



atg

Version 9.1

Upgrade and Migration Guide

9.0 to 9.1

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ATG Upgrade and Migration Guide 9.0 to 9.1

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1 Introduction

This guide describes how to upgrade from ATG 9.0 to ATG 9.1, and is written for programmers, DBAs, site administrators, and ATG partners.

For information on how to upgrade from earlier versions, refer to the migration table on atg.com.

Pre-migration steps

Before you begin migration:

- Review Chapter 2, *New in ATG 9.1*, to determine what new features in ATG 9.1 apply to your installation.
- Check the Supported Environments page on the ATG web site. Make sure you are running on a supported version of your application server, JDK, database server, and JDBC driver.
- Review the migration steps described in Chapter 3.

Convention for file locations

This guide uses the convention `<ATG9dir>` to represent the root directory for ATG products. By default, the Windows installation creates the root directory `C:\ATG\ATG9.1`, but its actual location can vary according to your installation.

ATG 9.1 documentation

To find out more about ATG 9.1, see the online ATG product manuals.





2 New in ATG 9.1

This section describes new features available in the ATG platform and applications.

All ATG products in this release use the same 9.1 version number. Consult the support matrix (see www.atg.com) for the latest information on supported product combinations and third-party applications.

Platform

This section describes new platform features introduced since the release of ATG 9.0.

ATG Content Administration

The following features are new to ATG Content Administration:

- Purging service lets you remove asset versions and projects from versioned repositories and file systems.
- Target site names are predefined in the workflows provided by the ATG installation.
- Deployment agents can be identified as essential or unessential for deployment to a target. All agents marked as essential must be online and functional during deployment. Deployment can proceed if an unessential agent is off-line.

Future deprecation of deployment to targets with earlier product versions

While version 9.1 of ATG Content Administration supports deployment to targets with earlier ATG versions, this support will be discontinued for future releases. For more information about deploying to earlier product versions, see the *ATG Content Administration Programming Guide*.

ATG Commerce

You can now use price lists in combination with SKU-based pricing.

ATG Platform REST Web Services

You can now access the features in the ATG Adaptive Scenario Engine in a RESTful manner. Client libraries written in Java and ActionScript make Web services easier to use by hiding the complexity of creating connections, assembling payloads for requests, and processing responses. For more information, see the *ATG Web Services and Integration Framework Guide*.



Applications

The following sections describe application features introduced since the release of ATG 9.0.

ATG Campaign Optimizer

The following features are new to ATG Campaign Optimizer 9.1. For full information, see the *ATG Campaign Optimizer User Guide*.

- Integration into the ATG Business Control Center to better integrate with complementing applications and improve the process of deploying tests.
- Use of standard ATG Content Administration workflows to deploy tests.
- Support for internal users.
- Deployment of tests on a staging server.
- Ability to preview tests as an external user.

ATG Commerce Service Center

The following features are new to ATG Commerce Service Center. For full information, see the *ATG Service Installation and Configuration Guide*.

- Custom shipping and payment groups
- Custom grids and tables
- Custom forms and tabs
- Custom navigation
- Customer and order search methodology
- CIM installation

ATG Merchandising

The following features are new to ATG Merchandising. For full information, see the *ATG Merchandising User Guide*.

- Significant improvements to the visual design of the product.
- Usability improvements to asset conflict resolution, for example better conflict resolution for catalog products added to the same category by different users.
- Support for a CSV import/export tool that allows merchants to work on catalog items in Excel spreadsheets and import them into ATG Merchandising.
- Support for a WYSIWYG HTML editor (EditLive) in text properties.
- Catalog orphans renamed “unlinked catalog items.”

ATG Outreach

ATG Outreach 9.1 includes the following enhancements. For full information, see the *ATG Outreach Guide for Business Users* and the *ATG Outreach Administration and Development Guide*.

- Staging server support. ATG Outreach now supports two workflows, one that deploys to a single (production) target, and one that deploys to both staging and production targets.



- EditLive HTML editor upgraded to version 6.5.

ATG Search

The following features are new to ATG Search. For full information, see the *ATG Search Administration Guide*.

- Index Review tools let you examine an index through Search Administration, providing both high-level and detailed diagnostic information about its content.
- Dictionary Inspection shows how the dictionary, custom terms, and text processing option sets affect content processing during indexing, and how Search interprets queries. These features let you see the effect of terms and term relationships in both core and custom dictionaries.

ATG Service

The following features are new to ATG Service. For full information, see the *ATG Service Installation and Configuration Guide*.

- New CIM installation
- New customer search methodology





3 Migration Steps

Migrating from ATG 9.0 to ATG 9.1 involves the following steps:

1. Back up your ATG 9.0 database.
2. Complete all Content Administration projects.
3. If your installation includes ATG Outreach, stop all running campaigns.
4. If your installation includes ATG Campaign Optimizer, stop all running tests.
5. Shut down all ATG servers.
6. Install ATG 9.1 as directed in the *ATG Installation and Configuration Guide*.
7. Download the appropriate migration kit from atg.com.
8. Unjar the migration kit located in the <ATG9dir>/migration/ directory.

This creates three migration directories:

```
<ATG9dir>/migration/90to91sql/db_components/oracle  
<ATG9dir>/migration/90to91sql/db_components/db2  
<ATG9dir>/migration/90to91sql/db_components/mssql
```

9. Upgrade the ATG 9.0 database schemas by running the scripts described in the next chapter, Database Migration.
10. If you use ATG Content Administration, update view mapping data on the asset management servers. You must migrate customized ATG Merchandising View mappings if any exist in ATG Merchandising 9.0.
11. If your environment includes ATG Outreach, follow the procedure for upgrading your existing application, described in Migrate ATG Outreach.
12. If your environment includes ATG Campaign Optimizer, follow the procedure for upgrading your existing application, described in Migrate ATG Campaign Optimizer.
13. Clear browser caches.
14. Clear the application server cache. For example, on JBoss empty the contents of each server directory: /work/jboss.web/localhost.
15. Test the upgraded platform and applications.





4 Database Migration

ATG 9.1 includes a number of enhancements to the database schemas used by ATG 9.0. The migration kit provides the batch files/shell scripts and DDL scripts that you need to upgrade existing schemas, in one of the following database-specific directories:

```
<ATG9dir>/migration/90to91sql/db_components/oracle  
<ATG9dir>/migration/90to91sql/db_components/db2  
<ATG9dir>/migration/90to91sql/db_components/mssql
```

You can run the batch files, or you can run the DDL scripts individually, as described in the Schema Migration section that follows.

Database migration steps

In order to migrate an ATG 9.0 database:

1. Change to one of the migration script directories. Make sure the directory has write permissions enabled.
2. Before you run the migration batch files or shell scripts, include a dot (.) in the PATH environment variable in order to enable execution of the DDL script commands. This step is optional if PATH includes the database migration script directories.
3. Run the scripts for the modules that you use, as described in Schema Migration.

Database Notes

All migration scripts are tailored to one of the following database systems:

- Oracle
- DB2
- MSSQL

The following sections describe how to execute the batch files/shell scripts and DDL scripts. Before running these scripts, change to the database-specific directory—for example,

```
<ATG9dir>/migration/90to91sql/db_components/oracle
```

Oracle

Batch file/shell script execution

```
file-name schema-owner-name password tns-alias
```



DDL script execution

```
sqlplus -s schema-owner-name/password@tns-alias <./ddl-pathname >logfile
```

DB2

Batch file/shell script execution

```
batch-filename schema-owner-name password DB2-alias
```

```
shell-scriptname schema-owner-name password DB2-alias path-to-db2profile
```

DDL script execution

```
db2 connect to DB2-alias user schema-owner-name using password
```

```
db2 -tvf ./ddl-pathname >logfile
```

MSSQL

Batch file execution

```
batch-file-name login password database-server database-name
```

DDL script execution

```
sqlcmd -u login -P password -S db-server -d db-name -i ddl-pathname -o logfile
```

Schema Migration

The following sections describe the migration kit DDL scripts and the corresponding batch files that you use to upgrade ATG module schemas. Upgrade each module in the order shown below. If a module upgrade requires multiple scripts, run these in the sequence shown.

Note: This section only lists modules that require schema migration.

Before running migration scripts

Review the migration scripts and modify where necessary. Make sure the scripts do not overwrite custom database changes. In order to run these scripts, your database login must be the same as the one used to create the original ATG 9.0 schemas.

Running SQL scripts

Instead of running batch files/shell scripts, you can manually upgrade each module by executing the applicable SQL scripts. Be sure to run these in the order shown.

DAS

Batch file/shell script	run_das.{bat sh}
SQL scripts	sitemap_ddl.sql seo_ddl.sql



B2CCommerce

Batch file/shell script	run_b2commerce_all.{bat sh}
SQL scripts	sitemap_ddl.sql* seo_ddl.sql* upgrade_pioneercycling_ddl.sql**
* Required only if DAS module is not already upgraded	
** Required only to upgrade the Pioneer Cycling reference application	

B2BCommerce

Batch file/shell script	run_b2bcommerce_all.{bat sh}
SQL scripts	sitemap_ddl.sql* seo_ddl.sql* upgrade_motorprise_ddl.sql**
* Required only if DAS module is not already upgraded	
** Required only to upgrade the Motorprise reference application	

Portals

Batch file/shell script	run_portals_all.{bat sh}
SQL scripts	sitemap_ddl.sql seo_ddl.sql

Versioned Modules

The scripts for all versioned modules listed below perform the same schema migration. Thus, migrating any one of these modules also migrates the others.

- DAS_versioned
- Publishing.Base
- BIZUI
- Versioned B2CCommerce
- Versioned B2BCommerce



DAS_versioned

Batch file/shell script	run_das_versioned.{bat sh}
SQL scripts	sitemap_ddl.sql versioned_seo_ddl.sql

Publishing.Base

Batch file/shell script	run_publishing_base_all.{bat sh}
SQL scripts	sitemap_ddl.sql versioned_seo_ddl.sql

BIZUI

Batch file/shell script	run_bizui_all.{bat sh}
SQL scripts	sitemap_ddl.sql versioned_seo_ddl.sql

Versioned B2CCommerce

Batch file/shell script	run_publishing_dcs_all.{bat sh}
SQL scripts	sitemap_ddl.sql versioned_seo_ddl.sql

Versioned B2BCommerce

Batch file/shell script	run_publishing_b2bcommerce_all.{bat sh}
SQL scripts	sitemap_ddl.sql versioned_seo_ddl.sql



Platform Data Warehouse

Batch file/shell script	run_arf_dw.{bat sh}
SQL scripts	upgrade_arf_dw_base_ddl.sql upgrade_arf_dw_base_init.sql

Commerce Data Warehouse

Batch file/shell script	run_dcs_dw.{bat sh}
SQL scripts	upgrade_arf_dw_base_ddl.sql* upgrade_arf_dw_base_init.sql* upgrade_dcs_dw_ddl.sql

* Required only if Platform Data Warehouse module is not already upgraded

Search

Note: After you upgrade this module, you must rebuild the entire Search index. For more information, see the *ATG Search Administration Guide*

Batch file/shell script	run_daf_search.{bat sh}*
SQL scripts	sitemap_ddl.sql** seo_ddl.sql** upgrade_daf_search_routing_ddl.sql

* In order to update the DAS module, uncomment the call to run_das.{bat|sh}

** Required only if DAS module is not already upgraded

Search Admin

Batch file/shell script	run_search_admin.{bat sh}
SQL scripts	upgrade_search_admin_common_ddl.sql upgrade_search_admin_customizations_ddl.sql



Outreach

Download the ATG Outreach 9.0 Migration Kit from atg.com. Then run the following script against the database tables used by the ATG Outreach (management) server.

Batch file/shell script	run_aco_management_ddl.{bat sh}
SQL scripts	upgrade_management_ddl.sql

Campaign Optimizer

If your environment includes ATG Campaign Optimizer, follow the procedure for upgrading your existing application, described in Migrate ATG Campaign Optimizer.

Note: If CAF tables are not present in your publishing schema, you will need to add them with the SQL script `caf_all.sql`.

Batch file/shell script	run_abtest_management.{bat sh} run_abtest_runtime.{bat sh}
SQL scripts	versioned_abtest_ddl.sql abtest_preview_ddl.sql abtest_tracking_ddl.sql abtest_markers_ddl.sql abtest_metrics_ddl.sql

If your environment includes ATG Campaign Optimizer with Commerce Extensions, follow the procedure for upgrading your existing application, described in Migrate ATG Campaign Optimizer.

Note: If CAF tables are not present in your publishing schema, you will need to add them with the SQL script `caf_all.sql`.

Batch file/shell script	run_dcs_abtest_management.{bat sh} run_dcs_abtest_runtime.{bat sh}
SQL scripts	versioned_dcs_abtest_ddl.sql abtest_dcs_metrics_ddl.sql



5 Migration Topics

The sections of this chapter show how to perform the following tasks:

- Update view mapping data
- Migrate customized ATG Merchandising view mappings
- Migrate ATG Commerce reports
- Migrate ATG Outreach
- Migrate ATG Campaign Optimizer

Update View Mapping Data

After you install ATG 9.1 and upgrade database schemas on customer-facing and asset management servers, you must update view mapping data on the asset management servers in the following steps:

1. Configure data source properties.
2. Run import scripts.
3. Update ATG 9.1 Merchandising view mappings as described later in this chapter; required only for ATG Merchandising 9.0 installations.

Caution: If you created customized view mappings in version 9.0 of ATG Merchandising, skip this section and follow the procedure described in the next section, Migrate Customized ATG Merchandising View Mappings.

Configure data source properties

Before you import the new ATG 9.1 view mappings, edit the following files in `<ATG9dir>/home/localconfig/atg/dynamo/service/jdbc`

- `fakeXADatasource.properties`
- `fakeXADatasource_production.properties`

Run import scripts

Run the following import scripts to import new view mappings:

1. `<ATG9dir>/BIZUI/install/importBIZUI.{bat|sh}`
2. `<ATG9dir>/AssetUI/install/importAssetUI.{bat|sh}`
3. `<ATG9dir>/DPS-UI/install/importDPSUI.{bat|sh}`
Note: If execution of this script generates errors, run it again.
4. `<ATG9dir>/DPS-UI/install/importDPSUIExamples.{bat|sh}` (optional)
5. If you have ATG Search installed:



- Set the environment variable `SEARCH_VERSION` to 9.0
- Run this script:

```
<ATG9dir>/Search9.0/SearchAdmin/install/create-search-admin.{bat|sh}
```

6. If you have ATG Service installed:

```
<ATG9dir>/Service9.0/Service/install/scripts/import-scripts/import-agent-all.{bat|sh}
```

For general information on view mapping, see the *Customizing Asset Display* chapter of the *ATG Content Administration Programming Guide*.

Migrate Customized ATG Merchandising View Mappings

If you have any custom view mappings for ATG Merchandising 9.0, you must complete the following procedure to migrate them. Do so after installing ATG Merchandising 9.1 and migrating the database schema.

1. Export customized view mappings.
2. Remove existing view mapping data.
3. Update ATG 9.1 Merchandising view mappings.
4. Import customized view mappings.
5. Update remaining view mapping data for the platform and other applications that run on the asset management servers.

Export customized view mappings

If your view mapping repository contains customized items, use the following script to export this repository to an XML file:

```
<ATG9.0dir>/home/bin/startSQLRepository
```

For information about using the `startSQLRepository` script, see the *ATG Repository Guide*.

Remove existing view mapping data

After you export custom 9.0 view mappings, remove all existing view mapping data from the repository. You can do this by dropping and recreating the view mapping tables with these scripts:

```
<ATG9.1dir>/BIZUI/sql/uninstall/database_vendor/drop_viewmapping_ddl.sql
<ATG9.1dir>/BIZUI/sql/db_components/database_vendor/viewmapping_ddl.sql
```

Update ATG Merchandising view mappings

Update the default ATG Merchandising view mappings as follows:

1. Locate the `<ATG9.1dir>/DCS-UI9.1/DCS-UI/install` directory and run the following scripts:
 - `importDCSUIManagement.{sh|bat}`
Imports the ATG Merchandising view mapping content.
 - `importDCSUIManagementExamples.{sh|bat}`
Imports sample multi-edit groups for catalog items.



2. Depending on your application, you might also need to run the following import scripts, which are located in `<ATG9dir>/DCS-UI9.1/DCS-UI/search/install`:
 - `importDCSUIsearchstandardcatalogs.{bat|sh}`

Imports the view mapping content that is required if you use ATG Consumer Commerce (or ATG Business Commerce with standard catalogs) and you want to use Dynamic Search and Navigation.
 - `importDCSUIsearchcustomcatalogs.{bat|sh}`

Imports the view mapping content that is required if you use ATG Business Commerce (or ATG Consumer Commerce with custom catalogs) and you want to use Dynamic Search and Navigation.
 - `importsearchTesting.{bat|sh}`

Imports the view mapping content required for search testing.

Import customized view mappings

Import the customized view mappings that you exported earlier as follows:

1. Locate and open the XML that contains your exported customized view mappings.
2. **Important:** Review the contents of the export file and delete any item descriptors that contain unchanged items. Review the remaining items, compare them against the new view mappings provided with this release, and make any changes needed to keep the intent of your original modifications. For example, if you are modifying any default view mappings, make sure those modifications are still necessary and correctly applied against the new default view mappings. Similarly, any references to default view mapping items should be reviewed and updated if the default view mappings being referenced have changed.
3. Use the following script to import the modified XML file:

```
<ATG9.1dir>/home/bin/startSQLRepository
```

For information about using the `startSQLRepository` script, see *Using the startSQLRepository Script* in the *ATG Repository Guide*.

Update remaining view mapping data

Update view mapping data for the platform and other applications that run on the asset management servers, as described earlier in this chapter.

Important: If you already imported view mapping data for other ATG Business Control Center-based applications that run on the management servers, such as ATG Outreach, you must reimport that data. Otherwise, the user interfaces for those applications will not display properly.

Migrate ATG Commerce Reports

The following procedure is required only if you use ATG Commerce reports and you customized the metadata model used by those reports. This procedure is not required if you did not customize the metadata model.

1. Upgrade the Commerce Data Warehouse module.
2. In the migration kit's root directory, find the jar file `pr160745-2.jar`.



3. Unjar `pr160745-2.jar` to a temporary location. The result is a single file:
`DCS/DW/cpf/model.xml`
4. Use XML file combination as described in the *ATG Programming Guide* to combine the migration kit's `model.xml` and your customized `model.xml`. The combined XML file contains required migration changes and any customizations you made to the model.
5. Replace your customized model with the new `model.xml`.
6. Install and configure ATG Customer Intelligence 9.1, including the Framework Manager metadata modeling tool.
7. Start the Framework Manager and open your customized model's project. This updates your model for changes in the supported Cognos version. Save the project.
8. Verify and publish the project. You might need to repair or reevaluate entities in the model.

Migrate ATG Outreach

To migrate an ATG Outreach 9.0 installation for use with ATG Outreach 9.1, complete the following steps:

1. Review and follow the general upgrade procedure described in Migration Steps. Make sure you stop all running campaigns, as described in the *ATG Outreach Guide for Business Users*.
2. Complete the procedures for updating the database as described in the Database Migration section of this guide. Make sure you complete the steps for the ATG Outreach tables as well as the platform tables.
3. Install and configure ATG Outreach 9.1 as described in the *ATG Outreach Administration and Development Guide*.
4. Move any custom pages (for example, custom opt-in or opt-out forms) deployed in the Outreach Web application under `/ACO9.0/ACO/communication/common/j2ee-apps/Outreach.ear/Outreach.war` to `/ACO9.1/ACO/communication/common/j2ee-apps/Outreach.ear/Outreach.war`.

Migrate ATG Campaign Optimizer

In previous releases, ATG Campaign Optimizer ran as a stand-alone application. ATG Campaign Optimizer 9.1 is integrated into the ATG Business Control Center and uses standard ATG CA workflows to deploy tests.

To migrate an ATG Campaign Optimizer 9.0 installation for use with ATG Campaign Optimizer 9.1, complete the following steps:

1. Review and follow the general upgrade procedures described in Migration Steps. Make sure you stop all running tests, as described in the *ATG Campaign Optimizer User Guide*.
2. Complete the procedures for updating the database as described in the Database Migration section of this guide. Make sure you complete the steps for ATG Campaign Optimizer as well as the platform tables.



3. Install and configure ATG Campaign Optimizer as described in the *ATG Campaign Optimizer User Guide*.
4. Export test data from ATG Campaign Optimizer 9.0.
5. Import test data to ATG Campaign Optimizer 9.1.
6. Update the ABT_Test table.

Export Test Data from ATG Campaign Optimizer 9.0

Use the following script to export the ATG Campaign Optimizer 9.0 ABTestRepository to an XML file:

```
<ATG9.0dir>/home/bin/startSQLRepository
```

The following example exports the ABTestRepository data from the ATG 9.0 instance called abtest_old to the XML file ABTestData.xml.

```
./startSQLRepository -m ABTest.management -s abtest_old -  
repository /atg/abtest/ABTestRepository -export all ABTestData.xml
```

For information about using the startSQLRepository script, see the *ATG Repository Guide*.

Import Test Data to ATG Campaign Optimizer 9.1

Use the following script to import the data into the ATG Campaign Optimizer 9.1 versioned database.

```
<ATG9.0dir>/home/bin/startSQLRepository
```

The following example imports the data from the XML file ABTestData.xml to ABTestRepository in the ATG Campaign Optimizer 9.1 versioned database in the ATG 9.1 instance called abtest_new.

```
./startSQLRepository -m ABTest.management.Versioned -s abtest_new -  
repository /atg/abtest/ABTestRepository -import ABTestData.xml -comment Initial -  
workspace initialcheckin -user admin
```

For information about using the startSQLRepository script, see the *ATG Repository Guide*.

Update the ABT_Test Table

Tests created in ATG 9.0 and earlier were created by special external profiles. ATG Campaign Optimizer 9.1 is integrated into the ATG Business Control Center and so these external users do not exist in ATG 9.1 publishing schema. When you save migrated tests in ATG Campaign Optimizer 9.1, the following occurs:

- On the View Tests page, the Created By column is blank for these tests
- The following message is written to the log file:
user profile not found for owner ID [OWNER_ID] in test [testID]

These issues do not affect the migrated tests. However, you can fix them by updating the OWNER_ID column of the ABT_Test table. For example, the following statement updates the ABT_TEST table in Oracle:

```
UPDATE TABLE ABT_TEST SET (OWNER_ID="PORTAL-ADMIN");
```





6 Migration Testing

In order to verify the success of your migration on asset management and production servers, follow these steps:

1. Assemble EAR files for the asset management and production servers.
2. Deploy the EAR files to the application server and start the production and management servers.
3. From the ATG 9.1 BCC, verify that you can view:
 - All internal users created in ATG 9.0
 - All assets created in ATG 9.0
4. Confirm that the ATG 9.1 production server contains all assets that were accessible on the ATG 9.0 platform.
5. Create projects, where you add new assets and edit existing ones. Deploy these assets and verify that the deployment is successful.
6. Confirm that deployed file assets are in the correct location and behave as expected.