Informatica

Informatica® Test Data Management
10.4.1

Upgrading From 10.4.0 (10.4.1)

Informatica Test Data Management Upgrading From 10.4.0 (10.4.1)
10.4.1
June 2020

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Preface

Follow the instructions in the Informatica *Test Data Management Upgrade Guide* to upgrade Test Data Management. The guide also includes information on prerequisite tasks and post upgrade tasks that you need to perform to complete the upgrade.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

Informatica Network

The Informatica Network is the gateway to many resources, including the Informatica Knowledge Base and Informatica Global Customer Support. To enter the Informatica Network, visit https://network.informatica.com.

As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit https://search.informatica.com. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit https://docs.informatica.com.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

Informatica Product Availability Matrices

Product Availability Matrices (PAMs) indicate the versions of the operating systems, databases, and types of data sources and targets that a product release supports. You can browse the Informatica PAMs at https://network.informatica.com/community/informatica-network/product-availability-matrices.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

You can find Informatica Velocity resources at http://velocity.informatica.com. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that extend and enhance your Informatica implementations. Leverage any of the hundreds of solutions from Informatica developers and partners on the Marketplace to improve your productivity and speed up time to implementation on your projects. You can find the Informatica Marketplace at https://marketplace.informatica.com.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through the Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:
https://www.informatica.com/services-and-training/customer-success-services/contact-us.html.

To find online support resources on the Informatica Network, visit https://network.informatica.com and select the eSupport option.

CHAPTER 1

Test Data Management Upgrade

This chapter includes the following topics:

- Overview, 8
- Upgrade Options, 8
- Steps to Upgrade from Version 10.4.0, 9

Overview

You can directly upgrade to Test Data Management 10.4.1 from 10.4.0.

Run the Informatica service installer to apply the hotfix on Test Data Management and services within an Informatica domain. Complete the pre-upgrade tasks before you apply the hotfix. After you apply the hotfix, upgrade the required services and complete post upgrade tasks to complete the Test Data Management upgrade.

Upgrade Options

You can run the Informatica 10.4.1 installer to upgrade from Test Data Management 10.4.0.

If you have a Test Data Management version earlier than 10.4.0, you must first upgrade to 10.4.0 before you can upgrade to 10.4.1.

You can use the Test Data Management 10.4.0 installer to upgrade from the following versions:

10.2.0 HotFix 2

10.2.0 HotFix 1

10.2.2

See the *Test Data Management 10.4.0 Upgrade Guide* for instructions about how to upgrade.

Run the Informatica service 10.4.0 installer to upgrade to Informatica service 10.4.0. See the Informatica service upgrade documentation for information about how to upgrade.

Steps to Upgrade from Version 10.4.0

To upgrade from an instance of Test Data Management 10.4.0, perform the following steps:

1. Perform prerequisite tasks.
2. Apply the hotfix. The hotfix updates Informatica and Test Data Management binaries.
3. Perform post upgrade tasks.

CHAPTER 2

Before You Upgrade TDM

This chapter includes the following topics:

- Read the Release Notes, 10
- Back Up the TDM Repository, 10
- Shut Down the TDM Server, 10
- Extract the Installer Files, 11
- Stop the Informatica Domain, 11

Read the Release Notes

Before you install or upgrade, read the product Release Notes. The Release Notes contain important information about the product installation and upgrade process. The Release Notes also contain information about known and fixed limitations.

Back Up the TDM Repository

Back up the TDM repository. Use the backup utility provided by the database that contains the TDM repository.

Back up the TDM repository to ensure that you can revert to the previous version of the repository if you encounter problems with the upgrade.

Shut Down the TDM Server

Shut down the TDM Server for the previous version of Test Data Management.

Extract the Installer Files

The installer files are compressed and distributed as a compressed file.

You can get the installation file from the FTP link contained in your fulfillment email. Download the Informatica installation tar file from the Informatica Electronic Software Download site to a directory on your machine and then extract the installer files.

Extract the installer files to a directory on your machine. The user that runs the installer must have read and write permissions on the installer files directory and execute permissions on the executable file.

Note: Make sure that you download the file to a local directory or a shared network drive that is mapped on your machine. You can then extract the installer files. However, you cannot run the installer from a mapped file. Copy the extracted files to a local drive and then run the installer.

Stop the Informatica Domain

Stop the Informatica domain.

When you stop the domain, all services in the domain stop.

CHAPTER 3

Apply the HotFix

This chapter includes the following topics:

- Apply or Roll Back the HotFix Overview, 12
- Applying or Rolling Back the HotFix in Graphical Mode, 12
- Applying or Rolling Back the HotFix in Console Mode, 13
- Applying or Rolling Back the HotFix in Silent Mode, 15

Apply or Roll Back the HotFix Overview

On Windows, you can run the installer to apply or roll back the hotfix in graphical, console, or silent mode.

On UNIX, you can run the installer to apply or roll back the hotfix in console or silent mode.

When you apply the hotfix, the installer updates the Informatica installation directory and the TDM binaries in the Informatica install directory.

Applying or Rolling Back the HotFix in Graphical Mode

You can run the installer in graphical mode on Windows.

When you apply the hotfix in graphical mode, a console window opens and runs in the background. If you close this window, the installation stops.

1. Log in to the machine with a system user account. The user account must be the same account used to install the previous version of Informatica services.
2. Close all other applications.
3. To begin the installation, run `install.bat` from the directory where you unzipped or untarred the installer.
4. On the Informatica 10.4.1 page, select **Apply hotfix to Informatica 10.4.0 or roll back the hotfix**, and then click **Start**.

   The **Installation Type** page appears.
5. Choose to apply or roll back the hotfix.

- To apply a hotfix, select **Apply the hotfix**.
- To roll back a hotfix, select **Roll back the hotfix**.

6. Read the terms and conditions of Informatica product usage toolkit and select **I agree to the terms and conditions**, and then click **Next**.

   Subject to your opt-out rights described below, the software will automatically transmit to Informatica in the USA information about the computing and network environment in which the Software is deployed and the data usage and system statistics of the deployment. This transmission is deemed part of the Services under the Informatica privacy policy and Informatica will use and otherwise process this information in accordance with the Informatica privacy policy available at https://www.informatica.com/in/privacy-policy.html. You may disable usage collection in Administrator tool.

   The **Installation Prerequisites** page appears.

7. Verify that all requirements are met before you continue the hotfix or rollback, and then click **Next**.

   The **Installation Directory** page appears.

8. Enter the absolute path for the directory in which the current version of Informatica services is installed, specify the installation environment, and then click **Next**.

   The **Pre-Installation Summary** page appears.

9. Review the installation information, and then click **Install** to apply or roll back the hotfix.

   If you are applying a hotfix, the installer copies the Informatica files to the installation directory. If you are rolling back a hotfix, the installer removes the hotfix and restores Informatica to the previous version.

10. Complete the post-installation tasks. Verify that the hotfix or rollback completed successfully by reviewing the log file or the **Post-Installation Summary** page.

Related Topics:

- "After you Apply the HotFix" on page 18

Applying or Rolling Back the HotFix in Console Mode

You can run the installer in console mode on UNIX and Windows.

When you run the installer in console mode, the words quit and back are reserved words. Do not use them as input text.

On AIX environments, ensure that the *JAVA_HOME* environment variable points to the supported Java version directory.

1. Log in to the machine with a system user account.
2. Close all other applications.
3. On a shell command line, run the `install.sh` file from the installer directory.

   The installer displays a message to verify that the locale environment variables are set.

4. Verify that the environment variables are set.
   - If the environment variables are not set, enter **N** to exit the installer and set them as required.
   - If the environment variables are set, enter **Y** to continue.
5. Enter the option to apply or roll back the hotfix on Informatica 10.4.0 and press **Enter** to continue.

6. Choose to apply or roll back the hotfix.
   - Enter **1** to apply the hotfix.
   - Enter **2** to roll back the hotfix.
7. Read the terms and conditions for Informatica installation and the product usage toolkit and select **I agree to the terms and conditions**.

   Subject to your opt-out rights described below, the software will automatically transmit to Informatica in the USA information about the computing and network environment in which the Software is deployed and the data usage and system statistics of the deployment. This transmission is deemed part of the Services under the Informatica privacy policy and Informatica will use and otherwise process this information in accordance with the Informatica privacy policy available at https://www.informatica.com/in/privacy-policy.html. You may disable usage collection in Administrator tool.
   - Press **1** to quit.
   - Press **2** to continue.
8. Verify that all installation requirements are met before you continue to apply or roll back the hotfix.
9. Press **Enter**.
10. Enter the absolute path for the directory in which the current version of Informatica services is installed or press **Enter** to use the default directory.

    The directory names in the path must not contain spaces or the following special characters: @|* $ # ! % ( ){ } [ ] , ; '
11. Specify the environment type associated with the Informatica services installation.
    - Press **1** to set Sandbox environment for a basic environment used for proof of concept with minimal users.
    - Press **2** to set Development environment for the design environment.
    - Press **3** to set Test environment for high volume processing that is closest to a production environment.
    - Press **4** to set Production environment for high volume processing with high levels of concurrency meant for end users. Advanced production environments are typically multi-node setups.

    Default is 1 for Sandbox.
12. Press **Enter**.
13. Review the installation information, and press **Enter** to apply or roll back the hotfix.

    If you are applying a hotfix, the installer copies the Informatica files to the installation directory. If you are rolling back a hotfix, the installer removes the hotfix and restores Informatica to the previous version.
14. Complete the post-installation tasks. Verify that the hotfix or rollback completed successfully by reviewing the log file or the **Post-Installation Summary** page.

Related Topics:

- "After you Apply the HotFix" on page 18

Applying or Rolling Back the HotFix in Silent Mode

To apply the hotfix in silent mode, create the `SilentInput.properties` file and then run the installer with the file.
Informatica provides a sample properties file, called `SilentInput_hotFix.properties`, that includes the parameters that are required by the installer.

The properties file is the same for both the Informatica services hotfix and Informatica client hotfix.

1. Go to the directory that contains the installation files.
2. Locate the `SilentInput_HotFix.properties` file.
3. Back up the file before you modify it.
4. Use a text editor to open the file and modify the values. The following table describes the installation properties that you can modify:

Property Name	Description
INSTALL_TYPE	Indicates whether to apply the hotfix or roll back the hotfix. If the value is 0, the installer applies the hotfix to the current Informatica installation. If the value is 1, the installer rolls back the current hotfix.
USER_INSTALL_DIR	Directory for the Informatica installation on which to apply or roll back the hotfix. To apply the hotfix to the Informatica services, enter the absolute path for the directory in which the current version of the Informatica services is installed. To apply the hotfix to the Informatica clients, enter the absolute path for the directory in which the current version of the Informatica clients is installed. To roll back the hotfix, enter the absolute path for the directory in which the current version of the Informatica services or clients is installed.
ENABLE_USAGE_COLLECTION	Enables the software to automatically transmit to Informatica in the USA information about the computing and network environment in which the Software is deployed and the data usage and system statistics of the deployment. This transmission is deemed part of the Services under the Informatica privacy policy and Informatica will use and otherwise process this information in accordance with the Informatica privacy policy available at https://www.informatica.com/in/privacy-policy.html. You may disable usage collection in Administrator tool. For more information about how to disable sending usage statistics, see *Informatica Administrator Guide* You must set the value to 1 to apply the hotfix.

Property Name	Description
INSTALLATION_ENVIRONMENT	Specify the environment type associated with the Informatica services installation. • Press **1** to set Sandbox environment for a basic environment used for proof of concept with minimal users. • Press **2** to set Development environment for the design environment. • Press **3** to set Test environment for high volume processing that is closest to a production environment. • Press **4** to set Production environment for high volume processing with high levels of concurrency meant for end users. Advanced production environments are typically multi-node setups. Default is 1 for Sandbox.

5. Save the properties file with the name SilentInput.properties.
6. Open a command window.
7. Go to root of the server or client installer directory.
8. Verify that the directory contains the `SilentInput.properties` file that you edited and saved.
9. Begin the installation from Windows, UNIX, or Linux.
   - To apply or roll back the hotfix on Windows, double-click the `silentInstallHotFix.bat`.
   - To apply or roll back the hotfix on UNIX or Linux, double-click the `silentInstallHotFix.sh`.

   If you apply a hotfix, the installer copies the Informatica files to the installation directory. If you roll back a hotfix, the installer removes the last hotfix and restores the previous version of Informatica.
10. Complete the post-installation tasks. Verify that the hotfix or rollback completed successfully by reviewing the log file or the **Post-Installation Summary** page.

Related Topics:

- "After you Apply the HotFix" on page 18

Sample Silent Input Properties (Server)

The following example shows the contents of the `SilentInput.properties` file when you apply or roll back the hotfix in silent mode.

```
############################################################
# Informatica Installer Build Details
# Copyright (c) 1993-2020 Informatica LLC
# This software contains confidential and proprietary
# information of Informatica LLC.
# All Rights Reserved.
############################################################

# Use the following guidelines when editing this file
# * Use this file to install without user interaction.
# * After you create the properties file, save the file with the name
SilentInput.properties
# * Any error condition that leads to failure, such as an invalid
# installation directory, generates a log file in the user home directory.
# For example:  /home/<user name>/silentErrorLog<time_stamp>.log

############################################################


# Set ENABLE_USAGE_COLLECTION  to 1 to accept the product usage toolkit end user license
agreement.
```

```
# You must set the value as 1 to install the Informatica platform.
# The product usage toolkit end user license agreement is available at: http://
www.informatica.com/us/eula/en-support-eula.aspx.
# As further described in the EULA, your use of the Informatica platform will enable the
product usage toolkit
# to collect certain product usage and failure information. You may disable this feature
at any time.
# For more information on how to disable this feature refer the Informatica
Administrator Guide.

ENABLE_USAGE_COLLECTION=0


## *INSTALL_TYPE - Set this value to '0' to apply the hotfix. Set this value to '1' to
roll back the hotfix.

INSTALL_TYPE=0


# * The USER_INSTALL_DIR variable must point to a valid directory with write
#     permissions enabled.



USER_INSTALL_DIR=/home/Informatica/10.4.0

#The INSTALLATION_ENVIRONMENT property represents the installation environment
# Set the property to one of the following installation environment types: Sandbox,
Development, Test, or Production. Values are case-sensitive.
# Set to Sandbox for a basic environment used for proof of concept with minimal
users.
# Set to Development for the design environment.
# Set to Test for high volume processing that is closest to a production environment.
# Set to Production for high volume processing with high levels of concurrency meant for
end users. Advanced production environments are typically multi-node setups.

INSTALLATION_ENVIRONMENT=
```

CHAPTER 4

After you Apply the HotFix

This chapter includes the following topics:

- Update the Application Services, 18
- Logging In to Test Data Manager, 19
- Update the Cache File Location in Test Data Manager, 19
- Copy JSON and XML Files, 19
- Configure the PowerCenter Integration Service for Kerberos-Enabled Hadoop HDFS Connections, 20
- Update Cluster Configuration Information, 20
- Configure Test Data Management for Format Preserving Encryption Masking in a Non-Hadoop Environment, 21
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Update the Application Services

Update and upgrade the services that Test Data Manager requires.

1. Log in to Informatica Administrator and click the **Services and Nodes** tab.
2. If you use a test data warehouse, select the Test Data Warehouse Service in the **Domain Navigator** panel and click **Actions** > **Upgrade Contents** to upgrade the content.

   The content upgrade updates the table structures and schema of the test data warehouse repository.
3. Select the Test Data Manager Service in the **Domain Navigator** panel and click **Actions** > **Upgrade Contents** to upgrade the content. The content upgrade updates the schema and table structures of the TDM repository.

   If you delete the Test Data Manager Service before you upgrade and create the service with a different name after you upgrade, you must enter the previous Test Data Manager Service name.
4. Enable the Test Data Manager Service.

Logging In to Test Data Manager

You can log in to Test Data Manager with the same user account that you used in the previous version.

1. Start a Microsoft Internet Explorer or Google Chrome browser.
2. In the **Address** field, enter the URL for Test Data Manager:

   ```
   http://<host name>:<port number>/tdm
   ```

   host name represents the host name of the machine where TDM is installed. *port number* is the startup port number for TDM. The default port number is 6605.

   If you configure TDM to use HTTPS, the URL redirects to the HTTPS site:

   ```
   https://<host name>:<HTTPS port number>/tdm
   ```
3. On the login page, enter an Informatica user name and password.
4. Click **Login**.

Update the Cache File Location in Test Data Manager

If you configured the location of the cache file directory in the existing TDM setup, you must update the location after you apply the hotfix.

1. Log in to Test Data Manager as an Administrator.
2. Open the **Administrator** view and click **Actions** > **Edit** > **Workflow Generation**.
3. Update the location in the **Cache Location** field.

   On a multinode setup you must:

   - Update the cache file directory on all TDM nodes in the setup.
   - Update the mount or mlink for the cache file directory on all TDM nodes in the setup.
4. Click **OK**.

Copy JSON and XML Files

The upgrade does not copy the `ResetObject.json` and XML files from the `TDM/utilities/ilmcli/Bin` folder and the `TDM/utilities/ilmcli/Conf` folder.

If your TDM setup contains the files in the default location, you can copy the files from the TDM folder that is backed up when you apply the hotfix. Copy the files to the same location in the current TDM folder.

If you store the files outside the TDM folder, you do not need to copy the files.

Configure the PowerCenter Integration Service for Kerberos-Enabled Hadoop HDFS Connections

If you use a Hadoop cluster with Kerberos authentication, you must configure the PowerCenter Integration Service before you can create and use a Hadoop HDFS connection in Test Data Manager.

Ensure that the KRB5_CONFIG environment variable contains the `krb5.conf` file location and that the `krb5.conf` file contains the correct entries.

1. Copy the `krb5.conf` file to the following location: `<Informatica installation directory>/TDM/datadirect`
2. Create a directory in the Informatica installation directory. For example: `<Informatica installation directory>/hadoophdfs/conf/`

   Ensure that the PowerCenter Integration Service is running so that the Informatica administrator user has read/write access to the directory.
3. Copy the following files from the Hadoop cluster to the directory that you created:
   - `/etc/hadoop/conf/core-site.xml`
   - `/etc/hadoop/conf/mapred-site.xml`
   - `/etc/hadoop/conf/hdfs-site.xml`
   - `/etc/hive/conf/hive-site.xml`
4. Ensure that the Informatica administrator user exists on all Hadoop cluster nodes and has the same UID. To create the Kerberos ticket cache file, run the kinit command on all nodes.
5. To create the Kerberos ticket cache file, run the kinit command on the Informatica node where the PowerCenter Integration Service is created.

   The command creates the ticket cache file with the following name format: `/tmp/krb5cc_<UID>`

   Ensure that you have read permission on the ticket cache file.

   Use the kinit command to verify, validate, and renew the tickets.
6. Edit the `core-site.xml` file in the directory and add the following parameters:

```
<property>
<name>hadoop.security.kerberos.ticket.cache.path</name>
<value>/tmp/REPLACE_WITH_CACHE_FILENAME</value>
<description>Path to the Kerberos ticket cache.</description>
</property>
```

7. Log in to the Administrator tool, select the PowerCenter Integration Service, and click the **Processes** tab.
8. Click **Edit** on the **Environment Variables** tab. In the CLASSPATH environment variable, add the directory that you created in step 1.
9. Restart the PowerCenter Integration Service.

Update Cluster Configuration Information

If you created Hadoop, Hive, or HDFS connections in the previous TDM version, you must update the connection information.

Edit the connection properties and select the required cluster configuration from the list of cluster configurations.

You must re-import the cluster configuration in Informatica Administrator before you can update the connections.

Configure Test Data Management for Format Preserving Encryption Masking in a Non-Hadoop Environment

Before you can use the format preserving encryption masking type in a plan, you must configure Test Data Management.

1. Create a `tokens` folder in any location on the machine where Informatica is installed.
2. Browse to the `<Informatica installation directory>\TDM\configuration` directory.
3. Open the `softhsm2.conf` file.
4. Set the `directories.tokendir` property to the `tokens` directory that you create in step 1 and save the change.
5. Set the `SOFTHSM2_CONF` environment variable to the `<Informatica installation directory>\TDM\configuration\softhsm2.conf` directory.
6. Set the `INFA_KEY_LOCATION` environment variable to the `<Informatica installation directory>\isp\config\keys` directory.
7. Restart the Informatica domain.

Configure Test Data Management for Format Preserving Encryption Masking in a Hadoop Environment

Before you can use the format preserving encryption masking type in a plan, you must configure Test Data Management.

1. Create a folder to store tokens on the Hadoop cluster machine. For example, create a `tokens` folder.
2. Browse to the `softhsm2.conf` file on the `<Informatica installation directory>\TDM\configuration`
3. Copy the `softhsm2.conf` file to the Hadoop cluster machine.
4. Open the `softhsm2.conf` file on the Hadoop cluster machine and set the `directories.tokendir` property to the directory that you create in step 1 and save the change.
5. Log in to Test Data Manager and click **Administrator** > **Connections**.
6. Open the connection that you use to push mappings to the Hadoop machine.

   You can find the Hadoop pushdown connection name from the **Administrator** > **Preferences** > **Hive Properties** tab.
7. On the **Hadoop Cluster Properties** tab, add the **Cluster Environment Variable** information:
   - Name: SOFTHSM2_CONF

- Value: Enter the path to the `softhsm2.conf` file on the Hadoop cluster machine. For example, enter `/home/tdmhdp/ENCRYPTION_RELATED_DATA/softhsm2.conf`.

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