



Informatica® Test Data Management
10.5

Upgrade Guide

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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

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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

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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, 7](#)
- [Upgrade Paths, 8](#)
- [Back Up the Test Data Management Repository, 9](#)
- [Upgrade the Informatica Domain, 9](#)
- [After You Upgrade, 10](#)

Overview

You can upgrade to Test Data Management 10.5 from versions 10.2.0 Hotfix 2, 10.4.0, and 10.4.1.

Perform the following high-level tasks to complete the Test Data Management upgrade:

1. Back up the repository to prepare for the Test Data Management upgrade.
2. Upgrade the Informatica domain and products that you require to work with Test Data Management.
3. Perform Test Data Management post upgrade tasks.

If you are on a different Test Data Management version, you must first upgrade to 10.2.0 Hotfix 2, 10.4.0, or 10.4.1 before you can upgrade to 10.5.

See the *Test Data Management Upgrade Guide* of the corresponding version for instructions about how to upgrade to the version.

Upgrade Paths

The upgrade paths that you take depend on the products that you upgrade. If you are on a version that does not support a direct upgrade, you must first upgrade to a supported version.

The following table lists the upgrade paths for each product that the installer supports.

Product	Versions
PowerCenter	You can upgrade to version 10.5 from the following versions including any hotfix and service pack: <ul style="list-style-type: none"> - 10.1.1 - 10.2 - 10.4 - 10.4.1
Informatica Data Quality	You can upgrade to version 10.5 from the following versions including any hotfix and service pack: <ul style="list-style-type: none"> - 10.1.1 - 10.2 - 10.4 - 10.4.1
Data Engineering Integration Data Engineering Quality	You can upgrade to version 10.5 from the following versions including any hotfix and service pack: <ul style="list-style-type: none"> - 10.1.1 - 10.2 - 10.2.1 - 10.2.2 - 10.4 - 10.4.1 <p>Important: If Data Engineering is in the same domain as any other product supported by the Informatica installer, verify that all products are upgraded to the same supported upgrade version before you upgrade to 10.5.</p>
Data Engineering Streaming	You can upgrade to version 10.5 from the following versions including any hotfix and service pack: <ul style="list-style-type: none"> - 10.2.2 - 10.4 - 10.4.1
Data Privacy Management	You can upgrade to version 10.5 from the following versions including any service packs: <ul style="list-style-type: none"> - 10.4 - 10.4.1 <p>Important: If Data Engineering, Enterprise Data Catalog, Data Privacy Management and are in the same domain of a version earlier than 10.4, upgrade them all to version 10.4 before you upgrade to 10.5.</p>
Enterprise Data Catalog	You can upgrade to version 10.5 from the following versions including any service packs: <ul style="list-style-type: none"> - 10.4 - 10.4.1 <p>Important: If Enterprise Data Catalog and Data Engineering are in the same domain of a version earlier than 10.4, upgrade them both to version 10.4 or 10.4.1 before you upgrade to 10.5.</p>

Product	Versions
Enterprise Data Preparation	<p>You can upgrade to version 10.5 from the following versions including any service packs:</p> <ul style="list-style-type: none"> - 10.4 - 10.4.1 <p>Important: If Data Engineering, Enterprise Data Catalog, and Enterprise Data Preparation are in the same domain of a version earlier than 10.4, upgrade them all to version 10.4 or 10.4.1 before you upgrade to 10.5.</p>
Test Data Management	<p>You can upgrade to version 10.5 from the following versions:</p> <ul style="list-style-type: none"> - 10.2.0 Hotfix 2 - 10.4 and all service packs - 10.4.1 and all service packs

Back Up the Test Data Management Repository

Back up the Test Data Management repository to ensure that you can revert to the previous version of the repository if you encounter problems with the upgrade. Use the backup utility provided by the database that contains the repository.

Upgrade the Informatica Domain

Upgrade the Informatica domain, services, and clients required to work with Test Data Management.

When you run the installer to upgrade Informatica services, the installer upgrades the Test Data Management binaries. The binaries are installed with both traditional and Data Engineering products.

See the Informatica services upgrade documentation for information about how to upgrade Informatica services.

Perform all pre-upgrade, upgrade, and post upgrade tasks for Informatica services. Upgrade prerequisites and steps might differ based on how you plan to use Test Data Management.

Refer to the appropriate document to ensure you upgrade the domain as required:

- If you use Test Data Management to run mappings only with PowerCenter, see the Informatica Upgrade for PowerCenter documentation.
- If you use Test Data Management to run mappings with PowerCenter and Data Engineering, see the upgrade documentation for Data Engineering.

After you perform the required domain post upgrade tasks, complete the post upgrade tasks for Test Data Management included in this document.

After You Upgrade

After you complete domain upgrade and post upgrade tasks, you must complete upgrade configuration tasks specific to Test Data Management.

Upgrade the Application Services

Upgrade the services that Test Data Manager requires.

As part of the domain post upgrade steps, you must have upgraded the following services before you perform this task:

- PowerCenter Repository Service
 - Model Repository Service
 - Data Integration Service
1. Log in to Informatica Administrator and click the **Services and Nodes** tab.
 2. Select the PowerCenter Repository Service in the **Domain Navigator** panel and on the **Repository Properties** tab, change the operating mode to Normal.
 3. Select the PowerCenter Integration Service in the **Domain Navigator** panel and perform the following tasks:
 - a. Click the **Processes** tab.
 - b. Click **Edit** on the **General Properties** tab.
 - c. In the **Edit General Properties** window, update the **\$PMRootDir** path to the latest path.
 - d. Click **OK**.
 - e. Recycle the service.
 4. If you use a test data warehouse, select the Test Data Warehouse Service in the **Domain Navigator** panel and perform the following tasks:
 - a. Click **Actions > Upgrade Contents** to upgrade the content.
The content upgrade updates the table structures and schema of the test data warehouse repository.
 - b. Recycle the service.
 5. Select the Test Data Manager Service in the **Domain Navigator** panel and perform the following tasks:
 - a. Click **Actions > Upgrade Contents** to upgrade the content. The content upgrade updates the schema and table structures of the Test Data Management 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 service name.
 - b. Click the **Processes** tab.
 - c. Click **Edit** on the **Execution Options** tab.
 - d. Update the path to the Informatica installation directory in the **Hadoop Distribution Directory** property and click **OK**.
You cannot test the connection if you do not update the property.
 - e. Recycle the service.
 - f. Enable the service.

Run the Upgrade Commands for Workflows

Run the following commands to run workflows created before upgrade without generating the workflows again.

Ensure that you stop the domain and set environment variables before you run the upgrade commands.

1. Update the following properties in the `<Informatica installation directory>/TDM/utilities/ilmcli/conf` configuration file and save the changes:

HTTP Mode

```
user=<Test Data Management user name>
password=<Password>
securityDomain=<Type of security domain>
isUserPasswordEncrypted=<Specify whether the password is encrypted with true or false>
TDMHostName=<host name of the machine where Test Data Management is installed>
TDMPort=<Test Data Management port number>
isHTTPS=<Specify whether HTTPS is enabled with true or false>
```

HTTPS Mode

```
user=<Test Data Management user name>
password=<Password>
securityDomain=<Type of security domain>
isUserPasswordEncrypted=<Specify whether the password is encrypted with true or false>
TDMHostName=<host name of the machine where Test Data Management is installed>
TDMPort=<Test Data Management port number>
isHTTPS=<Specify whether HTTPS is enabled with true or false>
javax.net.ssl.trustStore=<enter the complete path to the keystore file>
javax.net.ssl.trustStorePassword=<password of the keystore file>
```

2. Browse to the following location: `<Informatica installation directory>/TDM/utilities/ilmcli/bin`

3. Run the following commands:

```
sh ilmcmd -uec -ut upgrade -ct tdmcache
```

```
sh ilmcmd -uec -ut upgrade -ct <PowerCenter repository user name> -rdl "<JDBC connection string>" -rdu <PowerCenter repository user name> -rdp <password> -rdt <database type>
```

You can now run workflows that you generated before upgrade.

Update the Cache File Location in Test Data Manager

If you configured the location of the cache file directory in the existing Test Data Management setup, you must update the location after you upgrade.

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 Test Data Management nodes.
- Update the mount ormlink for the cache file directory on all Test Data Management nodes.

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 setup contains the files in the default location, you can copy the files from the `TDM` folder that is backed up when you upgrade. 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 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 Format Preserving Encryption Masking

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.tokenidir` property to the `tokens` folder 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 Format Preserving Encryption Masking in a Hadoop Environment

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

1. Create a folder to store tokens on the Hadoop cluster. 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.
4. Open the `softhsm2.conf` file on the Hadoop cluster machine and set the `directories.tokenidir` 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 environment.
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/tmdhdp/ENCRYPTION_RELATED_DATA/softhsm2.conf`.

Regenerate Masking Plans with Format Preserving Encryption

Format preserving encryption uses pass phrases to encrypt and decrypt source data. The pass phrases are stored encrypted.

Because version 10.5 uses an updated SiteKey algorithm, you must generate the workflows created before upgrade. The SiteKey algorithm is used to store sensitive information.