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ATG WEB COMMERCE

Version 10.0

Upgrade and Migration Guide

2007.1 to 10.0

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Oracle ATG Web Commerce Upgrade and Migration Guide 2007.1 to 10.0

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1 Introduction

This guide describes how to upgrade from ATG 2007.1 to ATG 10.0, and is written for programmers, DBAs, site administrators, and ATG partners.

Before you begin migration:

1. Review Chapter 2, [New Features](#), to determine which new features in ATG 9 and ATG 10.0 apply to your installation.
2. Check the Supported Environments information on the My Oracle Support Web site. Make sure you are running on a supported version of your application server, JDK, database server, and JDBC driver.
3. Review the [migration steps](#) described in Chapter 3.

Convention for File Locations

This guide uses the convention `<ATGversion-number>` to represent the root directory for ATG products—for example, `<ATG10dir>`. By default, the Windows installation for ATG10.0 creates the root directory `C:\ATG\ATG10.0`, but the actual location can vary according to your installation.

ATG Documentation

For detailed information about ATG products, see the ATG documentation on the Oracle Technology Network Web site.





2 New Features

The following sections describe new features available in the ATG platform and applications:

- [New in ATG 9](#) describes features introduced in the ATG 9.0 and ATG 9.1 releases.
- [New in ATG 10.0](#) describes new features introduced in ATG 10.0.

New in ATG 9

The following sections describe features that were introduced by the ATG 9.0 and ATG 9.1 releases:

- [Platform](#)
- [ATG Commerce](#)
- [ATG Search](#)
- [ATG Merchandising](#)
- [Multiple Applications Integration](#)
- [ATG Campaign Optimizer](#)
- [ATG Outreach](#)
- [ATG Commerce Service Center](#)
- [ATG Service](#)

Platform

Distributed/Hybrid Caching

Distributed/hybrid caching is a new caching mode that synchronizes item caches across multiple ATG instances. Distributed hybrid caching provides intelligent cache invalidation across multiple ATG instances. Unlike distributed JMS and TCP caching, which broadcast invalidation events to all participating servers, distributed hybrid caching sends invalidation events only to servers where the items are cached, which can significantly reduce network traffic.

Distributed hybrid caching is suitable for sites with the following requirements:

- Real-time access to item changes
- Large number of items to monitor across many clients

See the [ATG Repository Guide](#) for more information.



Preview

ATG Content Administration and the Asset Manager-based applications (including ATG Merchandising) let you test project assets on an application that is deployed on a preview-enabled server, and evaluate it from the perspective of different user profiles. You can preview assets from any project that you create in the Asset Manager or Content Administration.

New preview functionality differs from the asset-specific preview provided in earlier ATG releases in several ways:

- In addition to the BCC server, other servers can be enabled for preview. This lets you set up multiple preview applications where you can test project assets.
- All asset types supported by preview can be tested from any project.
- Preview supports personalization assets: user segments, targeters, content groups, slots, and scenarios.

See the [ATG Business Control Center Administration and Development Guide](#) for more information on setting up preview.

ATG Business Control Center/Asset Manager

In addition to Preview, described in the previous section, the following features are new to ATG Business Control Center/Asset Manager:

- The Search tab has a basic search option that is visible when you first enter the tab.
- “In progress” icons display when ATG Merchandising is processing information.
- You can navigate to items that have collection properties and update them more easily.
- Several changes were made to the way you customize ATG Merchandising. The process of creating tree views has been simplified, and buckets can have custom labels.
- The EditLive HTML editor has been upgraded to version 6.

See the [ATG Business Control Center Administration and Development Guide](#) for more information.

ATG CIM

CIM is a new ATG tool that reduces the complexity of configuring your ATG product installation. Text-based wizards guide you through many of the common configuration procedures, providing these benefits:

- Steps are performed in the correct order.
- Defaults are provided where possible, reducing the chance for errors
- All necessary steps are completed.

The result is a working, basic installation that can be used as a starting point for further work. Note that CIM is not intended to handle the entire configuration process, since much of the work of setting up an ATG installation is handled through the administrative user interfaces and through custom components.

You can use CIM to configure the following products after installing them:

- ATG platform
- ATG Content Administration
- ATG Commerce



If you have purchased and installed ATG Search, ATG Customer Intelligence, and ATG Merchandising, these can all be configured as add-ons to the list above.

CIM includes on-line help that can be accessed at any point while you are configuring your products. See the [ATG Installation and Configuration Guide](#) for information on accessing CIM. See the [ATG CIM Developer's Guide](#) for information on creating your own CIM scripts.

ATG Platform REST Web Services

You can 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](#).

ATG Content Administration

The following sections describe new features and important changes in ATG Content Administration. For full information, see the [ATG Content Administration Programming Guide](#) and the [ATG Content Administration Guide for Business Users](#).

One-Off Deployment

You can deploy project data to a one-off target, which accepts deployments outside the workflow and versioning safeguards of Content Administration. With one-off targets, you can evaluate project content before it is ready for workflow deployment. For example, after authoring new content across multiple projects, you might wish to assess its impact on performance, or check graphic design elements before submitting the projects for review.

One-off deployments can be launched at any time from a Content Administration project, regardless of that project's current workflow status. One-off deployments have no effect on that project's workflow or any target sites that are defined for that workflow. They do not lock project assets, so work on the project can continue unimpeded.

Project Workflow Changes

All workflows that precede ATG 9.0 are deprecated and can no longer be used. These must be replaced by one of two workflows provided by the ATG installation:

- Production-only (default) supports deployment to a single target.
- Staging/production supports deployment to two targets: first a staging target, then a production target.

Only one of these workflows is available, depending on how you assemble the asset management server application. In order to use the staging/production workflow, the EAR file that you deploy on the asset management server must be assembled with the `-I ayer stagi ng` option.

The production-only workflow locks project assets when a user approves deployment to production; the staging/production workflow locks assets when a user approves deployment to staging. In both cases, assets are checked in from a project only after deployment to production is complete and verified; until then, project assets are locked and other projects cannot deploy them.

Note: The installed workflow is incomplete: before you can use it, you must define deployment target sites; then edit the desired workflow in the ATG Control Center and specify these targets in the appropriate task elements, such as Approve and Deploy Project.

RecurringDeploymentService Changes

The property `Recurri ngDepl oymentServi ce. ski pTargetI ds` is no longer supported. Instead, you can set the property `Recurri ngDepl oymentServi ce. candi dateTargetNames`. When called, the

RecurringDeploymentService retrieves all pending projects in the system and deploys them to all target sites specified in the candidateTargetNames property. If this property is not set, the RecurringDeploymentService deploys to all targets that are configured for deployment.

Lock Conflict Resolution

In order to ensure versioning integrity, a deploying project obtains exclusive locks on its assets when deployment starts. It releases those locks only after deployment is complete and project assets are checked in, or when the deployment is reverted. Until a project's asset locks are released, other projects that share those assets cannot deploy.

If project deployment is blocked by other projects, you can use the project's Lock Conflicts tab in order to determine which other projects might have locks on its assets. For example, two projects—project1 and project2—might concurrently have the same asset. If project1 is already approved for deployment, it holds an exclusive lock on the shared asset. Consequently, attempts to deploy project2 yield the following error message.

Purging Asset Versions

You can purge outdated projects and asset versions from versioned repositories and file systems, through scheduled and on-demand purges.

Predefined Target Site Names

Target site names are predefined in the workflows provided by the ATG installation.

Essential and Unessential Deployment Agents

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.

ATG Commerce

Enhanced Integrations

ATG 9 provided significant enhancements to the integration between ATG Commerce and ATG Search. See the [ATG Commerce Search Guide](#) for more information. In addition, ATG Commerce includes a number of enhancements and bug fixes to better support integration with various other applications, including ATG Commerce Service Center and ATG Customer Intelligence. See the documentation for those products for more information.

SKU-based Pricing

ATG 9 allowed use of price lists in combination with SKU-based pricing.

ATG Search

There are a number of enhancements to the integration of ATG Search with the ATG platform:

- A new request/response API and new form handlers for building JSPs for querying ATG Search through the new API. The API and form handlers are designed to make coding of JSPs easier and cleaner, with better handling of request and response processing and pagination.
- Integration of faceted search capability into the new API, so that text queries and faceted search queries can both be handled through the same form handler.



- New options for customizing repository data for indexing, including new property accessors and filters as well as additional tags in the `IndexingOutputConfig` definition file.
- Support for Commerce Search reports through integration with ATG Customer Intelligence (ACI).

ATG Search also includes the following enhancements:

- Independent selection of customization adapters in Search Administration, including Merchandising's Search Configuration and Facet Sets. Previously, this data was not explicitly available in the Search project.
- Support for synchronized indexing based on ATG Content Administration deployments. This feature allows you to coordinate indexing with deployment operations automatically, rather than relying on manual indexing or guessing the optimal time for scheduled indexing.
- Index compression on initial deployment produces a smaller index footprint, which can be deployed on the network faster. This enhancement is most significant for indexes larger than 500 MB.

ATG Merchandising

ATG 9 introduced the following features and changes:

Property Prioritization Redesign

Search Merchandising includes a tab (called Result Prioritization tab) that lets you rank search term relevance and search term property match in addition to property prioritization.

Search Testing

Test search configurations, facets, or other ATG Search settings by running sample searches and examining the results. Alternatively, use search tests to replicate searches on your site and use the comprehensive diagnostic information produced by search tests to troubleshoot site behavior.

Prohibition of Duplicate Items

Prevent duplicate items (for example, SKUs) from being added through the UI by configuring the repository definition XML file. Duplicate entries are still allowed in a list or array collection as the default behavior.

Enhanced Asset Previewing

See [Preview](#) for more information.

Significant User Interface Performance Improvements

Faster loading of assets and less frequent refreshes.

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

Merchants can work on catalog items in Excel spreadsheets and import them into ATG Merchandising.

Miscellaneous

- Support for a WYSIWYG HTML editor (EditLive) in text properties.
- Catalog orphans renamed “unlinked catalog items.”

Multiple Applications Integration

ATG 9 introduced the following changes and features for an environment that uses multiple ATG applications:

Merged Customer Profiles

Any application can have access to the customer profile extensions defined by any other application. This enhancement means, for example, that an ATG Outreach user who is looking at customer profiles through the ATG Business Control Center on the asset management server can see the same profile properties and property values as an ATG Service user working with customer profiles on the agent server.

Shared External File Assets

Applications can share external file assets, which are segments, targeters, and other file assets that are designed to be used with customer profiles. All external file assets are created on the asset management server, from where they can be deployed to both the agent server and the customer-facing server as required.

ATG Campaign Optimizer

ATG 9 introduced the following changes and enhancements:

- Fixes to support changes in the platform and other ATG applications.
- 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 Outreach

ATG 9 introduced the following features and changes:

- Changes to campaign workflows to support workflow simplification in ATG Content Administration. All campaign and campaign template projects use the late staged deployment workflow model.
- Staging server support. ATG Outreach 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 Commerce Service Center

ATG 9 introduced the following features and changes:

- Context Root for Customizable Renderers, which allows creation of Web applications.
- Click to Call (C2C) integration.
- A new reporting framework to create reports using the Query Editor.
- Scheduled Orders, a B2B ATG Commerce feature, which allow agents to create schedule templates that enable repetitive and scheduled orders.
- Usability enhancements, including:
 - Addition of the Order Summary panel, which provides access and summary information to all aspects of the shopping cart process.
 - Modified Billing and Shipping process, creating more consistent, streamlined and navigable screens.
- Window scoped failover, which ensures failover if the CSC server shuts down.
- Custom shipping and payment groups
- Custom grids and tables
- Custom forms and tabs
- Custom navigation
- Customer and order search methodologies
- CIM installation

ATG Service

ATG 9 introduced the following features and changes:

Solutions Read from Non-Versioned Repository

Read-only solutions that agents access in the ATG Service Center are read from a non-versioned repository. This ensures that ATG Knowledge better conforms to ATG Content Administration best practices, improves performance, and reduces the hardware footprint by requiring fewer search engines. Solution authoring continues to use the versioned repository.

Switch Deployment Mode

ATG Knowledge and ATG Self Service production sites can use switch deployment mode. Switch deployment deploys updated assets to off-line areas, and then swaps these with assets on the live site as a single transaction.

Simplified Installation and Configuration

The process for installing and configuring ATG Customer Intelligence for ATG Service installations has been significantly simplified.

Improved User Interface

ATG Service Center usability issues have been addressed by the following user interface updates:

- Standardized navigation (any solution or working revision opened for viewing is displayed in the Research tab).

- One-click access that allows agents with the appropriate permissions to edit, claim, or release a task from any task list.
- New permissions allow agents to view a task, even if the solution cannot be viewed.
- Additional information helps agents prioritize tasks and a streamlined layout enhances readability.

New in ATG 10.0

This section describes features that introduced by ATG 10.0. It is divided into the following sections:

- [Platform](#)
- [ATG Commerce](#)
- [ATG Commerce Reference Store](#)
- [ATG Search](#)
- [ATG Merchandising](#)
- [ATG Customer Intelligence](#)
- [ATG Campaign Optimizer](#)
- [ATG Commerce Service Center \(CSC\)](#)
- [ATG Outreach](#)
- [ATG Service](#)

Platform

This section describes new platform features.

Site Administration

The ATG Business Control Center provides access to the Site Administration interface, where business users can define and manage a multisite environment at a high level. Site Administration lets you perform the following tasks:

1. Create and manage registered sites and site groups.
2. Specify data to be shared within a site group.
3. Create and manage site categories, which provide data and configurable properties for sites.

For full information, see the [ATG Multisite Administration Guide](#).

ATG Content Administration

Selective Cache Invalidation

You can optimize a site's performance after a switch deployment by enabling selective cache invalidation on target repositories. A repository that is thus configured invalidates its item caches selectively during deployment, rather than invalidating the contents of those caches entirely.

The SQL repository property `cacheSwitchHot`, set by default to `false`, is now deprecated in favor of selective cache invalidation. For more information, see the [ATG Content Administration Programming Guide](#).



GSARepository

The `allowNullProperties` property is now deprecated. It is replaced by `allowNullValues`, which enables multi-valued properties to accept null values. You can set `allowNullValues` a property of the entire repository, or as an attribute for individual item properties.

Rest Web Services

The ATG Platform REST Web Services include the following enhancements:

- Setting a property value of type Collection or Map can now be handled as either a replace or an append.
- Support for standard JSON input.
- A number of form handler improvements.
- Property filtering enhancements, including the ability to specify a property filter on a per-request basis.
- New control parameters.

For more information, see the [ATG Web Services and Integration Framework Guide](#).

Removed WAR Files

The following WAR files were removed from the WebUI module, as they contained out-of-date JavaScript and Dojo libraries:

dojo.war
dojo-04.war
turbogrid3.war

ATG Commerce

ATG 10.0 introduces the following features to ATG Commerce:

Multisite Support

ATG Commerce provides full multisite support:

- All ATG Commerce repository items—including categories, products, and SKUs—can be associated with specific sites. Site association supports merchandising strategies that let you filter and promote items based on sites.
- Orders, pricelists, coupons, and search form handlers support site-awareness.
- Shopping carts can be shared across sites or restricted to a given site or group of sites.
- ATG Commerce reports let you track sales and other metrics by site.

ATG B2BCommerce is also updated to support multiple sites.

For full information about these and other ATG Commerce features, see the [ATG Commerce Programming Guide](#).

Promotions Enhancements

- New UI for promotion and coupon management, providing a new navigation model and split screen and drag and drop features.
- Easy-to-use templates simplify promotion creation and management.

- Enhanced support for custom promotions, including new form-based replacement for the Discount Rule Editor screens.
- Tiered discount promotions let you define multiple levels of discounts within a single promotion.
- In a multisite environment, assign promotions to one or more registered sites.

Standard Catalog Deprecation

Previous versions of ATG Commerce included standard and custom catalogs. With this release, Commerce simplifies catalog planning and creation by providing custom catalog functionality to all users. This simplifies implementation and future expansion, and eliminates the need to run extra modules to obtain desired catalog functionality.

Existing catalogs can remain unchanged; however, the migration steps described in [ATG Commerce Notes](#) are required to ensure compatibility with current and future releases.

ATG Commerce Reference Store

The following features are new to ATG Commerce Reference Store (CRS). For full information, see the ATG Commerce Reference Store Overview.

- CRS has been recoded and reconfigured to function as a multisite implementation with three sites, ATG Store US, ATG Store Germany, and ATG Home. As a result, a number of CRS features are now site-aware.
- A variety of site-aware targeters, scenarios, and promotions have been added to CRS.
- New promotions have been added that include a coupon that supports multiple promotions and a tiered promotion.
- Multisite search functionality has been added that allows you to search the current site or multiple sites.
- CRS checkout and shipping flows have been improved.
- Text-based content for the storefronts is now contained in a repository. This allows the application to take advantage of internationalization features and it also allows merchandisers to edit the content in the ATG Business Control Center.
- Two new SKU sub-types have been added, clothing-sku and furniture-sku. These item types add properties that are appropriate for clothing and furniture items, respectively.
- A wood finish picker for products, such as furniture, that are made of wood has been added.

Note: There is no migration path from older versions of CRS to CRS 10.0. To use the 10.0 version, install and configure a new instance of CRS using the instructions in the [ATG Commerce Reference Store Installation and Configuration Guide](#).

ATG Search

The following features are new to ATG Search. For full information, see the [ATG Search Administration Guide](#) and the [ATG Search Query Guide](#).



Multisite Support

Along with other ATG applications, ATG Search supports the new multisite feature. Multisite uses for ATG Search are configured using the new Site Administration utility (see XREF).

New user interface elements allow you to target user searches to specific subsets of your content whenever you set up a new site, or to search across your entire index from any site.

Search reports now include site data, allowing you to track user activity at finer granularity.

Content Labels and Target Types

ATG Search uses a new mechanism, based on content labels and target types, for identifying the content to be searched for a given project. Independent projects have separate groupings of content for indexing. A project's content sets are grouped and identified for querying by one or more content labels. A project's target type specifies the instance of the index—for example, Production or Staging—where queries are directed.

Parallel Indexing and Index Queuing

Changes to the indexing process allow you to update multiple indexes at one time (resources permitting, and only if those indexes do not share content), and to queue indexing tasks to be performed later.

Metadata Enhancements

You can now add index-only metadata tags to unstructured content.

New Search Feedback Option

ATG Search now supports a feedback option that provides information on alternate searches using fewer words, if the original query provides insufficient results.

Diagnostics Capture

This feature, available in ATG Dynamo Server Admin, can help troubleshoot problems by capturing all relevant files required by ATG Support.

New Documentation

The ATG Search product documentation has been reorganized:

- The indexing information formerly in the *ATG Commerce Search Guide* has been moved to the *ATG Search Administration Guide*.
- A new manual, the *ATG Search Query Guide*, has been created from the querying information (including the faceted search discussions) formerly in the *ATG Commerce Search Guide* and the *ATG Search Query Reference Guide*.

The ATG Search 10.0 documentation consists of three manuals:

- *ATG Search Installation and Configuration Guide*: Describes how to install, configure, and run ATG Search.
- *ATG Search Administration Guide*: Describes how to use the ATG Search Administration console to prepare and index content, make searchable content available to end users, and maintain ATG Search.
- *ATG Search Query Guide*: Describes how to construct and issue search queries in JavaServer Pages and present the results that are returned.



ATG Merchandising

The following features are new to ATG Merchandising. For full information, see the [ATG Merchandising Administration Guide](#) and [ATG Merchandising Guide for Business Users](#).

New UI for asset management

Provides a new navigation model and split screen and drag and drop features.

Multisite awareness for personalization assets

User segments are aware of registered sites for rule execution. Content groups and targeters are aware of registered sites for rule execution and content collection. Scenario events are aware of registered sites.

Multisite support in Search Merchandising

All aspects of Search Merchandising, including faceted search, search configuration, and search testing, support multiple registered sites. In a multisite environment you can:

- Create global facets that are available to all registered sites.
- Define and organize search configurations by site, as well as by the existing dimensions, segment and language.
- Use site as a prioritization property.

ATG Customer Intelligence

ATG Customer Intelligence provides multisite support by storing information about the sites configured in ATG Commerce. It correlates reporting information about business processes with this new dimension. Many existing ATG Customer Intelligence reports now include controls to break down information by site.

For full information, see the [ATG Customer Intelligence Installation and Configuration Guide](#).

ATG Campaign Optimizer

In a multisite environment, you can preview and run tests on all registered sites or only on the site you specify.

For full information, see the [ATG Campaign Optimizer User Guide](#).

ATG Service

The following features are new to ATG Service. For detailed information, see the [ATG Service Installation and Configuration Guide](#).

Multisite Support

ATG Service recognizes sites and site group configurations; it uses a Self Service site type to enable ATG Self Service-specific site parameters. Existing ATG Self Service sites that are based on external user segments are now registered sites. Sites can be personalized using segments within sites.

Advanced Search Constraints

Users can select specific content from unstructured content using content sets created in ATG Search.



Owning Group Enhancements

Agents can select default owning group, or select owning groups for solutions.

New Rich Text Editor

The new editor provides additional capabilities when creating or editing a solution.

Solution Linking Validation

Links within solutions can be validated. The validation process generates a list of solutions that contain broken links.

Root Topic Selection

Agents can assign more than one root topic to an ATG Self Service site. Root topics can now also be subtopics of other topics.

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](#).

Multisite Support

ATG Commerce Service Center recognizes sites and site group configurations. Products are presented in context of current site. A site picker allows an agent to pick a site quickly.

Gift Registry

A new gift registry feature lets agents set up ATG Commerce gift registries on behalf of customers, and lets customers create a wish list.

Order Approvals

Agents can submit an approval for an order. A new approval process checks agent appeasement levels to verify approval or to escalate for approval.

Promotions Browser

Agents can view and grant existing promotions for the current order and/or customer.

Reporting

Seven new reports allow customer call center managers to track metrics.

Returns and Exchanges

Return and exchange calculations and methodology are updated and improved.

Debug Mode

Programmers can run ATG Commerce Service Center in debugging mode.



ATG Outreach

ATG Outreach now provides support for multisite campaigns. Campaigns can be applied to all the web sites managed by your ATG system or to one site only. Outreach reports have been updated to show the name of the site that generated the campaign data. Campaign actions and events are also site aware.

For full information, see the [ATG Outreach Guide for Business Users](#) and the [ATG Outreach Administration and Development Guide](#).



3 Migration Steps

Migrating from ATG 2007.1 to ATG 10.0 can be divided into the following stages:

- [General pre-migration tasks](#)
- [ATG installation](#)
- [Database schema migration](#)
- [Application-specific migration tasks](#)
- [General post-migration tasks](#)
- [Migration testing](#)

General Pre-Migration Tasks

Note: In addition to the tasks noted here, a number of ATG applications have their own pre-migration requirements. Before starting the migration, check the instructions for each installed application, under [Migration Notes](#).

Before starting migration, complete the following tasks:

1. Back up your ATG 2007.1 database.
2. Back up the `Publi shi ng` and `Publi shi ngAgent` directories—for example, these CIM-generated directories under `<ATG2007. 1di r>/home/servers/:`
`atg_publi shi ng_I ockserver/Publ i shi ng`
`atg_producti on_I ockserver/Publ i shi ngAgent`
3. If your installation includes ATG Content Administration, complete all projects.
Note: Solution workflow projects can remain open during the migration process.
4. If necessary, check whether the data warehouse loader server has loaded all logged data into the data warehouse. See [Schema Migration Prerequisites for Customer Intelligence](#).
5. Shut down all ATG servers.

ATG Installation

1. Install ATG 10.0 as directed in the [ATG Installation and Configuration Guide](#).
2. Copy your application modules to the ATG 10 installation. Update application code as necessary to conform with new ATG 10 functionality (see [New Features](#)).

Database Schema Migration

ATG provides several migration kits for upgrading the schemas of supported databases: Oracle, MSSQL, and DB2. Migration kits are available for download from the My Oracle Support Web site.

The following migration kits are available for ATG products:

- ATG platform
- ATG Search Administration
- ATG Service/ATG Commerce Service Center
- ATG Outreach
- ATG Campaign Optimizer

Each migration kit contains three database-specific directories:

```
/20071to100sql/db_components/oracle
/20071to100sql/db_components/db2
/20071to100sql/db_components/mssql
```

Run the scripts in these directories as directed in [Database Migration](#).

Batch File/Shell Script Naming Conventions

In general, each module provides batch files/shell scripts that use the following naming conventions:

| Naming convention | Updates... |
|-----------------------------|---|
| *. {bat sh} | Production schema |
| *_publ i shi ng. {bat sh} | Schema for ATG Content Administration tables and versioned tables |

Batch Files versus SQL Scripts

In general, the batch files/shell scripts run all required DDL scripts in the correct order. Instead of running batch files/shell scripts, you can upgrade each module by individually executing the applicable SQL scripts. Be sure to run these in the same order as they appear in the batch file or shell script.

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 2007.1 schemas.

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.

Running Batch Files

Use the syntax shown in the following sections to run batch files or shell scripts.

**Oracle**

filename. {bat|sh} *user-acct password tns-alias*

- *user-acct*: Name of the schema user account
- *password*: Password to the user account
- *tns-alias*: TNS name for the database

MSSQL

filename. {bat|sh} *user-acct password hostname db-schema*

- *user-acct*: Name of the schema user account
- *password*: Password to the user account
- *hostname*: Host name of the database server
- *db-schema*: Name of the database schema

DB2

filename. {bat|sh} *user-acct password DB2-alias*

- *user-acct*: Name of the schema user account
- *password*: Password to the user account
- *DB2-alias*: Alias for the DB2 database

Running DDL Scripts

Use the syntax shown in the following sections to run DDL scripts.

Oracle

```
sqlplus -S user-acct/password@tns-alias < ddl-pathname > logfile
```

MSSQL

```
sqlcmd -U user-acct -P password -S hostname -d db-schema  
-i ddl-pathname -o logfile
```

DB2

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

Application-Specific Migration Tasks

After completing all tasks described in previous sections, complete migration for specific ATG applications, as documented under [Migration Notes](#).

General Post-Migration Tasks

Note: In addition to the tasks noted here, a number of ATG applications have their own post-migration requirements. Check the instructions for each installed application, under [Migration Notes](#).



After migration is complete, perform the following tasks:

1. If using ATG Content Administration, launch a full deployment to all workflow targets, to fully synchronize content on the asset management server and workflow targets.
2. Clear browser caches.
3. Clear the application server cache.
For example, on JBoss, empty the contents of each server directory:
`/work/jboss.web/localhost`
4. If your application server is JBoss version 5.0, regenerate all SOAP Web Services. See information about automatic generation of Web Services in the [ATG Web Services and Integration Framework Guide](#).
5. Test the upgraded platform and applications (see [Migration Testing](#)).

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 10.0 BCC, verify that you can view:
 - All internal users created in ATG 2007.1
 - All assets created in ATG 2007.1
4. Confirm that the ATG 10.0 production server contains all assets that were accessible on the ATG 2007.1 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.



4 Database Migration

ATG 10.0 includes enhancements to ATG 2007.1 database schemas. The migration kit provides batch files/shell scripts and DDL scripts to upgrade existing schemas, in the following migration kit directories

```
/20071to100sql/db_components/oracle
/20071to100sql/db_components/db2
/20071to100sql/db_components/mssql
```

Each section in this chapter describes the batch and shell script files that are required to migrate a specific ATG module or group of related modules. Carefully evaluate each file and edit it according to your installation's specific needs. You can also run DDL scripts individually.

Note: Before running migration scripts, carefully review the [Database Schema Migration](#) section in the [Migration Steps](#) chapter.

This chapter contains the following sections:

- [Basic platform](#) (includes DAS, DPS, and DSS)
- [Publishing.Base](#)
- [Portals](#) (Oracle only)
- [B2CCommerce](#)
- [B2BCommerce](#)
- [Data Warehouse](#)
- [ATG Search](#)
- [Agent](#)
- [ATG Commerce Service Center \(CSC\)](#)

Basic Platform

The ATG platform minimally comprises three modules whose schemas require migration: DAS, DPS, and DSS. The sections that follow document schema migration scripts for these modules.

Basic Platform Production

| | |
|-------------------|---|
| Migration scripts | run_das. {bat sh} run_dps. {bat sh} run_dss. {bat sh} |
|-------------------|---|



Basic Platform Publishing

Note: Versioned database tables must now set their checkin_date column to TIMESTAMP. If necessary, be sure to manually update your application's versioned database tables accordingly.

| | |
|-------------------|--|
| Migration scripts | run_das_publishing. {bat sh} run_dps_internal_users_publishing. {bat sh} run_dss_internal_users_publishing. {bat sh} |
|-------------------|--|

Publishing.Base

| | |
|------------------------|---------------------------------|
| Prerequisite migration | Basic platform publishing |
| Migration scripts | run_publishing_base. {bat sh} |

Portals

Note: Oracle only

| | |
|------------------------|------------------------------|
| Prerequisite migration | Basic platform production |
| Migration scripts | run_portals_core. {bat sh} |

B2CCommerce

B2CCommerce Production

| | |
|------------------------|---------------------------|
| Prerequisite migration | Basic platform production |
| Migration scripts | run_dcs. {bat sh} |



B2CCommerce Publishing

| | |
|------------------------|--------------------------------|
| Prerequisite migration | Basic platform publishing |
| Migration scripts | run_dcs_publishing. {bat sh} |

B2BCommerce

B2BCommerce Production

| | |
|------------------------|-----------------------------|
| Prerequisite migration | B2CCommerce production |
| Migration scripts | run_b2bcommerce. {bat sh} |

B2BCommerce Publishing

| | |
|------------------------|--|
| Prerequisite migration | B2CCommerce publishing |
| Migration scripts | run_b2bcommerce_publishing. {bat sh} |

Data Warehouse

Note: Before you migrate the database schemas for ATG Customer Intelligence data warehouse, review the procedures in [ATG Customer Intelligence Notes](#).

Base Data Warehouse

| | |
|-------------------|-----------------------------|
| Migration scripts | run_arf_dw_base. {bat sh} |
|-------------------|-----------------------------|

ATG Commerce Reporting

| | |
|------------------------|-------------------------------------|
| Prerequisite migration | Base Data Warehouse |
| Migration scripts | run_dcs_dw. {bat sh} |

Search Admin Reporting

| | |
|------------------------|------------------------|
| Prerequisite migration | Base Data Warehouse |
| Migration scripts | run_arf_dw. {bat sh} |

ATG Commerce Service Center Reporting

| | |
|------------------------|---|
| Prerequisite migration | Base Data Warehouse Search Admin reporting |
| Migration scripts | run_dcs_dw. {bat sh} |

ATG Search

ATG Search comprises two modules:

- DAF.Search
- SearchAdmin

After database schema migration is complete, review the procedures in [ATG Search Notes](#).

Note: The batch files/shell scripts and DDL scripts for DAF.Search migration are in the Platform migration kit; Search Admin has its own migration kit.

ATG Search Production

| | |
|------------------------|---|
| Prerequisite migration | Basic platform production |
| Migration scripts | Platform migration kit: run_daf_search. {bat sh} SearchAdmin migration kit: run_search_admin. {bat sh} |

Search Publishing

| | |
|------------------------|---|
| Prerequisite migration | Basic platform publishing |
| Migration scripts | run_daf_search_publishing. {bat sh}* |



* If `versioned_refinement_ddl.sql` was not created in the ATG 2007.1 installation, comment `upgrade_refinement_versioned_ddl.sql` and uncomment `versioned_refinement_ddl.sql`.

Campaign Optimizer

If your environment includes ATG Campaign Optimizer, follow the procedure for upgrading your existing application, described in [ATG Campaign Optimizer Notes](#).

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 | <code>run_abtest_management.bat</code> {bat sh} <code>run_abtest_runtime.bat</code> {bat sh} |
| SQL scripts | <code>versioned_abtest_ddl.sql</code> <code>abtest_previous_ddl.sql</code> <code>abtest_tracking_ddl.sql</code> <code>abtest_markers_ddl.sql</code> <code>abtest_metrics_ddl.sql</code> |

If your environment includes ATG Campaign Optimizer with Commerce Extensions, follow the procedure for upgrading your existing application, described in [ATG Campaign Optimizer Notes](#).

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 | <code>run_dcs_abtest_management.bat</code> {bat sh} <code>run_dcs_abtest_runtime.bat</code> {bat sh} |
| SQL scripts | <code>versioned_dcs_abtest_ddl.sql</code> <code>abtest_dcs_metrics_ddl.sql</code> |

Agent

Agent Production

| | |
|------------------------|--|
| Prerequisite migration | Basic platform production |
| Migration scripts | <code>run_agent_production.bat</code> {bat sh} |

Agent Server

| | |
|------------------------|--|
| Prerequisite migration | Basic platform publishing Publishing.base |
| Migration scripts | run_agent_agent. {bat sh} |

ATG Service

This section covers the following topics:

- [ATG Service schema migration](#)
- [ATG Service data migration](#)

Before starting database migration, review [Schema Migration Prerequisites for ATG Service](#).

ATG Service Schema Migration

Service Production

| | |
|------------------------|---|
| Prerequisite migration | Basic platform production ATG Search Agent production |
| Migration scripts | Platform migration kit: run_ticketing_core. {bat sh} Service2007.1 migration kit: run_service_production. {bat sh} |

Service Agent

| | |
|------------------------|--|
| Prerequisite migration | Basic platform Basic platform publishing Publishing.base Agent server |
| Migration scripts | run_service_agent. {bat sh} |

Service Data Warehouse

Required only if reporting was installed with ATG 2007.1.



| | |
|------------------------|---|
| Prerequisite migration | Base data warehouse Search Admin reporting |
| Migration scripts | run_service_datawarehouse. {bat sh} |

Service Publishing

| | |
|------------------------|---|
| Prerequisite migration | Basic platform production Basic platform publishing Publishing, Base Search publishing |
| Migration scripts | ATG10.0 installation: . . /DAF/Search/common/sql /db_components/db-type/ refinement_ddl . sql * |

* Not required if srch_refinement_elements table is already present in production schema.

ATG Service Data Migration

This section explains how to migrate the data in the databases for ATG Knowledge and ATG Self Service from version 2007.1 to version 10.0.

1. Make sure you have completed all pre-migration tasks. See [General Pre-Migration Tasks](#) and [Schema Migration Prerequisites for ATG Service](#). Make sure you have migrated the database schema for ATG Service. See [ATG Service Schema Migration](#).
2. [Run the Service.DBMigration.2K71to100 module](#).
3. [Drop unused tables](#) in your database schemas.
4. [Import agent server data](#).
5. [Migrate publishing data](#).

Run the Service.DBMigration.2K71to100 Module

1. Make sure you have a PlatformLicenses.properties file that is multisite enabled. Install this license file in your ATG 10.0 installation directory.
2. Copy the xa-datasource element with the jndi-name ATGDataWarehouseDS from the atg-ds.xml file for your asset management server to the atg-ds.xml file for your agent server. The atg-ds.xml file is in the deployment directory of your application server.

For example, the atg-ds.xml file is in the following directory of a JBoss application server installation: jboss-eap-5.0/jboss-as/server/atg-publishing_lockserver/deploy/atg-ds.xml.
3. Assemble the Service.DBMigration.2K71to100 module with the <ATG10dir>/home/bin/runAssembler script as follows:



```
runAssembler -server atg_svcagent_lockserver
-standalone atg_svcagent_lockserver.ear
-layer appserverconfig
-m Service.DBMigration.2K71to100
```

4. Start the module.
5. When startup is complete (on display of the Nucleus Running message), stop the application server.

Drop Unused Tables

After you run the Service.DBMigration.2K71to100 module, drop unused tables by running the following scripts in the Service migration kit:

- run_post_drop_production. {bat|sh}
- run_post_drop_agent. {bat|sh}
- run_post_drop_arf_dw. {bat|sh}

Import Agent Server Data

To import Agent server data, follow these steps:

1. Start the Configuration and Installation Manager (CIM) utility that you used to install ATG 10.0. Deploy atg_svcagent_lockserver.ear.
2. Change to the following directory:
<ATG10dir>/home/localconfig/atg/dynamo/service/jdbc
3. Configure the following properties files with connection information as noted:
 - FakeXADatasource.properties
Set connection information for the agent schema
 - FakeXADatasource_agent.properties
Set connection information for the agent schema.
 - FakeXADatasource_production.properties
Set connection information for the production core schema.

For information about configuring FakeXADatasource files, see the [ATG Service Installation and Configuration Guide](#).

4. Update the view mappings in the publishing schema by running the following scripts:
<ATG10dir>/BI ZUI /install/importBizu. {bat|sh}
<ATG10dir>/BCC/install/importBCC. {bat|sh}
<ATG10dir>/AssetUI /install/importAssetUI. {bat|sh}
<ATG10dir>/DPS-UI /install/importDPSUI. {bat|sh}
5. Start the agent server. After startup, let the server run for five minutes, then shut it down.
6. Copy:
<ATG22001dir>/home/servers/atg_svcagent_lockserver
to:
<ATG10dir>/home/servers/svcagent_import20071to100
7. Change to this directory:
<ATG10dir>/home/servers/svcagent_import20071to100/localconfig



8. Remove these files:
 - JTDataSource.properties
 - DirectJTDataSource.properties
9. In the same directory, configure the agent server as indicated in the following table.

Note: Create directories and properties files as needed.

| Path | Configuration |
|--------------------------------------|--|
| /atg/dynamo/service/jdbc | FakeXADatasource_agent.properties: Points to the agent schema FakeXADatasource_production.properties: Points to the production core schema. FakeXADatasource.properties: Points to the agent schema |
| /atg/reporting/datawarehouse | FakeXADatasource.properties: Points to the data warehouse schema |
| /atg/reporting/datawarehouse/loaders | FakeXADatasource.properties: Points to the production core schema |
| /atg/search/routing | RoutingSearchService.properties: cacheService= |
| /atg/epub/deployment | DeploymentFiller.properties: enable=false |

10. Delete the following directories:
 - <ATG10dir>/home/servers/svcagent_import20071to100/Publishing
 - <ATG10dir>/home/servers/svcagent_import20071to100/PublishingAgent
11. Run the following script in the Service migration kit:


```
.. /scripts/run-agent-import. {bat|sh}
```

Pass the name of the server directory you created earlier in this procedure as a parameter when you invoke the script. For example:

```
run-agent-import.sh svcagent_import20071to100
```

Migrate Publishing Data

Note: This section only applies to 2007.1 installations that used an asset management server and defined a publishing schema. If your 2007.1 installation does not have a publishing schema, use CIM to create the publishing schema and import initial data.

The following requirements apply:

- The administration server and agent server must use different cluster names. You configure the cluster name on the administration server by setting the property `localconfig/atg/dynamo/service/ClusterName.clusterName`.



- The agent server cluster name must remain unchanged. Migrated solution workflows reference the agent cluster name used by the 2007.1 workflow—by default, default_cluster_name; if you change the agent cluster name, 2007.1 deployments cannot be completed.

To migrate publishing data:

1. Change to the following directory:

```
<ATG10dir>/home/localconfig/atg/dynamo/service/jdbc/
```
2. Configure two FakeXADatasource properties files with the appropriate connection information:
 - FakeXADatasource.properties
Set connection information for the publishing schema.
 - FakeXADatasource_production.properties
Set connection information for the production schema.
3. Update view mappings in the publishing schema by running the following scripts:


```
<ATG10dir>/BI ZUI /install/importBizu . {bat|sh}
<ATG10dir>/BCC/install/importBCC. {bat|sh}
<ATG10dir>/AssetUI /install/importAssetUI . {bat|sh}
<ATG10dir>/DPS-UI /install/importDPSUI . {bat|sh}
<ATG10dir>/SiteAdmin/Versions/install/importSiteAdmin. {bat|sh}
<ATG10dir>/SiteAdmin/Search/install/importSiteAdminSearch. {bat|sh}
```
4. Invoke the startSQLRepository utility as follows:

UNIX:

```
<ATG10dir>/home/bin/startSQLRepository
-m DPS.InternalUsers
-repository /atg/userprofiling/InternalProfileRepository
-import
<ATG10dir>/Search10.0/SearchAdmin/common/data/initia l/searchadmin-
profile.xml
```

Windows:

```
<ATG10dir>\home\bin\startSQLRepository.bat
-m DPS.InternalUsers
-repository /atg/userprofiling/InternalProfileRepository
-import
<ATG10dir>\Search10.0\SearchAdmin\common\data\initia l\searchadmin-
profile.xml
```
5. Start the asset management server. Let the server run for several minutes after startup is complete, then shut it down.
6. Change to this directory:

```
<ATG10dir>/home/servers/svcpub_import20071to100/localconfig/
```
7. Remove these files:
 - JTDataSource.properties
 - DirectJTDataSource.properties
8. In the same directory, configure the publishing server as indicated in the following table.



Note: Create directories and properties files as needed.

| Path | Configuration |
|--------------------------------------|---|
| /atg/dynamo/service/jdbc | FakeXADatasource_agent.properties: Points to the agent schema FakeXADatasource_production.properties: Points to the production core schema. FakeXADatasource.properties: Points to the publishing schema |
| /atg/reporting/datawarehouse | FakeXADatasource.properties: Points to the data warehouse schema |
| /atg/reporting/datawarehouse/loaders | FakeXADatasource.properties: Points to the loader schema |
| /atg/search/routing | RoutingSearchService.properties: cacheService= |
| /atg/epub/deployment | DeploymentFullfiller.properties: enable=false |

9. Delete this directory:

<ATG10dir>/home/servers/svcpub_import20071to100/Publishing

10. Run the following script in the Service10.0 migration kit in order to import the Self-Service sites:

```
.. /scripts/run-management-import. {bat|sh}
```

This script uses the svc_multisite_20071to100.xml file that was generated earlier by running the Service.DBMigration.2K71to100 module.

For example:

```
run-management-import.sh svcpub_import20071to100
```

Move External Segments from the Agent Server to the Administration Server

1. Change to the following directory:

<ATG10dir>/home/servers/atg_publishing_lockserver/localconfig/atg/epub/file

2. In this directory, create properties files for the following Nucleus components and configure them as shown in the following table:

| Component | Configuration |
|--------------------------|-----------------|
| PublishingFileRepository | pathSeparator=/ |



| Component | Configuration |
|------------------------------|--|
| VersionedLoaderEventListener | <pre>checkNonCompletion=true rootPath=\ <ATG10dir>/home/servers/atg_production_lockserver/ PublishingAgent/deploymentconfig/ive/config</pre> |

3. Create the following file:

```
<ATG10dir>/home/RL/bin/importSegments.xml
```

4. In this file, create an entry for each external segment you wish to move. For example:

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<manifest>
<add type-
mapping="/atg/epub/file/typemappers/SegmentTypeMapping"/>/work/service/ATG/ATG10.0/home/servers/atg_production_lockserver/PublishingAgent/deploymentconfig/ive/config/atg/registry/RepositoryGroups/femaleSegment.properties</add>
<add type-mapping=
"/atg/epub/file/typemappers/SegmentTypeMapping">
/work/service/ATG/ATG10.0/home/servers/atg_production_lockserver/PublishingAgent/deploymentconfig/ive/config/atg/registry/RepositoryGroups/maleSegment.properties
</add>
</manifest>
```

5. Start the production, agent and management servers.

6. If a publishing site is defined on the management server, delete it.

7. Run the RLClient tool as follows:

```
<ATG10dir>/RL/bin/RLClient. {bat|sh}
-h hostname -r RMI Port -m importSegments.xml
-auth username: password
```

where:

- *hostname* specifies the host where the management server is running.
- *RMI Port* is the port where RMI service of management server is running.
- *importSegments.xml* contains typemapping and path information for file assets.
- *username: password* provide access to the RMI service on the management server.

For general information about using RLClient to import file asset metadata into the PublishingFileRepository, see the [ATG Content Administration Programming Guide](#).

8. After running RLClient, verify that:

- All file assets to be imported were copied into this directory:

```
<ATG10dir>/home/Publishing/versionFileStore/PublishingFiles/fa100/0
```



- The PublishingFileRepository is loaded with data.
 - No errors are logged on atg_publication_lockserver.
9. Remove the file asset ownership file, if one exists, from each customer-facing server.
- Note:** If your 2007.1 installation included both ATG Merchandising and ATG Knowledge, you might need to remove file asset ownership.
- For more information about file asset ownership on ATG Content Administration clusters, see the [ATG Content Administration Programming Guide](#).
10. Remove file assets from the Agent cluster:
- Stop the management server
 - On the Knowledge server, invoke the Component Browser in the ATG Dynamo Server Admin interface and navigate to the VersionedFileAssetsDeletionTool: `atg/epub/file/migration/VersionedFileAssetsDeletionTool`
 - From the dropdown list, choose the Segment file type.
 - Click Get File Assets.
 - Select the external file assets that you imported on the management server.
 - Click Delete Selected.
11. Deploy file assets to the Agent cluster:
- Start the asset management server.
 - Open the BCC and create a publishing target site named Production.
- Note:** Target site names are case-sensitive.
- In the new target site, define the following repository mapping:
SiteRepository > SiteRepository_production
 - Create two publishing agents:
 - Self Service
 - Knowledge
 - Configure the Knowledge publishing agent to use the target DeployedConfigFileSystem instead of ConfigFileSystem.
 - Make changes live and initialize with a full deployment.
12. On Windows only, remove this file:
- ```
<ATG10dir>/home/servers/atg_publication_lockserver/localconfig/atg/epub/file/PublishingFileRepository.properties
```
13. Verify that the deployment is in healthy state with incrementally deployable showing as true.
- Navigate to the BCC home page.
  - Under Personalization, Targeting and Segmentation, click Browse.
  - Verify the presence of the segments that were moved from the Knowledge server.
  - Create, edit, or delete an external segment: under Personalization, Targeting and Segmentation, click on the appropriate link.
  - Create a project and perform the desired action on the segment.
  - Advance the project to deployment and check it in.

**Note:** Be sure to remove any imported segments that are also defined in `LocalConfig/atg/registry/RepositoryGroups`. The `LocalConfig` overrides the `ConfigFileSystem`, which causes the `LocalConfig` version of the segment to take precedence over any edits you make to the segment in the BCC.

### **Create a Knowledge Publishing Agent**

In ATG 10, deployment target sites are queried by the name `Production` instead of `ID`. You can avoid editing your workflows so they query by `ID` as follows:

1. On the Management server, navigate to the ATG Business Control Center's Admin Console.
2. Delete the target site.
3. Define a new target site with the following settings:
  - Site Name:** `Production`
  - Site Type:** `Workflow target`
  - Repository Mappings:**
    - `ServiceRepository > ServiceRepository_production`
    - `OptionRepository > OptionRepository_production`
    - `ServiceFrameworkRepository > ServiceFrameworkRepository_production`
    - `ServiceSegmentRepository > ServiceSegmentRepository_production`
    - `OfferRepository > OfferRepository_production`
  - Site Initialization Options:** `Do a full deployment`
4. Define and configure the following agents for the new site:
  - `Self Service`
  - `Knowledge`
  - `PublishingWebAgent`

In the configuration for `Self Service` and `Knowledge`, set `Include File Systems` to `ConfigFileSystem`; for the `PublishingWebAgent`, set to `DeployedConfigFileSystem`.

5. Make changes live on the new site.

### **Complete Data Migration**

1. Start the Production, Agent and Management servers
2. On the Management server, navigate to the ATG Business Control Center's Admin Console.
3. Edit the Publishing target site by adding the following repository mapping:
  - `SiteRepository > SiteRepository_production`
4. On the Agent server, use the BCC's Project Browser to find two active projects of type `Service Import`:
  - `20071to100ServiceFramework`
  - `20071to100Option`

Advance these projects to deployment.





5. On the Management server, use the BCC's Project Browser to find the Service Import project, and take the following actions:
  - Advance the project to deployment. This deploys the publishing data that was migrated by the run-management-import script earlier (see [Migrate Publishing Data](#)).
  - Verify the deployment. This action checks in the project.

## ATG Commerce Service Center (CSC)

This section describes database migration procedures for customers who have ATG Commerce Service Center installed. The following topics are covered:

- [CSC schema migration](#)
- [CSC data migration](#)

Before starting database migration, review [Schema Migration Prerequisites for CSC](#).

### CSC Schema Migration

**Note:** Unlike CSC 2007.1, CSC 10.0 does not require installation of ATG Service. The CSC 10.0 schema migration migrates the ATG Knowledge and ATG Service Framework tables, then drops the ATG Knowledge-only tables as described in [CSC Data Migration](#).

#### CSC Production

|                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prerequisite migration | Basic platform production<br>ATG Search<br>Agent production<br>B2CCommerce production                                                                                                                                                                                                                                                                                                                                                                  |
| Migration scripts      | <p><b>Service10.0 migration kit:</b><br/>run_service_production. {bat   sh}*</p> <p><b>Platform migration kit:</b><br/>run_compile_abandoned_orders_views_core. {bat   sh}+<br/>run_click_to_connect. {bat   sh}**<br/>run_ticketing_core. {bat   sh}</p> <p><b>CSC10.0 migration kit:</b><br/>run_dcs_csr_production. {bat   sh}</p> <p><b>ATG10 installation:</b><br/>.. /DAF/Search/common/sql/db_components/oracle/<br/>refinement_ddl.sql ***</p> |

+ Oracle only

\* Comment out execution of the DDL script upgrade\_search\_admin\_production\_ddl.sql

\*\* Required only if running ATG ClicktoConnect

\*\*\* Required only if CRS Search add-on was not previously installed.

### CSC Agent

|                        |                                                                                                                                      |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Prerequisite migration | Basic platform production<br>Basic platform publishing<br>Publishing.base<br>Agent server                                            |
| Migration scripts      | <b>Service10.0 migration kit:</b><br>run_service_agent. {bat   sh}<br><b>CSC10.0 migration kit:</b><br>run_dcs_csr_agent. {bat   sh} |

### CSC Data Warehouse

Required only if running ATG Reporting.

|                        |                                                  |
|------------------------|--------------------------------------------------|
| Prerequisite migration | Base Data Warehouse                              |
| Migration scripts      | run_arf_dw. {bat   sh}<br>run_dcs_dw. {bat   sh} |

### CSC Publishing

|                        |                                                                                                                                                                              |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prerequisite migration | Basic platform<br>Basic platform publishing<br>Publishing.base<br>Search publishing<br>B2CCommerce publishing                                                                |
| Migration scripts      | <b>CSC10.0 migration kit:</b><br>run_dcs_csr_management. {bat   sh}<br><b>ATG 10 installation:</b><br>../DAF/Search/common/sql/db_components/oracle/<br>refinement_ddl.sql * |

### CSC Data Migration

This section explains how to migrate CSC data from version 2007.1 to version 10.0. Before you begin migrating CSC data, be sure you:

- Complete all pre-migration tasks. See [General Pre-Migration Tasks](#) and [Schema Migration Prerequisites for CSC](#).
- Migrate the database schema for ATG Service.



CSC data migration comprises the following tasks:

1. [Drop unused tables.](#)
2. [Update view mappings.](#)
3. [Start the agent server.](#)
4. [Configure the agent server.](#)
5. [Import agent server data.](#)
6. [Import Agent publishing data.](#)

### ***Drop Unused Tables***

To drop unused tables from your migrated database, run the following DDL scripts:

- `run_post_drop_production. {bat | sh}` – Run on the production schema.
- `run_post_drop_agent. {bat | sh}` – Run on the agent schema.

### ***Update View Mappings***

1. Change to the following directory:  
`<ATG10dir>/home/localconfig/atg/dynamo/service/jdbc`
2. Configure two FakeXADatasource properties files with the appropriate connection information:
  - `FakeXADatasource.properties`  
Set connection information for the agent schema.
  - `FakeXADatasource_production.properties`  
Set connection information for the production schema.
3. Update the view mappings in the ATG Content Administration schema by running the ATG 10.0 import scripts that create view mappings:  
`<ATG10dir>/BI ZUI /install/importBizu. {bat | sh}`  
`<ATG10dir>/BCC/install/importBCC. {bat | sh}`  
`<ATG10dir>/AssetUI /install/importAssetui. {bat | sh}`  
`<ATG10dir>/DPS-UI /install/importDPSUI. {bat | sh}`

### ***Start the Agent Server***

Start the new Agent server in order to initialize new publishing workflows. After server startup is complete, allow it to run for approximately five minutes, then shut the server down.

### ***Configure the Agent Server***

Change to this directory:

```
<ATG10dir>/home/servers/svcagent_import20071to100/localconfig
```

In this directory, configure the agent server as indicated in the following table.

**Note:** Create directories and properties files as needed.



| Path                                 | Configuration                                                                                                                                                                                                                                                                              |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| /atg/dynamo/service/jdbc             | FakeXADatasource_agent.properties:<br>Points to the agent schema<br><br>FakeXADatasource_production.properties:<br>Points to the production core schema.<br><br>FakeXADatasource.properties:<br>Points to the agent schema                                                                 |
| /atg/dynamo/service/jdbc             | If using switch deployment:<br><br>SwitchingDataSourceA.properties:<br>Points to FakeXADatasource_switchA<br><br>SwitchingDataSourceB.properties:<br>Points to FakeXADatasource_switchB<br><br>FakeXADatasource_switchA and<br>FakeXADatasource_switchB point to the switching<br>schemas. |
| /atg/reporting/datawarehouse         | FakeXADatasource.properties:<br>Points to the data warehouse schema                                                                                                                                                                                                                        |
| /atg/reporting/datawarehouse/loaders | FakeXADatasource.properties:<br>Points to the loader schema                                                                                                                                                                                                                                |
| /atg/search/routing                  | RoutingSearchService.properties:<br>cacheService=                                                                                                                                                                                                                                          |
| /atg/commerce/catalog                | ProductCatalog.properties:<br>dataSource=\n/atg/dynamo/service/jdbc/JTDataSource_production                                                                                                                                                                                                |
| /atg/commerce/pricing/pricelists     | Pricelists.properties:<br>dataSource=\n/atg/dynamo/service/jdbc/JTDataSource_production                                                                                                                                                                                                    |
| /atg/assetregistry                   | AssetRegistry.properties:<br>dataSource=\n/atg/dynamo/service/jdbc/JTDataSource_agent                                                                                                                                                                                                      |
| /atg/search/repository               | RefinementRepository.properties:<br>dataSource=\n/atg/dynamo/service/jdbc/JTDataSource_production                                                                                                                                                                                          |
| /atg/scenario                        | ScenarioManager.properties:<br>enabled=false                                                                                                                                                                                                                                               |

**Import Agent Server Data**

In the CSC migration kit directory /migration/20071to100sql/scripts, run the following script:



```
run-csc-only-agent-import. {bat|sh} svcagent_import20071to100
```

### **Import Agent Publishing Data**

1. Change to the following directory:
 

```
<atg10dir>/home/localconfig/atg/dynamo/service/jdbc/
```
2. Configure the following properties files with connection information as noted:
  - FakeXADataSource.properties  
Set connection information for the publishing schema.
  - FakeXADataSource\_production.properties  
Set connection information for the production schema.
3. Update the view mappings in the ATG Content Administration schema by running the following ATG10.0 import scripts:
 

```
<ATG10dir>/BI ZUI /install /importBizu . {bat|sh}
<ATG10dir>/BCC/install /importBCC. {bat|sh}
<ATG10dir>/AssetUI /install /importAssetUI . {bat|sh}
<ATG10dir>/DPS-UI /install /importDPSUI . {bat|sh}
<ATG10dir>/SiteAdmin/Versioned/install /importSiteAdmin. {bat|sh}
<ATG10dir>/SiteAdmin/Search/install /
importSiteAdminSearch. {bat|sh}
<ATG10dir>/DCS-UI /install /importMerchandising. {bat|sh}
<ATG10dir>/DCS-UI /Versioned/install /importDCSUI Versioned. {bat|sh}
```
4. Run the startSQLRepository command:
 

```
<ATG10dir>/home/bin/startSQLRepository.sh -m DPS.InternalUsers -
repository
/atg/userprofiling/InternalProfileRepository -import
<ATG10dir>/Search10.0/SearchAdmin/common/data/initia /searchadmin-
profile.xml
```





# 5 Migration Notes

All sections in this chapter focus on an ATG feature or application that has its own migration-related requirements, beyond the general requirements and tasks that are outlined earlier in this manual under [Migration Steps](#).

This chapter contains the following sections:

- [Platform Notes](#)
- [ATG Commerce Notes](#)
- [ATG Search Notes](#)
- [ATG Customer Intelligence Notes](#)
- [ATG Outreach Notes](#)
- [ATG Commerce Service Center \(CSC\) Notes](#)
- [ATG Campaign Optimizer Notes](#)

## Platform Notes

This section covers the following platform migration tasks:

- [Updating view mappings](#)
- [Migrating content targeters and content groups](#)

### Updating View Mappings

After you install ATG 10.0 and upgrade database schemas on production 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.](#)

#### **Configure Data Source Properties**

Before you import the new ATG 10.0 view mappings, configure the following files, in `<ATG10dir>/home/local/config/atg/dynamo/service/jdbc`, to point to the publishing schema.

- `FakeXADDataSource.properties`
- `FakeXADDataSource_production.properties`

#### **Run Import Scripts**

1. Run the following import scripts to import new view mappings:



```
<ATG10dir>/BI ZUI /i nstal l /i mportBI ZUI . {bat |sh}
<ATG10dir>/BCC/i nstal l /i mportBCC. {bat |sh}
<ATG10dir>/AssetUI /i nstal l /i mportAssetUI . {bat |sh}
<ATG10dir>/DPS-UI /i nstal l /i mportDPSUI . {bat |sh}*
<ATG10dir>/DCS-UI /i nstal l /i mportMerchandi si ng. {bat |sh}
<ATG10dir>/DCS-UI /versi oned/i mportDCSUI Versi oned. {bat |sh}
ATG10dir>/DPS-UI /i nstal l /i mportDPSUI Exampl es. {bat |sh}*
*Optional
```

2. If you have ATG Search installed:
  - Set the environment variable SEARCH\_VERSION to 10.0
  - Run this script:

```
<ATG10dir>/Search10.0/SearchAdmin/i nstal l /create-search-
admin. {bat |sh}
```

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

## Migrating Content Targeters and Content Groups

Content targeters and content groups that you created in previous versions of ATG require migration to work correctly in ATG 10.0.

1. Edit each existing targeter and content group file before importing it into ATG 10.0. Add a `siteRulesets` property to each one and set it to the following value:
 

```
siteRulesets^=/Constants.nul l
```
2. After you initialize your sites by performing a full ATG Content Administration deployment, open each targeter and content group in the ATG Business Control Center and save it.
3. Deploy and complete the project. Do not make any further modifications to these assets until this step is complete.

## ATG Commerce Notes

The steps required to migrate ATG Commerce depend on whether you use standard or custom catalogs, and whether you use ATG Content Administration (CA). Accordingly, this section is divided into four sections that address the following combinations:

- [Standard catalogs / CA](#)
- [Custom catalogs / CA](#)
- [Standard catalogs / no CA](#)
- [Custom catalogs / no CA](#)

This section also covers the following topics:

- [Deprecating the Standard Catalog](#)
- [Standard Catalog Migration Steps](#)
- [Updating catalogs](#)





- [Performing basic maintenance on catalogs](#)
- [Assigning catalogs and price lists to profiles](#)
- [Casting beginUsable and endUsable properties as java.util.Date](#)

### **Prerequisites**

Before you migrate ATG Commerce, complete the procedures described earlier under [General Pre-Migration Tasks](#).

### **Standard Catalogs / CA**

1. Run one of the following sets of schema migration scripts:
  - B2CCommerce production  
B2CCommerce publishing
  - B2BCommerce production  
B2BCommerce publishing
2. On the asset management server, migrate the standard catalog (see [Deprecating the Standard Catalog](#)).
3. Perform all [general post-migration tasks](#) as described earlier in this guide, including full deployment from CA.

### **Custom Catalogs / CA**

1. Run one of the following sets of schema migration scripts:
  - B2CCommerce production  
B2CCommerce publishing
  - B2BCommerce production  
B2BCommerce publishing
2. On the asset management server, run the Catalog Update Service as described in [Updating Catalogs](#).
3. Perform all [general post-migration tasks](#) as described earlier in this guide, including full deployment from CA.

### **Standard Catalogs / No CA**

1. Run the migration scripts for either B2Ccommerce production or B2Bcommerce production.
2. [On the production server](#), migrate the standard catalog (see [Deprecating the Standard Catalog](#)).
3. On the production server, run the Basic Maintenance service as described in [Performing Basic Maintenance on Catalogs](#).

### **Custom Catalogs/ No CA**

1. Run the migration scripts for either B2CCommerce production or B2BCommerce production .
2. On the production server, run the Catalog Update Service as described in [Updating Catalogs](#).

3. On the production server, run the Basic Maintenance service as described in [Performing Basic Maintenance on Catalogs](#).

## Deprecating the Standard Catalog

Standard catalogs are deprecated in ATG 10.0. You should be aware of the following changes to ATG Commerce catalogs and modify your applications where necessary:

- The B2BCommerce module no longer depends on DCS. CustomCatalogs.
- In previous versions, the ProductCatalog repository name was ProductCatalog in module DCS, and CustomProductCatalog in module DCS. CustomCatalog. New customers who run DCS will get ProductCatalog. In order to preserve the old repository name, continue to run DCS. CustomCatalog by adding DCS. CustomCatalogs to startup commands and manifests, inasmuch as B2BCommerce no longer uses this module. The repository name change might affect slot behavior. You can modify slots to reference repositoryPath instead of repositoryName.
- The DCS. CustomCatalogs module is still available. Although now largely empty, the module serves the following objectives:
  - Configures the ProductCatalog.repositoryName property to CustomProductCatalog and overrides the DCS value of ProductCatalog.
  - Configures the ACC's admin.xml file to match the repository name.
  - Registers a CustomCatalogs module with the ModuleManager. A DCS. CustomCatalogs. Versioned module also remains that configures the repositoryName for ProductCatalog\_production and ProductCatalog\_staging

By retaining this module, you can continue to reference the name CustomProductCatalog in your application. This module also lets you retain references to DCS. CustomCatalog on command lines and manifest files.

- product.parentCatalog is not writable in custom catalogs. Consequently, you might need to change bulk import data and programs.
- The DCS module now adds the user.catalog property in userProfile.xml before B2CCommerce is included through XML file combination. As a result, the catalog appears before creditCards and secondaryAddresses, which may cause XML file combination to yield startup errors.

## Standard Catalog Migration Steps

If your application used standard catalogs, you must migrate it in the following steps:

1. Assemble the application with the Catalog Migration Service by including the module DCS. CustomCatalogMigration.
2. [Run the catalog migration service](#).
3. If running Content Administration, [deploy the migrated catalog](#).
4. If necessary, update your migrated application's admin.xml file in order to ensure that all catalog-related menus and items are visible in the ACC. Check that items that were deleted or renamed in the Core Commerce admin.xml file have corresponding updates in the application's admin.xml files.



### ***Run the Catalog Migration Service***

After you assemble the Catalog Migration Service in the application, launch the application and access the Catalog Migration Service as follows:

1. Access ATG Dynamo Administration on your production server.
2. Choose Commerce Administration.
3. From the Commerce Administration page, choose Standard to Custom Catalog Migration and perform the following tasks:
  - Enter the Nucleus path to your catalog repository component in the Catalog Repository To Migrate: field.
  - Enter a display name for the new custom catalog.
  - Click Migrate. Status updates display in the browser as the migration takes place.
4. After catalog migration is complete, exit ATG Dynamo Administration and stop the production server.

### ***Deploy the migrated catalog***

If running Content Administration, you deploy the migrated catalog as follows:

1. Reassemble the application,. This time, omit the module DCS. CustomCatalogMigration.
2. Start the asset management server and log into the BCC.
3. Under Content Administration, click Browse Projects and access the Catalog Migration project.
4. Advance this project to deployment.

## **Updating Catalogs**

If you are migrating a Commerce application that already uses custom catalogs, you run the Catalog Update service. This service ensures that relationships are properly defined between a catalog and its categories, products, and SKUs. You run this service as follows:

1. Log into the ATG Dynamo Server Admin and navigate to the Commerce Administration page.
2. Under Catalog Maintenance, choose Catalog Update.
3. Click Start Process.
4. Click the Refresh Status link to update the status information and see when the process has completed.

## **Performing Basic Maintenance on Catalogs**

The Basic Maintenance service executes standard batch maintenance services against the DCS catalog. You run this service as follows:

1. Log into the ATG Dynamo Server Admin and navigate to the Commerce Administration page.
2. Under Catalog Maintenance, choose Basic Maintenance.
3. Click Start Process.

4. If desired, you can view information, errors and warnings by clicking View Status on the Commerce Administration page.

### Assigning Catalogs and Price Lists to Profiles

If you assign catalogs or price lists to user profiles by means of a custom pipeline servlet or a scenario, set the `useProfile` property in the `/atg/commerce/util/ContextValueRetriever` component to `true`. Otherwise the profile assignments may be overridden by default values set in the `CatalogTools` and `PriceListManager` components or by multisite configuration settings. Refer to *Assigning a Catalog to a User* in the [ATG Commerce Programming Guide](#) for more information.

### Casting `beginUsable` and `endUsable` properties as `java.util.Date`

In ATG 10, `beginUsable` and `endUsable` properties of promotion repository items changed from `date` to `timestamp`. Application code that casts either property to `java.sql.Date` must be changed to `java.util.Date`.

### Promotion Property Changes

Two changes to the promotions repository items may affect code you have written that refers to those items.

First, the repository definition of the `uses` property of the `promotion` repository item has changed from enumerated to an integer, and no longer handles the following string:

```
![CDATA[Infinite]]
```

If you need to import promotions with infinite uses, set the `use` property to `-1`.

Second, the name of the `promotion` property of the `promotion` claimable item descriptor has changed to `promotions`. The `promotions` property is a collection rather than a single promotion, and must be treated accordingly in your code.

## ATG Search Notes

This section discusses migration tasks for ATG Search.

### **Deleting Old Indexes**

ATG recommends that before you delete any old index files from the `deployment` directory of your Search hosts before indexing with ATG Search 10.0.

### **Reindexing Search Content**

After [database schema migration](#) is complete, you must reindex all of your search content. If an index includes items from the ATG Commerce catalog repository, complete the ATG Commerce migration process, including running the Catalog Maintenance Service, before reindexing.

### **New API**

ATG 9.0 introduced a new request/response API and new form handlers for querying ATG Search. The new form handlers are found in the `atg.search.formhandlers` package, and the new request and response objects are found in the `atg.search.routing.command.search` package.



In addition, there are new faceted search classes that use the new API. Faceted search queries are now handled through the `atg.search.formhandlers.QueryFormHandler` class, which can also be used for text queries. The `atg.commerce.search.refinement.FacetSearchTools` class processes the refinement data in the search request and response objects.

If you have existing JSPs that use the old request/response API, you must rewrite them to use the new API. The old API, which was accessed through form handlers in the `atg.search.query.formhandlers` package and with the `atg.repository.search.refinement.FacetSearchDropInServlet` bean, is no longer available.

For information about using the new form handlers for text queries and for faceted search, see the [ATG Search Query Guide](#).

### ***ProductCatalogOutputConfig Definition File***

The default XML definition file used by the `/atg/commerce/search/ProductCatalogOutputConfig` component was modified for ATG 9.0. The file now includes fewer catalog properties by default, and uses property value filters to reduce the size of the index. If you use this definition file, you will see these differences reflected in your XHTML output files.

### ***Metadata Properties Returned***

The `docProps` property of the `<query>` request type specifies the indexed metadata properties to return in the response. Prior to ATG 9.0, if `docProps` was null, all of the metadata properties in the index were returned. In ATG 9.0, this behavior was changed; if `docProps` is null, no metadata properties are returned. If you want to return all of them, you can specify that by setting `docProps` to the special keyword "all." For example:

```
docProps="all"
```

If you want to return only certain properties, specify them as a comma-separated list. For example:

```
docProps+=atg:string:color,atg:float:salePrice
```

### ***Generating Refinement Configurations***

The process for generating refinement configurations for faceted search was changed in ATG 9.0. These files are now generated by a customization adapter, `/atg/commerce/search/refinement/CatalogRefinementConfigAdapter`. If you have any code or configuration that relies on the old mechanism for generating these files (using the `atg.commerce.search.refinement.admin.RefinementConfigurator` class), you will need to update it to work with the new customization adapter instead.

### ***Moving ARF das\_id\_generator Data***

Beginning with ATG 9.0, all ARF loader tables have been placed into the production schema and the `IdGenerator` component also uses the production schema. Any ARF-related data from your `das_id_generator` table that is not located in the production schema must be moved into the `das_id_generator` table in the production schema.

The default `das_id_generator` table configuration in ATG Search 2007.1 was to store the data in the publishing schema. Note that because ATG Commerce and ATG Service required the `das_id_generator` table configuration to store data in the production schema, your configuration may have been modified from the default setting. If so, you do not need to move any data.

To move ARF data:

1. Before performing the move, you must have ownership of the production schema that will be receiving the data. The owner of the source schema must grant select permission on the `das_id_generator` table to the production schema owner.
2. Once you have the correct ownership, modify the `move_arf_das_id_generator_data.sql` file. The script verifies that the production schema target seed is less than the seed of the source schema, creates the necessary rows, and moves the data.
3. Replace the *source* reference with the name of the schema that currently holds the ARF-related data.
4. Run the `20071to100sql/db_components/database_type/move_arf_das_id_generator_data.bat` | `sh` file.
5. If you are moving data from different schemas, rerun the script after changing the *source* reference for each schema.

### Identifying Search Environments

ATG Search 10.0 introduces a new mechanism, based on content labels and target types, for identifying the content to be searched for a given project. This mechanism is implemented by the `/atg/search/routing/DynamicTargetGenerator` component, which is enabled by default. If you want to instead continue to use the search environment name for search targeting, you can disable `DynamicTargetGenerator` by setting its `enabled` property to `false`. Note, however, that if `DynamicTargetGenerator` is disabled, you cannot use the ATG Merchandising Search Testing feature.

### Querying Properties of a Product's Parent Categories

Before ATG 10, the default XML definition file for the `/atg/commerce/search/ProductCatalogOutputConfig` component included properties of the product's `parentCategory` item, such as `parentCategory.displayName`. The XHTML document for the product included the values for a single parent category (the product's default parent category).

In ATG 10.0, the definition file has been modified to instead include properties of the product's `parentCategories` item, such as `parentCategories.displayName`, so that the XHTML document includes values for all of the product's parent categories, not just the default one:

---

```
<i tem property-name="parentCategories" parent-property="childProducts"
 is-multi="true">
 <meta-properties>
 <property name="$repository.repositoryName" suppress="true"/>
 <property name="$itemDescriptor.itemDescriptorName" suppress="true"/>
 <property name="$repositoryId" type="string"
 output-name="parentCategory.$repositoryId"/>
 </meta-properties>
 <text-properties>
 <property name="displayName" output-name="parentCategory.displayName"/>
 <property name="keywords" filter="concat"
 output-name="parentCategory.keywords"/>
 </text-properties>
</i tem>
```

---



Notice that the output-name attribute is used to change the names of the indexed properties to use parentCategory rather than parentCategories. This was done so existing JSP code that displays properties of the parentCategory item continues to work.

Note, however, that if a product has multiple parent categories, a query will by default return only the properties of one of the parent categories. So, for example, parentCategories.displayName will return a single value, even though the XHTML document includes displayName values for multiple parent categories. Unlike in earlier ATG versions, the category whose values are returned may not actually be the default category. Typically, you want to return values of properties of all categories in parentCategories, not just one. To do this, add these properties to the ListableProperties property of the QueryRequest component:

---

```
ListableProperties+=parentCategory.$repositoryId, \
 parentCategory.displayName, parentCategory.keywords
```

---

The values of these properties then be returned as List values. Note that you may also need to change your JSP code to handle List values.

## ATG Customer Intelligence Notes

In addition to database schema migration and other general tasks described elsewhere in this guide, you must perform a number of tasks for ATG Customer Intelligence migration. These are covered in the following sections:

- [Schema Migration Prerequisites for ATG Customer Intelligence](#)
- [Post-Migration Tasks for ATG Customer Intelligence](#)

### Schema Migration Prerequisites for ATG Customer Intelligence

Perform the following steps before migrating ATG Customer Intelligence from version 2007.1 to 10.0.

1. Make sure your production servers have logged all reporting data and that the log files have been rotated.  
Shutting these servers down gracefully completes all logging and rotates all log files.
2. Make sure the data warehouse loader server has loaded all logged data into the data warehouse. Load logged data manually by [invoking the loadAllAvailable method on data warehouse loader components](#).

**Note:** You must reproduce all customizations that you have made to your ATG Customer Intelligence metadata model after you migrate to version 10.0. Be sure you understand what customizations your organization might have made to the metadata model.

#### **Data Warehouse Loader Components**

The data warehouse loader components for each product are listed in the following table. Invoke the loadAllAvailable method of each component to make sure all logged data is loaded into the ATG Customer Intelligence data warehouse.

| Product                     | Loader components                                                                                                                                                       |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Platform                    | SiteVistLoader                                                                                                                                                          |
| ATG Commerce                | OrderSubmitLoader                                                                                                                                                       |
| ATG Search                  | SearchQueryLoader<br>ViewContentLoader<br>UseSearchEnvironmentLoader                                                                                                    |
| ATG Commerce Service Center | CallEventLoader<br>OrderSubmitLoader<br>SubmitReturnLoader                                                                                                              |
| ATG Outreach                | CampaignAuditTrailLoader<br>CampaignEnteredLoader<br>CampaignLoader<br>EmailClickLoader<br>EmailOpenLoader<br>InboundEmailLoader<br>OptOutLoader<br>OutboundEmailLoader |

### Invoking the loadAllAvailable Method

To invoke the loadAllAvailable method of a data warehouse loader component:

1. Navigate to the loader component in the ATG Dynamo Administration application. The loader components are available at the following URL:  
`http://server_name:port/dyn/admin/nucl eus/atg/reporting/datawarehouse/loaders/`
2. Follow the link to the global LockRequired property and set it to false.
3. Follow the link to the loadAllAvailable method and choose to invoke it.

### Post-Migration Tasks for ATG Customer Intelligence

After you migrate the ATG Customer Intelligence data warehouse from version 2007.1 to 10.0, perform the following steps:

1. Move your version 2007.1 installation of ATG Customer Intelligence aside. Retain all files in case they are needed for reference.
2. Install ATG Customer Intelligence version 10.0. See instructions in the [ATG Customer Intelligence Installation and Configuration Guide](#).
3. Reproduce any changes that your organization made to the metadata model.  
The metadata model for version 10.0 of ATG Customer Intelligence has changed significantly. The migration tools for ATG Commerce 10.0 do not automatically merge your changes with the new metadata model.

**Note:** you may be able to use the synchronize projects feature of the IBM Cognos 8 Framework Manager application to replay some customizations to the metadata model. This application is a component of





ATG Customer Intelligence. See information about synchronizing projects in the IBM Cognos 8 Framework Manager User Guide.

## ATG Outreach Notes

To migrate an ATG Outreach 2007.1 installation for use with ATG Outreach 10.0, complete the following steps:

1. Review and follow the procedures 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 appropriate 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 10.0 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 `/AC02007.1/AC0/communication/common/j2ee-apps/Outreach.ear/Outreach.war` to `/AC010.0/AC0/communication/common/j2ee-apps/Outreach.ear/Outreach.war`.

## ATG Service Notes

In addition to database schema migration for ATG Service and other general tasks described elsewhere in this guide, you must perform a number of tasks for ATG Service migration. These are covered in the following sections:

- [Schema Migration Prerequisites for ATG Service](#)
- [Post-Migration Tasks for ATG Service](#)

### Schema Migration Prerequisites for ATG Service

Perform the following tasks before migrating the databases for ATG Service from version 2007.1 to 10.0:

1. Complete all [general pre-migration tasks](#) as described earlier in this guide.
2. Complete or discard all non-solution projects that are running on the agent server. It is especially important to discard the Service Admin and Service Admin Internal projects, even if they have no assets. These projects use the following workflows, respectively:
  - `/Service/Admin/SvcAdmin.wdl`
  - `/Service/Admin/SvcAdminInternal.wdl`

### Move Service-Related Directories to the New Installation

Copy the directories listed in the following table from your ATG 2007.1 installation into your ATG 10.0 installation.



| Source Directory in <ATG2007.1dir>               | Destination Directory in <ATG10dir>             |
|--------------------------------------------------|-------------------------------------------------|
| /home/local config/atg/registry/RepositoryGroups | home/local config/atg/registry/RepositoryGroups |
| /home/servers/atg_publication_lockserver         | /home/servers/svcpub_import20071to100           |
| /versionFileStore*                               | /home/Publication/versionFileStore              |

\* Located in the ATG-Data directory. For example, on JBoss:  
*JBOSS\_HOME/bin/ATG-Data/Publication/versionFileStore*

### Post Migration Tasks for ATG Service

After you complete the ATG Service database migration, you must perform these tasks:

- [Remove Self Service Solutions content set from Search Admin.](#)
- [Configure Brand site context rule filter.](#)
- [Create ATGProfile Live Indexing Search environment.](#)

#### **Remove Self Service Solutions Content Set from Search Admin**

In ATG 10.0, solutions only need to be indexed once in order to search ATG Knowledge and ATG Self Service. Search constraints are applied so only external solutions are returned in ATG Self Service. Thus, you must remove Self Service Solutions content from the Search Admin configuration:

1. Go to the Search Admin content page.
2. Delete the Self Service Solutions content. If the Self Service Solutions content set is empty, delete that content set also.
3. Run a full indexing job.

#### **Configure Brand Site Context Rule Filter**

The migration creates a siteConfiguration for each 2007.1 Self Service site segment. If those segments were based on the brand parameter, the site context can be recognized in Self Service with the brand parameter by configuring the local config component /atg/svc/multi site/BrandRuleFilter:

1. Set the brandToSiteIdMap property where the key is the brand value and the value is the ID of the siteConfiguration item corresponding to the brand.
2. The migration uses the 2007.1 segment name as the site name. Look up the site by name in the component /atg/multi site/SiteRepository and use the site ID for the appropriate siteConfiguration item.

**Note:** The siteConfiguration ID is generated using first 40 characters of the segment name with its spaces removed.

For example:

```
local config/atg/svc/multi site/BrandRuleFilter.properties
brandToSiteIdMap=Brand X=BrandX, Brand Y=BrandY
```



- On the Agent server, configure the `selfToBrandMap` property in the component `/atg/svc/email/EmailLandingPage`. This enables sending links to solutions with a brand-based Self Service URL.

```
Local config/atg/svc/email/EmailLandingPage.properties
selfToBrandMap=brandX=Brand X, BrandY=Brand Y
```

### Create ATGProfile Live Indexing Search Environment

- On the Agent server, open the ATG Dynamo Server Admin and navigate to this Nucleus component:

```
/atg/search/routing/LiveIndexingService
```

- Create the profile search environment.
- Navigate to this Nucleus component:

```
/atg/userprofiling/search/ProfileOutputConfig
```

- Execute the component's `bulkLoad` method.

## ATG Commerce Service Center (CSC) Notes

In addition to database schema migration and other general tasks described elsewhere in this guide, you must perform a number of tasks for CSC migration. These are covered in the following sections:

- [Schema Migration Prerequisites for CSC](#)
- [Post-Migration Tasks for CSC](#)

### Schema Migration Prerequisites for CSC

Perform the following tasks before migrating the databases for ATG Service from version 2007.1 to 10.0:

- Complete all [general pre-migration tasks](#) as described earlier in this guide.
- Use CIM to install version 10 of ATG Commerce Service Center and ATG Knowledge; skip the database installation step.
- [Move CSC-related directories to the new installation](#) from your ATG 2007.1 installation.

### Move CSC-Related Directories to the New Installation

Copy the directories listed in the following table from your ATG 2007.1 installation into your ATG 10.0 installation.

| Source Directory in <ATG2007.1dir>                                   | Destination Directory in <ATG10dir>                                  |
|----------------------------------------------------------------------|----------------------------------------------------------------------|
| <code>/home/Publishing/versionFileStore</code>                       | <code>/home/Publishing/versionFileStore</code>                       |
| <code>/home/servers/atg_production_lockserver/PublishingAgent</code> | <code>/home/servers/atg_production_lockserver/PublishingAgent</code> |
| <code>/home/servers/atg_svcagent_lockserver/PublishingAgent</code>   | <code>/home/servers/atg_svcagent_lockserver/PublishingAgent</code>   |

If you use the PublishingWebAgent, also copy < ATGWeb2007.1dir>/home/PublishingWebAgent to <ATGWeb10dir>/home/PublishingWebAgent.

## Post Migration Tasks for CSC

After you complete the CSC database migration, you must perform these tasks:

1. [Deploy to non-versioned repositories.](#)
2. [Create CSC Search environment.](#)

### **Deploy to Non-Versioned Repositories**

**Note:** The following procedure is required only if a publishing site is already set up on the Agent server. If no publishing site is set up on the Agent server, you can skip this procedure.

1. Start the Agent server and log onto the BCC Project Browser. The Project Browser should display the following projects:
  - 20071to100ServiceFramework
  - 20071to1000ption
  - csc20071to1000ption
  - csc20071to100ServiceFramework
  - cscOnly20071to100ServiceFramework
2. Check in the following projects:
  - 20071to100ServiceFramework
  - 20071to1000ption
  - csc20071to1000ption
3. Open the following project:
  - css20071to100ServiceFramework
4. Switch to the assets tab, and resolve a merge conflict on the cmcHelpful Panels Panel Stack Definition:
  - Select Merge with Latest.
  - Select Use My Version.
  - Check in the project.
5. Open the following project:
  - cscOnly20071to100ServiceFramework
6. Switch to the assets tab and resolve a merge conflict on the WsRespondPanel Stack Panel Stack Definition:
  - Select Merge with Latest.
  - Select Use My Version. This removes the communcateLinkedSolutionsPanel panel from the WsRespondPanel Stack. panels.
  - Check in the project.
7. Complete the workflow for each of the projects in the ATG Content Administration application. Make sure you perform the Approve and Deploy to Production and Verify Production Deployment actions for each project. If you are using switching data sources, perform a full deployment.



### **Create CSC Search Environment**

You create an ATG Search Live Indexing search environment in order to perform Profile and Order searches. CSC uses an embedded search method for customer profile and order searches that are included in the DPS. Search. Index and DCS. Search. Order. Index modules on each customer-facing and management server. For additional information, refer to the [ATG Commerce Service Center Installation and Programming Guide](#).

1. On the agent server, open the ATG Dynamo Server Admin.
2. Open this Nucleus component:  
`/atg/search/routing/LiveIndexingService`
3. Create the ATGProfile search environment by entering the details of your search engine.
4. Create the ATGOrder search environment by providing the search engine information.
5. Open this Nucleus component:  
`/atg/userprofiling/search/ProfileOutputConfig`  
Execute its `bulkLoad` method.
6. Open this Nucleus component:  
`/atg/commerce/search/OrderOutputConfig`  
Execute its `bulkLoad` method.

## **ATG Campaign Optimizer Notes**

ATG Campaign Optimizer 2007.1 ran as a stand-alone application. ATG Campaign Optimizer 10.0 is integrated into the ATG Business Control Center and uses standard ATG CA workflows to deploy tests.

To migrate an ATG Campaign Optimizer 2007.1 installation for use with ATG Campaign Optimizer 10.0, complete the following steps:

1. Make sure you stop all running tests, as described in the [ATG Campaign Optimizer User Guide](#).
2. Review and follow the general upgrade procedures described in [Migration Steps](#).
3. Complete the procedures for updating the database as described in the [Database Schema Migration](#) section of this guide.
4. [Export test data from ATG Campaign Optimizer 2007.1.](#)
5. [Import test data to ATG Campaign Optimizer 10.0.](#)
6. [Migrate scenario files](#)
7. [Update the ABT\\_Test table.](#)

### **Export Test Data from ATG Campaign Optimizer 2007.1**

#### **Configure Data Source Properties**

Before you can export the tests, you must point to FakeXA data sources on your ATG 2007.1 management server by updating the `JTDataSource.properties` file in

```
<ATG2007.1>/home/servers/management/localconfig/atg/dynamo/service/jdbc/
```

**Export the ATG Campaign Optimizer 2007.1 Test Data**

Use the following script to export the ATG Campaign Optimizer 2007.1 ABTestRepository to an XML file:

```
<ATG2007.1dir>/home/bin/
```

The following example exports the ABTestRepository data from ATG 2007.1 to the XML file ABTestData.xml.

---

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

---

For information about using the startSQLRepository script, see the [ATG Repository Guide](#).

**Configure Data Source Properties**

Now you can configure JTDataSource.properties so that the JTDataSource points back to ATGPubDS:

---

```
dataSource=/atg/dynamo/service/jdbc/ATGPubDS
```

---

**Import Test Data to ATG Campaign Optimizer 10.0**

Copy the XML file you exported in the previous section to:

```
<ATG10dir>/home/bin
```

Use the following script to import the data into the ATG Campaign Optimizer 10.0 versioned database.

```
<ATG10dir>/home/bin/startSQLRepository
```

The following example imports the data from the XML file ABTestData.xml to ABTestRepository in the ATG Campaign Optimizer 10.0 versioned database. It also creates a BCC project called myColImport and imports existing tests into it so you can view them in ATG Campaign Optimizer 10.0.

---

```
./startSQLRepository -m ABTest.management.Versioned
-repository /atg/abtest/ABTestRepository
-import ABTestData.xml
-project myColImport
-workflow /CampaignOptimizer/ABTestWorkflow.wdl
-activity abtest.createProject
-user admin
```

---

When you finish running the import script, start the Publishing server. Open the project you created in the import script. (The name of the project is the value you specified for the `-project` flag.) For more information, see *Accessing the ATG Campaign Optimizer User Interface* in the [ATG Campaign Optimizer User Guide](#).

For information about using the startSQLRepository script, see the [ATG Repository Guide](#).



## Migrate Scenario Files

ATG recommends that you do not migrate the scenario files generated by ATG Campaign Optimizer. The contents of these scenario files changed after ATG 2007.1; therefore, migrating ATG Campaign Optimizer 2007.1 scenario files will cause errors in version 10.0. After migration is complete, open and save each test as follows:

1. Display the BCC Home page.
2. Locate the test in the To Do list, expand the entry, and click Author or Review (depending on which task is active). The Basic Info tab for the selected test is displayed.  
Alternatively, click the View Tests button and then select the name of the test to edit. Click the Edit button to open the test for editing.
3. Click Save to save the test in ATG Campaign Optimizer 10.0. This generates a new scenario file for the test.

For more information about ATG Campaign Optimizer scenarios, see *Appendix A: ATG Campaign Optimizer Scenario Elements* in the [ATG Campaign Optimizer User Guide](#).

## Update the ABT\_Test Table

Tests created in ATG 2007.1 were created by special external profiles. ATG Campaign Optimizer 10.0 is integrated into the ATG Business Control Center and so these external users do not exist in the ATG 10.0 publishing schema. When you save migrated tests in ATG Campaign Optimizer 10.0, 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");
```

---