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**COMMERCE**

Version 11.3.1

Platform Upgrade and Migration Guide

## Platform Upgrade and Migration Guide

### Document Version

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# 1 Introduction

This guide describes how to upgrade from Oracle ATG Web Commerce 10.2 or later versions to Oracle Commerce Platform 11.3.1. It is written for programmers, DBAs, site administrators, and partners.

Before you begin the migration process:

1. 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.
2. Review the [Migration Overview](#) chapter.

This guide uses the convention <ATGdir> to represent the installation directory for ATG products. By default, the Windows installation creates the installation directory C: \ATG\ATG11. 3. 1, but this location can vary in your installation.

For detailed information about Oracle Commerce Platform products, refer to the Oracle Commerce Platform documentation on the Oracle Technology Network Web site.

**Important:** You must upgrade your entire Oracle Commerce Platform installation; you cannot upgrade only portions of it. Oracle does not support running different versions of Oracle Commerce Platform products together. For example, using the 11.3.1 Oracle Commerce Platform with an older version of Commerce Service Center is not supported. The platform and all applications must have the same release number.

If you are performing a migration over more than two releases, you need to review any exported scripts and logs for any errors after each migration.

## The CIM Migration Tool

Much of the migration process is performed by the Configuration and Installation Manager (CIM) Migration Tool, which automates schema and data migration based on your current installation and installed migration kits.

## New in Oracle Commerce 11.3.1

For information on the features in this release, refer to the Oracle Commerce Version 11.3.1 What's New Reference knowledge article on My Oracle Support.





## 2 Migration Overview

To migrate from Oracle ATG Web Commerce 10.2 or later to Oracle Commerce Platform 11.3.1, you perform the following steps:

1. Complete the [Pre-Migration Task Checklist](#).
2. [Install Oracle Commerce Platform 11.3.1](#).
3. [Run the CIM Migration Tool](#).
4. Complete [Application-Specific Post-Migration Steps](#).
5. Complete [Migration Testing](#).

Each of these steps is detailed in the following chapters.





## 3 Pre-Migration Task Checklist

Before starting migration, complete these tasks:

1. Back up your Oracle Commerce Platform database.
2. Back up all of your **Publ i shi ng** and **Publ i shi ngAgent** directories --for example, these CIM-generated directories under `<ATG11di r>/home/servers/`:
  - `atg_publ i shi ng_lockserver/Publ i shi ng`
  - `atg_product i on_lockserver/Publ i shi ngAgent`You should also back up the `<ATG11di r>/home/Publ i shi ng` directory.
3. If your installation includes ATG Content Administration, complete all projects.
4. Process all reporting event logs. On the data warehouse load server, execute the `LoadAl l Avai l abl e` method on all loaders in `/atg/report i ng/datawarehouse/loaders/`.
5. Shut down all Oracle Commerce servers.
6. Shut down any search engines your environment uses.
7. Remove Oracle Commerce artifacts, such as server instances, EAR files, and data sources, from the application server.

**Note:** In addition to the tasks listed here, some applications may have their own requirements. Before starting the migration, review the instructions for each installed application, under [Application-Specific Post Migration Steps](#).





## 4 Install Oracle Commerce Platform 11.3.1

The next steps in the migration process are to install Oracle Commerce Platform 11.3.1, obtain the resources required for the migration process, and configure your environment.

1. Install Oracle Commerce Platform 11.3.1 as directed in the Platform Installation and Configuration Guide.
2. If you are migrating from releases earlier than 10.2, download the required migration kits for each of those releases and migrate them separately until you have migrated to release 10.2.

If you are migrating from 10.2, or later, you only need to download the **OCPI at form l 13 Mi grati on Ki t**.

3. Copy the files to <ATGdi r> and unpack the kit, which creates the <ATGdi r>\mi grati on directory.
4. **Note:** If you use both the Oracle Commerce Platform and the Oracle Commerce Service Center modules, you must unpack both kits before starting your schema migration since both the modules are migrated in one step. This note is only applicable if you are upgrading from versions older than 11.2. If you are migrating from version 11.2 to 11.3.1, there is no migration kit for Oracle Commerce Service Center.
5. If you are using an MSSQL database, delete all MSSQL script files that contain international data. For example:

```
<ATGdi r>\mi grati on\11. 0to11. 3\ARF\DW\base\sql\db_components\mssql\arf_rpd_i 18n_i ni t_XXX. sql
```

```
<ATGdi r>\mi grati on\11. 2to11. 3\ARF\DW\Endeca\sql\db_components\mssql\arf_search_datawarehouse_i 18n_i ni t_xxx. sql
```

```
<ATGdi r>\mi grati on\11. 2to11. 3\DCS\DW\sql\db_components\mssql\arf_dcs_i 18n_i ni t_xxx. sql
```

Alternatively, you can leave a single script file for each language, assuming that your database is capable of supporting that language.

6. Copy your existing configuration files and application modules to the Oracle Commerce Platform 11.3.1 installation. Update application code as necessary to conform to new Oracle Commerce Platform 11.3.1 functionality. For more information, see the [Application-Specific Post Migration Steps](#) chapter.

**Note:** Commerce Reference Store and the reference applications do not migrate.

7. Copy the directories listed from your older (10.2-11.2) installation into your Oracle Commerce Platform 11.3.1 installation:



```
/home/Publishing/versionFileStore  
/home/servers/atg_svcagent_lockserver/publishing  
/home/servers/atg_production_lockserver/PublishingAgent  
/home/servers/atg_svcagent_lockserver /PublishingAgent  
/home/servers/atg_staging/PublishingAgent
```

8. If you use a Publishing Web Agent server, copy `/home/PublishingWebAgent` from your older (10.2-11.2) installations to your Oracle Commerce Platform 11.3.1 installation.

## Version Compatibility

Before you begin installation of Oracle Commerce Platform 11.3.1, read the Oracle Commerce Supported Environments document in the My Oracle Support knowledge base (<https://support.oracle.com/>).



## 5 Run the CIM Migration Tool

The CIM Migration Tool is a utility that automates schema and data migration based on migration kits you install.

### Migration from Older Releases

With this version of the CIM Migration Tool, you can migrate from older versions (10.2 and later), migrating sequentially one release at a time.

#### Migrating from Releases Before 10.2

If you are migrating from releases earlier than 10.2, download the related kits and perform migrations necessary to bring your installation to the 10.2 release using the instructions in the related migration guides. You should follow the migration guide for each release as the instructions differ from release to release even though the migration zip file for 11.3 to 11.3.1 contains migration kits from 10.2 onwards.

### Data Migration

Data migration is not part of the Oracle Commerce Platform 11.3 to Oracle Commerce Platform 11.3.1 migration and running the CIM data migration option will not perform a data migration action. Review the Migration documentation for each release for more details.

### The importConfig Utility

Before running the CIM Migration Tool, you can use the `importConfig` utility to identify which products and add-ons were installed in your previous installation. Otherwise you will need to manually select them in the CIM Migration tool. Before running this utility, verify that in your environment `$DYNAMO_HOME` reflects your ATG11.3 installation folder.

**Note:** Your previous installation directory must be available to use the `importConfig` utility.

#### Command Line Usage

From the command line, run the following script:

```
<ATGdir>\bin\importConfig.sh|bat [previous platform location]
```



## Utility Results

When you run the `importConfig` utility, the following file is created:

```
<ATGdir>\CIM\data\import.xml
```

When the CIM Migration Tool runs, `import.xml` provides information on products and add-ons from previous installations that are listed in the migration information section.

## CIM Command Line Options

Start the CIM Migration Tool from the command line. The following options are available:

```
ci m. sh|bat [-m MODULELIST] [-debug] [-record] [-noencryption] [-batch
inputFilePath] [-migration] [-migrationpath migrationKitsBasePath]
```

### Other options

Option	Description
<code>-migration</code>	Begins the migration process.
<code>-debug</code>	Enables debug mode.
<code>-record</code>	Records the CIM options you selected and at the end of the migration, saves the recorded file to a location you specify.
<code>-noencryption</code>	Works with record option. Normally the CIM options are recorded in encrypted form. If you use this option, they are written a readable form.
<code>-batch</code>	Runs the recorded file you specify, completing the migration automatically, without any manual intervention.
<code>-m</code>	Specifies specific modules, such as DAS, DPS, etc.

## Migration Kit Location

The default path for the migration kits is, for example:

```
<ATGdir>\migration\11.3to11.3.1
```

If you have unpacked the migration kit or kits to `<ATGdir>\migration\11.3to11.3.1` use the unqualified CIM command:

```
ci m. sh|bat -migration
```

Otherwise, specify the kit location. For example:



```
ci m.sh|bat -migration -migrationpath \oracle\migration
```

## Starting CIM Migration

When you start CIM with the `-migration` switch, the `Migration Utility` task appears on the menu, for example:

---

```
=====CIM MAIN MENU=====
enter [h]Help, [q]Quit to exit
```

Choose the task you want to perform:

- [1] Configure OPSS Security
- [2] Server Instance Configuration
- [3] Application Assembly & Deployment
- [R] Set the Administrator Password
- [A] Select Application Server
- [M] Migration Utility
- [C] Custom CIM Plugin Launcher

---

**Note:** When the `-migration` switch is used, the tasks `Product Selection` and `Database Configuration` do not display.

Choose `M` to start the migration process. After you select `Migration Utility`, CIM displays the all the versions that can be migrated to the current release, for example:

---

```
-----MIGRATION SOURCE SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit
```

Choose the version you are migrating from:

- [1] 10.2
- [2] 11.0
- [3] 11.1
- [4] 11.2
- [5] 11.3

Select one >

---

After making your selection, the following menu displays:

---

```
-----PRODUCT SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit
```

\* [P] Product Selection

>

---



Choose all the products and add-ons that you have installed, then select **Product Selection** in menu and then select **Continue** when the WARNING message displays.

**Note:** Partial migration may cause the software to malfunction and is not permitted. You must migrate all modules.

If you have run the **importConfig** utility before running **cim**, the products and add-ons from the previous installation are selected by default in the available options.

CIM then displays a list of the installed products and add-ons that can be migrated, for example:

---

```
-----PRODUCT SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit
```

Select product you wish to configure by entering the corresponding item number.

(Searching for products... done.)

Migration information: following products were found in previous installation:

```
Oracle Commerce JAXRS-based REST
Oracle Commerce Platform-Guided Search Integration
Oracle Commerce Reference Store
Content Administration
Oracle Commerce Site Administration
Oracle Commerce MVC-based REST
Oracle Commerce Service Center
```

Choose one of the following options: (\* = Currently selected )

- [1] Oracle Commerce Platform -  
Includes, optionally, data warehouse components
- [2] Oracle Commerce WebCenter Sites Extensions -  
Includes Commerce Platform and Commerce CAS Reader.
- \*[3] Oracle Commerce JAXRS-based REST -  
RESTful Web Services using JAXRS-based framework
- \*[4] Oracle Commerce MVC-based REST -  
RESTful Web Services using MVC-based framework
- \*[5] Oracle Commerce Site Administration -  
Includes Commerce Platform and Content Administration
- \*[6] Oracle Commerce Platform-Guided Search Integration -  
Includes Commerce Platform. Select this option when Commerce Guided Search is used.
- \*[7] Content Administration -  
Includes Oracle Commerce Platform. Optional: Preview
- [8] Oracle Commerce Core Commerce -



Includes Commerce Platform and Content Administration. Optional: data warehouse components, Preview and Merchandising UI

[9] Oracle Commerce CAS Reader -  
Includes Commerce Platform. Select this option when Commerce Platform is used to import data to Commerce CAS.

\*[10] Oracle Commerce Service Center -  
Agent-facing commerce application

\*[11] Oracle Commerce Reference Store -  
Includes the Oracle Commerce Platform, Oracle Commerce Platform-Guided Search Integration, Content Administration, Site Administration, Core Commerce, and Merchandising. Optional: Data warehouse components and Preview

[D] Done

Select one or more >

---

In this menu and those that follow, select the products and add-ons you want to migrate and the migration tool will update the schema and import data. When your selection is complete, the Migration option displays:

---

```
-----PRODUCT SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit

[P] Product Selection - Done
*[C] Migration Selection

>
```

---

When the Product Selection is complete, choose option C to proceed with the migration process. The following screen displays:

---

```
-----MIGRATION SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit

Choose the Migration task you want to perform:

*[1] 10.2 -> 11.0
[2] 11.0 -> 11.1
[3] 11.1 -> 11.2
[4] 11.2 -> 11.3
[5] 11.3 -> 11.3.1
[D] Done
```

Select one >



After selecting a migration step, the following screen displays:

---

```

----- DATABASE MIGRATION SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit
*[D] Database Migration
    [C] Cancel

>

```

---

Choose **D** to begin the Data Migration process, which is described in the following section.

## Configuring Datasources

In the next step, you choose and configure the named datasource for each server you are using. The following example shows the servers that may be migrated by choosing the related datasource:

---

```

----- SELECT A DATASOURCE TO CONFIGURE-----
enter [h]Help, [m]Main Menu, [q]Quit to exit

    Choose the named datasource you want to configure:

    [1] Reporting Data Warehouse
    [2] Reporting Loader
    [3] Publishing
    [4] Staging
    [5] Production Core
    [6] Switching A
    [7] Switching B
    *[D] Done

Select one >

```

---

Select the server you want to migrate, for example, **Reporting Loader**:

---

```

----- CONFIGURE DATASOURCE REPORTING DATA WAREHOUSE-----
enter [h]Help, [m]Main Menu, [q]Quit to exit

    [C] Connection Details
    [T] Test Connection - Done
    [E] Export Database Migration Script
    [S] Migrate Schema
    [D] Migrate Data
    [X] Export Database Cleanup Script
    [L] Cleanup Schema
    *[0] Configure Another Datasource

```

---

After you have provided connection details, you may optionally test the connection by choosing Test Connection. Once you verify that you can connect to the database schema, for each server complete the following steps:



1. **Export Database Migration Scripts.** You must complete this step because the exported scripts are used to migrate the schema. After exporting the migration scripts, review the scripts and customize them, if needed for your environment.
2. **Migrate Schema.** After customizing the scripts, execute them by selecting the Migrate Schema option. When this completes, review the `cim.log` that has been created in `<ATGdir>/cim/log` for any errors.
3. **Migrate data.** Complete this step if data needs to be migrated.
4. **Export Database Cleanup Scripts.** These scripts list the tables that are no longer needed and would be dropped if you run Cleanup Schema. Review the exported scripts before running Cleanup Schema and make a copy the contents of the listed tables if you need to save the data. By running this menu option, the CIM Migration Tool may pick up either `dynamic_metadata_ddl_cleanup.sql`, `versioned_dynamic_metadata_ddl_cleanup.sql` or both depending on your configuration. If a script is not exported, you do not have to run the Cleanup Schema option.
5. **Cleanup Schema.** Execute the cleanup scripts by choosing Cleanup Schema. Execute this step only when you are ready to drop the tables that are no longer needed. It is not necessary to carry out this step before moving to migrate another server and datasource.

If you are migrating over more than two releases, start with the oldest version and migrate to the next newest version till you reach the current release. After each migration, review any exported scripts and review the CIM logs for any errors. The main purpose of the exports are described in the following section, which will help you understand which DDLs are executed as part of each migration. This allows you to make any changes necessary for your environment before you begin the migration process. If you are migrating from versions earlier than 11.2, please refer to the appropriate version of the Migration Guide.

### Import Migration Data

After you have migrated schemas, the Import Migration Data task imports migration data for the applications you are configuring.

Data migration is not part of the Oracle Commerce Platform 11.3 to Oracle Commerce Platform 11.3.1 migration. Running the CIM Data Migration option will not migrate data from 11.3 to 11.3.1.

However, if you are migrating from earlier versions to 11.1, data migration is performed by the CIM tool. Refer to the Migration documentation for each release for additional details. Data migration from 11.2 to 11.3.1 is performed by the CIM Migration Tool.

### Import Initial Data

Once all of your migration steps for each selected release are successful, the menu item **Import Initial Data** displays on the **Migration Utility** menu, for example:

---

```
-----MIGRATION SELECTION-----
enter [h]Help, [m]Main Menu, [q]Quit to exit

Choose the Migration task you want to perform:

[1] 10.2 -> 11.0
[2] 11.0 -> 11.1
```



- [3] 11.1 -> 11.2
- [4] 11.2 -> 11.3
- [5] 11.3 -> 11.3.1
- \*[I] Import Initial Data
- [D] Done

Select one >

---

Select the **Import Initial Data** menu option to execute the **startSQLRepository** imports required for migration. You should run these imports in the required order.



# 6 Application-Specific Post-Migration Steps

After completing all tasks described in previous sections, review these migration steps for specific applications, beyond the migration steps described in previous chapters.

Any applications not listed here can be assumed to have no additional migration issues.

## Oracle Commerce Core Commerce Notes

Information relating to Core Commerce is discussed in the following section.

### Add Commerce Item Endpoint Additions

The Add Commerce Item endpoint will not only return a 201 response code when an item is added. If a commerce item is added to an existing item and the quantity is updated in the cart, the response code will return 200.

### Update Current User Endpoint Additions

When a property is updated using the current user endpoint, the return response code is 200. When a new resource is created, such as an address, the return response code is 201.

### Commerce Item Endpoint Changes

In 11.3, the add commerce item endpoint always returned a 201. Now, it has the potential to return a 200, as well as a 201.

---

```
(/{commerceItems}/#POST)
```

---

This commerce item endpoint returns a 201 response code when an item is added. Otherwise, if a commerce item ends up being merged, a 200 response code is returned.

### Commerce Current User Changes

In 11.3, the current user update endpoint always returned a 201. Now, it will return with a 200 when updating properties of the current user.

---

```
(/currentUser/#PATCH)
```

---



This current user update endpoint returns a 200 response code when properties are updated. A 201 response is reserved for the actual creation of a new resource.

## Oracle Commerce Core Platform

Issues relating to Core Platform are discussed in the following section.

### **SecurityServlet in the servlet pipeline will now validate the host header against a list of known hosts**

Previously a list of known hosts was configured on `RedirectURLValidator`. This has been refactored so that it can be reused for validation of the host header. The configuration for the known hosts is now configured on `HostNameValidator` and the `RedirectURLValidator` picks up the configuration from there rather than duplicating the configuration. Customers should move any existing configuration from `RedirectURLValidator` to `HostNameValidator` so that it can be used by both validators.

## Oracle Commerce Business Control Center Notes

Information relating to Business Control Center is discussed in the following section.

### **UI customizations and JET**

If you have written any UI customizations in the following areas, you will need to rewrite them using JET (Oracle JavaScript Extension Toolkit):

- Site Administration
- Targeting and Segmentation
- Preview Users
- External Users
- Access Control

For more information about JET, see the Oracle JavaScript Extension Toolkit page, <http://www.oracle.com/webfolder/technetwork/jet/index.html>.



## 7 Post-Migration Task Checklist

After all migrations are complete, perform the following tasks:

1. If you use ATG Content Administration, it is good practice to launch a full deployment to all workflow targets. This ensures that content is fully synchronized between the asset management server and workflow targets.

**Note:** Before launching a full deployment, remap the repositories for your site in the Content Administration Console. This step is necessary because a number of repositories (such as **Product Catalog** and **Site**) are secured by default in this release.

2. Clear browser caches.
3. Clear the application server cache.

For example, on JBoss, empty the contents of each server directory:

```
/work/jboss.web/local host
```

4. It is good practice to review any existing scenarios and restart them if appropriate.
5. Test the upgraded platform and applications (see [Migration Testing](#)).





## 8 Migration Testing

To verify the success of your migration 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 asset management servers.
3. From the Oracle Commerce 11.3.1 Business Control Center, verify that you can view:
  - All internal users created in Oracle Commerce Platform 11.2, or earlier releases
  - All assets created in Oracle Commerce Platform 11.2, or earlier releases
4. Confirm that the Oracle Commerce Platform 11.3.1 production server contains all assets that were accessible on the previous releases of Oracle Commerce Platform.
5. Create some test projects and 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.