENCE;
```

```
CREATE SEQUENCE HIBERNATE_SEQUENCE INCREMENT BY 1 START WITH 1000 CACHE 20
NOORDER NOCYCLE
```

## 2.3.4 Contour Installation

### Download Contour Application Software

If you haven't already done so, download the software. If you need the download link please email [support@jamasoftware.com](mailto:support@jamasoftware.com) or call us at 800-679-3058.

### Platform

The windows option is a .zip file while the Mac/Linux is a .gzip file. Select which one best fits your environment.

### Unzip download

**Note:** If you are using the built-in MS Windows unzip tool, make sure you let the unzip process to complete fully before clicking on the Next button. There is a bug within Microsoft's utility that allows you to click Next prior to completion and can corrupt the unzipped files.

Here are some alternative utilities:

- 7Zip For Windows - [www.7-zip.org](http://www.7-zip.org) we recommend downloading the "32-bit.exe" version.
- Winzip - [www.winzip.com](http://www.winzip.com).

### Contour Installation

At this point everything is installed that Contour needs. The next steps is to place the Contour

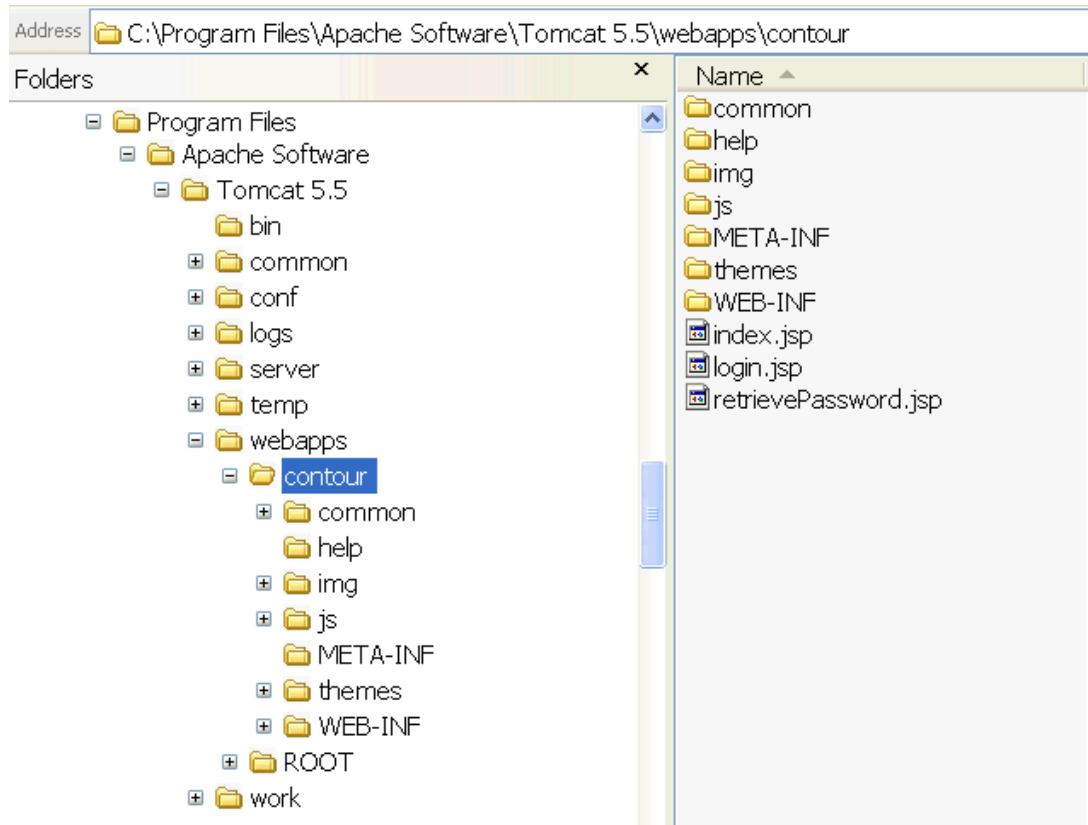
application downloaded into the Apache Tomcat webapps directory and start or restart the Tomcat application server.

Find the Contour file that has been unzipped.

**Hint:** If you unzipped the distribution using the common unzip option that creates a new directory named for the file being unzipped, then make sure you only copy the contents of the unzip directory and not the directory itself. For example: Using the option "Extract to contour" would result in the directory "c:\contour" being created to contain the contents of the distribution file.

1. Copy the Contour directory (and all sub directories) to your application server under Tomcat's ..\webapps directory.

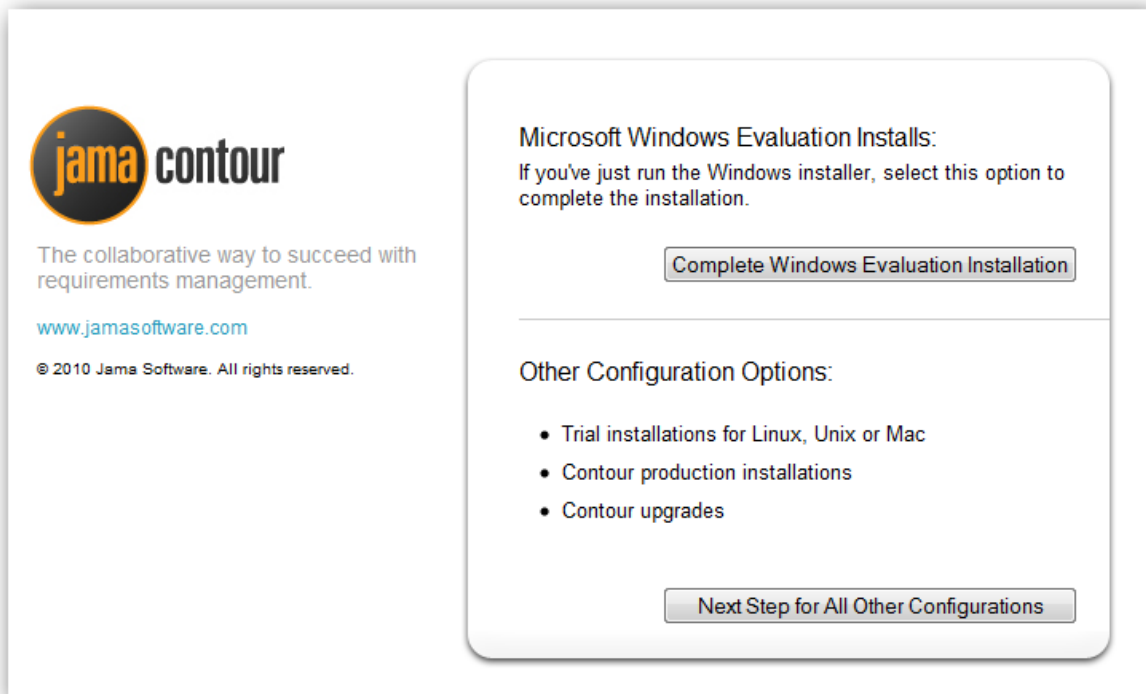
For example: "C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\contour"



3. Restart Tomcat.

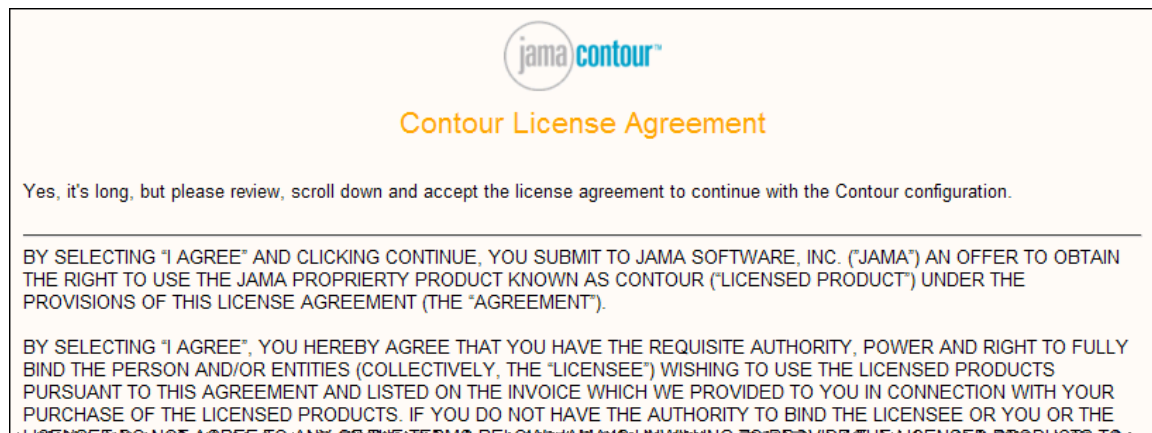
After Contour has been added to Tomcat and started, open your web browser and enter in <http://localhost:8080/contour> (or the appropriate URL to the server). It may take a minute or two before the Contour configuration page is displayed. If the Contour screens do not show, then check to make sure that the Application server (likely Tomcat) is up running.

In the Other Configuration Options select "Next Step"



## License Agreement

Review the license agreement, scrolling down to the bottom of the page and select "Accept" and "Next Step"



## Set Contour Configuration Location

Next, you'll need to select your environment type and enter a directory to store Contour configuration files. This directory is where your unique configuration files and document attachments are stored.

Contour will create the directory "contour\_home" if it doesn't exist. You'll want to remember this location for upgrades.

**Set Contour Configuration Location**

Contour stores your configuration settings in a folder that is separate from the application. This enables Contour to retain your settings when upgrading.

**New installations** - Specify a folder location.

- Microsoft Windows default = `c:\contour_home`
- Linux & Unix default = `/home/contour_home`
- Other location (If you enter another location, make note of this for future upgrades)

**Re-configuration** - If you are reconfiguring contour, the folder location is auto-populated.

- I'm Reconfiguring Contour

**Upgrades** - Enter the folder that your configuration settings are stored in.  
If you've forgotten the location, try searching for the file `setup.properties`. This file resides within the configuration folder.

Contour configuration folder location:

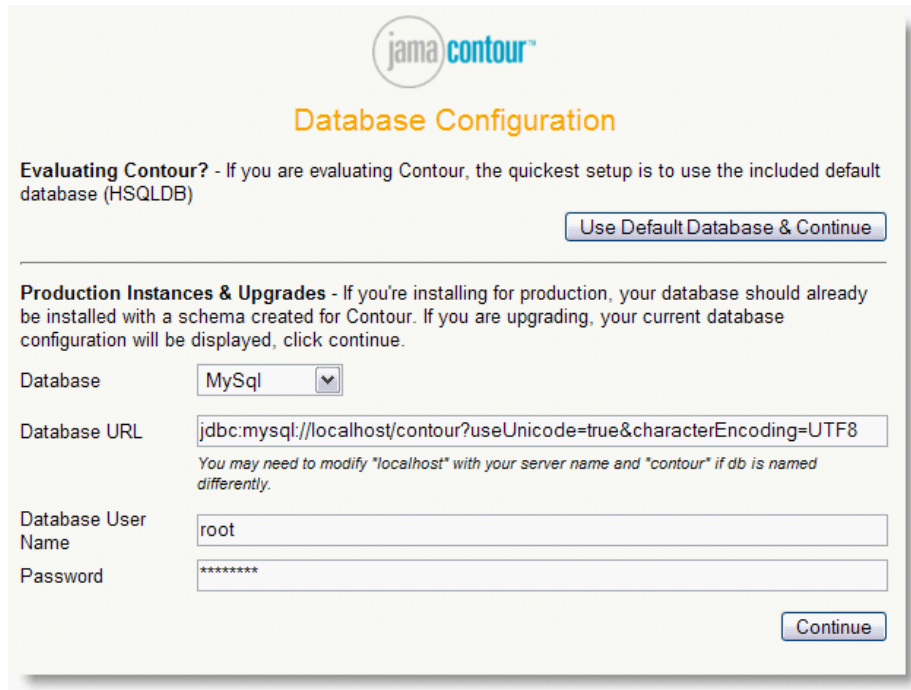
## Configure Database

If you are evaluating Contour, click the button Use Default Database & Continue. This will direct Contour to use the embedded database and requires no setup or configuration. If you are using a separate database you will need to configure it here. These steps assume that the database is already installed. If it is not please refer to the [database installation](#) section.

1. Select your database, such as MySQL, from the drop down list.
2. Contour will populate the database URL. Depending on the database configuration, you may need to change the database location or name.

**Hint:** In the screenshot below, the term "localhost" in the Database URL directs Contour to look for the database on the same server as the Application server. If your database is located on a different server it will be indicated here.

3. Enter the database user name configured during the database installation such as "root".
4. Enter the database user's password.
5. Click on the Continue button.

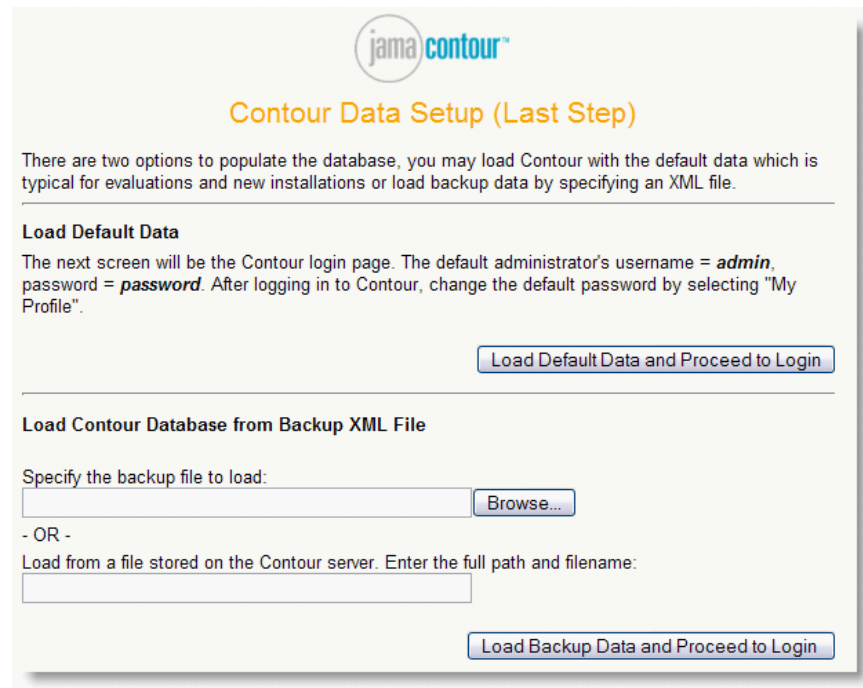


The screenshot shows the 'Database Configuration' dialog box for Jama Contour. At the top is the 'jama contour' logo. Below it is the title 'Database Configuration'. The dialog is divided into two sections. The first section, 'Evaluating Contour?', provides instructions for users evaluating the software and offers a 'Use Default Database & Continue' button. The second section, 'Production Instances & Upgrades', provides instructions for production installations and upgrades. It contains several input fields: a dropdown menu for 'Database' set to 'MySQL', a text field for 'Database URL' containing 'jdbc:mysql://localhost/contour?useUnicode=true&characterEncoding=UTF8' with a note below it stating 'You may need to modify "localhost" with your server name and "contour" if db is named differently.', a text field for 'Database User Name' containing 'root', and a password field for 'Password' containing '\*\*\*\*\*'. A 'Continue' button is located at the bottom right of the dialog.

## Populate Database

There are two options to load the database, either with the default data provided by Jama or with data from backup file. New installations should click on Load Default Data and Proceed to Login. If you already have a populated Contour database available from a prior Contour installation then refer to the [Configure](#) section available in the Upgrade guide.

1. Determine the location of the backup file.
2. Browse to the location and selected the file or enter in the location when the file is backed up to the Contour server.
3. Click on Load Backup Data and Proceed to Login.



The screenshot shows the 'Contour Data Setup (Last Step)' page. At the top is the 'jama contour' logo. Below it, the title 'Contour Data Setup (Last Step)' is displayed in orange. The main text explains that there are two options to populate the database: loading default data or loading backup data from an XML file. The 'Load Default Data' section provides instructions on the default administrator's username ('admin') and password ('password'), and advises changing the password after login. A button labeled 'Load Default Data and Proceed to Login' is located below this section. The 'Load Contour Database from Backup XML File' section offers two methods: specifying a backup file to load (with a text input field and a 'Browse...' button) or loading from a file stored on the Contour server (with a text input field for the full path and filename). A button labeled 'Load Backup Data and Proceed to Login' is located at the bottom of this section.

## Log In

The Contour login screen will be displayed. To login, the default administrator username and password are:

- User = admin
- Password = password

After logging in, make sure to change the admin user's password by clicking on the Edit Profile link available in Contour's header.

**Congratulations - Install is completed!**

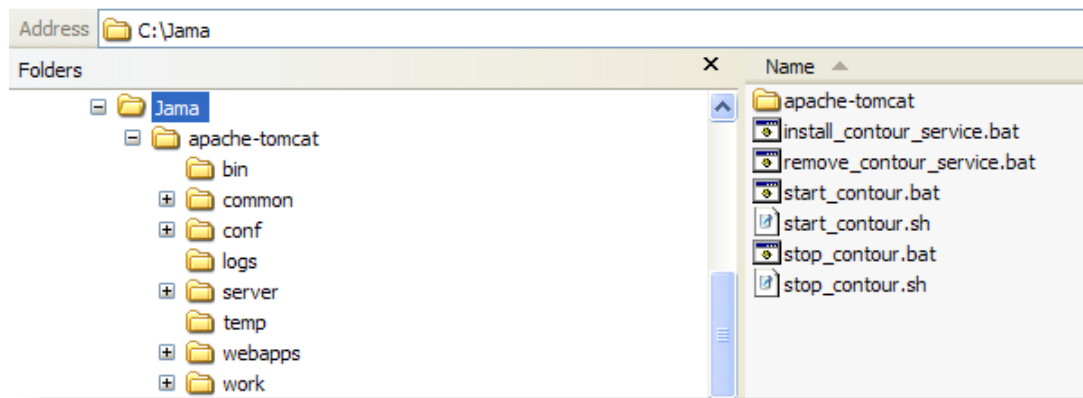
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## 2.4 Appendix

### 2.4.1 Uninstalling Contour

To uninstall Contour:

1. Navigate to your Contour directory and execute the file "remove\_contour\_service.bat".



2. Delete the Contour directory.
3. If you do not intend to reinstall Contour on this machine and want to completely remove all parts of Contour then delete your Contour home and backup directories if stored in a different location such as "c:\contour\_home".

## 2.4.2 Backing up Contour

We strongly recommend implementing an automated backup solution. The following should be backed up on a regular basis:

1. Database.
2. Contour home configuration directory, the default for Windows is "c:\contour\_home".
3. Keep a [copy of your custom](#) reports in a separate version control system.
4. Keep a copy of any modified files such as custom email and notification templates, custom rich text editor settings, or custom session settings.

### Backup Contour Database

It just takes a few minutes, so we recommend backing up both the database as well as creating an XML backup file.

- **Database** - Make sure you have a current backup of the Contour database using either your automated backup scripts / enterprise backup application / manual backup using your favorite database utility.
- **Database XML File** - We also recommend logging in as root (system administrator) and selecting Tools -> Backup Database and saving the XML backup file in a safe location. This XML file is most useful for migrating between different databases, but can also be used as a backup.

### Backup Contour Home Folder

Make a copy of your Contour home folder. This is the location you specified in the first configuration web page when installing Contour. This is a different location from the application server where Contour is installed.

For example, we recommended a location of "c:\contour\_backup" for Windows environments.

### **Backup any Edited Configuration Files**

If you've edited any of the configuration files such as the fcktemplates.xml (Editor Templates), keep a copy of this file in a safe location so you can copy back after the upgrade.

To backup the Editor Templates copy the directory FCKconfigs that is located at "..\webapps\contour\js\FCKconfigs".

### **Backup Custom Report Files**

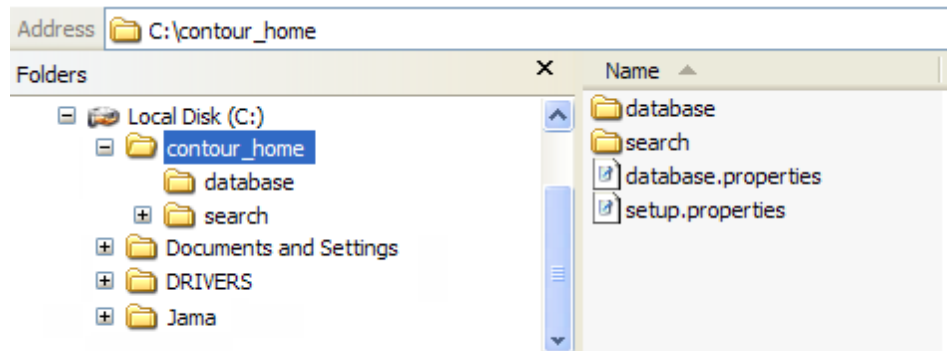
If you've created any custom report files, you'll want to keep a copy of these outside the /contour folder. The report entries will be retained, you'll just need to copy back the .rptdesign files after the upgrade.

It may be easiest to backup the entire Reports directory "..\webapps\contour\WEB-INF\reports" however you'll likely only want to restore those reports that your organization has created or altered. We occasionally update our default group of reports in response to customer suggestions and we believe that you'll want to get those updates as well.

### 2.4.3 Re-run Web Setup Screens

How do I reconfigure Contour or rerun the database configuration screens?

1. Locate your Contour home directory and either delete the file `setup.properties` or edit the file and change the variable `contour.setup` from true to false. The default Contour home directory is "contour\_home".



2. [Restart your Application](#) server (likely Tomcat).
3. Open your web browser to Contour URL. If already open then use the browser refresh button.

## 2.4.4 Resources

Once you're up and running, we encourage you to give us a call to walk through configuring Contour to fit your team's environment. You can reach us for the US 9:00 AM to 5:00 PM PST at (800) 679-3058 and from Europe 9am - 5pm GMT at +44 (0)1926 410656. We are also available at [support@jamasoftware.com](mailto:support@jamasoftware.com).

Visit the Support and Community collaboration site – <http://support.jamasoftware.com>.

Support Contacts – <http://www.jamasoftware.com/support>

## 2.4.5 How do I know if Tomcat is installed?

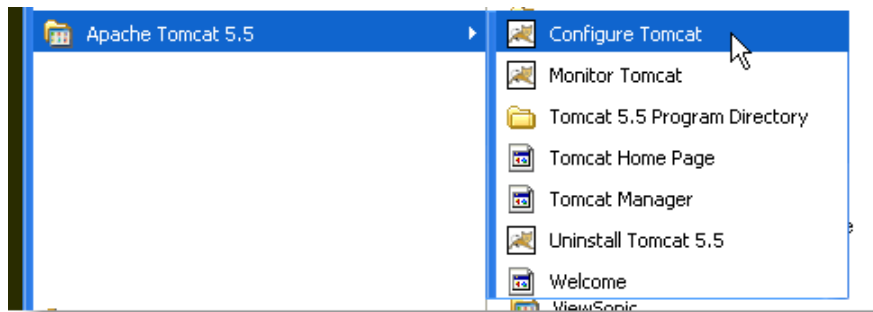
You may already have Tomcat installed. It's worth checking because you can't run two at the same time without some crazy configuring of Tomcat. Tomcat could be installed in different places depending on how the installation was done but there are a couple of places to check.

Here is a list of ways to check

### Location

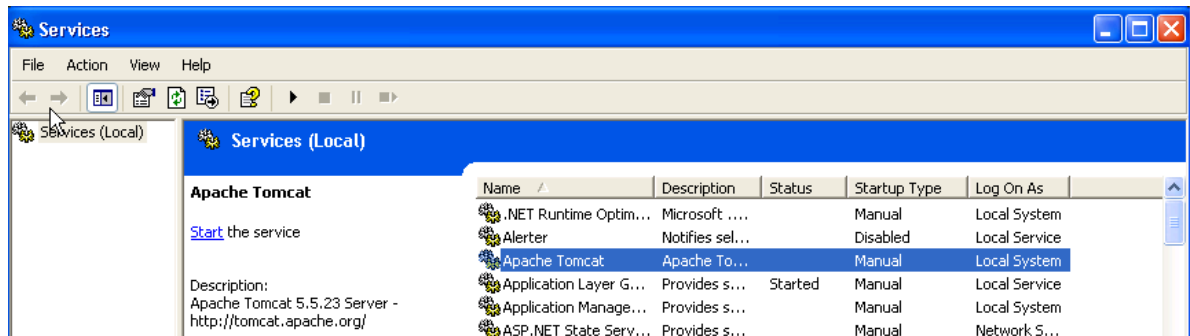
The default installation is C:/Program Files/Apache Foundation/Tomcat

### Start program files



### Services

Start --> Control Panel --> Administrative Tools --> Services



## 2.4.6 How do I know if Java is installed?

Contour is based on Java as is the application server. Before you install Java it may be worth checking to see if it is installed. However installing Java again will not mess anything up.

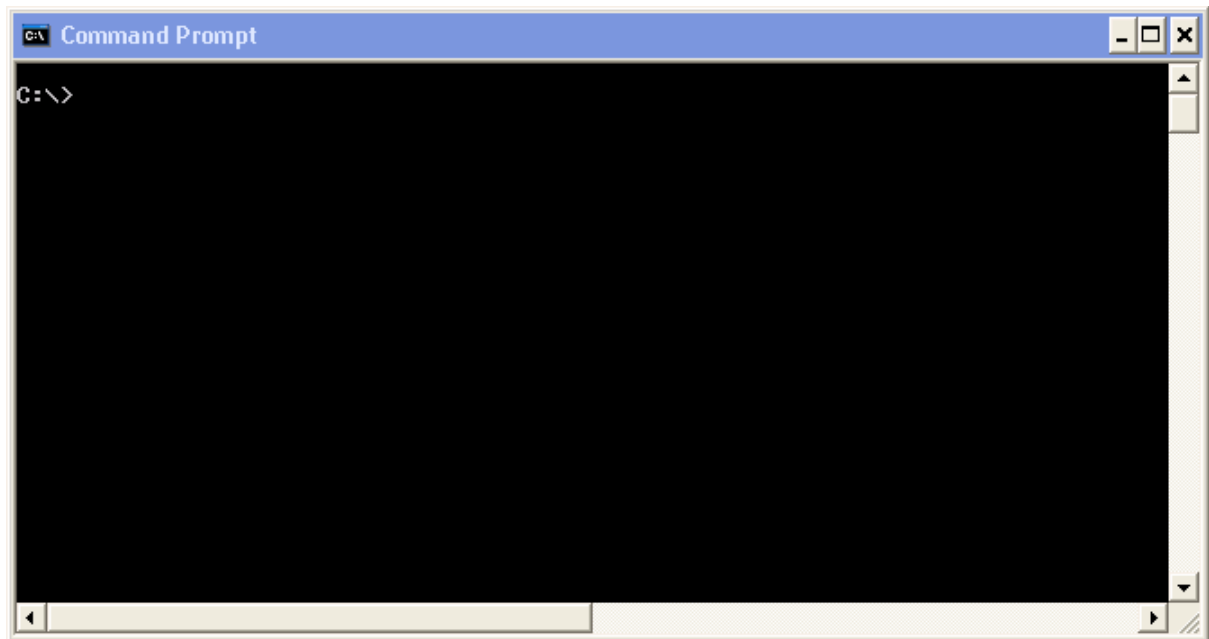
The best way is to check using the dos prompt.

Start --> All Programs --> Accessories --> Command Prompt

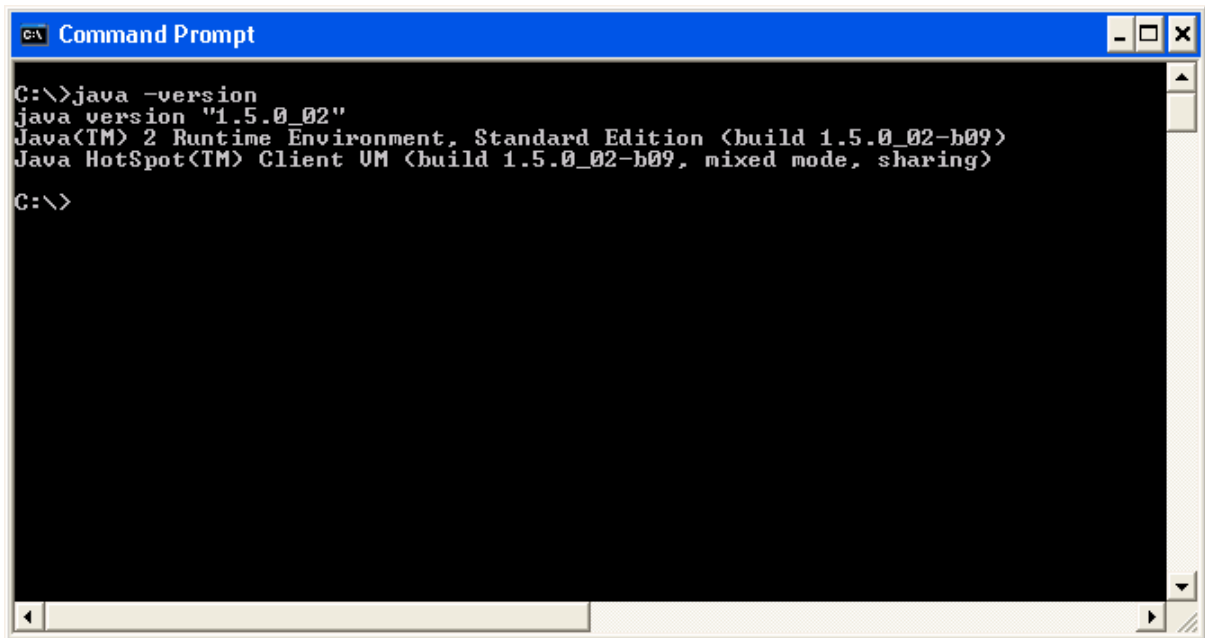
OR

Start --> Run --> "Cmd" and hit enter

You should end up with this window or something close.



At the prompt type `java -version`



```
C:\>java -version
java version "1.5.0_02"
Java(TM) 2 Runtime Environment, Standard Edition (build 1.5.0_02-b09)
Java HotSpot(TM) Client VM (build 1.5.0_02-b09, mixed mode, sharing)

C:\>
```

If you see this you are in good shape. The actual version number may be greater than what you see here. (1.6.x)

## 3 Upgrading Contour

These instructions are for upgrades only. If you are new to Contour, you'll want to follow the [installation guide](#).

**Note:** Please consult the [Release Notes](#) for specific information on the latest changes in Contour. The release notes contain a general overview of new features, system functionality that is changing, a list of fixed defects, and/or other informative notes.

### 3.1 Getting Started

Download and unzip the distribution file (NOT the file with Tomcat) into a temporary location. Windows users should check that their distribution file's extension is ".zip" while Linux/Unix/Mac should have a file with the extension "tar.gz".

If you are using the built-in MS Windows unzip tool, make sure you let the unzip process fully complete before clicking on the Next button. There is a bug within this utility that allows you to click Next prior to completion and can corrupt the unzipped files. Contact us if you need the link to download the application files.

Here are some alternative unzip utilities:

- [www.7-zip.org](http://www.7-zip.org) – Recommended
- [www.winzip.com](http://www.winzip.com)

### Moving from the Tomcat Packaged with Contour to an Independent Application

## Server

A quick note on the Contour application that comes with Tomcat already bundled. This is useful in getting people up and running quickly, however it is recommended if you are running Contour in a production environment to migrate to an Application server that was installed independently from Contour. We still recommend Tomcat, and there is very little difference between the one included in the download and what you'd get downloading and installing separately, but having it installed manually gives you more control over the servers management.

Here are the steps to making the move:

1. [Backup](#) any necessary Contour resources. If you are also moving to a new database then please review the section on [restoring the database from XML](#).
2. [Uninstall Contour](#). This will remove the Windows service if installed and direct you delete the application directory. The suggested directory was "c:\Jama". Do not remove the Contour home directory "contour\_home" that contains the system configurations since these will be reused with the new install.
3. Complete the instructions to [install an Application Server](#).
4. To reinstall Contour you will likely be able to follow the [upgrade instructions](#) when the Application server is located on the same machine as the original Contour installation. If it is a different server then you should reference the steps for [installing Contour](#).
5. When you keep the prior install's database, then the database.properties file available within the existing contour\_home directory will take care of configuration.

## 3.2 Upgrade

### Backup Contour Resources

Before you begin the upgrade process we recommend [backing up Contour](#).

### Stop Apache Tomcat

The steps to shut down Tomcat is the same whether you installed it packaged with Contour or separately. Only the name of the service might be different.

1. Make sure that the users of any other applications that rely on this Tomcat server are aware that you will be shutting down the server to upgrade Contour.
2. Windows users should open the Administrative Tools -> Services. Linux/Unix/Mac users will stop the server via the terminal or Services Manager.
3. Find either a service with the name Tomcat, Apache Tomcat or Contour.

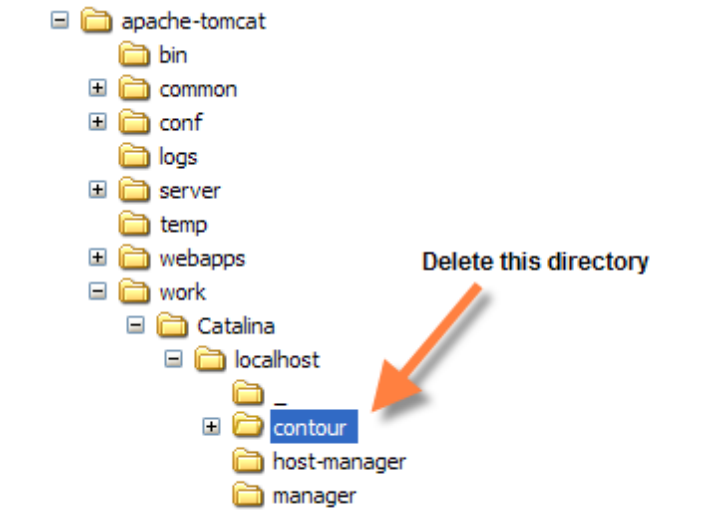
**Note:** If there are multiple instances of the listed names and you are unable to determine which server Contour is working with please contact your administrator or contact [Jama Support](#). If you do not have any references to Tomcat or Contour then it is likely that Contour was not installed as a service and Tomcat is not running and you can proceed.

4. Stop the server.

### Delete the cache directory

Tomcat caches files to help performance. To ensure that Tomcat is using the latest Contour files the cache needs to be deleted.

1. This file is located in Tomcat's cache directory for Contour.  
`/TOMCAT_HOME/work/Catalina/localhost/contour`
2. Delete the directory titled "contour" within the parent directory. Tomcat will recreate this upon restart.



**Hint:** If you are unable to delete the cache directory then Tomcat is still running.

### Delete the Contour index directory

Contour indexes data to improve performance. Delete this index ensure a clean new index during startup.

1. Stop the application server (Apache Tomcat) if it is not already stopped.
2. Locate the directory "Search" within your existing Contour home directory.
3. Delete the "Search" directory.

### Upgrade Contour

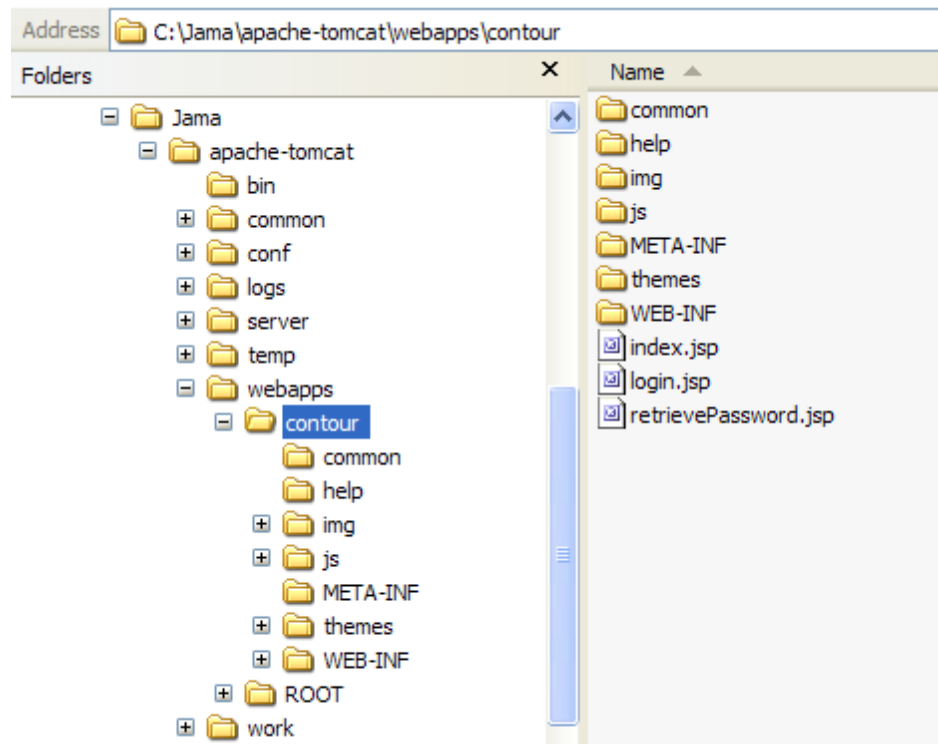
Replace the Contour folder that exists in Tomcat's /webapps folder with the newly downloaded and unzipped folder.

1. You can back up the old Contour directory if you'd like, but make sure you move it out of the webapps directory completely. Just renaming the directory to something like "contour\_old" is not enough.

**Note:** It's important that you don't end up with two instances of Contour under the webapps directory even if named differently. While it is possible to run two instances of Contour under one server there are additional considerations. Feel free to contact us if this is desired.

2. Move the newly contour directory extracted from the .zip to the /webapps directory. It is a good idea to make sure there isn't a Contour directory within the /webapps directory first since copy

and replace may leave files behind that are not needed with the latest release.



### Replace Custom Files and Reports

If you have custom report files, or any customized files, copy these back to their location within the / contour application folder.

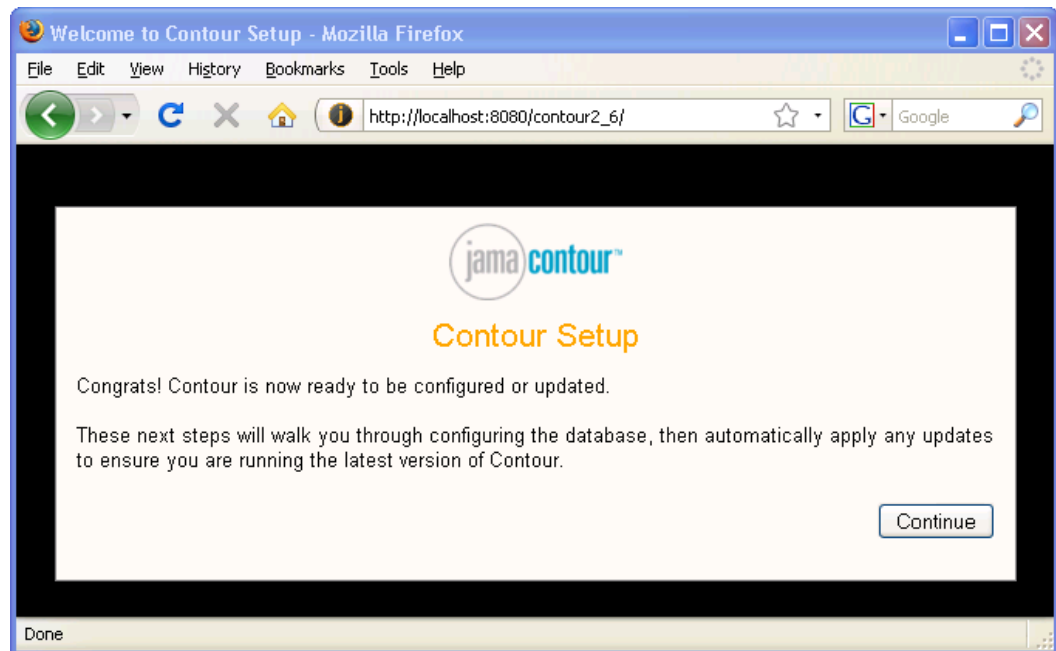
### Start Application Server

You are done with moving files. On to configuring your new Contour release.

## 3.3 Configure

Open your browser to <http://localhost:8080/contour> (assuming the default port)

1. The first screen allows you to begin your upgrade.



2. The next screen displays the Contour license agreement; review and accept.



3. From the Set Contour Configuration Location screen, enter the location for your contour configuration home directory. This is likely "c:\contour\_home" and was specified when you originally setup Contour.

**Set Contour Configuration Location**

Contour stores your configuration settings in a folder that is separate from the application. This enables Contour to retain your settings when upgrading.

**New installations** - Specify a folder location.

- Microsoft Windows default = `c:\contour_home`
- Linux & Unix default = `/home/contour_home`
- Other location (If you enter another location, make note of this for future upgrades)

**Re-configuration** - If you are reconfiguring contour, the folder location is auto-populated.

- I'm Reconfiguring Contour

**Upgrades** - Enter the folder that your configuration settings are stored in.

If you've forgotten the location, try searching for the file `setup.properties`. This file resides within the configuration folder.

Contour configuration folder location:  
c:\contour\_home

Continue

- Contour will display the current database configuration, no changes are needed. Click on the continue button to proceed.

**Database Configuration**

**Evaluating Contour?** - If you are evaluating Contour, the quickest setup is to use the included default database (HSQLDB)

Use Default Database & Continue

**Production Instances & Upgrades** - If you're installing for production, your database should already be installed with a schema created for Contour. If you are upgrading, your current database configuration will be displayed, click continue.

Database: MySQL

Database URL: jdbc:mysql://localhost/contour?useUnicode=true&characterEncoding=UTF8  
You may need to modify "localhost" with your server name and "contour" if db is named differently.

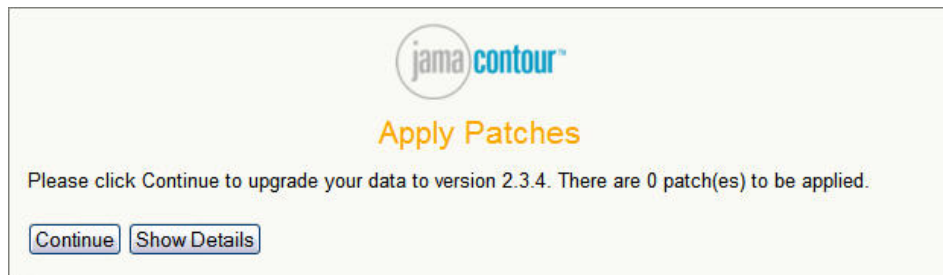
Database User Name: root

Password: \*\*\*\*\*

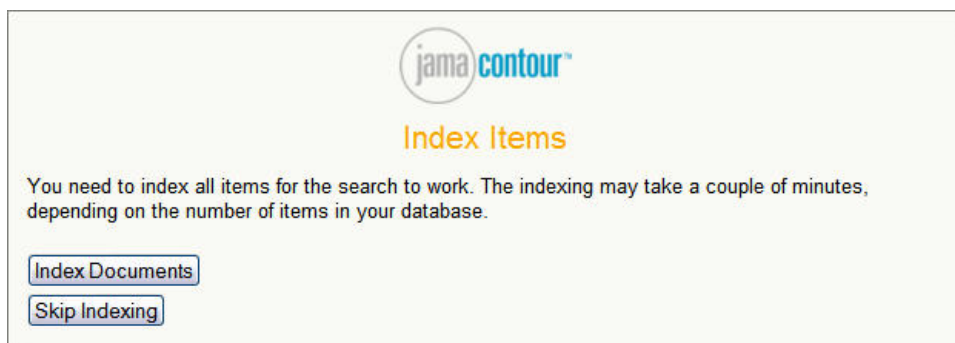
Continue

**Note:** If you don't see your correct database information, it's likely you didn't specify the correct contour home folder location as your previous installation. You can use the browser's back button to confirm it is set correctly.

- Contour will now update your database with any patches. If you are curious about what is going on click on the Show Details button for a peek.



6. Click on Index Documents which may take several minutes depending on the size of your database and number of file attachments. This task can also be performed by logging in as the system administrator (root user).



**Congratulations - Upgrade is completed!**

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## 3.4 Restore Database from XML

If something didn't work as planned, or you wind up moving servers or changing the `contour_home` location, you may need to use the backup XML file to populate your database.

Before you do this, you'll need to delete the old database and create a new empty database to receive the backup data.

### HSQL Embedded Database

1. Locate the database directory (the database is file based) within your Contour configuration location.

For example, `c:\contour_home\database`.

2. Make sure the database directory is empty or deleted so that when you re-run the Contour configuration it will create the new database and populate it with backup data.

**Hint:** We recommend moving the entire database folder to a backup location. You can delete if you are confident you don't need your data or have other backups.

### MySQL, SQL Server 2005 & 2008, or Oracle 10g

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From your database's admin tool:

1. Rename or drop the Contour database
2. Create an empty Contour database.

If you are unsure about any of these steps please revisit the steps to [install a database](#).

## MySQL Command Line

MySQL command line client the following commands can be used:

```
DROP DATABASE CONTOUR;
```

```
create database contour character set utf8;
```