



Informatica® Test Data Management
10.2.0 HotFix 2

Upgrade Guide

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Preface

The Informatica *Test Data Management Upgrade Guide* is written for the system administrator who is responsible for upgrading Test Data Management. This guide assumes that you have knowledge of relational database concepts and are familiar with the relational database systems and other file systems in your environment. This guide also assumes that you are familiar with the operating systems in your environment.

Informatica Resources

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- View product availability information.
- Create and review your support cases.
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If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

Informatica Product Availability Matrices

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

CHAPTER 1

Test Data Management Upgrade Overview

This chapter includes the following topics:

- [Introduction, 8](#)
- [Upgrade Options, 8](#)
- [Rules and Guidelines for Multinode Installations, 9](#)

Introduction

Use the Test Data Management (TDM) installer to upgrade from a previous version of TDM. To complete the upgrade process, log in to Informatica Administrator and upgrade the TDM repository content.

On Windows, you can upgrade in graphical mode. The length of the entire installer 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 the empty folders.

On UNIX, you can upgrade in graphical or console mode. Use a native tar or GNU tar utility to extract the installer files. The user that runs the installer must have read and write permission on the installer files directory and execute permission on install.sh.

You can perform the upgrade from a DVD or from the root of the directory where you download the installer files. Complete the pre-upgrade tasks before you start the upgrade.

When you upgrade TDM, the installer does not change the files of the previous version. It renames the existing TDM folder in the Informatica install directory and performs a fresh installation of TDM in the Informatica installation directory.

The installer renames the TDW folder in the Informatica install directory and creates a fresh TDW folder in the Informatica installation directory.

Upgrade Options

You can use the same installer to install or upgrade Test Data Management (TDM).

You can upgrade from Test Data Management versions 10.2 R1 and 10.2.0 HotFix 1.

If you have a TDM version earlier than 10.2 R1, you must upgrade to 10.2 R1 or 10.2.0 HotFix 1 before you can upgrade to 10.2.0 HotFix 2.

When you upgrade, the installer copies the TDM files to the specified directory. Upgrade the Test Data Manager Service content after you upgrade TDM to upgrade the objects.

TDM works with Informatica service. The TDM installer does not upgrade Informatica service. If you are not on the required version of Informatica service, you must upgrade Informatica service and apply required EBFs before you upgrade TDM.

Rules and Guidelines for Multinode Installations

You can install TDM on more than one machine in an Informatica domain that has a master gateway node and nodes.

Read the following rules and guidelines and understand the limitations before you install TDM in a multinode setup:

General

- The Test Data Manager Service connects to a PowerCenter® Integration Service in the domain. The nodes on which you create the Test Data Manager Service and the PowerCenter Integration Service must be on the same operating system. Create both nodes on the same operating system to link the paths to run workflows.
- If multiple nodes connect to a single PowerCenter Repository Service, use different folder names as work areas for each node.
- If you use parameters to enter the connection information in a plan, the parameter file must be present on the node on which the Test Data Manager Service runs. The file must be in the same directory path on both nodes.
- You can create a TDM multinode setup in a Kerberos environment.

Installation and Upgrade

- Install TDM on the master gateway node first.
- You must install TDM on the master node even if you do not create a Test Data Manager Service on the master node. You cannot install TDM and create the Test Data Manager Service on other nodes without installing TDM on the master node.
- When you create a Test Data Manager Service on a node that is not a master node, it is recommended to retain the default Test Data Manager Server Configuration settings and the Advanced Properties.
- You must install TDM on each node on which you create a Test Data Manager Service.
- You must install a single TDM version on all nodes in the domain.
- After you create the Test Data Manager Service, log in to Test Data Manager and verify the default staging connection on each node. You must use different connection names on each node. Use the default TDM_CONNECTION only on one node.
- The PowerCenter Integration Service creates temporary cache files on the node where you run a TDM workflow. The cache files must be available to the PowerCenter Integration Service for the workflow to run. If you configure the Test Data Manager Service and the PowerCenter Integration Service on different nodes, you must configure the TDM cache directory inside an `infa_shared` directory. The `infa_shared` directory must be accessible to all nodes that the Test Data Manager Service and the PowerCenter

Integration Service use. Configure the TDM cache directory from the **Workflow Generation** tab in the **Administrator | Preferences** view in Test Data Manager.

- Configure a different cache directory within the `infa_shared` directory for each node on which you create a Test Data Manager Service. TDM generates temporary folders with the plan name in the cache directory. The plan names might conflict with plans created on other nodes.
- It is recommended that you install TDM in the same directory structure on all nodes if you configure the Test Data Manager Service and PowerCenter Integration Service on different nodes. This is because TDM workflows that you run from a specific node use the scripts in the `<Informatica installation directory>\TDM\utilities` directory with the absolute path as set in TDM.
- If you install Informatica services in a different directory structure on each node on Windows, create a soft link on the node with the PowerCenter Integration Service. The soft link must allow the node with the PowerCenter Integration Service to access the cache folder on the node that generates the workflow.
- If you install Informatica services in a different directory structure on each node on Linux, you must mount the directories. Users must have read, write, and execute permission on the mounted directories.

Connection Sharing

Multiple nodes can connect to a single Model Repository Service, but the connections are not shared across the nodes. Changes to connections on one node do not impact other nodes.

Restrictions

- The Test Data Manager Service cannot connect to a PowerCenter Integration Service or a Data Integration Service that runs on a grid.
- Failover and recovery are not available with the Test Data Manager Service.
- You can install TDM in HTTPS mode only on a master node.

CHAPTER 2

Before You Upgrade TDM

This chapter includes the following topics:

- [Read the Release Notes, 11](#)
- [Back Up the TDM Repository, 11](#)
- [Shut Down the TDM Server, 11](#)
- [Upgrade Informatica Service, 12](#)
- [Extract the Installer Files, 12](#)
- [Set Up the X Window Server, 13](#)

Read the Release Notes

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

Back Up the TDM Repository

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

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

Shut Down the TDM Server

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

Upgrade Informatica Service

TDM versions work with specific versions of Informatica service.

Verify the version of Informatica service that works with the TDM version. Upgrade Informatica service before you run the TDM installer to upgrade TDM.

TDM 10.2.0 HotFix 2 works with Informatica service version 10.2.0 HotFix 2. You can apply the hotfix to Informatica versions 10.2.0 and 10.2.0 HotFix 1.

For information about how to upgrade Informatica service, see the Informatica 10.2.0 HotFix 2 upgrade documentation.

Extract the Installer Files

Download and extract the installer files on the machine that contains the TDM instance that you plan to upgrade.

Extract the Installer Files on UNIX

Before you perform the installation, extract the installer files on the UNIX machine. The user that runs the installer must have read and write permissions on the installer files directory and execute permissions on `install.sh`.

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 the UNIX machine. For example,

```
tar -xvf <filename.tar>
```

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: If you extract the tar file on Windows and then copy the installer files to UNIX, the installation can fail.

Extracting the Installer Files on Windows

The installer files are compressed and distributed as a zip file. The user that runs the installer must have read and write permissions on the installer files directory and execute permissions on `install.bat`.

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 (ESD) site to a directory on your machine and then extract the installer files.

Set Up the X Window Server

To run the installer in graphical mode, use a graphics display server. If you are logged in remotely to a UNIX machine, you can use an X Window server to redirect the graphics display to your local host.

If you do not have a display device installed on the machine where you want to install the product, you can run the installer by using an X Window server installed on another machine. Use the DISPLAY variable to redirect output of the X Window to another machine that has X Window and xterm installed.

The following table lists the commands to set the DISPLAY environment variable:

Shell	Command
C	setenv DISPLAY <host name>:0
Bash/Korn	export DISPLAY=<host name>:0
Bourne	DISPLAY=<host name>:0 export display

If you do not know the host name of the machine that has the X Window server that you want to use, ask your network administrator. You can also use the IP address of the machine. For more information about redirecting the DISPLAY variable, see the documentation from the UNIX or X Window vendor.

If the X Window server does not support the font that the installer uses, the installer displays the labels on the buttons incorrectly.

CHAPTER 3

TDM Upgrade

This chapter includes the following topics:

- [TDM Upgrade Overview, 14](#)
- [Upgrade Task Flow, 14](#)
- [Upgrading in Graphical Mode, 15](#)
- [Upgrading in Console Mode, 16](#)
- [Upgrading in Silent Mode, 16](#)

TDM Upgrade Overview

On Windows, you can run the installer in graphical or silent mode.

On UNIX, you can run the installer in graphical, console, or silent mode.

When you run the TDM installer to upgrade, the installer renames the existing TDM folder in the Informatica directory and performs a fresh installation of TDM in the Informatica installation directory.

Upgrade Task Flow

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

Perform the following steps to complete the upgrade:

1. Stop and disable the Test Data Manager Service.
2. Stop the Informatica domain.
3. Upgrade Informatica services.

The Informatica domain starts up after the upgrade.

4. Stop the Informatica domain.
5. Run the TDM installer to upgrade TDM.
6. Start the Informatica domain.
7. Log in to Informatica Administrator.
8. Optional. If you use a test data warehouse, upgrade the Test Data Warehouse Service content.

9. Upgrade the Test Data Manager Service content.
10. Enable the Test Data Manager Service.
11. Optional. Update the cache file location in Test Data Manager.

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

RELATED TOPICS:

- [“Upgrading in Console Mode” on page 16](#)
- [“Upgrading in Graphical Mode” on page 15](#)

Upgrading in Graphical Mode

You can run the installer in graphical mode on UNIX or Windows.

You cannot run the installer in graphical mode on the SUSE Linux Enterprise 11 operating system.

If you encounter problems on Windows when you run the install.bat file from the root directory, run the following file: `<Informatica Installation Dir>/server/install.exe`

Note: Read the information in the Upgrade Task Flow and perform the Informatica services upgrade before you run the TDM installer.

1. Log in to the machine with a system user account.
2. Close all other applications.
3. Begin the installation.
 - On Windows, run install.bat from the installer root directory.
 - On UNIX, perform the following steps:
 1. Use a shell command line to run install.sh from the installer root directory.
 2. Press **g** for graphical mode installation.

The installer **Welcome** page opens.

4. Click **Next**.
5. Select the option to upgrade Test Data Management and click **Next**.
6. Enter the installation directory. You must install Test Data Management in the Informatica install directory.
7. Click **Next**.

The installer checks for the required files in the Informatica install directory.

8. Review the information, and click **Install** to continue.

The installer copies the Test Data Management files to the installation directory.

The **Post-Installation Summary** page indicates whether the upgrade completed successfully.

9. Click **Done**.
10. Restart the Informatica domain.

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

RELATED TOPICS:

- [“After you Upgrade TDM” on page 19](#)

Upgrading in Console Mode

You can upgrade TDM in console mode on UNIX.

Note: Read the information in the Upgrade Task Flow and perform the Informatica services upgrade before you run the TDM installer.

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 a system user account.
2. Close all other applications.
3. On a shell command line, run the install.sh file from the root directory.
4. Press **c** to install in console mode.
5. Verify the prerequisites and then press **Enter** to continue.
6. Press **2** to upgrade Test Data Management.
7. Enter the installation directory. You must install Test Data Management in the Informatica install directory.
8. Press **Enter** to continue.
9. Review the installation information and press **Enter** to continue.
The **Post-Installation Summary** section indicates whether the upgrade completed successfully.
10. Press **Enter** to exit the installer.
11. Restart the Informatica domain.

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

RELATED TOPICS:

- [“After you Upgrade TDM” on page 19](#)

Upgrading in Silent Mode

To upgrade TDM without user interaction, upgrade in silent mode. Use the properties file Silentinput.properties to specify the installation parameters. The installer reads the file to determine the upgrade options.

Copy the installation files to the hard disk on the machine where you plan to upgrade TDM. The user that runs the installer must have read and write permissions on the installer files directory and execute permissions on the install.bat and Silentinstall.sh files. If you upgrade on a remote machine, verify that you can access and create files on the remote machine.

Note: Read the information in the Upgrade Task Flow and perform the Informatica services upgrade before you run the TDM installer.

To upgrade in silent mode, perform the following tasks:

1. Create the installation properties file and specify the installation parameters.
2. Run the installer with the installation properties file.

Creating the Properties File

Informatica provides a sample properties file that includes the parameters that the installer requires. You can customize the sample properties file to specify the options for your installation.

The name of the sample properties file is `SilentInput.properties`. The file is located in the installer root directory of the installation DVD or the installer download location. After you customize the file, save the file with the same name in the same directory. Then run the installer in silent mode.

1. Browse to the installer root directory.
2. Find the sample `SilentInput.properties` file.
3. Create a backup copy of the `SilentInput.properties` file.
4. Use a text editor to open the file and enter the values of the installation parameters:

The following table describes the installation parameters:

Property Name	Description
INSTALL_TYPE	Indicates whether to install or upgrade TDM. If the value is 0 the installer performs an installation. If the value is 1 the installer performs an upgrade.
TDM_USER_INSTALL_DIR	Absolute path for the directory in which to install TDM. You must install TDM in the Informatica installation location. The directory names in the path must not contain spaces or the following special characters: @ * \$ # ! % () { } [] , ; ' .
PC_OLD_USER_INSTALL_DIR	Absolute path of the installation directory of the previous installed version of Informatica services. Enter this value if you have upgraded Informatica services and INSTALL_TYPE=1.

5. Verify that the values you set are correct. Then save the properties file with the name `SilentInput.properties` in the same directory.

Running the Silent Installer

After you create the properties file, open a command window to start the silent installation.

1. Open a command window.
2. Go to the TDM installer files directory.
3. Verify that the directory contains the `SilentInput.properties` file that you created.
4. Run the silent installer.
On Windows, double click the file `silentinstall.bat`.
On UNIX, run the file `silentinstall.sh`.

The silent installer runs in the background. The process can take a while. View the TDM installation log file in the `<Informatica installation directory>\TDM` location for more information about the tasks performed

by the installer and configuration properties for the installed components. If the silent installation fails, the installer creates the `silentErrorLog.log` file.

On UNIX, the installer creates the log file in the `$HOME` directory.

On Windows, the installer creates the log file in the root directory.

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

CHAPTER 4

After you Upgrade TDM

This chapter includes the following topics:

- [Update the Application Services, 19](#)
- [Update the Cache File Location in Test Data Manager, 20](#)
- [Copy JSON and XML Files, 20](#)
- [Configure the Informatica Services Machine for Kerberos-Enabled Hadoop HDFS Connections, 20](#)
- [Configure the Test Data Management Machine for Format Preserving Encryption Masking, 21](#)
- [Regenerate Workflows, 22](#)
- [Export Projects and Plans, 22](#)
- [Optional. Deploy Data Packs, 22](#)
- [Test Data Manager Service Logs, 22](#)
- [Logging In to Test Data Manager, 23](#)

Update the Application Services

Update and upgrade the services that Test Data Manager requires.

1. Log in to Informatica Administrator and click the **Services and Nodes** tab.
2. Optional. If you use a test data warehouse, select the Test Data Warehouse Service in the **Domain Navigator** panel and click **Actions > Upgrade Contents** to upgrade the content.
The content upgrade updates the table structures and schema of the test data warehouse repository.
3. Select the Test Data Manager Service in the **Domain Navigator** panel and click **Actions > Upgrade Contents** to upgrade the content. The content upgrade updates the schema and table structures of the TDM repository.
4. Enable the Test Data Manager Service.

Update the Cache File Location in Test Data Manager

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

On a multinode setup you must:

- Update the cache file directory on all TDM nodes in the setup.
 - Update the mount ormlink for the cache file directory on all TDM nodes in the setup.
1. Log in to Test Data Manager as an Administrator.
 2. Open the **Administrator** view and click **Actions > Edit > Workflow Generation**.
 3. Update the location in the **Cache Location** field.
 4. Click **OK**.

Copy JSON and XML Files

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

If your TDM setup contains the files in the default location, you can copy the files from the TDM folder that is renamed post upgrade. Copy the files to the same location in the current TDM folder.

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

Configure the Informatica Services Machine for Kerberos-Enabled Hadoop HDFS Connections

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

Before you begin, perform the following prerequisite tasks:

- Install the latest version of the JCE policy files.
 - Ensure that the `KRB5_CONFIG` environment variable contains the `krb5.conf` file location and that the `krb5.conf` file contains the correct entries.
 - Copy the `krb5.conf` file to the following location: `<Informatica installation directory>/TDM/datadirect`
 - Ensure that you have read permission on the ticket cache file.
1. Create a directory in the Informatica installation directory. For example: `<Informatica installation directory>/hadoophdfs/conf/`
Ensure that the PowerCenter Integration Service is running so that the Informatica administrator user has read/write access to the directory.

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

The command creates the ticket cache file with the following name format:

```
/tmp/krb5cc_<UID>
```

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


```
<property>
<name>hadoop.security.kerberos.ticket.cache.path</name>
<value>/tmp/REPLACE_WITH_CACHE_FILENAME</value>
<description>Path to the Kerberos ticket cache.</description>
</property>
```
6. Log in to the Administrator tool, select the PowerCenter Integration Service, and click the **Processes** tab.
7. Click **Edit** on the **Environment Variables** tab. In the CLASSPATH environment variable, add the directory that you created.
8. Restart the PowerCenter Integration Service.

Configure the Test Data Management Machine for Format Preserving Encryption Masking

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

1. Create a `tokens` folder on the machine where Informatica service is installed.
2. Go to the `<Informatica installation directory>\TDM\configuration` directory.
3. Open the `softhsm2.conf` file.
4. Set the `directories.tokenidir` property to the `tokens` directory that you create in step 1 and save the change.
5. Set the `SOFTSM2_CONF` environment variable to the `<Informatica installation directory>\TDM\configuration\softhsm2.conf` directory.
6. Set the `INFA_KEY_LOCATION` environment variable to the `<Informatica installation directory>\isp\config\keys` directory.
7. Restart the Informatica domain.

Regenerate Workflows

Command tasks record the paths as absolute paths. Workflows that were created before upgrade contain the path of the previous version. Post upgrade, the path must be updated.

To update the path to the latest in plans that contain workflows, regenerate the workflows and then run the workflows. When you regenerate a workflow, the paths get updated in the workflow command task.

Note: If you do not edit or delete the directory specified in the path, a workflow might run successfully without regeneration.

Export Projects and Plans

You cannot import projects or plans that you exported before the upgrade if the projects or plans contain overrides.

If you exported projects or plans that contain overrides, export them again after the upgrade. You can then import the files that you exported after upgrade when needed.

Optional. Deploy Data Packs

Required if you upgrade from TDM 10.2 R1 in an HTTPS environment.

A reset job for a data pack that you deploy in a TDM 10.2 R1 HTTPS environment might fail in TDM 10.2.0 HotFix 2.

Post upgrade, deploy the data pack before you run a job to reset the data pack.

Test Data Manager Service Logs

The Test Data Manager Service logs contain detailed information about all Test Data Manager Service actions. View the Test Data Manager Service logs from the **Logs | Services** view in the Administrator tool.

View detailed information about Test Data Manager Service startup and shut down. You can also view console logs and error log messages in the Test Data Manager Service logs in the Administrator tool.

View information about content creation and content upgrade when you perform a service upgrade or create content for the service.

You can access all the Test Data Manager Service logs from the **Logs | Services** view of the Administrator tool.

Viewing Test Data Manager Service Logs

View the event logs for the Test Data Manager Service that you want to monitor.

You can view messages for events such as enablement, disablement, content creation, and content upgrade of the Test Data Manager Service.

1. In the Administrator tool, click the **Logs** tab.
2. Select the **Service** view.
The contents panel displays event logs for all services.
3. From the **Service Type** list, select Test Data Manager Service.
4. From the **Service Name** list, select the Test Data Manager Service that you want to monitor.
5. Click the **Filter** button.

The Log Manager retrieves the log events and displays the most recent log events first.

To narrow down the list of log events, select the severity and time period of the events that you want to view. Click the **Filter** button again to refresh the list.

Logging In to Test Data Manager

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

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

`http://<HostName>:<PortNumber>/tdm`

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

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

`https://<HostName>:<HTTPSPortNumber>/tdm`

3. On the login page, enter an Informatica user name and password.
4. Click **Login**.

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