



Informatica® Test Data Management
10.2.1

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

Informatica Network

Informatica Network hosts Informatica Global Customer Support, the Informatica Knowledge Base, and other product resources. To access Informatica Network, visit <https://network.informatica.com>.

As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
- Review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to search Informatica Network for product resources such as documentation, how-to articles, best practices, and PAMs.

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

Informatica Documentation

To get the latest documentation for your product, browse the Informatica Knowledge Base at https://kb.informatica.com/_layouts/ProductDocumentation/Page/ProductDocumentSearch.aspx.

If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at infa_documentation@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. If you are an Informatica Network member, you can access PAMs at

<https://network.informatica.com/community/informatica-network/product-availability-matrices>.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services. 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 are an Informatica Network member, you can access Informatica Velocity resources at <http://velocity.informatica.com>.

If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

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

Informatica Global Customer Support

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

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:

<http://www.informatica.com/us/services-and-training/support-services/global-support-centers>.

If you are an Informatica Network member, you can use Online Support at <http://network.informatica.com>.

CHAPTER 1

Test Data Management Upgrade Overview

This chapter includes the following topics:

- [Introduction, 8](#)
- [Upgrade Options, 8](#)

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 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.

Upgrade Options

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

You can upgrade from Test Data Management version 10.2.0

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 domain service. The TDM installer does not upgrade Informatica domain service. If you are not on the required version, you must upgrade Informatica domain service before you upgrade TDM.

If you have a TDM version earlier than 10.2.0, you must upgrade to 10.2.0 before you can upgrade to 10.2.1.

You can upgrade to 10.2.1 if the current TDM version contains only Hadoop plans.

If you use TDM for both Hadoop and non Hadoop plans, you must perform a fresh install of Informatica domain service 10.2.1 and TDM 10.2.1.

Perform the following steps if the current TDM version contains Hadoop and non Hadoop plans:

1. Export projects, plans, and global objects that you require from the current TDM setup.
2. Perform a fresh installation of Informatica domain service 10.2.1. For information about how to install Informatica domain service, see the *Informatica 10.2.1 Installation and Configuration Guide*.
3. Perform a fresh installation of TDM 10.2.1. For information about how to install TDM, see the *Test Data Management 10.2.1 Installation Guide*.
4. Import the projects, plans, and global objects into TDM 10.2.1.

Note: If the projects contain Hadoop and non Hadoop plans, the import process imports only the Hadoop plans. You must import all masking rules that are included in Hadoop and non Hadoop plans before you import the project.

CHAPTER 2

Before You Upgrade TDM

This chapter includes the following topics:

- [Read the Release Notes, 10](#)
- [Back Up the TDM Repository, 10](#)
- [Shut Down the TDM Server, 10](#)
- [Upgrade Informatica Service, 11](#)
- [Extract the Installer Files, 11](#)
- [Set Up the X Window Server, 11](#)

Read the Release Notes

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

Back Up the TDM Repository

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

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

Shut Down the TDM Server

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

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. Apply any required EBFs on Informatica service before you upgrade TDM.

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.

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, 13](#)
- [Upgrade Task Flow, 13](#)
- [Upgrading in Graphical Mode, 14](#)
- [Upgrading in Console Mode, 15](#)
- [Upgrading in Silent Mode, 15](#)

TDM Upgrade Overview

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

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. Upgrade the Model Repository Service content.
9. Upgrade the content of the profiling warehouse configured in the Data Integration Service.
10. Upgrade the Test Data Manager Service content.
11. Enable the Test Data Manager Service.

12. 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 15](#)
- [“Upgrading in Graphical Mode” on page 14](#)

Upgrading in Graphical Mode

You can run the installer in graphical mode on UNIX

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

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

The installer checks for the required files in the Informatica install directory.
7. Enter the install directory of the previous installed Informatica version.
8. Click **Next**.
9. 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.
10. Click **Done**.
11. 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 18](#)

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. Enter the install directory of the previous installed Informatica version.
10. Press **Enter** to continue.
11. Review the installation information and press **Enter** to continue.
The **Post-Installation Summary** section indicates whether the upgrade completed successfully.
12. Press **Enter** to exit the installer.
13. 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 18](#)

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: <code>@ * \$ # ! % () { } [] , ; ' "</code>
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 <code>INSTALL_TYPE=1</code> .

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 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.

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:

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Update the Application Services

Update and upgrade the services that Test Data Manager requires.

1. Log in to Informatica Administrator.
2. Select the Model Repository Service in the **Domain Navigator** panel and click **Actions > Repository Contents > Upgrade** to upgrade the content.
3. Select the Data Integration Service in the **Domain Navigator** panel and click **Actions > Profiling Warehouse Database Contents > Upgrade** to upgrade the content.
4. 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.
5. Enable the Test Data Manager Service.

Copy the Non-English Locale Properties File

The upgrade does not copy non-English locale properties files. If you upgrade TDM in a non-English setup, you can copy the non-English locale properties file from the previous version.

1. Browse to the following location: `<Informatica installation directory>/TDM_<timestamp>/lang`.
2. Copy the following file: `pc_<locale name>.properties` to the same location in the current version: `<Informatica installation directory>/TDM/lang`.

For a list of locales and their locale codes, see the *TDM Installation Guide*.

3. Verify that the entry `PARTITION_LABEL=<Locale specific "Partition #">` exists. Add the entry if required.

For example, for a setup with a Brazilian Portuguese locale, the file name would be `pc_pt_BR.properties` and the entry would be `PARTITION_LABEL=Partição n°`.

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**.

Update Cluster Configuration Information

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

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

You must create a cluster configuration in Informatica Administrator before you can update the connections.

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.

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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