



Informatica® Informatica
9.6.1 HotFix 4

Upgrading from Version 9.5.1

Informatica Informatica Upgrading from Version 9.5.1

9.6.1 HotFix 4

April 2016

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Publication Date: 2018-07-04

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Preface

Upgrading from Version 9.5.1 is written for the system administrator who is responsible for upgrading the Informatica product. This guide assumes that you have knowledge of operating systems, relational database concepts, and the database engines, flat files, or mainframe systems in your environment. This guide also assumes that you are familiar with the interface requirements for your supporting applications.

Informatica Resources

Informatica My Support Portal

As an Informatica customer, the first step in reaching out to Informatica is through the Informatica My Support Portal at <https://mysupport.informatica.com>. The My Support Portal is the largest online data integration collaboration platform with over 100,000 Informatica customers and partners worldwide.

As a member, you can:

- Access all of your Informatica resources in one place.
- Review your support cases.
- Search the Knowledge Base, find product documentation, access how-to documents, and watch support videos.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Documentation

The Informatica Documentation team makes every effort to create accurate, usable documentation. If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at infa_documentation@informatica.com. We will use your feedback to improve our documentation. Let us know if we can contact you regarding your comments.

The Documentation team updates documentation as needed. To get the latest documentation for your product, navigate to Product Documentation from <https://mysupport.informatica.com>.

Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. You can access the PAMs on the Informatica My Support Portal at <https://mysupport.informatica.com>.

Informatica Web Site

You can access the Informatica corporate web site at <https://www.informatica.com>. The site contains information about Informatica, its background, upcoming events, and sales offices. You will also find product and partner information. The services area of the site includes important information about technical support, training and education, and implementation services.

Informatica How-To Library

As an Informatica customer, you can access the Informatica How-To Library at <https://mysupport.informatica.com>. The How-To Library is a collection of resources to help you learn more about Informatica products and features. It includes articles and interactive demonstrations that provide solutions to common problems, compare features and behaviors, and guide you through performing specific real-world tasks.

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Informatica Support YouTube Channel

You can access the Informatica Support YouTube channel at <http://www.youtube.com/user/INFASupport>. The Informatica Support YouTube channel includes videos about solutions that guide you through performing specific tasks. If you have questions, comments, or ideas about the Informatica Support YouTube channel, contact the Support YouTube team through email at supportvideos@informatica.com or send a tweet to @INFASupport.

Informatica Marketplace

The Informatica Marketplace is a forum where developers and partners can share solutions that augment, extend, or enhance data integration implementations. By leveraging any of the hundreds of solutions available on the Marketplace, you can improve your productivity and speed up time to implementation on your projects. You can access Informatica Marketplace at <http://www.informaticamarketplace.com>.

Informatica Velocity

You can access Informatica Velocity at <https://mysupport.informatica.com>. Developed from the real-world experience of hundreds of data management projects, Informatica Velocity represents the collective knowledge of our consultants who have worked with organizations from around the world to plan, develop, deploy, and maintain successful data management solutions. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Global Customer Support

You can contact a Customer Support Center by telephone or through the Online Support.

Online Support requires a user name and password. You can request a user name and password at <http://mysupport.informatica.com>.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <http://www.informatica.com/us/services-and-training/support-services/global-support-centers/>.

CHAPTER 1

Upgrade Overview

This chapter includes the following topics:

- [Informatica Upgrade, 12](#)
- [Informatica Upgrade Paths, 12](#)
- [Upgrade Process, 13](#)
- [Business Glossary Upgrade, 14](#)

Informatica Upgrade

The Informatica platform consists of a server component and one or more client components. Informatica provides separate installers to upgrade the Informatica services and clients.

When you upgrade each node in the domain, you can choose to change the node configuration to allow changes to the node host name, port numbers, or domain configuration repository database.

Informatica Upgrade Paths

You can directly upgrade to 10.0 from Informatica 9.5.1 and 9.6.1

If the product version that is currently installed cannot be upgraded to Informatica 10.0, you must first upgrade to a supported version. To determine the Informatica product version that is currently installed, click **Help > About Informatica Administrator** in the Informatica Administrator header area.

The following table describes the Informatica product versions from which you can upgrade:

Informatica Version	Upgrade Path	Comments
8.1.x	9.1.0 -> 9.6.1 -> 10.0	If the PowerCenter 8.1.x domain includes Metadata Manager or Data Analyzer, you must first upgrade to PowerCenter 8.6.1 and then upgrade to Informatica PowerCenter 9.1.0.
8.5.x	9.1.0 -> 9.6.1 -> 10.0	If the PowerCenter 8.5.x domain includes Metadata Manager or Data Analyzer, you must first upgrade to PowerCenter 8.6.1 and then upgrade to Informatica PowerCenter 9.1.0.

Informatica Version	Upgrade Path	Comments
8.6	9.1.0 -> 9.6.1 -> 10.0	If the PowerCenter 8.1.x domain includes Metadata Manager or Data Analyzer, you must first upgrade to PowerCenter 8.6.1 and then upgrade to Informatica PowerCenter 9.1.0.
8.6.1	9.1.0 -> 9.6.1 -> 10.0	After you upgrade to version 9.1.0, you must upgrade to version 9.6.1, and then upgrade to version 10.0.
8.6.2	9.1.0 -> 9.6.1 -> 10.0	After you upgrade to version 9.1.0, you must upgrade to version 9.6.1, and then upgrade to version 10.0.
9.0	9.1.0 -> 9.6.1 -> 10.0	After you upgrade to version 9.1.0, you must upgrade to version 9.6.1, and then upgrade to version 10.0.
9.0.1	9.1.0 -> 9.6.1 -> 10.0	After you upgrade to version 9.1.0, you must upgrade to version 9.6.1, and then upgrade to version 10.0.
9.1.0	9.6.1 -> 10.0	Upgrade to version 9.6.1, and then upgrade to upgrade to version 10.0.
9.5.0	9.5.1 -> 10.0	Upgrade to version 9.5.1, and then upgrade to upgrade to version 10.0.
9.5.1	10.0	You can directly upgrade to version 10.0.
9.6.0	9.6.1 -> 10.0	Upgrade to version 9.6.1, and then upgrade to upgrade to version 10.0.
9.6.1	10.0	You can directly upgrade to version 10.0.

Upgrade Process

The upgrade of the Informatica services and Informatica clients consists of multiple phases.

The upgrade consists of the following phases:

1. Complete the pre-upgrade tasks for the domain to ensure that you can successfully run the installer.
2. Upgrade the domain. To upgrade the domain, run the Informatica server installer and select the upgrade option. The domain upgrade wizard installs the server files and configures the domain. If the domain has multiple nodes, you must upgrade all nodes. When you upgrade each node in the domain, you can choose to change the node configuration to allow changes to the node host name, port numbers, or domain configuration repository database.

The following table describes the actions that the installer performs when you upgrade the domain:

Tasks	Description
Runs pre-upgrade check	Installer runs the pre-upgrade check and displays the conflicts in the domain. Resolve the conflicts before you proceed with the upgrade.
Installs Informatica.	Installs Informatica directories and files into the new directory.
Copies infa_shared directory.	Copies the contents of the infa_shared directory from the existing installation directory into the new installation directory.
If the existing domain uses the Metadata Manager Service, copies mm_files directory.	Copies the contents of the mm_files directory from the default location in the existing installation directory into the new installation directory.
Upgrades the domain.	Upgrades the domain to run version 10.0 application services. The upgrade retains the user and administrator accounts in the domain.
Starts Informatica Services.	Starts Informatica Services on the node.

3. Upgrade the application services. After you upgrade the domain, log in to the Administrator tool and upgrade the application services. The service upgrade wizard provides a list of all application services that must be upgraded. It upgrades the services based on the order required by the dependent objects.
4. Upgrade the Informatica clients. Use the client installer to upgrade the following Informatica client tools:
 - PowerCenter Client
 - Informatica DeveloperUpgrade Informatica Developer to the Informatica version, including the hotfix version, of the domain upgrade.

Note: You cannot connect to the Informatica domain using the Developer tool from a previous version.

To upgrade Informatica clients, run the Informatica client installer and select the upgrade option. If the clients are installed on multiple machines, upgrade the clients on all machines.
5. Perform the post-upgrade tasks.

Note: If you upgrade the Informatica installation on more than one machine, complete the first upgrade with the detailed instructions in this guide. You can use the upgrade checklist in the appendix to perform subsequent upgrades.

Business Glossary Upgrade

Effective in version 9.6.0, business glossary functionality is moved from Metadata Manager to the Analyst tool. Before you upgrade the domain, you must export and delete business glossaries from Metadata Manager. You use the Metadata Manager glossary export files to create corresponding business glossaries in the Analyst tool after upgrade.

Analyst tool business glossaries contain multiple features that Metadata Manager business glossaries do not have. For example, Analyst tool business glossaries provide business policies that govern the business practices related to business terms. Analyst tool glossaries can be used by a wide range of business users.

Business users that do not need to see data lineage no longer have to use Metadata Manager to create and view business terms and categories.

The upgrade process for business glossaries consists of the following phases:

1. Before you upgrade the domain, export and purge business glossaries from Metadata Manager.
2. Upgrade the domain.
3. Import business glossaries into the Analyst tool.
4. Create and load resources in Metadata Manager that are based on the Analyst tool business glossaries.

The following table describes the steps that you perform when you upgrade business glossaries:

Step	Metadata Manager Tasks	Analyst Tool Tasks
1.	Back up the Metadata Manager repository.	-
2. (Optional)	For each glossary that uses enumerated links or rule-based links, back up the enumerated links and linking rules files.	-
3. (Optional)	If custom attributes were added to the business glossary model, export the business glossary model.	-
4.	Export each business glossary to a Microsoft Excel file.	-
5.	Add a worksheet to each Microsoft Excel that contains the Metadata Manager Service name.	-
6.	Purge and delete each business glossary from Metadata Manager.	-
7.	Upgrade the domain.	
8. (Optional)	-	If custom attributes were added to the business glossary model in Metadata Manager, import the Metadata Manager model export file.
9. (Optional)	-	If business terms or categories were linked across glossaries in Metadata Manager, merge the glossary export files and delete duplicate business terms.
10.	-	Import each business glossary file.
11. (Optional)	-	Publish any unpublished business terms and categories that you want to see in Metadata Manager.
12.	Create one business glossary resource for each Analyst tool business glossary.	-
13. (Optional)	For each glossary that uses enumerated links or rule-based links, associate the enumerated links and linking rules files with the business glossary resource.	-
14.	Load each business glossary resource and check each glossary.	-

For more information about the differences between business glossaries in versions 9.5.x and 9.6.x, see the *Business Glossary 9.5.x to 9.6.x Transition Guide*. For more information about Analyst tool business glossaries, see the *Informatica Business Glossary Guide*. For more information about creating and configuring business glossary resources in Metadata Manager, see the *Metadata Manager Administrator Guide*.

All product documentation is available on the Informatica My Support Portal at <http://mysupport.informatica.com>.

RELATED TOPICS:

- [“Prepare Metadata Manager” on page 35](#)
- [“Upgrade the Domain” on page 48](#)
- [“Object Missing” on page 38](#)
- [“Metadata Manager Service” on page 83](#)

CHAPTER 2

Before You Upgrade the Domain

This chapter includes the following topics:

- [Read the Release Notes, 17](#)
- [Review the Windows Requirements, 17](#)
- [Review the UNIX Requirements, 24](#)
- [Back Up the Data Transformation Files, 31](#)
- [Prepare the PowerCenter Repository, 32](#)
- [Prepare the Model Repository, 32](#)
- [Prepare the Reporting and Dashboards Service, 33](#)
- [Prepare the Profiling Warehouse, 34](#)
- [Prepare the Reference Data Warehouse, 34](#)
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- [Prepare the Staging Database, 35](#)
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- [Prepare Metadata Manager, 35](#)
- [Prepare Data Analyzer, 39](#)
- [Prepare the Domain, 39](#)
- [Prepare to Change the Node Configuration, 41](#)

Read the Release Notes

Read the Informatica Release Notes for updates to the installation and upgrade process. You can also find information about known and fixed limitations for the release.

Review the Windows Requirements

Before you upgrade the Informatica domain, set up the machine to meet the requirements to upgrade Informatica. If the machine where you upgrade Informatica is not configured correctly, the upgrade can fail.

Review the Patch Requirements

Before you upgrade the Informatica domain, verify that the machine has the required operating system patches and libraries.

The following table lists the patches and libraries that the Informatica services require on a Windows platform:

Platform	Operating System	Operating System Patch
Windows x64	2012 R2 64-bit	None required
Windows x64	2008 R2 64-bit	None required
Windows x64	2008 64-bit	SP2

Verify the Domain Upgrade Requirements

Verify that your machine meets the minimum system requirements to upgrade the Informatica domain.

The following table lists the minimum memory and disk space required to upgrade the Informatica domain:

RAM	Disk Space
4 GB	10 GB

Note: When you upgrade, the installer requires an additional 4 GB disk space plus the amount of disk space used by the existing `infa_shared` directory.

The following table lists the minimum system requirements to run the Informatica client tools:

Client	Processor	RAM	Disk Space
PowerCenter Client	1 CPU	512 MB	3 GB
Informatica Developer	1 CPU	512 MB	5 GB

For more information about product requirements and supported platforms, see the Product Availability Matrix on the Informatica My Support Portal:

<https://mysupport.informatica.com/community/my-support/product-availability-matrices>

Temporary Disk Space Requirements

The installer writes temporary files to the hard disk. Verify that you have enough available disk space on the machine to support the installation. When the installation completes, the installer deletes the temporary files and releases the disk space.

The Informatica services installer requires 1 GB of temporary disk space.

The Informatica clients installer also requires 1 GB of temporary disk space.

Verify Application Service Hardware Requirements

The Informatica version to which you are upgrading requires more memory and disk space than previous versions.

The following table lists the minimum system requirements for a domain with different node configurations:

Services	Processor	Memory	Disk Space
One node runs the following services: <ul style="list-style-type: none"> - Analyst Service - Content Management Service - Data Integration Service - Metadata Manager Service - Model Repository Service - PowerCenter Integration Service - PowerCenter Repository Service - Reporting Service - Reporting and Dashboards Service - Search Service - Web Services Hub 	2 CPUs with multiple cores	12 GB	20 GB
One node runs the following services: <ul style="list-style-type: none"> - Analyst Service - Content Management Service - Data Integration Service - Model Repository Service - Search Service 	2 CPUs with multiple cores	12 GB	20 GB
One node runs the following service: <ul style="list-style-type: none"> - Analyst Service 	1 CPU with multiple cores	4 GB	n/a
One node runs the following service: <ul style="list-style-type: none"> - Search Service 	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: <ul style="list-style-type: none"> - Analyst Service - Search Service 	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: <ul style="list-style-type: none"> - Metadata Manager Service - PowerCenter Integration Service - PowerCenter Repository Service - Reporting Service 	2 CPUs with multiple cores	8 GB	10 GB
One node runs the following services: <ul style="list-style-type: none"> - Metadata Manager Service - PowerCenter Integration Service - PowerCenter Repository Service - Reporting and Dashboards Service 	2 CPUs with multiple cores	8 GB	10 GB
One node runs the following services: <ul style="list-style-type: none"> - PowerCenter Integration Service - PowerCenter Repository Service 	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: <ul style="list-style-type: none"> - Data Integration Service - Model Repository Service 	1 CPU with multiple cores	4 GB	10 GB

Services	Processor	Memory	Disk Space
One node runs the following services: - Data Integration Service - Content Management Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following service: - Metadata Manager Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following service: - Reporting Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following service component: - Metadata Manager Agent	1 CPU with multiple cores	4 GB	400 MB
One node runs the following service: - Web Services Hub	1 CPU with multiple cores	4 GB	5 GB

Review the Environment Variables

Configure the environment variables to work with the Informatica installation.

The following table describes environment variables to review on Windows:

Variable	Description
%TEMP%	Location of the temporary files created during installation. Informatica requires 1 GB disk space for temporary files. Configure the environment variable if you do not want to create temporary files in the default drive.
PATH	The installer appends file paths required by Informatica to the PATH environment variable. Verify that the length of the PATH environment variable does not exceed the system limits. Verify that the PATH environment variables do not contain earlier versions of Informatica.
Library path	Verify that the library path environment variables do not contain earlier versions of Informatica.
INFA_HOME	Contains the location of the Informatica installation directory. Clear this variable before you start the upgrade.
INFA_DOMAINS_FILE	Contains the location of the domains.infa file. Clear this variable before you start the upgrade.

Review the Maximum Heap Size

Verify that Informatica Services uses the required maximum heap size for the number of users in the domain.

The following table lists the minimum requirement for the maximum heap size settings, based on the number of users and services in the domain:

Number of Domain Users	Maximum Heap Size (1-5 Services)	Maximum Heap Size (6-10 Services)
1,000 or less	512 MB (default)	1024 MB
5,000	2048 MB	3072 MB
10,000	3072 MB	5120 MB
20,000	5120 MB	6144 MB
30,000	5120 MB	6144 MB

Note: The maximum heap size settings in the table are based on the number of application services in the domain.

If the domain has more than 1,000 users, update the maximum heap size based on the number of users in the domain.

1. Extract the installation files.
2. Go to the following directory:<installer files directory>/source/tomcat/bin.
3. Use a text editor to open the infaservice file.
4. Search for the following text: `INFA_JAVA_OPTS=% INFA_JAVA_OPTS% -XX.`
5. Set the value for `-Xmx` to the maximum heap size required for the number of Informatica domain users. For example, to set the maximum heap size to 3072 MB, use the following configuration:

```
set INFA_JAVA_OPTS=% INFA_JAVA_OPTS% -XX:GCTimeRatio=9 -Xmx3072m
```

Extract the Installer Files

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

Use a zip utility to extract the installer files to a directory on your machine. Verify the zip utility version is compatible with the Windows operating system version. When you unzip the file, verify that the zip utility also extracts empty folders.

You can extract the installer files in the following ways:

- Installation DVD. Download the Informatica zip file from the installation DVD to a directory on your machine and then extract the installer files, or extract the installer files directly from the DVD to a directory on your machine. If you download the zip file to a directory on your machine, verify the length of the entire installation directory path, including the zip file name, is 60 characters or less.
- FTP download. Download the Informatica installation zip file from the Informatica Electronic Software Download site to a directory on your machine and then extract the installer files.

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.

Run the Pre-Installation (i10Pi) System Check Tool

Run the Pre-installation (i10Pi) System Check Tool to verify whether the machine meets the system requirements for installation or upgrade.

1. Log in to the machine with a system user account.
2. Close all other applications.
3. Go to the root of the directory that contains the installation files and run install.bat as administrator.

To run the file as administrator, right-click the install.bat file and select **Run as administrator**.

Note: If you do not run the installer as administrator, the Windows system administrator might encounter issues when accessing files in the Informatica installation directory.

The **Informatica 10.0** page appears.

4. Select **Install or upgrade Informatica**.
5. Select **Run the Pre-Installation (i10Pi) System Check Tool** to verify whether the machine meets the system requirements for the installation or upgrade.

6. Click **Start**.

The Informatica Pre-Installation (i10Pi) System Check Tool **Welcome** page appears.

7. Click **Next**.

The **System Information** page appears.

8. Enter the absolute path for the installation directory.

The directory names in the path must not contain spaces or the following special characters: @ | * \$ # ! % () { } [] , ; ' .

Note: Informatica recommends using alphanumeric characters in the installation directory path. If you use a special character such as á or €, unexpected results might occur at run time.

9. Enter the starting port number for the node that you will create or upgrade on the machine. The default port number for the node is 6005.
10. Click **Next**.

The **Database and JDBC Connection Information** page appears.

11. Enter the information for the domain configuration repository database.

The following table describes the database information for the domain configuration repository:

Prompt	Description
Database type	Database for the domain configuration repository. Select Oracle, IBM DB2, Microsoft SQL Server, or Sybase ASE.
Database user ID	User ID for the database user account for the domain configuration repository.
Database user password	Password for the database user account.

The domain configuration repository must be accessible to all gateway nodes in the domain.

12. Enter the JDBC connection information.
 - To enter the connection information using the JDBC URL information, select **Specify the JDBC connection properties** and specify the JDBC URL properties.

The following table describes the JDBC URL properties:

Property	Description
Database host name	Host name for the database server.
Database port number	Port number for the database server.
Database service name	Service name for Oracle and IBM DB2 databases or database name for Microsoft SQL Server and Sybase ASE.

- To enter the connection information using a custom JDBC connection string, select **Custom JDBC connection string** and type the connection string.

Use the following syntax for the JDBC connection string for the databases:

IBM DB2

```
jdbc:Informatica:db2://host_name:port_no;DatabaseName=
```

Oracle

```
jdbc:Informatica:oracle://host_name:port_no;ServiceName=
```

Microsoft SQL Server

```
jdbc:Informatica:sqlserver://host_name:port_no;SelectMethod=cursor;DatabaseName=
```

Sybase

```
jdbc:Informatica:sybase://host_name:port_no;DatabaseName=
```

Verify that the connection string contains all the connection parameters required by your database system.

13. Click **Test Connection** to verify that you can connect to the database, and then click **OK** to continue.

14. Click **Next** to start the system check.

The tool checks the settings of the hard drive, the availability of the ports, and the configuration of the database. After the system check is complete, the **System Check Summary** page appears, displaying the results of the system check.

15. Analyze the results of the system check.

Each requirement is listed, along with one of the following check statuses:

- [Pass] - The requirement meets the criteria for the Informatica installation or upgrade.
- [Fail] - The requirement does not meet the criteria for the Informatica installation or upgrade. Resolve the issue before you proceed with the installation or upgrade.
- [Information] - Verify the information and perform any additional tasks as outlined in the details.

The results of the system check are saved to the following file: `.../Server/i10Pi/i10Pi/en/i10Pi_summary.txt`

16. Click **Done** to close the Pre-Installation (i10Pi) System Check Tool.

If the Pre-Installation (i10Pi) System Check Tool finishes with failed requirements, resolve the failed requirements and run the Pre-Installation (i10Pi) System Check Tool again.

Note: If the Informatica Pre-Installation (i10Pi) System Check Tool check finishes with failed requirements, you can still perform the Informatica installation or upgrade. However, Informatica highly recommends that you resolve the failed requirements before you proceed.

Review the UNIX Requirements

Before you upgrade the Informatica domain, set up the machine to meet the requirements to upgrade Informatica. If the machine where you upgrade Informatica is not configured correctly, the upgrade can fail.

Review the Patch Requirements

Before you upgrade the Informatica domain, verify that the machine has the required operating system patches and libraries.

The following table lists the patches and libraries that the Informatica services require on a UNIX platform:

Platform	Operating System	Operating System Patch
AIX	7.1 TL2	OS level: 7100-02 bos.adt.debug Version 7.1.2.0
AIX	6.1 TL8	OS level: 6100-08 bos.adt.debug Version 6.1.8.0
Linux-x64	Red Hat Enterprise Linux 6.5	All of the following packages, where <version> is any version of the package: <ul style="list-style-type: none">- e2fsprogs-libs-<version>.el6- keyutils-libs-<version>.el6- libselinux-<version>.el6- libsepol-<version>.el6
Linux-x64	Red Hat Enterprise Linux 7	All of the following packages, where <version> is any version of the package: <ul style="list-style-type: none">- e2fsprogs-libs-<version>.el5- keyutils-libs-<version>.el5- libselinux-<version>.el5- libsepol-<version>.el5

Install the Java Development Kit

If you are upgrading Informatica on AIX, verify that the Informatica version you are upgrading to supports the Java Development Kit (JDK) version that is installed on your machine. If you do not have a supported JDK version installed, uninstall the current version, and then download and install the supported version.

The JDK is not bundled with the Informatica installer for AIX. The JDK is bundled with the Informatica installer for all other platforms.

AIX

Informatica services on AIX is certified with JDK version 7.1 SR3 FP1. Use your IBM ID to download the JDK for AIX from the IBM web site.

If you have problems installing the JDK, contact the JDK vendor.

The software available for download at the referenced links belongs to a third party or third parties, not Informatica LLC. The download links are subject to the possibility of errors, omissions or change. Informatica assumes no responsibility for such links and/or such software, disclaims all warranties, either express or implied, including but not limited to, implied warranties of merchantability, fitness for a particular purpose, title and non-infringement, and disclaims all liability relating thereto.

Verify the Domain Upgrade Requirements

Verify that your machine meets the minimum system requirements to upgrade the Informatica domain.

The following table lists the minimum memory and disk space required to upgrade the Informatica domain:

Operating System	RAM	Disk Space
AIX	4 GB	10 GB
Linux	4 GB	10 GB

For more information about product requirements and supported platforms, see the Product Availability Matrix on the Informatica My Support Portal:

<https://mysupport.informatica.com/community/my-support/product-availability-matrices>

Temporary Disk Space Requirements

The installer writes temporary files to the hard disk. Verify that you have enough available disk space on the machine to support the installation. When the installation completes, the installer deletes the temporary files and releases the disk space.

The installer requires 1 GB of temporary disk space.

Verify Application Service Hardware Requirements

The Informatica version to which you are upgrading requires more memory and disk space than previous versions.

The following table lists the minimum system requirements for a domain with different node configurations:

Services	Processor	Memory	Disk Space
One node runs the following services: <ul style="list-style-type: none">- Analyst Service- Content Management Service- Data Integration Service- Metadata Manager Service- Model Repository Service- PowerCenter Integration Service- PowerCenter Repository Service- Reporting Service- Reporting and Dashboards Service- Search Service- Web Services Hub	2 CPUs with multiple cores	12 GB	20 GB
One node runs the following services: <ul style="list-style-type: none">- Analyst Service- Content Management Service- Data Integration Service- Model Repository Service- Search Service	2 CPUs with multiple cores	12 GB	20 GB
One node runs the following service: <ul style="list-style-type: none">- Analyst Service	1 CPU with multiple cores	4 GB	n/a

Services	Processor	Memory	Disk Space
One node runs the following service: - Search Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: - Analyst Service - Search Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: - Metadata Manager Service - PowerCenter Integration Service - PowerCenter Repository Service - Reporting Service	2 CPUs with multiple cores	8 GB	10 GB
One node runs the following services: - Metadata Manager Service - PowerCenter Integration Service - PowerCenter Repository Service - Reporting and Dashboards Service	2 CPUs with multiple cores	8 GB	10 GB
One node runs the following services: - PowerCenter Integration Service - PowerCenter Repository Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: - Data Integration Service - Model Repository Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following services: - Data Integration Service - Content Management Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following service: - Metadata Manager Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following service: - Reporting Service	1 CPU with multiple cores	4 GB	10 GB
One node runs the following service component: - Metadata Manager Agent	1 CPU with multiple cores	4 GB	400 MB
One node runs the following service: - Web Services Hub	1 CPU with multiple cores	4 GB	5 GB

Review the Environment Variables

Configure the environment variables to work with the Informatica installation.

The following table describes the environment variables to review on UNIX:

Variable	Description
IATEMPDIR	Location of the temporary files created during installation. Informatica requires 1 GB disk space for temporary files. Configure the environment variable if you do not want to create temporary files in the /tmp directory.
INFA_DOMAINS_FILE	Contains the location of the domains.infa file. Clear this variable before you start the upgrade.
INFA_HOME	Contains the location of the Informatica installation directory. Clear this variable before you start the upgrade.
INFA_JDK_HOME	Location of the folder containing the supported Java Development Kit (JDK). Set the INFA_JDK_HOME environment variable if you are installing Informatica on AIX, HP-UX, or zLinux. In the configuration file for your shell, for example the .bashrc file, set the INFA_JDK_HOME environment variable to the directory that contains the JDK. Verify that the login shell can access the INFA_JDK_HOME environment variable.
JRE_HOME	If you install the Informatica services on a Linux machine, clear the JRE_HOME environment variable before you start the installation.
LANG and LC_ALL	Change the locale to set the appropriate character encoding for the terminal session. For example, set the encoding to <code>Latin1</code> or <code>ISO-8859-1</code> for French, <code>EUC-JP</code> or <code>Shift JIS</code> for Japanese, or <code>UTF-8</code> for Chinese or Korean. The character encoding determines the types of characters that appear in the UNIX terminal.
DISPLAY	Unset the DISPLAY environment before you run the installer. Installation might fail if the DISPLAY environment variable has some value.
LD_PRELOAD	On HP-UX, the environment variable selects the Data Transformation libjvm shared object of the JRE. Unset the LD_PRELOAD environment variable, if you are upgrading Informatica on HP-UX.
Library path	Verify that the library path environment variables do not contain earlier versions of Informatica.
PATH	The installer appends file paths required by Informatica to the PATH environment variable. Verify that the length of the PATH environment variable does not exceed the system limits. Verify that the PATH environment variables do not contain earlier versions of Informatica.

Set the File Descriptor Limit

Verify that the operating system meets the file descriptor requirement.

Informatica service processes can use a large number of files. Set the file descriptor limit per process to 16,000 or higher. The recommended limit is 32,000 file descriptors per process.

To verify the file descriptor limit, run the following command:

C Shell

```
limit
```

Bash Shell

```
ulimit -a
```

To set the file descriptor limit, run the following command:

C Shell

```
limit -h filesize <value>
```

Bash Shell

```
ulimit -n <value>
```

Review the Maximum Heap Size

Verify that Informatica Services uses the required maximum heap size for the number of users in the domain.

The following table lists the minimum requirement for the maximum heap size settings, based on the number of users and services in the domain:

Number of Domain Users	Maximum Heap Size (1-5 Services)	Maximum Heap Size (6-10 Services)
1,000 or less	512 MB (default)	1024 MB
5,000	2048 MB	3072 MB
10,000	3072 MB	5120 MB
20,000	5120 MB	6144 MB
30,000	5120 MB	6144 MB

Note: The maximum heap size settings in the table are based on the number of application services in the domain.

If the domain has more than 1,000 users, update the maximum heap size based on the number of users in the domain.

1. Extract the installation files.
2. Go to the following directory:<installer files directory>/source/tomcat/bin.
3. Use a text editor to open the infaservice file.
4. Search for the following text: `INFA_JAVA_OPTS=% INFA_JAVA_OPTS% -XX`.
5. Set the value for `-Xmx` to the maximum heap size required for the number of Informatica domain users. For example, to set the maximum heap size to 3072 MB, use the following configuration:

```
set INFA_JAVA_OPTS=% INFA_JAVA_OPTS% -XX:GCTimeRatio=9 -Xmx3072m
```

Extract the Installer Files

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

Use a native tar or GNU tar utility to 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 install.sh.

You can extract the installer files in the following ways:

- Installation DVD. Download the Informatica tar file from the installation DVD to a directory on your machine and then extract the installer files, or extract the installer files directly from the DVD to a directory on your machine.
- FTP download. 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.

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.

Run the Pre-Installation (i10Pi) System Check Tool

Run the Pre-installation (i10Pi) System Check Tool to verify whether the machine meets the system requirements for installation or upgrade.

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 root directory.
The installer displays the message to verify that the locale environment variables are set.
4. If the environment variables are not set, press **n** to exit the installer and set them as required.
If the environment variables are set, press **y** to continue.
5. Press **1** to install or upgrade Informatica.
6. Press **1** to run the Pre-Installation (i10Pi) System Check Tool that verifies whether the machine meets the system requirements for the installation or upgrade.
7. From the Informatica Pre-Installation (i10Pi) System Check Tool **Welcome** section, press **Enter**.
The **System Information** section appears.
8. Type the absolute path for the installation directory.
The directory names in the path must not contain spaces or the following special characters: @|* \$ # ! % () {} [] , ; ' **Note:** Informatica recommends using alphanumeric characters in the installation directory path. If you use a special character such as á or €, unexpected results might occur at run time.
9. Press **Enter**.
10. Enter the starting port number for the node that you will create or upgrade on the machine. The default port number for the node is 6005.
11. Press **Enter**.
The **Database and Connection Information** section appears.
12. To enter the JDBC connection information using a custom JDBC connection string, press **1**. To enter the JDBC connection information using the JDBC URL information, press **2**.

To connect to a secure database, you must enter the JDBC connection using a custom JDBC connection string.

13. Enter the JDBC connection information.

- To enter the connection information using a custom JDBC connection string, type the connection string and specify the connection parameters.

Use the following syntax for the JDBC connection string for the databases:

IBM DB2

```
jdbc:Informatica:db2://host_name:port_no;DatabaseName=
```

Oracle

```
jdbc:Informatica:oracle://host_name:port_no;ServiceName=
```

Microsoft SQL Server

```
jdbc:Informatica:sqlserver://host_name:port_no;SelectMethod=cursor;DatabaseName=
```

Sybase

```
jdbc:Informatica:sybase://host_name:port_no;DatabaseName=
```

Verify that the connection string contains all the connection parameters required by your database system.

- To enter the connection information using the JDBC URL information, specify the JDBC URL properties.

The following table describes the connection information:

Prompt	Description
Database type	Type of database for the domain configuration repository. Select from the following database types: <ul style="list-style-type: none">- 1 - Oracle- 2 - Microsoft SQL Server- 3 - IBM DB2- 4 - Sybase ASE
Database user ID	User ID for the database user account for the domain configuration repository.
Database user password	Password for the database user account.
Database host name	Host name for the database server.
Database port number	Port number for the database.
Database service name	Service name for Oracle and IBM DB2 databases or database name for Microsoft SQL Server and Sybase ASE.

The tool checks the settings of the hard drive, the availability of the ports, and the configuration of the database. After the system check is complete, the **System Check Summary** section displays the results of the system check.

14. Analyze the results of the system check.

Each requirement is listed, along with one of the following check statuses:

- [Pass] - The requirement meets the criteria for the Informatica installation or upgrade.
- [Fail] - The requirement does not meet the criteria for the Informatica installation or upgrade. Resolve the issue before you proceed with the installation or upgrade.
- [Information] - Verify the information and perform any additional tasks as outlined in the details.

The results of the system check are saved to the following file: `.../Server/i10Pi/i10Pi/en/i10Pi_summary.txt`

15. Press **Enter** to close the Pre-Installation (i10Pi) System Check Tool.

You can continue to the Informatica service installation or upgrade immediately or end the system check and continue with the installation or upgrade later. If you continue to the installation or upgrade immediately, you do not have to restart the installer.

16. To continue to the Informatica service installation or upgrade immediately, press **y**.

To end the system check and continue with the installation or upgrade later, press **n**.

If the Pre-Installation (i10Pi) System Check Tool finishes with failed requirements, resolve the failed requirements and run the Pre-Installation (i10Pi) System Check Tool again.

Note: If the Informatica Pre-Installation (i10Pi) System Check Tool check finishes with failed requirements, you can still perform the Informatica installation or upgrade. However, Informatica highly recommends that you resolve the failed requirements before you proceed.

Back Up the Data Transformation Files

Before you upgrade, you must back up the Data Transformation files that were created under previous versions. After you complete the upgrade, copy the files to the new installation directories to get the same custom global components as in the previous version.

The following table lists the files or directories that you must back up:

File or Directory	Default Location
Repository	<Informatica installation directory>\DataTransformation\ServiceDB
Custom Global Components directory (TGP files)	<Informatica installation directory>\DataTransformation\autoInclude\user
Custom Global Components directory (DLL and JAR files)	<Informatica installation directory>\DataTransformation\externLibs\user
Configuration file	<Informatica installation directory>\DataTransformation\CMConfig.xml
License file	<Informatica installation directory>\DataTransformation\CDELICENSE.cfg

Do not copy the Data Transformation Library files. Instead, install the Data Transformation Libraries again.

Prepare the PowerCenter Repository

Before you upgrade the domain, back up the PowerCenter repository.

To back up a PowerCenter repository, select the PowerCenter Repository Service in the Administrator tool. On the Domain actions menu, select **Repository Contents > Back Up**.

Prepare the Model Repository

Before you upgrade the domain, complete the steps to prepare the Model repository.

1. Back up the repository.
2. Verify the database user account requirements.
3. Verify the maximum heap size.

Back Up the Repository

Before you upgrade the domain, back up the Model repository.

To back up each Model repository, select the Model Repository Service in the Administrator tool. Then, on the Domain Actions menu, click **Repository Contents > Backup**.

Verify the Database User Account Requirements

If the Model repository database is on Oracle, set the OPEN_CURSORS parameter to 4000 or higher.

If the Model repository database is on IBM DB2, set the DynamicSections parameter to 3000 or higher.

Verify the Maximum Heap Size Setting

Before you upgrade, verify that the maximum JVM heap size for the Model Repository Service meets the upgrade requirements.

The requirements for the maximum JVM heap size depend on the following platforms on which the Model Repository Service runs:

32-bit Windows

When the Model Repository Service runs on 32-bit Windows, verify that the maximum JVM heap size for the service does not exceed 768 MB.

Effective in version 9.6.0, the default maximum JVM heap size for the Model Repository Service is 768 MB. Previously, the default maximum JVM heap size was 1024 MB. When you upgrade, the upgrade process does not change the heap size for the Model Repository Service. When the Model Repository Service runs on 32-bit Windows, a heap size of 1024 MB can cause memory issues and prevent the service from starting.

All other platforms

If the Model repository is large, increase the maximum JVM heap size to increase performance during the Model repository upgrade process.

If the Model repository is less than 500 MB, the default maximum heap size is sufficient for the upgrade process. If the Model repository is larger than 500 MB, you might want to increase the maximum heap size for the upgrade process. For example, if the Model repository is 1 GB, increase the maximum heap size to 2048 MB. If the Model repository is larger than 1 GB, increase the maximum heap size to 4096.

To change the maximum heap size, select the Model Repository Service in the Administrator tool and select the **Properties** view. Click **Edit** in the **Advanced Properties** section, and then edit the Maximum Heap Size property.

Prepare the Reporting and Dashboards Service

Before you upgrade the domain, prepare the Reporting and Dashboards Service.

Export the Jaspersoft Resources

If you are upgrading Informatica and you have a Reporting and Dashboards Service, export the Jaspersoft repository resources before you upgrade the domain.

Verify that the default_master.properties file contains valid data.

1. Export the Jaspersoft repository resources.

Enter the following command to export the Jaspersoft repository resources:

```
js-ant export -DexportArgs="--roles <role name> --roles-users <user name>
--uris /<Report_Folder_Name> --repository-permissions --report-jobs
--include-access-events" -DdatabaseUser=<username> -DdatabasePass=<password> -
DexportFile=<File_Name>.zip
```

The following table describes the options and arguments in the export command:

Option	Argument	Description
--roles	role name	Comma-separated list of roles that you want to export. If you do not specify a value, all roles are exported.
--roles-users	user name	Comma-separated list of users that you want to export. If you do not specify a value, all roles are exported.
--uris	/folder name	Name of the folder in the repository.
--repository-permissions	-	The permissions associated with the folder that you want to export.
--report-jobs	-	The scheduled jobs associated with the reports that you want to export.
--include-access-events	-	The access events that you want to export.
-DdatabaseUser	username	User account for the database.
-DdatabasePass	password	Password of the database user account.

2. Repeat this process for all report folders that you want to export.

Note: After you export the Jaspersoft repository resources, add the valid database user and password in the default_master.properties file.

Configure the Database User for the Jaspersoft Repository

Before you upgrade, configure the database user for the Jaspersoft repository.

Before you install Jaspersoft and import repository data from the previous JasperReports Server installation, ensure that the data source configured is available for the upgrade process.

1. Ensure that you have exported the Jaspersoft repository resources in the Reporting and Dashboard Service before you upgrade the domain.
2. Disable the Reporting and Dashboard Service.
3. Navigate to the following directory: `<Informatica installation directory>/jasperreports-server/buildomatic`
4. Add the valid database user and password to the default_master.properties file.

Prepare the Profiling Warehouse

Before you upgrade the domain, back up the profiling warehouse.

Use the native database backup option to back up the profiling warehouse.

Back Up the Database

Before you upgrade the domain, back up the profiling warehouse.

Use the native database back up option to back up the profiling warehouse.

Prepare the Reference Data Warehouse

Before you upgrade the domain, back up the reference data warehouse.

Use the native database back up option to back up the reference data warehouse.

Prepare the Reference Data Directories

Before you upgrade PowerCenter, verify the location of any reference data directory in the PowerCenter directory structure.

By default, the upgrade operation preserves the contents of the following reference data directories:

- `Informatica_installation_directory>/services/DQContent/INFA_Content/dictionaries/`
Parent directory for the dictionary files.
- `<Informatica_installation_directory>/services/DQContent/INFA_Content/av/`

Parent directory for the address reference data files.

- `<Informatica_installation_directory>/services/DQContent/INFA_Content/identity/`
Parent directory for the identity population data files.

If you install or copy reference data files to a non-default directory in the PowerCenter directory structure, back up the directory before you upgrade. Take a note of the directory location, so that you can restore the directory to the PowerCenter directory structure after you upgrade. If you install or copy reference data files to a directory outside the PowerCenter directory structure, you do not need to back up the directory.

You can use configuration files and environment variables to identify the reference data directories. Use the `INFA_CONTENT` environment variable to specify the parent directory for the dictionary files. Use the `AD50.cfg` file to specify the parent directory for the address reference data files. Use the `IDQTx.cfg` file to specify the parent directory for the identity population data files. Follow the post-upgrade steps to verify the contents of any configuration file or any environment variable that you set.

Prepare the Staging Database

Before you upgrade the domain, back up the staging database.

Use the native database back up option to back up the staging database.

Prepare the Human Task Database

Before you upgrade the domain, back up the Human task database.

Use the native database back up option to back up the Human task database.

Verify that any workflow that reads or writes to the database is complete before you upgrade.

Prepare Metadata Manager

Before you upgrade the domain, prepare Metadata Manager.

1. Back up the Metadata Manager warehouse.
2. Export and delete business glossaries.
3. Disable the Metadata Manager Service.
4. Back up the Metadata Manager properties file.

Back Up the Metadata Manager Warehouse

Before you upgrade the domain, back up the Metadata Manager warehouse.

Use the native database backup option or the Metadata Manager `backupCmdLine` command line program to back up the Metadata Manager warehouse.

backupCmdLine includes commands to back up and restore the Metadata Manager warehouse.
backupCmdLine is in the following directory:

```
<Informatica services installation directory>\services\MetadataManagerService\utilities  
\mmBackupUtil
```

To back up the Metadata Manager warehouse with backupCmdLine, use the following syntax:

```
backupCmdLine.(bat | sh) backup <DBType> "<JDBCCConnectionString>" <DBUserName>  
<DBPassword> <FileName.bkp>
```

Export and Delete Business Glossaries

Effective in version 9.6.0, business glossary functionality was moved from Metadata Manager to the Analyst tool. Before you upgrade the domain, you must export and delete business glossaries from Metadata Manager. You use the Metadata Manager glossary export files to create corresponding business glossaries in the Analyst tool after upgrade.

Tip: Before you export business glossaries from Metadata Manager, check the business glossary model for unused custom attributes. Similarly, check the glossaries for unused business terms and categories. Remove these objects before you start the business glossary migration process so that unused objects are not migrated to the Analyst tool glossaries.

To export and delete business glossaries from Metadata Manager, perform the following tasks:

1. Back up linking rules and enumerated links files.

If the business glossaries that you want to upgrade use linking rules or enumerated links to establish data lineage, back up the linking rules and enumerated links files. After you re-create the business glossaries in the Analyst tool, you use these files to create lineage links for the corresponding business glossary resources in Metadata Manager.

Note: This step is required when any Metadata Manager business glossary uses linking rules or enumerated links files. If the Metadata Manager business glossaries do not use linking rules or enumerated links files, you can skip this step.

2. Export the Business Glossary model.

The Analyst tool uses the model export XML file to create properties that you can add to the business term template.

Note: This step is required if custom attributes were added to the business glossary model. If no custom attributes were added to the model, you can skip this step.

3. Export each business glossary to a Microsoft Excel file.

Export each business glossary that you want to upgrade. After upgrade, you import these files into the Analyst tool to re-create the glossaries in the Analyst tool.

4. Update each Microsoft Excel file.

Update each exported Microsoft Excel file so that it conforms to the Analyst tool glossary import file format.

5. Purge and delete business glossaries.

You must purge and delete the glossaries from Metadata Manager before you upgrade. If you do not do this, the glossaries remain in the Metadata Manager repository as read-only resources that you cannot edit or synchronize with the Analyst tool.

After you upgrade, you import each Microsoft Excel business glossary file into the Analyst tool. Instructions for importing the glossaries appear in the "After You Upgrade" chapter.

Step 1. Back Up Linking Rules and Enumerated Links Files

If the business glossaries that you are upgrading use linking rules or enumerated links files, back up the files before you upgrade the domain. When you create business glossary resources in Metadata Manager after upgrade, you need these files to re-establish lineage links between business terms and metadata objects in other resources.

Note: If the Metadata Manager business glossaries do not use linking rules files or enumerated links files, you can skip this step.

To determine whether business glossaries use linking rules files or enumerated links files, check the glossary properties on the **Load** tab.

1. In Metadata Manager, click the **Load** tab.

2. Select a business glossary.

The business glossary properties appear in the Properties panel.

3. Click the **Enumerated Links** tab.

Locate and back up all files listed on this tab.

If you uploaded the files instead of adding them, the Metadata Manager Service uploads the files into the following directory:

```
<Metadata Manager file location directory>\mm_load\data_files\<resource ID>
```

4. Click the **Linking Rules** tab.

If linking rules appear on this tab, locate and back up the files used to create the linking rules.

The Metadata Manager Service uploads the files into the following directory:

```
<Metadata Manager file location directory>\mm_load\data_files\<resource ID>
```

Step 2. Export the Business Glossary Model

If custom attributes were added to the business glossary model, export the Business Glossary model. The Analyst tool uses the model export XML file to create properties that you can add to the business term template.

Because Metadata Manager contains one model for all business glossaries, you perform this step one time.

Note: If no custom attributes were added to the business glossary model, you can skip this step.

The Analyst tool extracts attributes for business terms, including attributes in custom classes. It creates a property for each attribute that does not exist in the business term template by default. It does not extract custom attributes or usage context for categories.

For example, the business glossary that you export from Metadata Manager contains a custom attribute called "Citation ID." This attribute does not exist by default in the Analyst tool business term template. When you import the model export XML file into the Analyst tool after upgrade, the Analyst tool extracts the "Citation ID" attribute from the model export file. It creates a business term template property called "Citation ID" that you can add to the business term template.

1. In Metadata Manager, click the **Model** tab.

2. Select **Actions > Export Models**.

The **Export Model** dialog box appears.

3. In the **Available Models** list, select the Business Glossary model, and click **Add**.

You do not have to include the rule set definitions.

4. Click **Export**.

The options to save the model export XML file depend on the browser.

Object Missing

This object is not available in the repository.

Step 4. Update Microsoft Excel Files

After you export business glossaries to Microsoft Excel files, edit each Microsoft Excel file and add a worksheet that contains the Metadata Manager Service name. You must perform this step for each Microsoft Excel file that you exported from Metadata Manager.

The Analyst tool uses the Metadata Manager Service name to create an internal ID for the business glossary that it uses for asset linking. If you do not specify the Metadata Manager Service name, then when you view a business term in the Analyst tool, any related assets that are Metadata Manager catalog objects do not appear as links.

If you do not add the worksheet to the Excel file, the Analyst tool sets the Metadata Manager Service name to "MM."

1. Open the Microsoft Excel file.
2. Create a worksheet called `MMServiceName`.
3. In cell A1 of the `MMServiceName` worksheet, enter the name of the Metadata Manager Service in the upgraded domain.
4. Save the file.

Step 5. Purge and Delete Business Glossaries

Purge business glossary metadata and delete business glossaries from the Metadata Manager repository before you upgrade. You must purge and delete all business glossaries.

Warning: If you do not purge and delete business glossaries, the business glossaries remain in the Metadata Manager repository. You can view the business glossaries, but you cannot perform the following tasks:

- Add categories or terms.
- Export or email glossary metadata.
- Synchronize the glossaries with Analyst tool business glossaries because the internal IDs for the previous and upgraded glossaries are different.
- Select a category or business term and open the corresponding Analyst tool business glossary from within Metadata Manager.

Further, if the old glossaries use custom attributes, the upgraded glossaries will not conform to the upgraded business glossary model, which can cause load failures. You cannot delete and re-import the model after upgrade.

1. In Metadata Manager, click the **Load** tab.
2. Select the business glossary resource for which you want to purge metadata.
3. Click **Actions > Purge Resource Metadata**.

Metadata Manager purges the metadata from the Metadata Manager warehouse and displays the result of the purge operation in the **Resources** panel.

4. Click **Actions > Delete Resource**.

Metadata Manager deletes the business glossary.

Back Up the Metadata Manager Properties File

Before you upgrade the domain, back up the Metadata Manager properties file.

The imm.properties file is in the following directory:

```
<Informatica installation directory>\services\shared\jars\pc\classes
```

Prepare Data Analyzer

Before you upgrade the domain, prepare the Data Analyzer repository.

1. Assign roles to users and groups.
2. Back up the Data Analyzer repository.

Assign Roles to Users and Groups

Create roles for Reporting Service privileges and assign the roles to users and groups. If you do not use roles to assign Reporting Service privileges, users and groups lose privilege assignments after you upgrade.

Back Up the Repository

Back up each Data Analyzer repository.

To back up each Data Analyzer repository, select the service in the Administrator tool. Then, on the Domain Actions menu, click **Repository Contents > Backup**.

Prepare the Domain

Before you upgrade the domain, complete the steps to prepare the domain.

Rename the Administrator Group

The Informatica domain version 9.6.0 and later includes an Administrator group with default administrator privileges.

In version 9.6.0 or later, the Administrator group has administrator permissions and privileges on the domain and all application services. All users in the Administrator group have the same permissions and privileges as the default administrator created during installation.

When you upgrade a domain that contains a group named Administrator, the upgrade process assigns the group default administrator privileges. The privileges assigned to the group in the previous release are removed.

If you do not want the Administrator group to have the default Administrator group privileges after you upgrade, perform the following tasks:

1. Log in to the Administrator tool.
2. Create another group and assign the privileges of the Administrator group to the new group.

3. Move users in the Administrator group who must not have the default administrator privileges to the new group.

Verify Database User Account Requirements

Perform the following tasks for the domain configuration repository database:

- Set the OPEN_CURSORS parameter to 4000 or higher.
- Set permissions on the view `$parameter` in the Oracle database.
- Set the privileges to run `show parameter open_cursors` in the Oracle database.
When you run the pre-installation (i10Pi) system check tool, i10Pi runs the command against the database to identify the OPEN_CURSORS parameter with the domain database user credentials.

You can run the following query to determine the open cursors setting for the domain database user account:

```
SELECT VALUE OPEN_CURSORS FROM V$PARAMETER WHERE UPPER(NAME)=UPPER('OPEN_CURSORS')
```

- Set the DynamicSections parameter to 3000 or higher in the IBM DB2 database.
For more information about updating the DynamicSections parameter, see [Appendix A, "Updating the DynamicSections Parameter of a DB2 Database" on page 94](#).

Shut Down the Domain

You must shut down the domain before you back up domain and then upgrade the domain.

To shut down the domain, stop the Informatica service process on each node in the domain.

You can stop the Informatica service process on each node using one of the following methods:

- To stop Informatica from the Windows Start menu, click **Programs > Informatica[Version] > Server > Stop Informatica Services**.
- To stop Informatica on UNIX, you use the `infaservice` command. By default, the `infaservice` executable file is installed in the following directory:

```
<Informatica installation directory>/tomcat/bin
```

Enter the following command to stop the daemon:

```
infaservice shutdown
```

You can also stop the Informatica service from the Windows control panel or from the Administrator tool.

Back Up the Domain

Before you upgrade the domain, you must back up the configuration metadata for the domain.

Complete the following steps to back up the domain:

- Run the `infasetup BackupDomain` command to back up the domain configuration database tables to a file.
- Back up the metadata configuration files to any directory accessible by the machines where you install Informatica.

Informatica `infasetup` includes command line programs to back up and restore the domain. `infasetup` is located in the following directory:

```
<Informatica installation directory>/server
```

To back up the domain with `infasetup`, use the following syntax:

```
BackupDomain  
<<-DatabaseAddress|-da> database_hostname:database_port|
```



```

<-DatabaseConnectionString|-cs> database_connection_string>

<-DatabaseUserName|-du> database_user_name

<-DatabasePassword|-dp> database_password

<-DatabaseType|-dt> database_type

[<-DatabaseServiceName|-ds> database_service_name]

<-BackupFile|-bf> backup_file_name

[<-Force|-f>]

<-DomainName|-dn> domain_name

[<-Tablespace|-ts> tablespace_name (used for IBM DB2 only)]

[<-SchemaName|-sc> schema_name (used for Microsoft SQL Server only)]

[<-DatabaseTlsEnabled|-dbtls> database_tls_enabled]

[<-DatabaseTruststorePassword|-dbtp> database_truststore_password]

[<-TrustedConnection|-tc> trusted_connection (used for Microsoft SQL Server only)]

[<-EncryptionKeyLocation|-kl> encryption_key_location]

```

Back up the metadata configuration files to any directory accessible by the machines where you install Informatica. The following table describes the metadata files and the locations where you can find them:

Metadata File	Description	Location
nodemeta.xml	Contains metadata for a node.	Stored in the isp/config directory on each node in the domain. If you use the same backup directory name on all the nodes, rename nodemeta.xml before copying it to the backup location. For example, you back up nodemeta.xml to the /nodebak directory on nodeA and nodeB. Rename the configuration files so that on nodeA the file is backed up to /nodebak/nodemeta_A.xml, and on nodeB the file is backed up to /nodebak/nodemeta_B.xml.
domains.infa	Contains connectivity information for the gateway nodes.	Stored in one of the following locations: <ul style="list-style-type: none"> - The Informatica installation directory on the client and server machines. - The location configured through the INFA_DOMAINS_FILE environment variable.

Prepare to Change the Node Configuration

Before you upgrade the domain with changes to the node configuration, you must perform steps to prepare for the upgrade.

The steps that you perform depend on the kind of change that you plan to make to the node configuration. You can migrate the domain configuration repository to a different database. Or, you can migrate the Informatica services installation to a different machine.

Migrating to a Different Database

If the domain configuration repository database type or version is no longer supported, you must migrate the repository to a different database. Migrate the repository in the previous Informatica instance before you upgrade the domain.

For example, if the domain configuration repository is in a Sybase ASE 15.0.3 database, migrate the repository to a Sybase ASE 15.7 database.

For more information about product requirements and supported platforms, see the Product Availability Matrix on the Informatica My Support Portal:

<https://mysupport.informatica.com/community/my-support/product-availability-matrices>

1. Verify that you have shut down the domain.
2. Verify that you have backed up the domain configuration database tables to a file with the `infasetup BackupDomain` command.
3. Create a database schema and a user account in a supported database.
4. Restore the domain configuration in the backup file to the specified database schema with the `infasetup RestoreDomain` command.
5. When you upgrade a gateway node, select the **Allow changes to the node host name and port number** option. When you select this option, you can configure the gateway node to connect to the new domain configuration repository database. All gateway nodes must have a connection to the domain configuration repository to retrieve and update domain configuration. When you upgrade a worker node, clear the **Allow changes to the node host name and port number** option.

Migrating the Installation to a Different Machine

If the Informatica services are installed on a machine with an operating system that is no longer supported, you must migrate the installation to a different machine before you upgrade the domain.

For example, effective in 9.6.0, Informatica dropped support for 32-bit Linux. If any node in a 9.5.1 domain is on 32-bit Linux, you must migrate the node to a machine with a supported operating system before upgrading the node to 10.0.

For more information about product requirements and supported platforms, see the Product Availability Matrix on the Informatica My Support Portal:

<https://mysupport.informatica.com/community/my-support/product-availability-matrices>

Before you upgrade the domain, complete the following steps on the machine where you want the new version of Informatica to run:

1. Copy the installation directory.
2. Verify port requirements.
3. Create a system user account.
4. If you plan to run the Data Integration Service, PowerCenter Repository Service, or PowerCenter Integration Service on the new machine, configure native connectivity on the new machine so that these services can connect to databases.

When you upgrade the migrated node, select the **Allow changes to the node host name and port number** option. When you select this option, you can update the configuration of the node on the new machine. When you upgrade other nodes in the domain that you did not migrate to different machines, clear the **Allow changes to the node host name and port number** option.

Copy the Installation Directory

Copy the directory of the previous version of Informatica to the machine where you want the new version of Informatica to run.

For example, if the previous version of Informatica is installed in `C:\Informatica\9.5.1`, copy the `C:\Informatica\9.5.1` directory and subdirectories to the new machine.

When you run the upgrade installer, specify the Informatica installation directory on the new machine as the one that you want to upgrade.

Verify Port Requirements

The installer sets up the ports for components in the Informatica domain, and it designates a range of dynamic ports to use for some application services.

You can specify the port numbers to use for the components and a range of dynamic port numbers to use for the application services. Or you can use the default port numbers provided by the installer. Verify that the port numbers are available on the machines where you install the Informatica services.

The following table describes the ports used by Informatica:

Port Type	Description
Node port	Port number for the node created during installation. Default is 6005.
Service Manager port	Port number used by the Service Manager on the node. The Service Manager listens for incoming connection requests on this port. Client applications use this port to communicate with the services in the domain. This is the port that the Informatica command line programs use to communicate to the domain. This is also the port for the SQL data service JDBC/ODBC driver. Default is 6006.
Service Manager shutdown port	Port number that controls server shutdown for the domain Service Manager. The Service Manager listens for shutdown commands on this port. Default is 6007.
Informatica Administrator port	Port number used by Informatica Administrator. Default is 6008.
Informatica Administrator shutdown port	Port number that controls server shutdown for Informatica Administrator. Informatica Administrator listens for shutdown commands on this port. Default is 6009.

Port Type	Description
Range of dynamic ports for application services	<p>Range of port numbers that can be dynamically assigned to application service processes as they start up. When you start an application service that uses a dynamic port, the Service Manager dynamically assigns the first available port in this range to the service process. At a minimum, the number of ports in the range must be at least twice the number of application service processes that will run on the node. Default is 6014 to 6114.</p> <p>The Service Manager dynamically assigns port numbers from this range to the following application services:</p> <ul style="list-style-type: none"> - Model Repository Service - PowerCenter Integration Service - PowerCenter Repository Service <p>The Service Manager also assigns port numbers from this range to the system services.</p>
Static ports for application services	<p>Static ports are ports that are assigned dedicated port numbers that do not change. When you create the application service, you can accept the default port number, or you can manually assign the port number.</p> <p>The following services use static port numbers:</p> <ul style="list-style-type: none"> - Analyst Service. Default is 8085 for HTTP. - Content Management Service. Default is 8105 for HTTP. - Data Integration Service. Default is 8095 for HTTP. - Metadata Manager Service. Default is 10250 for HTTP. - Reporting and Dashboards Service. Default is 10370 for HTTP. - Reporting Service. Default is 16080 for HTTP. - Search Service. Default is 8084 for HTTP. - Web Services Hub. Default is 7333 for HTTP.

Note: Services and nodes can fail to start if there is a port conflict. You can update the range of ports for application services after you upgrade.

Create a System User Account on Windows

Create a system user account to perform the installation and to run the Informatica service. Verify that the user account that you use to install the Informatica services has write permission on the installation directory.

You can install Informatica with the user account logged in to the machine and run it under another user account. You can create a local account or a domain account to install Informatica or run the Informatica Windows service.

Note: To access a repository on Microsoft SQL Server that uses a Windows trusted connection, create a domain account.

The user accounts require the following permissions to run the installer or to run the Informatica Windows service:

- **Logged in user account.** The user account must be a member of the Administrators group and have the *Log on as a service* permission. Log in with this user account before you install Informatica.
- **Another user account.** The user account must be a member of the Administrators group and have Log on as a service and Act as operating system permissions. You do not have to log in with this user account before you install Informatica. During installation, you can specify the user account to run the Informatica Windows service.

Create a System User Account on UNIX

Create a user account specifically to run the Informatica daemon.

Verify that the user account you use to install Informatica has write permission on the installation directory.

Configure Native Connectivity on Service Machines

To establish native connectivity between an application service and a database, install the database client software for the database that you want to access.

Native drivers are packaged with the database server and client software. Configure connectivity on the machines that need to access the databases. To ensure compatibility between the application service and the database, install a client software that is compatible with the database version and use the appropriate database client libraries.

The following services use native connectivity to connect to different databases:

Data Integration Service

The Data Integration Service uses native database drivers to connect to the following databases:

- Source and target databases. Reads data from source databases and writes data to target databases.
- Data object cache database. Stores the data object cache.
- Profiling source databases. Reads from relational source databases to run profiles against the sources.
- Profiling warehouse. Writes the profiling results to the profiling warehouse.
- Reference tables. Runs mappings to transfer data between the reference tables and the external data sources.

When the Data Integration Service runs on a single node or on primary and back-up nodes, install database client software and configure connectivity on the machines where the Data Integration Service runs.

When the Data Integration Service runs on a grid, install database client software and configure connectivity on each machine that represents a node with the compute role or a node with both the service and compute roles.

PowerCenter Repository Service

The PowerCenter Repository Service uses native database drivers to connect to the PowerCenter repository database.

Install database client software and configure connectivity on the machines where the PowerCenter Repository Service and the PowerCenter Repository Service processes run.

PowerCenter Integration Service

The PowerCenter Integration Service uses native database drivers to connect to the following databases:

- Source and target databases. Reads from the source databases and writes to the target databases.
- Metadata Manager source databases. Loads the relational data sources in Metadata Manager.

Install database client software associated with the relational data sources and the repository databases on the machines where the PowerCenter Integration Service runs.

Install Database Client Software

You must install the database clients on the required machines based on the types of databases that the application services access.

To ensure compatibility between the application service and the database, use the appropriate database client libraries and install a client software that is compatible with the database version.

When you upgrade Informatica services on Windows, ensure that you install the appropriate database client on the machine that runs the Data Integration Service, PowerCenter Integration Service, and PowerCenter Repository Service.

Install the following database client software based on the type of database that the application service accesses:

IBM DB2 Client Application Enabler (CAE)

Configure connectivity on the required machines by logging in to the machine as the user who starts Informatica services.

Microsoft SQL Server 2012 Native Client

You must install the Microsoft SQL Server 2012 Native Client for the existing mappings to work.

Download the client from the following Microsoft website:

<http://www.microsoft.com/en-in/download/details.aspx?id=29065>.

Oracle client

Install compatible versions of the Oracle client and Oracle database server. You must also install the same version of the Oracle client on all machines that require it. To verify compatibility, contact Oracle.

Sybase Open Client (OCS)

Install an Open Client version that is compatible with the Sybase ASE database server. You must also install the same version of Open Client on the machines hosting the Sybase ASE database and Informatica. To verify compatibility, contact Sybase.

Configure Database Client Environment Variables on UNIX

Configure database client environment variables on the machines that run the Data Integration Service, PowerCenter Integration Service, and PowerCenter Repository Service processes.

The database client path variable name and requirements depend on the UNIX platform and the database.

After you configure the database environment variables, you can test the connection to the database from the database client.

The following table lists the database environment variables you need to set in UNIX:

Database	Environment Variable Name	Database Utility	Value
Oracle	ORACLE_HOME PATH	sqlplus	Set to: <DatabasePath> Add: <DatabasePath>/bin
IBM DB2	DB2DIR DB2INSTANCE PATH	db2connect	Set to: <DatabasePath> Set to: <DB2InstanceName> Add: <DatabasePath>/bin
Sybase ASE	SYBASE15 SYBASE_ASE SYBASE_OCS PATH	isql	Set to: <DatabasePath>/sybase<version> Set to: \${SYBASE15}/ASE-<version> Set to: \${SYBASE15}/OCS-<version> Add: \${SYBASE_ASE}/bin:\${SYBASE_OCS}/bin:\$PATH

CHAPTER 3

Upgrade the Domain

This chapter includes the following topics:

- [Domain Upgrade Overview, 48](#)
- [Upgrading in Graphical Mode, 48](#)
- [Upgrading in Console Mode, 53](#)
- [Upgrading in Silent Mode, 55](#)
- [Troubleshooting the Domain Upgrade, 58](#)

Domain Upgrade Overview

Use the server installer to upgrade the domain of a previous version of Informatica services. The server installer provides a domain upgrade wizard to guide you through the upgrade process.

The upgrade wizard installs Informatica 10.0 in the installation directory you specify. It does not modify the files in the directory of the previous version.

The upgrade wizard reads the domain information from files in the previous version and uses the same settings to configure the domain and server files for Informatica 10.0. It upgrades the tables of the domain configuration repository in the same database as the previous version.

Complete the pre-upgrade tasks before you start the upgrade. Run the installer on all machines that host previous versions of Informatica that you want to upgrade. On Windows, you can upgrade in graphical or silent mode. On UNIX, you can upgrade in console or silent mode.

Note: In a multi-node domain, upgrade the master gateway node before you upgrade other nodes.

You can perform the upgrade from a DVD or from the root of the directory where you download the installation files.

After you upgrade the domain, upgrade Informatica Developer to the same Informatica version, including the hotfix version.

Upgrading in Graphical Mode

You can upgrade in graphical mode to upgrade the domain on the same machine and on the same domain configuration repository database. You can upgrade the domain in graphical mode on Windows.

To upgrade the domain to a different machine or to a different domain configuration repository database and change the node configuration, see [GUID-21D7767A-C22D-4684-80F2-DCA8554E3184#GUID-21D7767A-C22D-4684-80F2-DCA8554E3184](#).

On Windows, if you encounter problems when you run the install.bat file from the root directory, run the following file:

```
<Informatica installation directory>/server/install.exe
```

1. Log in to the machine with the same user account that you used to install the previous version.
2. Stop all processes that access the directory and subdirectories of the Informatica product to upgrade, including command prompts and tail logs.
3. Go to the root of the directory for the installation files and run install.bat as administrator.

To run the file as administrator, right-click the install.bat file and select **Run as administrator**.

Note: If you do not run the installer as administrator, the Windows system administrator might encounter issues when accessing files in the Informatica installation directory.

The **Informatica 10.0** page appears.

4. Select **Install or upgrade to Informatica 10.0**.

Informatica provides utilities to facilitate the Informatica services installation process. You can run the following utility before you upgrade Informatica services:

Pre-Installation (i10Pi) System Check Tool.

Verifies whether the machine on which you are installing Informatica services meets the system requirements for installation. For more information about running the Pre-Installation (i10Pi) System Check Tool, see [“Run the Pre-Installation \(i10Pi\) System Check Tool” on page 22](#).

5. Read the terms and conditions of Informatica product usage toolkit and select **I agree to the terms and conditions**.

Informatica DiscoveryIQ is a product usage tool that sends routine reports on data usage and system statistics to Informatica. Informatica DiscoveryIQ uploads data to Informatica 15 minutes after you install and configure Informatica domain. Thereafter, the domain sends the data every 30 days. You can choose to not send any usage statistics to Informatica. For more information on how to disable sending usage statistics, see the *Informatica Administrator Guide*.

6. Click **Start**.
7. Select **Upgrade to Informatica <Version>**.

The **Upgrade Pre-Requisites** page displays the upgrade system requirements.

8. Verify the requirements before you continue the upgrade.
9. Click **Next**.
10. On the **Upgrade Directory** page, enter the directory of the Informatica version you want to upgrade and the directory in which you want to install Informatica 10.0.

The following table describes the directories that you must specify:

Directory	Description
Directory of the Informatica product to upgrade	Directory that contains the version of Informatica services that you want to upgrade.
Directory for Informatica 10.0	<p>Directory in which to install Informatica 10.0.</p> <p>Enter the absolute path for the installation directory. The directory cannot be the same as the directory that contains the previous version of Informatica services. The directory names in the path must not contain spaces or the following special characters: @ * \$ # ! % () { } [] , ; '.</p> <p>Note: Informatica recommends using alphanumeric characters in the installation directory path. If you use a special character such as á or €, unexpected results might occur at run time.</p> <p>On Windows, the installation directory must be on the current machine.</p>

11. To run the pre-upgrade check process to identify if there are any potential issues with the upgrade, select the **Enable pre-upgrade checks** option.
12. Verify that the **Allow changes to the node host name and port numbers** option is not selected.
13. Click **Next**.
The upgrade wizard displays a warning to shut down the Informatica domain before you continue the upgrade.
14. Click **OK**.
15. Enter the keyword and directory for the encryption key for the Informatica domain.
Informatica uses an encryption key to secure sensitive data, such as passwords, that are stored in the Informatica domain. When you upgrade a domain with a single node, you must specify a keyword to use to create an encryption key for the domain.
When you upgrade a domain with multiple nodes, the installer determines the type of node you are upgrading and displays a different screen based on the type of node. When you upgrade the master gateway node, you must specify a keyword to create an encryption key for the domain. When you

subsequently upgrade other nodes, you must specify the encryption key created for the domain when you upgraded the master gateway node.

- The following table describes the encryption key parameters that you specify when you upgrade a domain with a single node or when you upgrade the master gateway node of a multinode domain:

Property	Description
Keyword	Keyword to use to create a custom encryption key to secure sensitive data in the domain. The keyword must meet the following criteria: <ul style="list-style-type: none">- From 8 to 20 characters long- Includes at least one uppercase letter- Includes at least one lowercase letter- Includes at least one number- Does not contain spaces The encryption key is created based on the keyword that you provide when you create the Informatica domain.
Encryption key directory	Directory in which to store the encryption key on the master gateway node.

- The following table describes the encryption key parameters that you specify when you upgrade a node other than the master gateway node:

Property	Description
Select the encryption key	Path and file name of the encryption key for the Informatica domain of the node that you are upgrading. If you copied the encryption key file to a temporary directory to make it accessible to the nodes in the domain, specify the path and file name of the encryption key file in the temporary directory.
Encryption key directory	Directory in which to store the encryption key on the node that you are upgrading.

Note: All nodes in an Informatica domain use the same keyword and encryption key. You must keep the name of the domain, the keyword for the encryption key, and the encryption key file in a secure location. The encryption key is required when you change the encryption key of the domain or move a repository to another domain. If you do not have the encryption key, you must have the domain name and the keyword used to generate the encryption key.

16. Click **Next**.
17. On the **Pre-Installation Summary** page, review the upgrade information, and click **Install** to continue. The upgrade wizard installs the Informatica server files to the Informatica 10.0 installation directory.
18. If you are upgrading a gateway node, the upgrade wizard displays the database and user account information for the domain configuration repository to be upgraded.
If you are upgrading a worker node, the upgrade wizard does not display the domain configuration repository information. You cannot modify the database connection information.

The following table describes the properties that the installer displays for the domain configuration repository:

Property	Description
Database type	Database for the domain configuration repository.
Database user ID	Database user account for the domain configuration repository.
User password	Password for the database user account.

The upgrade wizard displays the database connection string for the domain configuration repository based on how the connection string of the previous version was created at installation:

- If the previous version used a JDBC URL at installation, the upgrade wizard displays the JDBC connection properties, including the database address and service name.
Optionally, you can specify additional JDBC parameters to include in the JDBC URL. To provide additional JDBC parameters, select JDBC parameters and enter a valid JDBC parameter string.
- If the previous version used a custom JDBC connection string at installation, the upgrade wizard displays the custom connection string.

You cannot specify additional JDBC parameters.

19. Click **Test Connection** to verify that you can connect to the database, and then click **OK** to continue.
20. Click **Next**.

On Windows, the upgrade wizard creates a service to start Informatica. By default, the service runs under the same user account as the account used for installation. You can run the Windows service under a different user account.

21. Select whether to run the Windows service under a different user account.

The following table describes the properties that you set:

Property	Description
Run Informatica under a different user account	Indicates whether to run the Windows service under a different user account.
User name	User account with which to run the Informatica Windows service. Use the following format: <code>DomainName\UserAccount</code> This user account must have the Act as operating system permission.
Password	Password for the user account with which to run the Informatica Windows service.

22. Click **Done**.

You can view the upgrade log files to get more information about the tasks performed by the upgrade wizard and to view the configuration of installed components.

Upgrading in Console Mode

You can upgrade in console mode to upgrade the domain on the same machine and on the same domain configuration repository database. You can upgrade the domain in console mode on UNIX.

To upgrade the domain to a different machine or to a different domain configuration repository database and change the node configuration, see [GUID-21D7767A-C22D-4684-80F2-DCA8554E3184#GUID-21D7767A-C22D-4684-80F2-DCA8554E3184](#).

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

1. Log in to the machine with the same user account that you used to install the previous version.
2. Stop all processes that access the directory and subdirectories of the Informatica product to upgrade, including command prompts and tail logs.
3. On a shell command line, run the install.sh file from the root directory.

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

4. If the environment variables are not set, press **n** to exit the installer and set them as required.
If the environment variables are set, press **y** to continue.
5. Press **1** to install or upgrade Informatica.

Informatica provides utilities to facilitate the Informatica services installation process. You can run the following utility before you upgrade Informatica services:

Pre-Installation (i10Pi) System Check Tool.

Verifies whether the machine on which you are installing Informatica services meets the system requirements for installation. For more information about the Pre-Installation (i10Pi) System Check tool, see ["Run the Pre-Installation \(i10Pi\) System Check Tool" on page 29](#).

6. Press **3** to run the Informatica services installation.
7. Press **y** to continue the installation.
8. Press **2** to upgrade to Informatica 10.0.
9. Read the terms and conditions of Informatica product usage toolkit and press **2** to continue the upgrade.
Informatica DiscoveryIQ is a product usage tool that sends routine reports on data usage and system statistics to Informatica. Informatica DiscoveryIQ uploads data to Informatica 15 minutes after you install and configure Informatica domain. Thereafter, the domain sends the data every 30 days. You can choose to not send any usage statistics to Informatica. For more information on how to disable sending usage statistics, see the *Informatica Administrator Guide*.
10. Press **Enter**.
11. At the prompt, enter the directory of the Informatica version you want to upgrade and the directory in which you want to install Informatica 10.0.

The following table describes the directories you must specify:

Directory	Description
Directory of the Informatica product to upgrade	Directory that contains the version of Informatica services that you want to upgrade.
Directory for Informatica 10.0	<p>Directory in which to install Informatica 10.0.</p> <p>Enter the absolute path for the installation directory. The directory cannot be the same as the directory that contains the previous version of Informatica services. The directory names in the path must not contain spaces or the following special characters: @ * \$ # ! % () { } [] , ; '.</p> <p>Note: Informatica recommends using alphanumeric characters in the installation directory path. If you use a special character such as á or €, unexpected results might occur at run time.</p> <p>On Windows, the installation directory must be on the current machine.</p>

12. To run the pre-upgrade check process to identify if there are any potential issues with the upgrade, select the **Enable pre-upgrade checks** option.

13. Enter **1** to use the same node configuration as the previous version.

The installer displays a warning to shut down the Informatica domain that you want to upgrade before you continue the upgrade.

14. Press **Enter**.

15. Enter the keyword and directory for the encryption key for the Informatica domain.

Informatica uses an encryption key to secure sensitive data, such as passwords, that are stored in the Informatica domain. When you upgrade a domain with a single node, you must specify a keyword to use to create an encryption key for the domain.

When you upgrade a domain with multiple nodes, the installer determines the type of node you are upgrading and displays a different screen based on the type of node. When you upgrade the master gateway node, you must specify a keyword to create an encryption key for the domain. When you subsequently upgrade other nodes, you must specify the encryption key created for the domain when you upgraded the master gateway node.

- The following table describes the encryption key parameters that you specify when you upgrade a domain with a single node or when you upgrade the master gateway node of a multinode domain:

Property	Description
Keyword	<p>Keyword to use to create a custom encryption key to secure sensitive data in the domain. The keyword must meet the following criteria:</p> <ul style="list-style-type: none"> - From 8 to 20 characters long - Includes at least one uppercase letter - Includes at least one lowercase letter - Includes at least one number - Does not contain spaces <p>The encryption key is created based on the keyword that you provide when you create the Informatica domain.</p>
Encryption key directory	Directory in which to store the encryption key on the master gateway node.

- The following table describes the encryption key parameters that you specify when you upgrade a node other than the master gateway node:

Property	Description
Select the encryption key	Path and file name of the encryption key for the Informatica domain of the node that you are upgrading. If you copied the encryption key file to a temporary directory to make it accessible to the nodes in the domain, specify the path and file name of the encryption key file in the temporary directory.
Encryption key directory	Directory in which to store the encryption key on the node that you are upgrading.

Note: All nodes in an Informatica domain use the same keyword and encryption key. You must keep the name of the domain, the keyword for the encryption key, and the encryption key file in a secure location. The encryption key is required when you change the encryption key of the domain or move a repository to another domain. If you do not have the encryption key, you must have the domain name and the keyword used to generate the encryption key.

16. Review the upgrade information and press **Enter** to continue.

The installer copies the server files to the Informatica 10.0 installation directory.

The installer displays the database and user account information for the domain configuration repository to upgrade. It displays the database connection string for the domain configuration repository based on how the connection string of the previous version was created at installation:

- If the previous version used a JDBC URL at installation, the installer displays the JDBC connection properties, including the database address and service name.
- If the previous version used a custom JDBC connection string at installation, the installer displays the custom connection string.

17. Press **Enter**.

18. If you use a JDBC URL, you can specify additional parameters to include in the connection string.

If you use a custom connection string, you cannot specify additional parameters.

The Post-Installation Summary window indicates whether the upgrade completed successfully. It also shows the status of the installed components and their configuration.

You can view the upgrade log files to get more information about the upgrade tasks performed by the installer and to view the configuration properties for the installed components.

Upgrading in Silent Mode

You can upgrade in silent mode to upgrade the domain on the same machine and on the same domain configuration repository database.

To upgrade the domain to a different machine or to a different domain configuration repository database and change the node configuration, see [GUID-21D7767A-C22D-4684-80F2-DCA8554E3184#GUID-21D7767A-C22D-4684-80F2-DCA8554E3184](#).

To upgrade the Informatica services without user interaction, upgrade in silent mode. Use a properties file to specify the upgrade options. The installer reads the file to determine the upgrade options. You can use silent

mode upgrade to upgrade the Informatica services on multiple machines on the network or to standardize the upgrade process across machines.

Copy the Informatica installation files to the hard disk on the machine that hosts the Informatica instance you plan to upgrade.

To upgrade in silent mode, complete the following tasks:

1. Create the upgrade properties file and specify the upgrade options.
2. Run the installer with the upgrade properties file.
3. Secure the passwords in the upgrade properties file.

Creating the Properties File

Informatica provides a sample properties file that includes the upgrade parameters that are required by the installer. You can customize the sample properties file to specify the options for your upgrade.

The sample upgrade properties file is named `SilentInput_upgrade.properties` and is located in the root directory of the installation DVD or the installer download location. After you customize the file, save it with the file name `SilentInput.properties`.

1. Go to the root of the directory that contains the installation files.
2. Find the file named `SilentInput_upgrade.properties`.
Back up the file before you modify it.
3. Use a text editor to open the file and modify the values of the upgrade parameters.

The following table describes the upgrade parameters that you can modify:

Property Name	Description
INSTALL_TYPE	Indicates whether to install or upgrade Informatica. If the value is 0, the installer performs a fresh installation of Informatica. If the value is 1, the installer upgrades a previous version of Informatica.
USER_INSTALL_DIR	Directory in which to install the new version of Informatica services. The directory cannot be the same as the directory that contains the previous version of Informatica services.
UPG_BACKUP_DIR	Directory that contains the previous version of Informatica services that you want to upgrade.
KEY_DEST_LOCATION	Directory in which to store the encryption key for the node created during the installation.
PASS_PHRASE_PASSWD	Keyword to use to create an encryption key to secure sensitive data in the domain. The keyword must meet the following criteria: <ul style="list-style-type: none">- From 8 to 20 characters long- Includes at least one uppercase letter- Includes at least one lowercase letter- Includes at least one number- Does not contain spaces Set this property when you upgrade the master gateway node.

Property Name	Description
KEY_SRC_LOCATION	Directory that contains the encryption key for the master gateway node of the Informatica domain. Set this property when you upgrade a node other than the master gateway node.
SERVER_PORT	Port number that controls server shutdown for the domain Service Manager. The Service Manager listens for shutdown commands on this port. You can set this parameter if ADVANCE_PORT_CONFIG=1.
AC_PORT	Port number used by the Administrator tool. You can set this parameter if ADVANCE_PORT_CONFIG=1.
AC_SHUTDOWN_PORT	Port number that controls server shutdown for the Administrator tool. The Administrator tool listens for shutdown commands on this port. You can set this parameter if ADVANCE_PORT_CONFIG=1.
ENABLE_USAGE_COLLECTION	Enables Informatica DiscoveryIQ, a product usage tool that sends routine reports on data usage and system statistics to Informatica. Informatica DiscoveryIQ uploads data to Informatica 15 minutes after you install and configure Informatica domain. Thereafter, the domain sends the data every 30 days. You can choose to not send any usage statistics to Informatica. For more information on how to disable sending usage statistics, see the <i>Informatica Administrator Guide</i> . You must set the value to 1 to upgrade.

- On Windows, specify whether to run the Informatica service under the same user account as the account used for upgrade.

The following table describes the properties that you set:

Property	Description
USE_LOGIN_DETAILS	Indicates whether to run the Windows service under a different user account. If the value is 0, the installer configures the service to run under the current user account. If the value is 1, the installer configures the service to run under a different user account.
WIN_USER_ID	User account with which to run the Informatica Windows service. Use the following format: <domain name>\<user account> This user account must have the Act as operating system permission.
WIN_USER_PSSWD	Password for the user account with which to run the Informatica Windows service.

- Save the properties file with the name SilentInput.properties.

Running the Silent Installer

After you create the properties file, open a command prompt to start the silent upgrade.

- Open a command prompt.

On Windows, open the command prompt as administrator. If you do not open the command prompt as administrator, the Windows system administrator might encounter issues when accessing files in the Informatica installation directory.

2. Go to the root of the server installer directory.
3. Verify that the directory contains the file `SilentInput.properties` with the upgrade options.
4. Run the silent upgrade. On Windows, run `silentInstall.bat`. On UNIX, run `silentInstall.sh`.

The silent upgrade runs in the background. The process can take a while. The silent upgrade process is complete when the `Informatica_<Version>_Services_InstallLog.log` is created in the installation directory.

The silent upgrade fails if you incorrectly configure the properties file or if the installation directory is not accessible. If the upgrade fails, view the silent upgrade log file and correct the errors. Then run the silent installer again. The silent upgrade log file name is `silentErrorLog.log`. The installer creates it in the root directory on Windows and in the user home directory on UNIX.

Secure the Passwords in the Properties File

After you run the silent upgrade, ensure that passwords in the properties file are kept secure.

When you configure the properties file for a silent upgrade, you enter passwords in plain text. After you run the silent upgrade, use one of the following methods to secure the passwords:

- Remove the passwords from the properties file.
- Delete the properties file.
- Store the properties file in a secure location.

Troubleshooting the Domain Upgrade

If the upgrade does not complete successfully, review log files to determine the cause of the failure. The upgrade log files are in the root of the directory where the new version of Informatica is installed. Review the following log file: `Informatica_<Version>_Services_Upgrade.log`.

If the upgrade fails, restore the domain configuration repository database from the backup and run the installer again.

If the Administrator tool is configured for secure communication, you might receive a `404 Not Found` message when you access the Administrator tool. This issue occurs when the machine that runs the gateway node cannot access the keystore file used for the HTTPS connection to the Administrator tool. Copy the file to an accessible location, and then shut down the domain. Run the `infasetup UpdateGatewayNode` command to update the gateway node with the location of the keystore file. You must run the command on each gateway node in the domain.

CHAPTER 4

Before You Upgrade the Application Services

This chapter includes the following topics:

- [Configure POSIX Asynchronous I/O, 59](#)
- [Configure Informatica Environment Variables, 59](#)
- [Configure Locale Environment Variables, 60](#)
- [Verify the Keystore File Location for the Administrator Tool, 60](#)
- [Clear Browser Cache, 61](#)
- [Complete Changing the Node Configuration, 61](#)

Configure POSIX Asynchronous I/O

If you install Informatica on IBM AIX, make POSIX Asynchronous I/O available on any node where you want to run a PowerCenter Integration Service. A PowerCenter Integration Service running on an IBM AIX machine can fail to start if POSIX Asynchronous I/O is not available.

Configure Informatica Environment Variables

You can configure the INFA_DOMAINS_FILE and INFA_HOME environment variables to store the domain and installation location settings.

INFA_DOMAINS_FILE

The installer creates a domains.infa file in the Informatica installation directory. The domains.infa file contains the connectivity information for the gateway nodes in a domain, including the domain names, domain host names, and domain host port numbers.

Set the value of the INFA_DOMAINS_FILE variable to the path and file name of the domains.infa file.

Configure the INFA_DOMAINS_FILE variable on the machine where you install the Informatica services. On Windows, configure INFA_DOMAINS_FILE as a system variable.

INFA_HOME

Use INFA_HOME to designate the Informatica installation directory. If you modify the Informatica directory structure, you need to set the environment variable to the location of the Informatica installation directory or the directory where the installed Informatica files are located.

For example, you use a softlink in UNIX for any of the Informatica directories. To configure INFA_HOME so that any Informatica application or service can locate the other Informatica components it needs to run, set INFA_HOME to the location of the Informatica installation directory.

Configure Locale Environment Variables

Use LANG, LC_CTYPE, or LC_ALL to set the UNIX code page.

Different UNIX operating systems require different values for the same locale. The value for the locale variable is case sensitive.

Use the following command to verify that the value for the locale environment variable is compatible with the language settings for the machine and the type of code page you want to use for the repository:

```
locale -a
```

The command returns the languages installed on the UNIX operating system and the existing locale settings.

Locale on Linux

All UNIX operating systems except Linux have a unique value for each locale. Linux allows different values to represent the same locale. For example, "utf8," "UTF-8," "UTF8," and "utf-8" represent the same locale on a Linux machine. Informatica requires that you use a specific value for each locale on a Linux machine. Make sure that you set the LANG environment variable appropriately for all Linux machines.

Locale for Oracle database clients

For Oracle database clients, set NLS_LANG to the locale you want the database client and server to use with the login. A locale setting consists of the language, territory, and character set. The value of NLS_LANG depends on the configuration. For example, if the value is american_america.UTF8, set the variable in a C shell with the following command:

```
setenv NLS_LANG american_america.UTF8
```

Verify the Keystore File Location for the Administrator Tool

If you used a keystore file that you created to secure the connection to the Administrator tool, you must verify the keystore file location before you access the Administrator tool. The upgrade process does not update this location.

If you used the default keystore file generated by the installer in the previous domain, you do not need to verify the keystore file location.

The tasks that you must perform depend on the following locations where you previously stored the keystore file:

A location inside the previous Informatica installation directory structure

If you stored the keystore file in a location inside the previous Informatica installation directory structure, perform the following steps:

1. Copy the file to another location.
2. Update the gateway node with the copied keystore file location.

Run the `infasetup UpdateGatewayNode` command to update the gateway node with the location of the keystore file. You must run the command on each gateway node in the domain.

A location outside the previous Informatica installation directory structure

If you stored the keystore file in a location outside the previous Informatica installation directory structure, verify that the machine that runs the gateway node can access the file.

Clear Browser Cache

Before you access the Administrator tool, clear the browser cache.

On Windows Internet Explorer, delete the browsing history, including temporary files, cookies, and history.

If you do not clear the browser cache, the previous Administrator tool URL is not redirected to the latest URL and some menu options may not appear.

Complete Changing the Node Configuration

If you chose to change the node configuration during the domain upgrade because you migrated the Informatica services installation to a different machine, you must perform additional tasks before you upgrade the application services.

Note: If you chose to change the node configuration during the domain upgrade because you migrated the domain configuration repository to a different database, you do not need to perform additional tasks.

You must perform the following additional tasks:

1. Configure the environment variables.
2. Verify the range of dynamic port numbers.
3. Verify the location of the node backup directory.
4. Configure PowerExchange Adapters.

Configure Environment Variables

Informatica uses environment variables to store configuration information when it runs the application services and connects to the clients. Configure the environment variables to meet the Informatica requirements. Incorrectly configured environment variables can cause the Informatica domain or nodes to fail to start or can cause connection problems between the Informatica clients and the domain.

To configure environment variables on UNIX, log in with the system user account you used to install Informatica.

Configure Library Path Environment Variables on UNIX

Configure library path environment variables on the machines that run the Data Integration Service, PowerCenter Integration Service, and PowerCenter Repository Service processes. The variable name and requirements depend on the platform and database.

Linux

Configure the LD_LIBRARY_PATH environment variable.

The following table describes the values that you set for the LD_LIBRARY_PATH for the different databases:

Database	Value
Oracle	<DatabasePath>/lib
IBM DB2	<DatabasePath>/lib
Sybase ASE	"\${SYBASE_OCS}/lib:\${SYBASE_ASE}/lib:\${LD_LIBRARY_PATH}"
Informix	<DatabasePath>/lib
Teradata	<DatabasePath>/lib
ODBC	<CLOSEDODBCHOME>/lib

AIX

Configure the LIBPATH environment variable for the following Java-based components and databases:

Java component variables

The PowerCenter Integration Service requires the Java Runtime Environment libraries to process the following Java-based components:

- Custom transformations that use Java
- Java transformations
- PowerExchange adapters that use Java: PowerExchange for JMS, PowerExchange for Web Services, and PowerExchange for webMethods.

Configure the library path environment variable to point to the installed Java directory on machines where the PowerCenter Integration Service process runs. Configure the LIBPATH environment variable with the following values:

- JAVA_HOME/java/jre/bin
- JAVA_HOME/java/jre/bin/classic
- JAVA_HOME/usr/lib:/lib

Databases

The following table describes the values that you set for the LIBPATH environment variable for the different databases:

Database	Value
Oracle	<DatabasePath>/lib
IBM DB2	<DatabasePath>/lib
Sybase ASE	"\${SYBASE_OCS}/lib:\${SYBASE_ASE}/lib:\${LIBPATH}"
Informix	<DatabasePath>/lib
Teradata	<DatabasePath>/lib
ODBC	<CLOSEDODBCHOME>/lib

Verify the Range of Dynamic Port Numbers

When you upgrade a migrated node, the upgrade wizard assigns a default range of port numbers that can be dynamically assigned to application service processes that run on the node.

The default range of dynamic port numbers is 6013 to 6113. Verify that the default range of port numbers are available on the machine that runs the new version of Informatica. If the range of port numbers are not available, use the Administrator tool to update the range. Configure the minimum and maximum dynamic port numbers for service processes in the **Advanced Properties** section of the node **Properties** view.

Verify the Node Backup Directory

Verify that the backup directory for the node is accessible by the machine that runs the new version of Informatica. In the Administrator tool, view the **Backup Directory** property in the **Advanced Properties** section of the node **Properties** view.

Configure PowerExchange Adapters

If your previous installation included PowerExchange adapters, configure the PowerExchange adapters on the machine that runs the new version of Informatica. If the PowerExchange adapter has an installer, re-install the PowerExchange adapter.

CHAPTER 5

Application Service Upgrade

This chapter includes the following topics:

- [Application Service Upgrade Overview, 64](#)
- [Running the Service Upgrade Wizard, 65](#)
- [Verify the Model Repository Service Upgrade, 66](#)

Application Service Upgrade Overview

The Informatica services version that you upgrade from determines the application service upgrade process.

Some Informatica services versions require that you upgrade the application services. When you upgrade an application service, you must also upgrade the dependent services. When you upgrade an application service, the upgrade process upgrades the database contents of the databases associated with the service.

Use the service upgrade wizard, the actions menu of each service, or the command line to upgrade application services. The service upgrade wizard upgrades multiple services in the appropriate order and checks for dependencies. If you use the actions menu of each service or the command line to upgrade application services, you must upgrade the application services in the correct order and verify that you upgrade dependent services.

The privileges required to upgrade application services depend on the service.

After you upgrade the Model Repository Service, check the log to verify that the upgrade completed successfully.

Privileges to Upgrade Services

The privileges required to upgrade application services depend on the application service.

A user with the Administrator role on the domain can access the service upgrade wizard.

A user must have these roles, privileges, and permissions to upgrade the following application services:

Model Repository Service

To upgrade the Model Repository Service using the service upgrade wizard, a user must have the following credentials:

- Administrator role on the domain.
- Create, Edit, and Delete Projects privilege for the Model Repository Service and write permission on projects.

To upgrade the Model Repository Service from the Actions menu or from the command line, a user must have the following credentials:

- Manage Services privilege for the domain and permission on the Model Repository Service.
- Create, Edit, and Delete Projects privilege for the Model Repository Service and write permission on projects.

Data Integration Service

To upgrade the Data Integration Service, a user must have the Administrator role on the Data Integration Service.

Content Management Service

To upgrade the Content Management Service, a user must have the Administrator role on the Content Management Service.

PowerCenter Repository Service

To upgrade the PowerCenter Repository Service, a user must have the Manage Services privilege for the domain and permission on the PowerCenter Repository Service.

Metadata Manager Service

To upgrade the Metadata Manager Service, a user must have the Manage Services privilege for the domain and permission on the Metadata Manager Service.

Service Upgrade from Previous Versions

When you upgrade from a previous version, some application services require an upgrade. Upgrade the application services that you used in the previous version.

Before you upgrade, verify that the Metadata Manager Service is disabled. Verify that all other application services are enabled.

To upgrade application services, upgrade the following services and associated databases in this order:

1. Model Repository Service
2. Data Integration Service
3. Profiling warehouse for the Data Integration Service
4. Metadata Manager Service
5. PowerCenter Repository Service

Note: When you upgrade all other application services, the upgrade process upgrades the database contents of the databases associated with the service.

Running the Service Upgrade Wizard

Use the service upgrade wizard to upgrade application services and the database contents of the databases associated with the services. The service upgrade wizard displays upgraded services in a list along with

services and associated databases that require an upgrade. You can also save the current or previous upgrade report.

Note: The Metadata Manager Service must be disabled before the upgrade. All other services must be enabled before the upgrade.

1. In the Informatica Administrator header area click **Manage > Upgrade**.
2. Select the application services and associated databases to upgrade.
3. Optionally, specify if you want to **Automatically recycle services after upgrade**.
If you choose to automatically recycle application services after the upgrade, the upgrade wizard restarts the services after they have been upgraded.
4. Click **Next**.
5. If dependency errors exist, the **Dependency Errors** dialog box appears. Review the dependency errors and click **OK**. Then, resolve dependency errors and click **Next**.
6. Enter the repository login information.
7. Click **Next**.

The service upgrade wizard upgrades each application service and associated database and displays the status and processing details.

8. When the upgrade completes, the **Summary** section displays the list of application services and their upgrade status. Click each service to view the upgrade details in the **Service Details** section.
9. Optionally, click **Save Report** to save the upgrade details to a file.
If you choose not to save the report, you can click **Save Previous Report** the next time you launch the service upgrade wizard.
10. Click **Close**.
11. If you did not choose to automatically recycle application services after the upgrade, restart the upgraded services.

You can view the upgrade report and save the upgrade report. The second time you run the service upgrade wizard, the Save Previous Report option appears in the service upgrade wizard. If you did not save the upgrade report after upgrading services, you can select this option to view or save the previous upgrade report.

Verify the Model Repository Service Upgrade

After you upgrade the Model Repository Service, check the Model Repository Service log to verify that the upgrade completed successfully.

Object Dependency Graph

When you upgrade a Model Repository Service, the upgrade process upgrades the contents of the Model repository and rebuilds the object dependency graph.

If the upgrade process encounters a fatal error while upgrading the Model repository contents, then the service upgrade fails. The Administrator tool or the command line program informs you that you must perform the upgrade again.

If the upgrade process encounters a fatal error while rebuilding the object dependency graph, then the upgrade of the service succeeds. You cannot view object dependencies in the Developer tool until you rebuild the object dependency graph.

After you upgrade the Model Repository Service, verify that the Model Repository Service log includes the following message:

```
MRS_50431 "Finished rebuilding the object dependency graph for project group '<project group>'."
```

If the message does not exist in the log, run the `infacmd mrs rebuildDependencyGraph` command to rebuild the object dependency graph. Users must not access Model repository objects until the rebuild process completes, or the object dependency graph might not be accurate. Ask the users to log out of the Model Repository Service before service upgrade.

The `infacmd mrs rebuildDependencyGraph` command uses the following syntax:

```
rebuildDependencyGraph
<-DomainName|-dn> domain_name
[<-SecurityDomain|-sdn> security_domain]
<-UserName|-un> user_name
<-Password|-pd> password
<-ServiceName|-sn> service_name
[<-ResilienceTimeout|-re> timeout_period_in_seconds]
```

Maximum Heap Size

After you upgrade the Model repository, reset the maximum heap size to the recommended 1 GB setting.

The upgrade process resets the Model Repository Service maximum heap size to 4 GB. After the upgrade, reset the maximum heap size property to the value to which it was set prior to the upgrade, or to the setting that Global Customer Support recommended for your environment.

To reset the maximum heap size, select the service in the **Domain Navigator**, click the **Properties** view, and expand **Advanced Properties**. Set the **Maximum Heap Size** property to the pre-upgrade value. Set the **permGen** property to the minimum of 512 MB.

CHAPTER 6

Informatica Client Upgrade

This chapter includes the following topics:

- [Informatica Client Upgrade Overview, 68](#)
- [Informatica Client Upgrade Options, 69](#)
- [Upgrading in Graphical Mode, 69](#)
- [Upgrading in Silent Mode, 70](#)

Informatica Client Upgrade Overview

Use the client installer to upgrade a previous version of the Informatica client tools. The Informatica client tools are installed on the installation directory you specify. The client installer configures the newly installed client tools with the same settings as the previous version. The client installer does not modify the files of the previous version of the client tools.

Complete the pre-upgrade tasks before you start the upgrade. Run the installer on all machines that host previous versions of the Informatica client tools that you want to upgrade. You can upgrade the Informatica clients in graphical or silent mode.

When you run the client installer, you can select the following Informatica client tools to upgrade:

Informatica Developer

Informatica Developer is a client application that you use to create and run mappings, data objects, and virtual databases. Objects created in Informatica Developer are stored in a Model repository and are run by a Data Integration Service. If you upgrade Informatica Developer, verify that the Informatica version, including the hotfix version, matches the version of the domain upgrade.

PowerCenter Client tools

The PowerCenter Client is a set of tools you can use to manage the PowerCenter repository, mappings, and sessions. The client upgrade also upgrades the following client tools:

- Custom Metadata Configurator
- Mapping Architect for Visio
- Mapping Analyst for Excel

By default, the when you upgrade the Informatica client tools, the following components are also upgraded:

- DataDirect ODBC drivers
- Java Runtime Environment libraries

You can perform the upgrade from a DVD or from the root of the directory where you download the installation files.

On Windows, the length of the entire installation directory path, including the zip file name, must be 60 characters or less. Verify that the zip utility version is compatible with the Windows operating system version. When you unzip the file, verify that the zip utility also extracts empty folders.

Informatica Client Upgrade Options

You can upgrade the Informatica client tools in one of the following ways:

- Upgrade in Graphical Mode. Upgrades the Informatica client tools in graphical mode. The installer guides you through the upgrade process.
- Upgrade in Silent Mode. Upgrades the Informatica client tools using a properties file that contains the upgrade options.

Upgrading in Graphical Mode

If you encounter problems when you run the install.bat file from the root directory, run the following file:

```
<Informatica installation directory>\client\install.exe
```

1. Close all applications.
2. Run install.bat from the root directory.
3. On the **Installation Type** page, select **Upgrade to Informatica 10.0 Clients** and click **Next**.
4. On the **Upgrade Pre-Requisites** page, verify the system requirements before you continue the installation and click **Next**.
5. On the **Select Client Tool Selection** page, select the Informatica client you want to upgrade.

You can upgrade the following Informatica client applications:

- Informatica Developer
 - PowerCenter Client
6. Click **Next**.
 7. On the **Select Directory** page, enter the directory of the Informatica version you want to upgrade and the directory in which you want to install Informatica 10.0.

The following table describes the directories you must specify:

Directory	Description
Directory of the Informatica client to upgrade	Directory that contains the previous version of the Informatica client tool that you want to upgrade.
Directory for the Informatica 10.0 client tools	<p>Directory in which to install the Informatica 10.0 client tools.</p> <p>Enter the absolute path for the installation directory. The installation directory must be on the current machine. The directory names in the path must not contain spaces or the following special characters: @ * \$ # ! % () { } [] , ; '.</p> <p>Note: Informatica recommends using alphanumeric characters in the installation directory path. If you use a special character such as á or €, unexpected results might occur at run time.</p>

8. Click **Next**.
9. On the **Pre-Installation Summary** page, review the installation information and click **Install**.
The installer copies the Informatica client files to the installation directory.
10. On the **Post-installation Summary** page, verify whether the upgrade completed successfully and click **Done** to close the installer.
11. After you complete an upgrade of Informatica Developer, log off the Windows machine and then log back on to complete the system configurations.

You can view the installation log files to get more information about the upgrade tasks performed by the installer.

Upgrading in Silent Mode

To upgrade the Informatica client tools without user interaction, upgrade in silent mode. Use a properties file to specify the upgrade options. The installer reads the file to determine the upgrade options. You can use silent mode upgrade to upgrade the Informatica client tools on multiple machines on the network or to standardize the upgrade process across machines.

Copy the Informatica installation files to the hard disk on the machine that hosts the Informatica client you plan to upgrade.

To upgrade in silent mode, complete the following tasks:

1. Create the upgrade properties file and specify the upgrade options.
2. Run the installer with the upgrade properties file.

Creating the Properties File

Informatica provides a sample properties file that includes the upgrade parameters that are required by the installer. You can customize the sample properties file to specify the options for your upgrade.

The sample properties file is named `SilentInput.properties` and is located in the root of the client installer directory.

1. Go to the root of the directory that contains the client installation files.

2. Locate the file named SilentInput.properties.
Back up the file before you modify it.
3. Use a text editor to open the file and modify the values of the upgrade parameters.
The following table describes the upgrade parameters you can modify:

Property Name	Description
INSTALL_TYPE	Indicates whether to install or upgrade the Informatica client tools. To upgrade from a previous version of Informatica, set the value to 1.
USER_INSTALL_DIR	Directory in which to install the new version of the Informatica client tools.
UPG_BACKUP_DIR	Directory of the previous version of the Informatica tools that you want to upgrade.
DXT_COMP	Indicates whether to install Informatica Developer. If the value is 1, the Developer tool will be installed. If the value is 0, the Developer tool will not be installed. Default is 1.
CLIENT_COMP	Indicates whether to install the PowerCenter Client. If the value is 1, the PowerCenter Client will be installed. If the value is 0, the PowerCenter Client will not be installed. Default is 1.

4. Save the properties file.

Running the Silent Installer

After you create the properties file, open a command prompt to start the silent upgrade.

1. Open a command prompt.
2. Go to root of the client installer directory.
3. Verify that the directory contains the file SilentInput.properties with the upgrade options.
4. To start the silent upgrade process, run silentInstall.bat.

The silent upgrade runs in the background. The process can take a while. The silent upgrade process is complete when the Informatica_<Version>_Client_InstallLog.log is created in the installation directory.

The silent upgrade fails if you incorrectly configure the properties file or if the installation directory is not accessible. If the upgrade fails, view the installation log files and correct the errors. Then run the silent installer again.

5. After you complete an upgrade of Informatica Developer, log off the Windows machine and then log back on to complete the system configurations.

CHAPTER 7

After You Upgrade

This chapter includes the following topics:

- [Informatica Domain, 72](#)
- [Secure Client Connections to the Domain, 74](#)
- [Upgrade the Connection Provider Type for Microsoft SQL Server, 74](#)
- [Update ODBC Data Sources, 75](#)
- [PowerCenter Integration Service, 75](#)
- [Content Management Service, 75](#)
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- [Email Service, 77](#)
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Informatica Domain

After you upgrade, complete the post-upgrade tasks for the domain.

Update the Log Events Directory

After you upgrade, you might want to update the log events directory for the domain.

The default value of the log events directory after an upgrade depends on the following upgrade types:

Upgrade the domain without changes to the node configuration.

The log events directory points to the location that you specified in the previous version.

Upgrade the domain with changes to the node configuration.

The log events directory points to the `isp/logs` directory in the new installation directory.

To use a different directory for the logs, update the Log Directory Path property for the domain in the Administrator tool. You can also use the `infasetup updateGatewaynode` command to update the directory. For example, you can configure the log events directory as the `server/infra_shared/logs` directory in the new installation directory.

Update ODBC Data Sources

The Informatica installation includes DataDirect 7.1 ODBC drivers. Re-create each ODBC data source to use the new drivers if you upgrade from Informatica 9.5.1.

Configure a Secure Database

After you upgrade, you can optionally configure the domain configuration repository on a database that is secured with the SSL protocol. You configure a secure domain configuration repository database from the command line.

The SSL protocol uses SSL certificates stored in a truststore file. Access to the secure database requires a truststore that contains the certificates for the database. You can use a secure domain configuration repository database only if you enable secure communication for the domain.

For more information about configuring a secure domain configuration repository database, see the *Informatica Security Guide*.

Verify the SMTP Configuration Properties

If you configured an email server for the Data Integration Service to send scorecard notifications in the previous version, verify that SMTP is correctly configured for the domain after you upgrade. To use the same email server configured for the Data Integration Service, use the values that you recorded for the Data Integration Service before upgrading.

Effective in version 10.0, the email server properties for the Data Integration Service are removed. Scorecard notifications use the email server configured for the domain. If you did not configure SMTP for the domain in the previous version, the upgraded domain uses the email server configured for the first Data Integration Service encountered during the upgrade. If you configured SMTP for the domain in the previous version, the upgraded domain continues to use that email server.

Secure Client Connections to the Domain

If you enabled secure communication between client applications and the Informatica domain in the previous version, verify the keystore file locations after you upgrade.

When you configure a secure connection between a client application and a service, you specify the keystore file that contains the keys and certificates for the secure HTTPS connection. After you upgrade, you must verify the keystore file locations. The upgrade process does not update these locations.

Note: If you used RSA encryption with fewer than 512 bits to create the private key and SSL certificate, you must create new SSL certificate files. Due to the FREAK vulnerability, Informatica does not support RSA encryption with fewer than 512 bits.

The tasks that you must perform depend on the following locations where you previously stored the keystore files:

A location inside the previous Informatica installation directory structure

If you stored the keystore file in a location inside the previous Informatica installation directory structure, perform the following steps:

1. Copy the file to another location.
2. Update the application service with the copied keystore file location.

Use the Administrator tool to update the location of the keystore file for the appropriate application service. For example, if the keystore file is used for Analyst tool security, update the keystore file location in the Analyst Service properties.

A location outside the previous Informatica installation directory structure

If you stored the keystore file in a location outside the previous Informatica installation directory structure, verify that the keystore file can be accessed from the machine where the application service runs.

Upgrade the Connection Provider Type for Microsoft SQL Server

After you upgrade, the Microsoft SQL Server connection is set to the OLEDB provider type by default.

It is recommended that you upgrade all your Microsoft SQL Server connections to use the ODBC provider type. You can upgrade all your Microsoft SQL Server connections to the ODBC provider type by using the following commands:

- If you are using PowerCenter, run the following command: `pmrep upgradeSqlServerConnection`
- If you are using the Informatica platform, run the following command: `infacmd.sh isp upgradeSQLSConnection`

After you run the upgrade command, you must set the environment variable on each machine that hosts the Developer tool and on the machine that hosts Informatica services in the following format:

```
ODBCINST=<INFA_HOME>/ODBC7.1/odbcinst.ini
```

After you set the environment variable, you must restart the node that hosts the Informatica services.

Update ODBC Data Sources

The Informatica installation includes DataDirect 7.1 ODBC drivers. Re-create each ODBC data source to use the new drivers if you upgrade from Informatica 9.5.1.

PowerCenter Integration Service

After you upgrade, complete the post-upgrade task for the PowerCenter Integration Service.

Configure Umask for Operating System Profiles

If you upgraded from a version that used operating system profiles, set the umask setting to change the security on files that the DTM writes.

For example, you can change umask to 077 for maximum security. You must restart Informatica services if you change the umask setting.

Content Management Service

After you upgrade, verify the reference data configuration options on each Content Management Service in the domain.

Verify the Location of the Identity Population Files

If you install identity population data files, verify that the Informatica services that run mappings and sessions can find the files.

Identity Population Files in Data Quality

The Data Integration Service reads the path to the population files from the **Identity Properties** options on the Content Management Service. The upgrade process preserves the path in the identity properties.

Identity Population Files in PowerCenter

The PowerCenter Integration Service can read the path to the population files from the IDQTx.cfg configuration file or from the SSAPR environment variable.

When you upgrade, the PowerCenter installer writes an empty IDQTx.cfg file to the following directory:

`<Informatica installation directory>/server/bin`

If the installer finds an IDQTx.cfg file in the `server/bin` directory, it renames the file with the following name:

IDQTx.cfg.bak

The IDQTx.cfg that the upgrade operation installs does not specify a location for the identity population data files. You can copy the location from the IDQTx.cfg.bak file. If you do not set a population file location in IDQTx.cfg, the PowerCenter Integration Service looks for the location in the SSAPR environment variable.

Restart Services

The Content Management Service interacts with other services to manage reference data.

Restart the Content Management Service after you upgrade. You can manually restart the service, or you can restart services automatically when you run the service upgrade wizard. If you update a property on the Content Management Service, restart any service that uses the property that you updated.

Restart the Analyst Service if you update the following property:

- Reference data warehouse name

Restart the Data Integration Service if you update a property for the following types of reference data:

- Address reference data
- Identity population data
- Classifier model data
- Probabilistic model data

Data Integration Service

After you upgrade, complete the post-upgrade tasks for each Data Integration Service.

Reset the HTTP Proxy Server Password

If the Data Integration Service runs Web Service Consumer transformations and is configured to use an HTTP proxy server with authentication, reset the HTTP proxy server password.

If you do not reset the password, then the Data Integration Service cannot successfully process Web Service Consumer transformations.

Reset the HTTP Proxy Server Password for the Data Integration Service in the Administrator tool.

Verify the Workflow Options

If the Data Integration Service will run workflows, verify that the Workflow Orchestration Service module is active and identify the workflow database.

The Workflow Orchestration Service module runs workflows. The workflow database stores run-time workflow metadata. The Workflow Orchestration Service module and the workflow database connection are properties on the Data Integration Service.

After you identify the workflow database, create the workflow database contents. To create the contents, use the **Actions** menu options for the Data Integration Service in the Administrator tool. Recycle the service before you create the workflow database contents.

Verify the Execution Options

If the Data Integration Service runs on multiple nodes and you configured the execution options differently for each service process, verify that the Execution Options on the Properties view use the correct values. Use the values that you recorded for each Data Integration Service process before upgrading.

Effective in version 10.0, the execution options on the Processes view are moved to the Properties view for the Data Integration Service. You configure the execution options for the Data Integration Service. Each Data Integration Service process uses the same value for each option.

The upgrade determines the values based on the following situations:

- If the option defines a maximum integer value, the highest value defined for all processes is used as the Data Integration Service value on the Properties view.
- If the option defines a string value, the value defined for the first node encountered during the upgrade is used as the Data Integration Service value on the Properties view.

Verify Maximum Memory Per Request

If you changed the default value of the Maximum Session Size property for a Data Integration Service process in the previous version, verify that the Maximum Memory Per Request property for the service uses the correct values.

Effective in version 10.0, the Data Integration Service process property Maximum Session Size is renamed to Maximum Memory Per Request. You configure the Maximum Memory Per Request property for the following Data Integration Service modules:

- Mapping Service Module. Default is 536,870,912 bytes.
- Profiling Service Module. Default is 536,870,912 bytes.
- SQL Service Module. Default is 50,000,000 bytes.
- Web Service Module. Default is 50,000,000 bytes.

The upgraded service uses the version 10.0 default value for each module. If you changed the default value of Maximum Session Size in a previous version, you must change the value of Maximum Memory Per Request after you upgrade. Use the value that you recorded for each Data Integration Service process before upgrading.

Email Service

If you configured an email server for the Data Integration Service to send workflow notifications in the previous version, configure and enable the Email Service after you upgrade. Workflow notifications include emails sent from Human tasks and Notification tasks in workflows run by the Data Integration Service.

Effective in version 10.0, the email server properties for the Data Integration Service are removed. Workflow notifications use the email server configured for the Email Service.

To send workflow notifications, configure an email server for the Email Service and then enable the Email Service. To use the same email server configured for the Data Integration Service in previous versions, use the values that you recorded for the Data Integration Service before upgrading.

Analyst Service

After you upgrade, complete the post-upgrade tasks for each Analyst Service.

Verify the Flat File Cache Location

You must verify the location of the flat file cache directory after you upgrade. The upgrade process does not update this location.

If you created the flat file cache directory within the previous Informatica installation directory, copy the directory to the upgraded Informatica installation directory and update the Analyst Service property with the new location.

If you created the directory outside of the previous Informatica installation directory, verify that both the Analyst Service and the Data Integration Service can access the directory.

If the Analyst Service and the Data Integration Service run on different nodes, configure the flat file directory to use a shared directory. If the Data Integration Service runs on primary and back-up nodes or on a grid, each Data Integration Service process must be able to access the files in the shared directory.

To verify the location of the flat file cache directory, view the **Flat File Cache Location** property in the run-time properties for the Analyst Service.

Verify the Human Task Properties

If you expect to run workflows that contain Human tasks, associate an Analyst Service with the Data Integration Service that runs the workflows. Use the Human task properties on the Analyst Service to identify the Data Integration Service. Users can log in to the Analyst Service URL to work on the records that the Human tasks specify.

Consider the following rules and guidelines when you verify the Human task properties:

- Select a Data Integration Service that you configure to run workflows.
- An Analyst Service uses run-time properties to identify the Data Integration Service that runs profiles and performs other run-time operations. If you do not configure the run-time properties, do not associate the Analyst Service with a Model Repository Service.
- If you upgrade a domain that includes a Data Director Service, the upgrade process converts the Data Director Service to an Analyst Service. The upgrade process uses the Data Integration Service properties from the Data Director Service to update the Human task properties on the Analyst Service.
- If you upgrade services in a domain that contains an Analyst Service and a Data Director Service, the domain contains two Analyst Services after the upgrade. You can maintain the two services, or you can merge the properties to a single Analyst Service.

Assign Privileges

If there is an Analyst Service in the Informatica domain, you must grant a Model Repository Service privilege to users. You might need to grant Analyst Service privileges based on the tasks that users need to perform in the Analyst tool.

Grant the following Model Repository Service privilege to users:

- Access Analyst

Grant the following Analyst Service privileges to users:

- Access Mapping Specifications
- Load Mapping Specification Results
- Workspace Access
- Manage Glossaries
- Design Workspace
- Discovery Workspace
- Glossary Workspace
- Scorecards Workspace

Recycle the Analyst Service

To access the Analyst tool after you upgrade, recycle the Analyst Service. Before you recycle the Analyst Service, complete the upgrade and post-upgrade steps for the Model Repository Service and Data Integration Service. After you recycle the Analyst Service, wait for at least 10 minutes before you access the **Glossary** workspace.

Before you recycle the Analyst Service, verify that you have performed the following tasks:

- Upgrade the Model Repository Service.
- Upgrade the Data Integration Service.

Note: The Model Repository Service and the Data Integration Service must be running before you recycle the Analyst Service.

Business Glossary Desktop

Change the port number and host name of the Business Glossary Desktop application to reference glossaries on a machine that hosts the Analyst Service.

Changing the Business Glossary Desktop Port Number and Host Name

Change the Business Glossary Desktop server settings to establish a connection to the machine that hosts the Analyst Service.

1. In the Business Glossary Desktop application, click **Edit > Settings**.
The **Informatica Business Glossary Settings** window appears.
2. Click the **Server** tab.
3. In the **Port** field, enter the port number of the machine on which the Analyst Service runs.
4. In the **Host** field, enter the host name of the machine on which the Analyst Service runs.
5. Optionally, in the **Username** and **Password** fields, update the Analyst tool user name and password.
6. Click **Test** to test the connection to the business glossary.
7. Click **OK**.

Search Service

To perform searches in the Analyst tool and Business Glossary Desktop after you upgrade, create the Search Service in the Informatica domain. Before you create the Search Service, complete the upgrade and post-upgrade steps for the Model Repository Service, Data Integration Service, and Analyst Service.

Before you create and enable the Search Service, verify that you have performed the following tasks:

- Upgrade the Model Repository Service.
- Upgrade the Data Integration Service.
- Recycle the Analyst Service.

Note: The Model Repository Service, Data Integration Service, and Analyst Service must be running before you enable the Search Service.

Object Missing

This object is not available in the repository.

Step 1. Import the Metadata Manager Model Export File

If you exported the business glossary model from Metadata Manager before you upgraded the domain, import the model export file into the Analyst tool. The Analyst tool uses the model export file to create properties for attributes that do not exist in the business term template by default.

Note: If no custom attributes were added to the business glossary model in Metadata Manager, you can skip this step.

Use the glossary Import wizard to import the model export XML file. The Import wizard instructs you to import a Microsoft Excel file, but you can use it to import the model export XML file.

1. In the Analyst tool, click **Open** to open the **Library** workspace.
2. In the Library Navigator, click the **Glossaries** section.
3. Right-click any glossary and click **Import**.

The Import wizard appears.

4. Click **Browse** and select the model export XML file for the business glossary.

Note: The Import wizard asks you to import a Microsoft Excel (.xlsx) file, but you can select and import an XML file.

5. Click **Next** to import the file.
6. Click **Import**.

The Analyst tool adds the attributes to the **Business Term Template** panel in the **Glossary** workspace.

Step 2. Merge the Business Glossary Files

If you linked business terms and categories across glossaries, merge the Microsoft Excel business glossary files into one to preserve the links between glossaries. After you merge the files, delete the duplicate business terms.

Note: If no business terms and categories were linked across glossaries in Metadata Manager, you can skip this step.

If the glossary you export contains categories that are linked to business terms in other glossaries, Metadata Manager includes the linked business terms in the glossary export file. When you merge the glossary export files, the merged Microsoft Excel file contains duplicate business terms. You must delete the duplicate business terms before you import the merged Microsoft Excel file, to preserve the links in the Analyst tool. If you do not delete the duplicate terms, the Analyst tool skips the duplicate terms during import.

Use Microsoft Excel to merge the exported business glossary files. To merge the files, open one business glossary file and add the information from the other glossary file as new rows at the bottom. After you merge the business glossaries, delete duplicate terms from the business term sheet. You import the merged file into the Analyst tool.

Object Missing

This object is not available in the repository.

Step 4. Publish Categories and Unpublished Terms

In Analyst tool, business glossary categories have phases, but in Metadata Manager they do not. When you import business glossary files into Analyst tool, the import process sets the phase for all categories to draft. Publish the categories so that they appear in the Metadata Manager business glossary resource.

When you create a business glossary resource in Metadata Manager and load the resource, the Metadata Manager Service imports published business terms and categories. It does not import draft terms or categories. Therefore, if you want to import a business glossary that contains categories into Metadata Manager, you must publish the categories in the Analyst tool before you create the business glossary resource in Metadata Manager. You must also publish all unpublished business terms that you want to view in Metadata Manager.

The method that you use to publish categories and terms depends on the number of categories and terms that you want to publish. You can publish each category or term individually. You can also publish multiple categories and terms simultaneously by creating a business initiative, adding the unpublished categories and terms to the business initiative, and then publishing the business initiative. When you use a business initiative, audit trails capture the history of changes to each term and category.

Publishing a Single Category or Term

If you have a few categories or business terms to publish, publish each category or term individually. If the category or term has a draft phase, you must propose it for review before you can publish it.

1. In the Analyst tool, click **Open** to open the **Library** workspace.
2. In the Library Navigator, click the **Assets** section.
3. Click **Categories** or **Business Terms**.
4. Click the category or term that you want to publish.
5. In the **Actions** menu, click **Propose for Review**.

A confirmation dialog box appears.

6. Click **OK**.
The Analyst tool changes the phase to In Review.
7. In the **Actions** menu, click **Publish Category** or **Publish Term**.
A confirmation dialog box appears.
8. Click **OK**.
The Analyst tool changes the phase to Published.

Publishing Multiple Categories or Terms

If you have multiple categories or terms to publish, create a business initiative so that you can publish the categories and terms simultaneously. When you use a business initiative, audit trails capture the history of changes to each term and category.

1. In the Analyst tool, from the **New** menu, select **Business Initiative**.
The **Select Glossary** dialog box appears.
2. Select the business glossary and click **OK**.
A business initiative opens in the **Glossary** workspace.
3. Enter a name and optional description for the business initiative.
For example, you might name the business initiative "PublishAfterUpgrade" and enter a description such as, "Publish unpublished business terms and categories after upgrading from 9.5.x to 9.6.x."
4. In the **Asset Collection** section, from the **Actions** menu, click **Add**.
The **Assets** dialog box appears. The dialog box lists all glossary assets that are in the Draft or In Review phase.
5. Select all of the categories and terms that you want to publish and click **OK**.
The Analyst tool adds the categories and terms to the asset collection.
6. Click **Save > Save and Finish**.
The business initiative remains in the **Glossary** workspace. The categories and terms that you selected are in Draft phase.
7. From the **Actions** menu, click **Propose for Review**.
The Analyst tool prompts you to propose the business initiative for review.
8. Click **OK** to propose the business initiative.
The Analyst tool changes the phase for all categories and terms in the business initiative to In Review.
9. From the **Actions** menu, click **Publish Initiative**.
The Analyst tool displays a message alerting you that all assets in the business initiative will be published.
10. Click **OK** to publish the business initiative.
The Analyst tool changes the phase for all categories and terms in the business initiative to Published.

Metadata Manager Agent

After you upgrade, you must uninstall and reinstall each Metadata Manager Agent so that Metadata Manager can extract metadata from the metadata sources. Install the latest version of the Metadata Manager Agent before you migrate resources.

1. Stop the Metadata Manager Agent.
2. Reinstall the Metadata Manager Agent.

For information about installing the Metadata Manager Agent, see the *Metadata Manager Administrator Guide*.

Metadata Manager Service

After you reinstall the Metadata Manager Agent, perform the following post-upgrade tasks for each Metadata Manager Service:

1. Update the Metadata Manager properties file to include any customization.
2. If the Metadata Manager repository is a Microsoft SQL Server database and the Metadata Manager Service runs on UNIX, verify that the ODBCINST environment variable is set.
3. Enable the Metadata Manager Service.
4. Migrate and reload Metadata Manager resources.
5. Create business glossary resources based on the business glossaries that you imported into the Analyst tool.
6. Verify Load privileges and permissions for Metadata Manager users.

To view, load, or manage a resource on the **Load** tab, users must have both the appropriate Metadata Manager Service privilege and read or write permission on the resource.

Update the Metadata Manager Properties File

Compare the imm.properties file in the previous installation directory with the 10.0 version. Update the 10.0 version of the imm.properties file as required.

The imm.properties file is in the following directory:

```
<Informatica installation directory>\services\shared\jars\pc\classes
```

The changes take effect when you enable the Metadata Manager Service.

Verify the ODBCINST Environment Variable on UNIX

If the Metadata Manager repository is a Microsoft SQL Server database and the Metadata Manager Service runs on UNIX, verify that the ODBCINST environment variable is set on the machine that runs the PowerCenter Integration Service.

The PowerCenter Integration Service runs the workflows that extract metadata from the IME-based files and load it into the Metadata Manager warehouse. The PowerCenter Integration Service uses ODBC to connect to the Microsoft SQL Server database. On UNIX, the ODBCINST environment variable must be set to the location of the odbcinst.ini file. Otherwise, the PowerCenter Integration Service cannot access the ODBC driver.

On the machine that runs the PowerCenter Integration Service, verify that the ODBCINST environment variable is set to the following value:

```
ODBCINST=<INFA_HOME>/ODBC7.1/odbcinst.ini
```

If the environment variable is not set, set the environment variable, and then restart the domain.

Migrate and Reload Metadata Manager Resources

Some models are changed between Metadata Manager versions. If a model has significant changes, such as renamed classes, you must migrate and reload the resources that are based on the model. If a model has minor changes, such as new class attributes, you must reload the resources that are based on the model.

If a model has significant changes, the upgrade process marks the resources that are based on the model as deprecated. You cannot create, configure, edit, load, or add schedules for a deprecated resource. If there are deprecated resources in the repository, you must migrate them to the current version of Metadata Manager. You must also migrate resource configuration files for deprecated resource types if you want to upload them into the current version of Metadata Manager. After you migrate resources, you must reload them.

You migrate, purge, and reload different types of resources based on the version of Metadata Manager from which you upgrade.

The following table lists the types of resources that you must migrate and reload when you upgrade from version 9.5.1 or 9.5.1 HotFix 1:

Metadata Source Type	Resource Type
Business Intelligence	Business Objects Cognos Microsoft Analysis and Reporting Services Microstrategy Oracle Business Intelligence Enterprise Edition (OBIEE)
Data Modeling	Embarcadero ERStudio ERwin Sybase PowerDesigner
Database Management	JDBC

The following table lists the types of resources that you must migrate and reload when you upgrade from version 9.5.1 HotFix 2, 9.5.1 HotFix 3, or 9.5.1 HotFix 4:

Metadata Source Type	Resource Type
Business Intelligence	Business Objects Cognos Microsoft Analysis and Reporting Services Microstrategy Oracle Business Intelligence Enterprise Edition (OBIEE)
Data Modeling	ERwin Sybase PowerDesigner

Additionally, you must purge and reload all other types of resources except business glossary resources and custom resources. You must reload custom resources only if the model or the metadata has changed between releases.

Migrate resources and resource configuration files with the migration utilities, `rmu` and `rcfmu`.

Migration Utilities

The `rmu` and `rcfmu` migration utilities are command line programs that migrate deprecated resources and deprecated resource configuration files to the current version.

Use the following utilities:

rmu

Migrates deprecated resources by creating new, equivalent resources. You can also use `rmu` to migrate resources from the previous version of Metadata Manager to the current version. You can migrate one or all resources in the repository.

rcfmu

Migrates a resource configuration file from the previous version of Metadata Manager to the current version. After you migrate a resource configuration file, you must upload it to the repository.

After you migrate and reload a resource, edit the new resource to re-create the shortcuts, comments, links, and relationships that exist in the original resource. You must also update any schedule to which the original resource is assigned.

For information about `rmu` and `rcfmu` syntax and options, see the *Metadata Manager Administrator Guide*.

Migrating Deprecated Resources from 9.5.1 HotFix 1 or Earlier

When you upgrade from version 9.5.1 or 9.5.1 HotFix 1, migrate and reload JDBC resources, purge and reload other database management resources, and then migrate and reload other resources. To prevent the loss of connection information for business intelligence and data modeling resources, migrate, purge, and reload resources in the following order.

Before you migrate resources, install the latest version of the Metadata Manager Agent.

1. Run the `rmu` migration utility on each deprecated JDBC resource.
2. Load the new JDBC resources.
3. Purge and reload all other database management resources.
4. Run the `rmu` migration utility on each deprecated business intelligence and data modeling resource.
5. Load the new business intelligence and data modeling resources.
6. Purge and reload SAP R/3, SAP Business Warehouse, Informatica Platform, and PowerCenter resources.
7. Edit the new resources to re-create the shortcuts, comments, links, and relationships that exist in the original resources.
8. Optionally, delete the deprecated resources.

Note: `rmu` cannot convert Business Objects universe names to universe IDs. Therefore, after you migrate a Business Objects resource, you might need to update the universe ID.

Migrating Deprecated Resources from 9.5.1 HotFix 2 or Later

When you migrate resources from version 9.5.1 HotFix 2, 9.5.1 HotFix 3, or 9.5.1 HotFix 4, purge and reload database management resources before you migrate, purge, and reload other resources. To prevent the loss

of connection information for business intelligence and data modeling resources, migrate, purge, and reload resources in the following order.

Before you migrate resources, install the latest version of the Metadata Manager Agent.

1. Purge and reload all database management resources, including JDBC resources.
2. Run the rmu migration utility on each deprecated business intelligence and data modeling resource.
3. Load the new business intelligence and data modeling resources.
4. Purge and reload each SAP R/3, SAP Business Warehouse, Informatica Platform, PowerCenter, and Embarcadero ERStudio resource.
5. Edit the new resources to re-create the shortcuts, comments, links, and relationships that exist in the original resources.
6. Optionally, delete the deprecated resources.

Migrating Resource Configuration Files

You can migrate one resource configuration file at-a-time. After you migrate a resource configuration file, you can create and load the resource.

Before you migrate resource configuration files, install the latest version of the Metadata Manager Agent.

1. Run the rcfm migration utility on a resource configuration file.
2. Create a resource from the new resource configuration file.
3. Update connection information, if required.
4. Load the new resource.
5. Edit the new resource to create the shortcuts, comments, links, and relationships.

Note: rcfm cannot convert Business Objects universe names to universe IDs. Therefore, after you migrate a Business Objects resource, you might need to update the universe ID.

Create Business Glossary Resources

After you upgrade, create business glossary resources in Metadata Manager. Create one resource for each Analyst tool business glossary that you want to view in Metadata Manager.

Before you log in to Metadata Manager and create Business Glossary resources, clear the browser cache to ensure that Metadata Manager displays information for the upgraded glossaries only.

Complete the following tasks for each business glossary:

1. Create a business glossary resource.
Create one business glossary resource for each Analyst tool business glossary that you want to view in Metadata Manager.
2. For each glossary that uses enumerated links or rule-based links, associate the enumerated links and linking rules files with the business glossary resource.
Note: If the Metadata Manager business glossaries do not use linking rules files or enumerated links files, you can skip this step.
3. Load the resource.
Load the resource to extract business glossary metadata from the Analyst tool and load it into the Metadata Manager repository.

Step 1. Create a Business Glossary Resource

In Metadata Manager, create one business glossary resource for each Analyst tool business glossary that you want to view in Metadata Manager.

1. In Metadata Manager, click the **Load** tab.
2. Click **Actions > New Resource**.
The **Resource Selection** window appears.
3. Click **Business Glossary > Business Glossary**.
4. Click **Next**.
The **Properties** page appears.
5. Enter the business glossary resource name and optional description.
Note: The business glossary resource name should match the Analyst tool glossary name. If the names do not match, the related terms for a business term do not appear in the Metadata Manager business glossary.
6. Click **Next**.
The **Configuration** page appears.
7. Enter the connection properties.
8. Click **Test Connection** to test the connection to the Analyst tool.
If Metadata Manager cannot connect to the Analyst tool, an error message appears. Correct the error and test the connection again.
9. Click **Next**.
The **Enumerated Links** window appears.
10. Optionally, add or upload enumerated links files.
11. Click **Next**.
The **Schedules** window appears.
12. Optionally, attach a schedule.
13. Click **Finish**.

Step 2. Associate Linking Rules with the Glossary

For each glossary that uses enumerated links or rule-based links, associate the enumerated links and linking rules files with the business glossary resource. Metadata Manager uses these files to link business terms with metadata objects in other resources. Metadata Manager creates the links when you load the resource.

Note: If the Metadata Manager business glossaries do not use linking rules files or enumerated links files, you can skip this step.

1. In Metadata Manager, click the **Load** tab.
2. In the Resources panel, select the business glossary resource.
The Properties panel appears.
3. Click the **Edit Resource** button.
The **Edit Resource** window appears.
4. To add or upload enumerated links files, click the **Enumerated Links** tab, and specify the files to add or upload:

- Add enumerated links files when you store the files in a directory that the Metadata Manager web application can access and the files change.
 - Upload enumerated links files when the files do not change. Metadata Manager uploads the files into the Metadata Manager repository.
5. To upload linking rules files, click the **Linking Rules** tab, and select the files to upload.
 6. Click **OK**.

Step 3. Load the Resource

After you create the business glossary resource, load the resource to extract business glossary metadata from the Analyst tool and load it into the Metadata Manager repository.

1. In Metadata Manager, click the **Load** tab.
2. In the **Resources** panel, select the business glossary resource that you want to load.
3. Click **Actions > Start Load**.
Metadata Manager adds the resource to the load queue, and then starts the load process.
4. To view the load progress, click **Actions > View Load Details**.

When the load finishes, verify that all of the glossary metadata is loaded and verify the related catalog objects for the business terms. To check the glossary, open the **Glossary** view on the **Browse** tab.

Verify Load Privileges and Permissions for Metadata Manager Users

Effective in version 9.6.1 HotFix 3, permissions control which resources that users can access on the **Load** tab as well as the **Browse** tab. A user with any privilege in the Load privilege group requires permissions to perform actions on a particular resource. For example, to load a resource, a user needs Load Resource privilege and write permission on the resource.

After you upgrade, you must verify permissions for each user that has privileges in the Load privilege group. If a user does not have the appropriate permissions on a resource, the user cannot view, load, or manage the resource.

The following table lists the privileges and permissions required to manage an instance of a resource in the Metadata Manager warehouse:

Privilege	Includes Privileges	Permission	Description
View Resource	-	Read	User is able to perform the following actions: <ul style="list-style-type: none"> - View resources and resource properties in the Metadata Manager warehouse. - Export resource configurations. - Download the Metadata Manager Agent installer.
Load Resource	View Resource	Write	User is able to perform the following actions: <ul style="list-style-type: none"> - Load metadata for a resource into the Metadata Manager warehouse.* - Create links between objects in connected resources for data lineage. - Configure search indexing for resources. - Import resource configurations.

Privilege	Includes Privileges	Permission	Description
Manage Schedules	View Resource	Write	User is able to perform the following actions: - Create and edit schedules. - Add schedules to resources.
Purge Metadata	View Resource	Write	User is able to remove metadata for a resource from the Metadata Manager warehouse.
Manage Resource	- Purge Metadata - View Resource	Write	User is able to create, edit, and delete resources.
* To load metadata for Business Glossary resources, the Load Resource, Manage Resource, and View Model privileges are required.			

Configure permissions on the **Security** tab of the Metadata Manager application. For more information about configuring permissions, see the *Metadata Manager Administrator Guide*.

Reporting and Dashboards Service

After you upgrade, complete the post-upgrade tasks for each Reporting and Dashboards Service.

Upgrade to Jaspersoft 4.7

After you upgrade, install or upgrade the Jaspersoft application and assign the iReport Designer license.

Upgrading from Informatica 9.1.0 HotFix 1 or 9.1.0 HotFix 2 to Jaspersoft 4.7

Install the Jaspersoft application. You can run the following command to import the Jaspersoft repository resource that you exported before you upgraded the domain.

```
js-ant import -DimportFile=<File_Name>.zip -DdatabaseUser=<username> -
DdatabasePass=<password>
```

For more information about installing Jaspersoft, see the *Informatica Administrator Guide*.

Upgrading from Informatica 9.1.0 HotFix 3 or later to Jaspersoft 4.7

Upgrade the Jaspersoft repository with the existing contents on the Actions tab of the Administrator tool. You can also run the following command to import the Jaspersoft repository resource that you exported before you upgraded the domain.

```
js-ant import -DimportFile=<File_Name>.zip -DdatabaseUser=<username> -
DdatabasePass=<password>
```

Note: js-ant requires the bash shell interpreter. Verify that the bash shell is available.

Assign the iReport License

1. Select **Start > Informatica > Jaspersoft iReport Designer**.
2. Select **Help > License Manager**.
3. Select **Install License**.
4. Navigate to the <Informatica installation directory>\clients\iReport-Professional directory and select the jasperserver.license.

Reference Data

After you upgrade, complete the post-upgrade tasks for reference data objects and files.

Restore the Reference Data Directories

If you backed up a reference data directory from the PowerCenter directory structure before you upgraded, restore the directory to the same location in the current directory structure.

If you cannot restore the directory to the same location, restore the directory to a location that the PowerCenter Integration Service can read. Use a configuration file or an environment variable to identify the location.

Use the INFA_CONTENT environment variable to specify the parent directory for dictionary files. Use the AD50.cfg file to specify the parent directory for address reference data files. Use the IDQTx.cfg file to specify the parent directory for identity population data files.

Note: The PowerCenter Integration Service reads the identity population data files from a directory with the name `/default/`. The parent directory for the identity population data files must contain a directory with the name `/default/`.

Compile Probabilistic Models

Informatica uses Named Entity Recognition technology to compile the logic in a probabilistic model. From time to time, Informatica upgrades the Named Entity Recognition engine. To verify that a probabilistic model in the Model repository uses the current Named Entity Recognition engine, compile the model after you upgrade.

Consider the following rules and guidelines when you upgrade an installation that includes probabilistic models:

- A probabilistic model stores reference data and compilation logic in a file on the Content Management Service host machine. You cannot compile a probabilistic model if the reference data is absent from the model file. If you cannot compile a probabilistic model in the Developer tool, contact the developer who most recently updated the model. Ask the developer for a backup copy of the file that contains the reference data.
- If an upgraded PowerCenter repository contains a mapping that reads a probabilistic model, replace the model file in the PowerCenter directory structure. Use a current Developer tool to compile the probabilistic model, and export the model file to the PowerCenter directory structure again. By default, the PowerCenter Integration Service reads model files from the `server/bin` directory. If the model files are not present at the default location, the PowerCenter Integration Service reads the file locations from the `NER.properties` property file.

Update the Classifier Model and Probabilistic Model Property Files in PowerCenter

The PowerCenter Integration Service reads configuration settings for classifier model files and probabilistic model files from property files. The classifier model property file name is `CLASSIFIER.properties`. The probabilistic model property file name is `NER.properties`.

During the upgrade process, the PowerCenter installer writes empty property files to the following location:

```
<Informatica installation directory>/server/bin
```

If the installer finds a CLASSIFIER.properties file or NER.properties file at the location, it renames the files with the following names:

CLASSIFIER.properties.bak

NER.properties.bak

To maintain the classifier model and probabilistic model properties that you defined before you upgraded, update the upgrade files with the contents of the backup files. Or, delete the upgrade files, and remove the `bak` extension from the backup file names.

Update the Address Reference Data Configuration Files in PowerCenter

The PowerCenter Integration Service reads configuration settings for address reference data from the AD50.cfg file.

During the upgrade process, the PowerCenter installer writes an empty AD50.cfg file to the following location:

<Informatica installation directory>/server/bin

If the installer finds an AD50.cfg file at the location, it renames the file with the following name:

AD50.cfg.bak.

To maintain the address reference data configuration that you defined before you upgraded, update the upgrade files with the contents of the backup files. Or, delete the upgrade files, and remove the `bak` extension from the backup file names.

Profiles

After you upgrade, complete the post-upgrade tasks for profiles and scorecards.

Migrate Profile and Scorecard Results

After you upgrade, you need to migrate the profile results and scorecard results to the profile warehouse.

To migrate the profile results and scorecard results, run the following commands:

- `infacmd ps migrateProfileResults`. Migrates column profile results and data domain discovery results to the profiling warehouse.
- `infacmd ps synchronizeProfile`. If you have enterprise discovery profiles in specific projects, run the command to migrate documented, user-defined, and committed primary keys and foreign keys for all the profiles to the profiling warehouse.
- `infacmd ps migrateScorecards`. If you created scorecards in Informatica Analyst, run the command to migrate the scorecard results to the profiling warehouse.

Import Data Domains

To add predefined data domain groups and related data domains to the data domain glossary, import the `Informatica_IDE_DataDomain.xml` file into the Developer tool using the **Windows > Preferences > Informatica > Data Domain Glossary > Import** menu option.

To view and make changes to rules associated with data domains, import the `Informatica_IDE_DataDomainRule.xml` file using the **File > Import** menu option in the Developer tool.

Upgrade the Informatica Drivers for SQL Data Services

Upgrade the Informatica JDBC or ODBC drivers for SQL data services.

Upgrade the Informatica ODBC or JDBC driver on the machine from which you connect to the SQL data service. To upgrade the driver, run the Informatica JDBC/ODBC driver installation program and select the upgrade option.

User Authentication

To ensure a high level of security for the Informatica domain, you can configure the domain to use Kerberos authentication.

Before you configure the Informatica domain to use Kerberos authentication, verify that the upgraded domain and services are working as expected. Verify that you can enable all upgraded services and run all operations in the domain and all domain functionality works as expected.

For more information about setting up Kerberos authentication, see the *Informatica Security Guide*.

Copy the Data Transformation Files

After you upgrade Data Transformation, copy the files from the previous installation directories to the new installation directories, to get the same workspace, repository, and custom global components as in the previous version.

File or Directory	Default Location
Repository	<Informatica installation directory>\DataTransformation\ServiceDB
Custom Global Components directory (TGP files)	<Informatica installation directory>\DataTransformation\autoInclude\user
Custom Global Components directory (DLL and JAR files)	<Informatica installation directory>\DataTransformation\externLibs\user

Do not copy the Data Transformation Library files. Instead, install the Data Transformation Libraries again.

Read the Release Guide

The *Informatica Release Guide* lists new features and enhancements, behavior changes between versions, and tasks that you might need to perform after you upgrade. Read the *Informatica Release Guide* to view the list of new functionality that you might want to implement or new options that you might want to enable.

APPENDIX A

Updating the DynamicSections Parameter of a DB2 Database

This appendix includes the following topics:

- [DynamicSections Parameter Overview, 94](#)
- [Updating the DynamicSections Parameter, 94](#)

DynamicSections Parameter Overview

IBM DB2 packages contain the SQL statements to be executed on the database server. The DynamicSections parameter of a DB2 database determines the maximum number of executable statements that the database driver can have in a package. You can raise the value of the DynamicSections parameter to allow a larger number of executable statements in a DB2 package. To modify the DynamicSections parameter, connect to the database using a system administrator user account with BINDADD authority.

Updating the DynamicSections Parameter

Use the DataDirect Connect for JDBC utility to raise the value of the DynamicSections parameter in the DB2 database.

To use the DataDirect Connect for JDBC utility to update the DynamicSections parameter, complete the following tasks:

- Download and install the DataDirect Connect for JDBC utility.
- Run the Test for JDBC tool.

Downloading and Installing the DataDirect Connect for JDBC Utility

Download the DataDirect Connect for JDBC utility from the DataDirect download web site to a machine that has access to the DB2 database server. Extract the contents of the utility file and run the installer.

1. Go to the DataDirect download site:
<http://www.datadirect.com/support/product-documentation/downloads>
2. Choose the Connect for JDBC driver for an IBM DB2 data source.

3. Register to download the DataDirect Connect for JDBC Utility.
4. Download the utility to a machine that has access to the DB2 database server.
5. Extract the contents of the utility file to a temporary directory.
6. In the directory where you extracted the file, run the installer.

The installation program creates a folder named testforjdbc in the installation directory.

Running the Test for JDBC Tool

After you install the DataDirect Connect for JDBC Utility, run the Test for JDBC tool to connect to the DB2 database. You must use a system administrator user account with the BINDADD authority to connect to the database.

1. In the DB2 database, set up a system administrator user account with the BINDADD authority.
2. In the directory where you installed the DataDirect Connect for JDBC Utility, run the Test for JDBC tool.
On Windows, run testforjdbc.bat. On UNIX, run testforjdbc.sh.

3. On the Test for JDBC Tool window, click Press Here to Continue.

4. Click Connection > Connect to DB.

5. In the Database field, enter the following text:

```
jdbc:datadirect:db2://  
HostName:PortNumber;databaseName=DatabaseName;CreateDefaultPackage=TRUE;ReplacePackage=TRUE;DynamicSections=3000
```

HostName is the name of the machine hosting the DB2 database server.

PortNumber is the port number of the database.

DatabaseName is the name of the DB2 database.

6. In the User Name and Password fields, enter the system administrator user name and password you use to connect to the DB2 database.
7. Click Connect, and then close the window.

APPENDIX B

Upgrade Checklist

This appendix includes the following topics:

- [Upgrade Checklist Overview, 96](#)
- [Before You Upgrade the Domain, 96](#)
- [Domain Upgrade, 98](#)
- [Before You Upgrade the Application Services, 98](#)
- [Application Service Upgrade, 99](#)
- [Informatica Client Upgrade, 99](#)
- [After You Upgrade, 100](#)

Upgrade Checklist Overview

The upgrade checklist summarizes the tasks that you must perform to complete an upgrade. If you upgrade the Informatica product on more than one machine, complete the first upgrade using the detailed instructions in this guide. You can use this checklist to perform subsequent upgrades.

Before You Upgrade the Domain

Before you upgrade the domain, perform the following pre-upgrade tasks:

- ☐ Read the Informatica Release Notes.
- ☐ Perform the following tasks to set up the machine to meet the requirements on Windows:
 - Verify that the machine has the required operating system patches and libraries.
 - Verify that the machine meets the minimum system requirements to upgrade the domain.
 - Verify that the machine meets the hardware requirements to upgrade the application services.
 - Review the environment variables.
 - Review the maximum heap size setting.
 - Extract the installer files.
 - Run the pre-installation (i10Pi) system check tool.

- ☐ Perform the following tasks to set up the machine to meet the requirements on UNIX:
 - Verify that the machine has the required operating system patches and libraries.
 - Install the Java Developer Kit when you upgrade Informatica on AIX, HP-UX, or zLinux.
 - Verify that the machine meets the minimum system requirements to upgrade the domain.
 - Verify that the machine meets the hardware requirements to upgrade the application services.
 - Review the environment variables.
 - Verify that the operating system meets the file descriptor requirement.
 - Review the maximum heap size setting.
 - Extract the installer files.
 - Run the pre-installation (i10Pi) system check tool.
- ☐ Back up the PowerCenter repository.
- ☐ Perform the following tasks to prepare the Model repository:
 - Back up the Model repository.
 - Verify the user account requirements for the Model repository database.
 - Verify the maximum heap size setting.
- ☐ Perform the following tasks to prepare the Data Integration Service:
 - Record the email server properties for the Data Integration Service.
 - Record the execution options for each Data Integration Service process.
 - Verify that all workflows are complete.
- ☐ Perform the following tasks to prepare the Reporting and Dashboards Service:
 - Export the Jaspersoft repository resources.
 - Configure the database user for the Jaspersoft repository.
- ☐ Perform the following tasks to prepare the profiling warehouse:
 - Use the native database back up option to back up the profiling warehouse.
 - Verify the user account permissions for the database.
- ☐ Use the native database back-up option to back up the reference data warehouse.
- ☐ Back up any reference data directory at a non-default location in the PowerCenter directory structure.
- ☐ Prepare the staging database.
Use the native database back-up option to back up the staging database.
- ☐ Perform the following tasks to prepare Metadata Manager:
 - Back up the Metadata Manager warehouse.
 - Export, purge, and delete business glossaries.
 - Disable the Metadata Manager Service.
 - Back up the Metadata Manager properties file.
- ☐ Perform the following tasks to prepare the Data Analyzer repository:
 - Assign roles to users and groups.
 - Back up the Data Analyzer repository.

- ☐ Record the ODBC data source names of the ODBC connections in the domain.
- ☐ Perform the following tasks to prepare the domain:
 - Rename the Administrator group.
 - Verify user account requirements for the domain configuration repository database.
 - Shut down the domain. To shut down the domain, stop the Informatica service process on each node in the domain.
 - Back up the domain.
- ☐ Prepare to change the node configuration.
Perform the additional pre-upgrade tasks if you choose to change the node configuration for the following reasons:
 - If the domain configuration repository database type or version is no longer supported, migrate the repository to a different database.
 - If the Informatica installation is on a machine with an operating system that is no longer supported, migrate the installation to a different machine.

RELATED TOPICS:

- [“Before You Upgrade the Domain” on page 17](#)

Domain Upgrade

Use the server installer to upgrade the domain. The server installer provides a domain upgrade wizard to guide you through the upgrade process.

The upgrade wizard installs the Informatica files in the installation directory that you specify. It does not modify the files in the directory of the previous version.

When you run the upgrade wizard, select the option to change the node configuration if you upgrade the domain to a different machine or to a different domain configuration repository database.

RELATED TOPICS:

- [“Upgrade the Domain” on page 48](#)

Before You Upgrade the Application Services

Before you upgrade application services, perform the following pre-upgrade tasks:

- ☐ Configure POSIX Asynchronous I/O.
If you install Informatica on IBM AIX, make POSIX Asynchronous I/O available on any node where you want to run a PowerCenter Integration Service.
- ☐ Configure Informatica environment variables.
- ☐ Configure locale environment variables.
Verify that the locale setting is compatible with the code page for the repository.

- ☐ If you used a keystore file that you created to secure the connection to the Administrator tool, verify the keystore file location.
- ☐ Clear the browser cache.
- ☐ If you chose the option to change the node configuration to migrate the Informatica installation to a different machine, perform the following tasks:
 - Configure the environment variables.
 - Verify the range of port numbers that can be dynamically assigned to application service processes that run on the node.
 - Verify that the backup directory for the node is accessible by the node.
 - Configure PowerExchange adapters. If the PowerExchange adapter has an installer, re-install the PowerExchange adapter.

RELATED TOPICS:

- [“Before You Upgrade the Application Services” on page 59](#)

Application Service Upgrade

Some service versions require a service upgrade. You can use the service upgrade wizard to upgrade services.

To upgrade application services, perform the following upgrade tasks:

- ☐ Upgrade the Model Repository Service.
- ☐ Upgrade the Data Integration Service.
- ☐ Upgrade the profiling warehouse for the Data Integration Service.
- ☐ Upgrade the PowerCenter Repository Service.
- ☐ Upgrade the Metadata Manager Service.

RELATED TOPICS:

- [“Application Service Upgrade” on page 64](#)

Informatica Client Upgrade

Use the client installer to upgrade the client tools. The client tools are installed in the installation directory you specify. The client installer configures the newly installed client tools with the same settings as the previous version.

RELATED TOPICS:

- [“Informatica Client Upgrade” on page 68](#)

After You Upgrade

After you upgrade the domain, application services, and client files, perform the following post-upgrade tasks:

- ☐ Perform the following tasks for the domain:
 - Verify that the log events directory is correct.
To use a different directory for the logs, update the Log Directory Path property for the domain.
 - The Informatica installation includes new DataDirect ODBC drivers. Re-create each ODBC data source to use the new drivers.
 - You can optionally configure the domain configuration repository on a database that is secured with the SSL protocol.
 - To send scorecard notifications, verify that SMTP is correctly configured for the domain.
- ☐ If you enabled secure communication between client applications and the previous domain, verify the keystore file locations. The upgrade process does not update these locations.
- ☐ If you upgraded from a version that used operating system profiles, set the umask setting to change the security on files that the DTM writes.
- ☐ Perform the following tasks for each Content Management Service:
 - Verify the location of the identity population data files.
 - Restart the Content Management Service.
If you update any property for address reference data, identity population data, classifier model data, or probabilistic model data, restart the Data Integration Service.

If you update the location of the reference data warehouse, restart the Analyst Service and the Data Integration Service.
- ☐ Perform the following tasks for each Data Integration Service:
 - Reset the HTTP proxy server password.
If the Data Integration Service runs Web Service Consumer transformations and is configured to use an HTTP proxy server with authentication, reset the HTTP proxy server password.
 - If you plan to run workflows, activate the Workflow Orchestration Service module and configure the workflow database. Before you run a workflow, recycle the service.
 - If the Data Integration Service runs on multiple nodes and you configured the execution options differently for each service process, verify that the Execution Options on the Properties view use the correct values.
 - Verify that the Maximum Memory Per Request property uses the correct value for each Data Integration Service module.
- ☐ To send notifications from workflows run by the Data Integration Service, configure and enable the Email Service.
- ☐ Perform the following tasks for each Analyst Service:
 - Verify the location of the flat file cache directory. The upgrade process does not update this location.

- If you plan to run workflows that contain Human tasks, select an Analyst Service to associate with the Data Integration Service that runs the Human tasks.
 - Assign privileges.
If you have an Analyst Service in the Informatica domain, you must grant the Access Analyst privilege from the Model Repository Service privileges to users. Based on the tasks that users need to perform in the Analyst tool, you might need to grant the Access Mapping Specifications, Load Mapping Specification Results, Workspace Access, Manage Glossaries, Design Workspace, Discovery Workspace, Glossary Workspace, and Scorecards workspace privileges from the Analyst Service privileges to users.
 - Recycle the Analyst Service.
Before you recycle the Analyst Service, complete the upgrade and post-upgrade steps for the Model Repository Service, Data Integration Service, and Content Management Service.
- ☐ Change the port number and host name of the Business Glossary Desktop application to reference glossaries on a machine that hosts the Analyst Service.
 - ☐ To perform searches in the Analyst tool and Business Glossary Desktop, create the Search Service.
 - ☐ If you exported business glossaries from Metadata Manager, import the glossaries into the Analyst tool. Perform the following tasks to import the glossaries:
 - If custom attributes were added to the business glossary model in Metadata Manager, import the Metadata Manager model export file.
 - If business terms and categories were linked across glossaries in Metadata Manager, merge the Microsoft Excel business glossary files into one file, and delete duplicate business terms.
 - Import business glossary files.
 - Publish the categories and all unpublished business terms that you want to view in Metadata Manager.
 - ☐ Uninstall and reinstall the Metadata Manager Agent.
 - ☐ Perform the following tasks for each Metadata Manager Service:
 - Update the Metadata Manager properties file to include any customization.
 - If the Metadata Manager repository is a Microsoft SQL Server database and the Metadata Manager Service runs on UNIX, verify that the ODBCINST environment variable is set.
 - Enable the Metadata Manager Service.
 - Migrate and reload Metadata Manager resources.
 - Create business glossary resources based on the business glossaries that you imported into the Analyst tool.
Create the business glossary resource, upload linking rules files if required, and load the resource.
 - Verify Load privileges and permissions for Metadata Manager users.
 - ☐ Perform the following tasks for reference data objects and files:
 - If you created a backup copy of a reference data directory from the PowerCenter directory structure, restore the directory to the PowerCenter directory structure.
 - Compile any probabilistic model in the Model repository. If the PowerCenter directory structure contains a probabilistic model file, replace the file with a file that you export from the current Developer tool.
 - If you use probabilistic model files in PowerCenter, configure the NER.properties file.
 - If you use classifier model files in PowerCenter, configure the classifier.properties file.
 - If you use AddressDoctor reference data in PowerCenter, configure the AD50.cfg file.

- ☐ Perform the following tasks for profiles and scorecards:
 - Migrate the column profile, data domain discovery, and scorecard results to the profiling warehouse.
 - Import data domain groups and related data domains to the data domain glossary. If you want to add predefined data domain groups and their related data domains to the data domain glossary, import the `Informatica_IDE_DataDomain.xml` file.
- ☐ Upgrade the Informatica ODBC or JDBC driver on each machine from which you connect to the SQL data service.
- ☐ To ensure a high level of security for the Informatica domain, you can optionally configure the domain to use Kerberos authentication.
- ☐ Read the *Informatica Release Guide* to view the list of new functionality that you might want to implement or new options that you might want to enable.

RELATED TOPICS:

- [“After You Upgrade” on page 72](#)

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