Oracle® WebCenter Sites

Site Capture Upgrade Guide

11*g* Release 1 (11.1.1) Bundled Patch 1

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ORACLE®

Oracle® WebCenter Sites: Site Capture Upgrade Guide, 11*g* Release 1 (11.1.1) Bundled Patch 1

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Table of

Contents

About This Guide 5
Audience 5
Related Documents 5
Conventions 5
Third-Party Licenses 6

1 Before You Upgrade 7
Overview of the Site Capture Upgrade Process 8
Planning the Upgrade Process 8
Pre-Upgrade Steps 9

2 Upgrading Site Capture to 11*g*R1 Bundled Patch 1 11
Upgrading the Test Environment 12
Upgrading the Active Environment 15
Upgrading Custom Implementations and Integrating with the Publishing System 15
Custom Implementations 15
Integrating with the Publishing System 15

3 Reference: Site Capture Backup and Recovery 17
Prerequisites for Backing Up and Recovering 18
Backup and Recovery Guidelines 18
Site Capture Installation Directory 18
Web Application 18
WebCenter Sites Database 20
Running the Recovered Application 22

About This Guide

This guide describes the process of upgrading Oracle WebCenter Sites: Site Capture 11*g*R1 to Site Capture 11*g*R1 Bundled Patch 1, running on Oracle WebCenter Sites 11*g*R1.

Applications discussed in this guide are former FatWire products. Naming conventions are the following:

- *Oracle WebCenter Sites* is the current name of the application previously known as *FatWire Content Server*. In this guide, *Oracle WebCenter Sites* is also called *WebCenter Sites*.
- *Oracle WebCenter Sites: Site Capture* is the current name of the application previously known as *FatWire Site Capture*. In this guide, *Oracle WebCenter Sites: Site Capture* is also called *Site Capture* or the *Site Capture* application.

Audience

This guide is for installation engineers and anyone else who has experience installing and configuring WebCenter Sites: Site Capture.

Related Documents

For more information, see the following documents for the 11*g*R1 Bundled Patch 1 release, available at `http://docs.oracle.com`:

- *WebCenter Sites Release Notes*
- *WebCenter Sites Certification Matrix*
- *WebCenter Sites Upgrade Guide*
- *WebCenter Sites Installation Guide for the Site Capture Application*

Conventions

The following text conventions are used in this guide:

- **Boldface** type indicates graphical user interface elements that you select.

- *Italic* type indicates book titles, emphasis, or variables for which you supply particular values.
- `Monospace` type indicates file names, URLs, sample code, or text that appears on the screen.
- **`Monospace bold`** type indicates a command.

Third-Party Licenses

Oracle WebCenter Sites and its applications include third-party libraries. For additional information, see *Oracle WebCenter Sites 11g*R1 *Bundled Patch 1: Third-Party Licenses*.

Chapter 1

Before You Upgrade

This guide is written for experienced Site Capture installation engineers. Before upgrading, read the rest of this guide to familiarize yourself with the upgrade strategy and prerequisites, upgrade procedures, changes that will be made by the installer, and the post-upgrade steps.

This guide contains the following sections:

- Overview of the Site Capture Upgrade Process
- Planning the Upgrade Process
- Pre-Upgrade Steps

Overview of the Site Capture Upgrade Process

The Site Capture upgrade feature is implemented in the Site Capture 11*g*R1 Bundled Patch 1 installer to help you upgrade Site Capture components from the versions listed below to the current version, distributed as part of WebCenter Sites.

Providing the upgrade feature inside the Site Capture installer enables:

- Upgrading from:
  - FatWire Site Capture 1.1 to Oracle WebCenter Sites: Site Capture 11*g*R1 Bundled Patch 1
  - Oracle WebCenter Sites: Site Capture 11*g*R1 to 11*g*R1 Bundled Patch 1
- Adding new features and bug fixes to your existing Site Capture installation
- Ensuring integrity of data in your existing Site Capture installation
- Ensuring the generation of an application `war` file with all new features in your existing Site Capture installation directory

Note

If your WebCenter Sites installation will not be upgraded to 11*g*R1 Bundled Patch 1, do not upgrade the Site Capture application. The upgraded version runs on WebCenter Sites 11*g*R1 Bundled Patch 1.

Planning the Upgrade Process

Upgrades disrupt the operation of active systems and may result in extended downtime. To minimize such disruptions, Oracle highly recommends adopting the strategy outlined in this section, when upgrading to Site Capture 11*g*R1 Bundled Patch 1.

Note

This guide uses the term “active” to denote any system that is currently running Site Capture and whose unexpected downtime will affect business and productivity of the organization.

Site Capture runs on its own database and interacts with WebCenter Sites through the Web Experience Management (WEM) framework. Before upgrading an active Site Capture environment, it is critical to perform a trial upgrade on a duplicate environment. The trial upgrade will help you detect and document system-specific issues and correct them in advance of the actual upgrade.

If a duplicate environment is not available, then start by upgrading your active Site Capture 1.1 or Site Capture 11*g*R1 environment. **Note that this approach is highly risky; it should not be attempted unless extended downtime is deemed acceptable.**

Pre-Upgrade Steps

Before upgrading, complete the following steps:

- Read the rest of this guide to familiarize yourself with the upgrade prerequisites and procedures.
- Read the following guides for the 11*g*R1 Bundled Patch 1 release, available at `http://docs.oracle.com`:
  - *WebCenter Sites Release Notes*
  - *WebCenter Sites Certification Matrix*
  - *WebCenter Sites Upgrade Guide*
- Upgrade your Content Server 7.6 Patch 2 or WebCenter Sites 11*g*R1 environment to WebCenter Sites 11*g*R1 Bundled Patch 1. For instructions, see the *WebCenter Sites 11g*R1 *Bundled Patch 1 Upgrade Guide*.

  After successfully upgrading to WebCenter Sites 11*g*R1 Bundled Patch 1, you will upgrade Site Capture 1.1 or Site Capture 11*g*R1 to version 11*g*R1 Bundled Patch 1 by running the Site Capture 11*g*R1 Bundled Patch 1 installer on all Site Capture systems in your environment.

  The Site Capture 11*g*R1 Bundled Patch 1 installer detects and reuses the mode (single or cluster) that was selected during the Site Capture 1.1 or Site Capture 11*g*R1 installation process. For example, if Site Capture 1.1 was installed in cluster mode and deployed, the Site Capture 11*g*R1 Bundled Patch 1 installer continues to treat the system as a cluster and deploys it.

  Note

  The mode of a Site Capture system (single or cluster) cannot be changed during upgrade.

- If your current Site Capture application was modified since it was first deployed (most likely it was), back up your current Site Capture application by backing up the installation directory and database. For detailed instructions, see Chapter 3, "Reference: Site Capture Backup and Recovery."

  Note

  In the post-upgrade process, you will use the backed-up installation directory and database to reapply the customizations they may contain.

Chapter 2

Upgrading Site Capture to 11*g*R1 Bundled Patch 1

This chapter contains instructions for upgrading a Site Capture 1.1 or Site Capture 11*g*R1 test environment to Site Capture 11*g*R1 Bundled Patch 1, verifying the test environment, and then upgrading the active environment.

This chapter contains the following sections:

- Upgrading the Test Environment
- Upgrading the Active Environment
- Upgrading Custom Implementations and Integrating with the Publishing System

Upgrading the Test Environment

In this section, you will back up your active environment as a precaution. If you choose to create a test environment, you will do so by recovering the backup.

Step 1. Back Up Your Site Capture 1.1 or Site Capture 11*g*R1 Environment

1. Review Chapter 3, "Reference: Site Capture Backup and Recovery" for guidelines and specific instructions.
2. Back up Site Capture in the active environment, as described in Chapter 3, "Reference: Site Capture Backup and Recovery."
3. Take note of all the information about your existing installation, such as application server configuration and database configuration. While these will not be changed during the upgrade, you might need to reference existing settings if changes are needed elsewhere.

Step 2. Create the Test Environment

Note

Complete a trial upgrade on a test environment before upgrading the active environment. If a test environment is not available, then start by upgrading the active Site Capture environment and expect extended downtime. We strongly recommend using a test environment, given the extent of changes made in Site Capture 11*g*R1 Bundled Patch 1.

1. When you are ready to create the test environment, recover the backup that you created in the previous step. Refer to Chapter 3, "Reference: Site Capture Backup and Recovery" for guidelines.
2. Continue with the guidelines below to complete the test environment:
   a. Site Capture:
   Copy Site Capture into the same location that it occupied on its previous host.
   b. Application Server:
      1) Install the application server using the same paths that were used on the previous host.
      2) Create the data source using the same JNDI name that was used on the previous host. Use the database information for the restored database.
      3) Deploy the Site Capture application as required by your application server.

Step 3. Upgrade Site Capture Instances to 11*g*R1 Bundled Patch 1

In this section, you will run the Site Capture 11*g*R1 Bundled Patch 1 upgrade installer in the preferred manner (interactive or silent) on each instance of Site Capture 1.1 or Site Capture 11*g*R1.

- Interactive Upgrade can be used on environments where the X11-like GUI is available.
- Silent Upgrade can be used on environments where the command prompt is available.

Interactive Upgrade

1. Extract the Site Capture installer archive into a temporary directory and run the installer script:
   - On Windows: **`scinstall.bat`**
   - On Unix: **`./scInstall.sh`**

   Note

   Monitor the installer log (`install_log.log`) during post-upgrade testing. If an error occurs, you can trace its source by reviewing the logs.

   As you proceed through the upgrade, bear in mind the following:
   - Most fields in the installer will be pre-populated with values that the installer detected from your original installation. Check the pre-populated values. If they are outdated, you will need to supply the current values. (Information such as passwords, you will have to enter manually.)
   - Fields whose values you are not permitted to change will be disabled (grayed out).
2. Proceed to the *WebCenter Sites Installation Guide for the Site Capture Application* and follow instructions for installing Site Capture. Once the installation is completed, return to this guide and continue.

   Note

   At this point, it is assumed that the upgrade of Site Capture has been completed and you have a valid Site Capture installation running. If the upgrade failed, review the previous steps and the logs and resolve any issues.

3. Wait until the installer process exits normally and shows the command prompt again. The `ROOT` folder and the `ROOT.war` file will be created in the `webapps` folder of the installation directory specified in the `omii.ini` file.
4. If you update the Site Capture host name/port number, delete SiteCapture `FW_Application` and SiteCapture `FW_View` from AdminSite.
5. The only way to customize Site Capture is through Java code, which can be incorporated into the Site Capture web application in the form of `class`/`jar` files. No other files must be manually configured. Once the upgrade is complete, all changes must be manually preserved in the installer-generated `war` file. Refer to "Upgrading Custom Implementations and Integrating with the Publishing System," on page 15.
6. Deploy the Site Capture `ROOT.war` file on the applicable application server.

Silent Upgrade

1. Copy the `omii.ini` file from `/fw-site-capture/ominstallinfo` to a folder outside and rename the copy as desired. The silent installer will use this copy during the upgrade.
2. Open the desired `omii.ini` file.
3. Search for the `isAlreadyInstalled` property.
4. Set the `isAlreadyInstalled` property to `true` for upgrade silent installation.
5. Search for the `CSInstallAccountPassword` property.
6. Provide the unencrypted password for the `CSInstallAccountPassword` property.
7. Save the property file.
8. Open the `Install.ini` file (located at the root level in the extracted folder), add the line `loadfile=` to the first section, and save the file.
9. Open a command prompt and run one of the following commands:
   - Windows: **`scInstall.bat -silent`**
   - Linux: **`scInstall.sh -silent`**

   You will see the following message in the command window after installation is successful: "`Installation Finished Successfully`"
10. Proceed to the *WebCenter Sites Installation Guide for the Site Capture Application* and follow instructions for installing Site Capture. Once the installation is completed, return to this guide and continue.
11. Wait until the installer process exits normally and shows the command prompt again. The `ROOT` folder and the `ROOT.war` file will be created in the `webapps` folder of the installation directory specified in the `omii.ini` file.
12. If you update the Site Capture host name/ port number, then delete SiteCapture `FW_Application` and SiteCapture `FW_View` from AdminSite.
13. The only way to customize Site Capture is through Java code, which can be incorporated into the Site Capture web application in the form of `class/jar` files. No other files must be manually configured. Once the upgrade is complete, all changes must be manually preserved in the installer-generated `war` file. Refer to "Upgrading Custom Implementations and Integrating with the Publishing System," on page 15.
14. Deploy the Site Capture `ROOT.war` file on the applicable application server.

Step 4. Verify the Upgraded Environment

Note

If you have a cluster, begin with the primary cluster member, then test each secondary cluster member. Finally, test the cluster via the load balancer.

Complete the following steps on each Site Capture instance in the upgraded environment:

1. Log in to WebCenter Sites as a general administrator.

2. Go to the Site Capture application.
3. Test the Site Capture application and all functions that are routinely used during normal operations.
4. When the environment is verified, do one of the following:
   - If you upgraded the test environment, continue to "Upgrading the Active Environment," on page 15.
   - If you upgraded the active environment:
     1) Enable the publishing schedules.
     2) Enable any events.
     3) Back up the upgraded environment.
     4) Clear Client Browser caches (as existing cached content may cause issues).
     5) Resume work.

Upgrading the Active Environment

The following steps apply if you upgraded the test environment:

1. Having verified the test environment, you will now upgrade the active environment. **Assuming the active environment continued to operate during the trial upgrade,** upgrade the active environment by referring to the previous steps in this guide and any notes that you may have created during the trial upgrade.
2. Verify the upgraded environment, as described in the previous section.
3. Resume work.

Upgrading Custom Implementations and Integrating with the Publishing System

- Custom Implementations
- Integrating with the Publishing System

Custom Implementations

Site Capture supports custom implementations such as `ResourceRewriter` and `LinkExtractor`, so that websites can be crawled according to desired URL patterns. Developers can customize a crawler with these customized implementations and create the required `class/jar` files. In upgrade scenarios, you must preserve and redeploy custom `class/jar` files in the latest application `war` files before starting the application.

Integrating with the Publishing System

In this section you will integrate Site Capture with the WebCenter Sites RealTime publishing process:

1. **On the WebCenter Sites source system:**
   a. Do one of the following:

- For upgrade from Site Capture 11gR1:
  Replace the `fw-crawler-publish-listener-11.1.1.6.0.jar` with `fw-crawler-publish-listener-11.1.1.6.1.jar` to the `/WEB-INF/lib` folder.
- For upgrade from Site Capture 1.1:
  Replace the `fw-crawler-publish-listener-1.1.jar` with `fw-crawler-publish-listener-11.1.1.6.1.jar` to the `/WEB-INF/lib` folder.

b. Unzip the `fw-crawler-publish-listener-11.1.1.6.1-elements.zip` file and re-import `FW_PublishingEventRegistry.html` using CatalogMover.

c. Restart the WebCenter Sites source system.

2. On the WebCenter Sites target system:

a. Using CatalogMover, re-import `ElementCatalog.html` and `SiteCatalog.html` from the unzipped `fw-crawler-publish-listener-11.1.1.6.1-elements.zip` file extracted in step 1b above (on the WebCenter Sites source system).

b. There is no need to copy the `crawler.properties` file (keep the existing file as is). If you update the Site Capture host name/ port number, update the `crawler.properties` file accordingly.

c. Do one of the following:

- For upgrade from Site Capture 11gR1:
  Replace the `fw-crawler-publish-listener-11.1.1.6.0.jar` with `fw-crawler-publish-listener-11.1.1.6.1.jar` file to the `/WEB-INF/lib` folder.
- For upgrade from Site Capture 1.1:
  Replace the `fw-crawler-publish-listener-1.1.jar` with `fw-crawler-publish-listener-11.1.1.6.1.jar` file to the `/WEB-INF/lib` folder.

d. Restart the WebCenter Sites target system.

Chapter 3

Reference: Site Capture Backup and Recovery

This section supports previous sections by providing detailed information about the backup and recovery steps you are instructed to complete.

This chapter contains the following sections:

- Prerequisites for Backing Up and Recovering
- Backup and Recovery Guidelines

Prerequisites for Backing Up and Recovering

- Before backing up any part of Site Capture application, it is best to shut down the application server. If you must make a live backup of the Site Capture application, ensure the site is not in use and no requests are being made to the application server.
- Before recovering any part of the Site Capture application, ensure the application server is shut down.

Backup and Recovery Guidelines

This section contains steps for backing up and recovering the Site Capture installation directory, web application, and database.

Site Capture Installation Directory

Backup

Jar or tar the Site Capture installation directory.

For example:

```
tar -cvf SiteCapture_backup.tar /u01/CS/Install
jar cvf SiteCapture_backup.jar /u01/CS/Install
```

Recovery

Unjar or untar the backed-up Site Capture installation directory.

For example:

```
tar -xvf SiteCapture_backup.tar
jar xvf SiteCapture_backup.jar
```

Web Application

Refer to Table 1 and the sections that follow.

Table 1: Backup and Recovery Information for the `ROOT.war` File

`.war` Deployment Method	**Backup**	**For Recovery Information, See...**
Non-Exploded. For Site Capture on WebSphere	Unnecessary if the Site Capture installation directory is backed up. (The `ROOT.war` file contained in the Site Capture installation directory: `<sc_install_dir>/ fw-site-capture/webapps/)`	"Non-Exploded Files Recovery:

Table 1: *(continued)* Backup and Recovery Information for the `ROOT.war` File

`.war` Deployment Method	Backup	For Recovery Information, See...
Exploded. For Site Capture on: • Apache Tomcat • Oracle WebLogic	• No "development changes" to the files. • Backup is unnecessary if the files have not been changed during development **and** the Site Capture installation directory is backed up. • (The `ROOT.war` file contained in the Site Capture installation directory: • `<sc_install_dir>/fw-site-capture/webapps/`)	• "Exploded Files Recovery" with no development changes
	• With "development changes" to the files. • Backup is required.	• "Exploded Files Recovery" with development changes

Non-Exploded Files Backup

See Table 1.

Non-Exploded Files Recovery

1. Undeploy the Site Capture application.
2. Recover the Site Capture installation directory (for instructions, see "Backup and Recovery Guidelines": "Site Capture Installation Directory").
3. Redeploy the Site Capture application.

Exploded Files Backup

- To back up exploded files with no development changes, see Table 1.
- To back up exploded files with development changes:

  Jar or tar the deployed Site Capture web application. Label the backup to distinguish it from the compressed `ROOT.war` file. For example:

```
tar -cvf ROOT_web_backup.tar /u01/software/Tomcat/webapps/ROOT
jar cvf ROOT_web_backup.jar /u01/software/Tomcat/webapps/ROOT
```

Exploded Files Recovery

- To recover exploded files with no development changes:
  1. Stop the application server.
  2. Delete the exploded web application.

     For example:

```
rm -rf /u01/software/Tomcat/webapps/ROOT/*
```

3. Recover the Site Capture installation directory (for instructions, see "Backup and Recovery Guidelines": "Site Capture Installation Directory").
4. Unjar the backed-up Site Capture web application:

   For example:
   ```
   cd /u01/software/Tomcat/webapps/ROOT
   jar xvf /ominstallinfo/app/ROOT.war
   ```

- To recover exploded files with development changes:
  1. Stop the application server.
  2. Delete the exploded web application.

     For example:
     ```
     rm -rf /u01/software/Tomcat/webapps/ROOT
     ```
  3. Unjar the backed-up Site Capture web application:

     For example:
     ```
     cd /u01/software/Tomcat/webapps
     jar xvf <sc_install_dir>/ROOT_web_backup.tar
     ```

WebCenter Sites Database

Backup

- To back up SQL Server SQL 2005/2008/2008R2
  1. Open SQL Server Management Studio.
  2. Connect to the database server.
  3. Expand **Databases**.
  4. Right-click on the database to be backed up. Click **Tasks** > **Backup**.
  5. Under "Backup type," select **Full**. Under **Destination**, click **Add**.
  6. Enter the path and file name for the backup file. Click **OK**.
  7. Under "Destination," select the newly created backup location.
  8. Click **OK**.
- To back up Oracle 11g
  1. Log in to the server as the oracle user.
  2. Set `<ORACLE_HOME>` to the oracle database directory and `ORACLE_SID` to the database name.
  3. Log in to sqlplus as `sys`. Then, do the following:
     a) Use the create directory sql to map to the OS directory, where the exports will be stored.

        For example:
        ```
        SQL> create directory exp_dp_dir as '/u01/backup/
          exports';
        ```
     b) Grant permissions for database export and directory access.

        For example:

```
SQL> grant read,write on directory exp_dp_dir to system;
 SQL> grant EXP_FULL_DATABASE to system
```

4. Run the **expdp** command to start exporting.

   For example:

   ```
   expdp system/<password> DIRECTORY=exp_dp_dir
    DUMPFILE=<file_name>.dmp FULL=y SCHEMA=<YOUR_SCHEMA>;
   ```

- To back up DB2 9.7
  1. Log in to the server as the db2inst user.
  2. Run the following command:
     `db2 force applications all`
  3. Run the following command:
     db2 backup db <db_name> to <backup_dir>

> **Note**
>
> After the command has completed, note the timestamp. This timestamp will be included in the name of the database backup file.

Recovery

- To recover SQL Server SQL 2005/2008/2008R2
  1. Open SQL Server Management Studio.
  2. Connect to the database server.
  3. Expand **Databases**.
  4. Right-click on the database to be restored. Select **Tasks** > **Restore** > **Database**.
  5. Under "Source for restore," select **From database**.
  6. Under "Select the backup sets to restore," select the most recent backup.
  7. Click **Script** at the top.
     This step opens the query editor containing the restore statement.
  8. Edit the query by adding `REPLACE,` after `WITH`. This will allow the database log to be overwritten.
  9. Click **Execute**.
- To recover Oracle 11g
  1. Log in to the server as the oracle user.
  2. Set `<ORACLE_HOME>` to the oracle database directory and `ORACLE_SID` to the database name.
  3. Go to `<$ORACLE_HOME>/bin`.
  4. Run the following command:

     ```
     ./impdp system/<password> DIRECTORY=exp_dp_dir
      DUMPFILE=<file_name>.dmp SCHEMAS=<YOUR_SCHEMA>;
     ```

- To recover DB2 9.7

1. Log in to the server as the db2inst user.
2. Run the following command:
   db2 force applications all
3. Run the following command:
   db2 restore db <db_name> from <backup_dir> replace existing

Running the Recovered Application

Before starting the application server, note the following:

- If you are using Apache Tomcat, clear the application server cache:
  rm -rf <server_dir>/tmp/*
  rm -rf <server_dir>/work/*
- For the Oracle WebLogic application server, the cache will be cleared upon redeployment of the application.