



Informatica® Test Data Management  
9.7.0

# Release Guide

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# Table of Contents

<b>Preface</b> .....	<b>6</b>
Informatica Resources. ....	6
Informatica My Support Portal. ....	6
Informatica Documentation. ....	6
Informatica Product Availability Matrixes. ....	6
Informatica Web Site. ....	6
Informatica How-To Library. ....	7
Informatica Knowledge Base. ....	7
Informatica Support YouTube Channel. ....	7
Informatica Marketplace. ....	7
Informatica Velocity. ....	7
Informatica Global Customer Support. ....	7
 <b>Part I: Test Data Management 9.7.0</b> .....	 <b>8</b>
 <b>Chapter 1: New Features and Enhancements (9.7.0)</b> .....	 <b>9</b>
New Features and Enhancements for Version 9.7.0. ....	9
Test Data Warehouse. ....	9
tdwquery. ....	9
TDM Support for Hadoop. ....	10
Connection Permissions. ....	10
 <b>Chapter 2: Changes (9.7.0)</b> .....	 <b>11</b>
Changes for Version 9.7.0. ....	11
Default Value in Reference Lookup Generation. ....	11
Override Entity Relations at Run Time. ....	11
 <b>Part II: Test Data Management 9.6.1 HotFix 1</b> .....	 <b>12</b>
 <b>Chapter 3: New Features and Enhancements (9.6.1 HotFix 1)</b> .....	 <b>13</b>
New Features and Enhancements for Version 9.6.1 HotFix 1. ....	13
Test Tool Integration. ....	13
 <b>Chapter 4: Changes (9.6.1 HotFix 1)</b> .....	 <b>14</b>
Changes for Version 9.6.1 HotFix 1. ....	14
 <b>Part III: Test Data Management 9.6.0</b> .....	 <b>15</b>
 <b>Chapter 5: New Features and Enhancements (9.6.0)</b> .....	 <b>16</b>
New Features and Enhancements for Version 9.6.0. ....	16
Test Data Generation. ....	16

Kerberos Authentication. . . . .	16
Rule Simulation. . . . .	16
Data Viewer for Profile Results. . . . .	17
Link Business Glossary Terms to TDM Objects. . . . .	17
Search Field. . . . .	17
Accelerator for JD Edwards. . . . .	17
Data Discovery Options. . . . .	17
<b>Chapter 6: Changes (9.6.0). . . . .</b>	<b>18</b>
Changes for Version 9.6.0. . . . .	18
Test Data Management Installer. . . . .	18
Test Data Management as a Managed Service in Informatica. . . . .	18
Changes to Supported Platforms. . . . .	18
User and User Group Management. . . . .	18
Test Data Manager Roles and Privileges. . . . .	19
TDM Licenses. . . . .	21
Exception Handling for Standard Masking Rules. . . . .	22
Data and Metadata Patterns in Policy Packs. . . . .	22
Override Owner Name and Target Prefix. . . . .	22
TDM Accelerators. . . . .	22
Edit Entity. . . . .	22
TDM Web UI. . . . .	23

# Preface

The *Test Data Management Release Guide* lists new features and enhancements, behavior changes between versions, and tasks that you might need to complete after you upgrade from a previous version.

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# Part I: Test Data Management

## 9.7.0

This part contains the following chapters:

- [New Features and Enhancements \(9.7.0\), 9](#)
- [Changes \(9.7.0\), 11](#)



# CHAPTER 1

## New Features and Enhancements (9.7.0)

This chapter includes the following topic:

- [New Features and Enhancements for Version 9.7.0, 9](#)

## New Features and Enhancements for Version 9.7.0

This section describes the new features and enhancements for version 9.7.0.

### Test Data Warehouse

Configure a test data warehouse to store and manage multiple versions of test data in a central location. Store versions of test data from relational sources as versions of a data set.

A test data warehouse consists of a test data repository and a test data mart. The test data repository stores the metadata related to the data sets. The test data mart stores the data. You can use a single test data repository and a single test data mart for multiple machines in the domain that host a Test Data Manager Service. You can share and reuse test data across teams and projects. To return a test environment to a specific state, you can reset a data set version from the test data mart to a target. To search the test data repository, you can add tags to the data set versions.

For information about how to configure a test data repository and test data mart, see the *Test Data Management 9.7.0 Administrator Guide*.

For information about how to create a data set in the test data mart, see the *Test Data Management 9.7.0 User Guide*.

### tdwquery

tdwquery is a command line program that you can use to analyze data in a data set version.

Store multiple versions of test data in the test data mart and then use tdwquery to run queries to analyze the data. You can use the Select and Select Distinct clauses with multiple functions and joins to filter and search for data when you run queries.

For information on how to configure and use tdwquery, see the *Test Data Management 9.7.0 User Guide*.

## TDM Support for Hadoop

You can perform data movement, data masking, and data domain profiling operations on Big Data Edition Hadoop clusters. In Test Data Manager, you can create Hive and Hadoop Distributed File System (HDFS) connections and use them as source and target connections.

You can add groups and data masking components to a Hadoop plan. You can run data domain profiles on Hive and HDFS data sources to identify sensitive data.

You can create a Hadoop plan to move data from flat files, and relational databases such as Oracle and DB2, ODBC-Sybase, and ODBC-Microsoft SQL Server into Hive and HDFS targets. You can also create a Hadoop plan when you want to move data between Hadoop sources and targets.

In a Hadoop plan, you can perform data movement and data masking operations. You can run a plan audit report and plan detail report for a Hadoop plan. You cannot perform data subset and data generation operations in a Hadoop plan.

## Connection Permissions

To restrict access to connections that you create in Test Data Manager, you can assign connection permissions.

Allow or deny access, or provide a certain level of access to users and user groups by assigning connection permissions. The level of tasks that you can perform depend on the permission assigned. Read, write, and execute are the three levels of permission. Assign and edit connection permissions from Test Data Manager.

For more information, see the *Test Data Management 9.7.0 Administrator Guide*.

## CHAPTER 2

# Changes (9.7.0)

This chapter includes the following topic:

- [Changes for Version 9.7.0, 11](#)

## Changes for Version 9.7.0

This section describes the changes for version 9.7.0.

### Default Value in Reference Lookup Generation

Effective in 9.7.0, you can specify a default value that you want to generate in the target column instead of null values.

The default value can be one of the values present in the parent table if the tables are in a parent-child relationship.

Previously, you could not specify a default value and TDM generated null values in the target.

### Override Entity Relations at Run Time

Effective in 9.7.0, you can choose to override constraints and maintain only referential integrity at run time for entities of any size. The changes apply to the data at run time and do not affect the entity.

Choose to maintain referential integrity only or maintain transactional integrity in the subset operation. When you select referential integrity only, the subset operation fetches minimal data to maintain referential integrity, but might break transactional integrity. When you select transactional integrity, the subset operation maintains relational and transactional integrity, but might fetch additional data.

Previously, you could choose to maintain only referential integrity in entities with up to 25 tables.

# Part II: Test Data Management

## 9.6.1 HotFix 1

This part contains the following chapters:

- [New Features and Enhancements \(9.6.1 HotFix 1\), 13](#)
- [Changes \(9.6.1 HotFix 1\), 14](#)

## CHAPTER 3

# New Features and Enhancements (9.6.1 HotFix 1)

This chapter includes the following topic:

- [New Features and Enhancements for Version 9.6.1 HotFix 1, 13](#)

## New Features and Enhancements for Version 9.6.1 HotFix 1

This section describes the new features and enhancements for version 9.6.1 HotFix 1.

### Test Tool Integration

You can integrate HP Application Lifecycle Management (ALM) 11.5 and 12.0 with TDM.

You can configure TDM to copy flat file results of a subset, masking, or generation plan that you run in TDM to a project in an HP ALM server. You must integrate the HP ALM server with TDM and enable test tool integration in the plan. You can also integrate an HP ALM server that uses an HTTPS connection instead of an HTTP connection. When you run the workflow from Test Data Manager, TDM copies the flat file results to the TDM server location and creates a copy in the HP ALM server location as a separate job. You must run the workflow from Test Data Manager. The test tool integration job does not run when you run the workflow from the PowerCenter client. Use this feature to directly copy and maintain flat file results in an HP ALM server. You can then use the data to create and run test cases in HP ALM.

## CHAPTER 4

# Changes (9.6.1 HotFix 1)

This chapter includes the following topic:

- [Changes for Version 9.6.1 HotFix 1, 14](#)

## Changes for Version 9.6.1 HotFix 1

There are no changed behaviors for version 9.6.1 HotFix 1.

# Part III: Test Data Management

## 9.6.0

This part contains the following chapters:

- [New Features and Enhancements \(9.6.0\), 16](#)
- [Changes \(9.6.0\), 18](#)

## CHAPTER 5

# New Features and Enhancements (9.6.0)

This chapter includes the following topic:

- [New Features and Enhancements for Version 9.6.0, 16](#)

## New Features and Enhancements for Version 9.6.0

This section describes the new features and enhancements for version 9.6.0.

### Test Data Generation

You can generate test data to create an environment that does not use data from the production database.

Create data generation rules to define the type of data you want to generate. Apply generation rules to target columns or use default rules to generate data based on the datatype of the column. When you define rules, you can set generation techniques and parameters to create random test data.

You create projects to import metadata, enable relationships, and create entities. You assign a generation rule, create a plan, and run the plan to generate the data.

You can configure default plan settings in the **Administrator | Preferences** view before you create a data generation plan.

### Kerberos Authentication

TDM supports the Kerberos network authentication protocol for client server applications. You can install TDM in an Informatica domain that uses Kerberos authentication.

### Rule Simulation

You can simulate the output of a standard masking rule using the Rule Simulator.

View the results, and make changes to the rule before you assign it to a column or add it to a plan. You can use data from a connection, use default sample data, or enter sample data to simulate the masking rule output.



## Data Viewer for Profile Results

You can view column data before you approve data discovery profile results. The data viewer displays the first 200 records of columns returned in a data domain profile run. Use the Data Preview option on the Data Domain profile results page to view the data.

## Link Business Glossary Terms to TDM Objects

You can link TDM global objects such as policies, data domains, masking rules, and generation rules to business terms in the Business Glossary. Use this to store information that users can look up from one central location. When you link a business term to a TDM object, you can view the TDM object when you select the business term in the Analyst.

## Search Field

Test Data Manager includes a Search field. Use the Search field to find objects within the TDM repository. You can filter to include or exclude types of objects in the search from the Search tab that opens. You cannot search for connections. Configure a start date and time for a complete indexing of objects and reindexing frequency in hours from the new General Properties tab in the **Administrator | Preferences** view. You can reduce the search return time by indexing objects in the repository.

When you include an object, the search results also return any objects contained within it and objects that contain it. You can search for objects globally.

## Accelerator for JD Edwards

TDM Accelerator supports the JD Edwards Enterprise One business application versions 8.12 and 9.0. Use the predefined components in the TDM Accelerator to create nonproduction databases for the JD Edwards Enterprise One application.

For more information, see the *TDM Accelerator Guide*.

## Data Discovery Options

You can disable physical primary key columns when you do not need the composite primary keys or entity relationships. You can also edit the precision of a source table column based on the values that you need in the target column.

You can use select conditional constraints to perform data generation operation.

# CHAPTER 6

## Changes (9.6.0)

This chapter includes the following topic:

- [Changes for Version 9.6.0, 18](#)

## Changes for Version 9.6.0

This section describes the changes for version 9.6.0.

### Test Data Management Installer

Effective in 9.6.0, you cannot use the Test Data Management installer to perform a combined installation of Informatica services and Test Data Management. You can use the installer to install or upgrade Test Data Management. You must use the Informatica installer to install or upgrade Informatica services before you install or upgrade Test Data Management.

Previously, you could use the Test Data Management installer to perform a combined installation of Informatica services and Test Data Management or to install Test Data Management separately.

### Test Data Management as a Managed Service in Informatica

Effective in 9.6.0, Test Data Management is available as a service on the Informatica domain. Create and administer the Test Data Manager Service from the Administrator tool to create the TDM repository and repository content. Alternatively, use the TDM command line program to create and manage the Test Data Manager Service.

Previously, TDM was independent of the Informatica domain and not a service on the domain.

### Changes to Supported Platforms

Effective in version 9.6.0, Informatica dropped support for 32-bit Linux and for Solaris on x64. Before you upgrade to Informatica 9.6.0 on a supported 64-bit server, back up the installation and restore it on the 64-bit server. When you select the Informatica product to upgrade, enter the path to the restored installation. For more information, see the Informatica upgrade guide.

### User and User Group Management

Effective in 9.6.0, you create and manage Test Data Manager users and user groups from the Administrator tool. Assign Test Data Manager roles and privileges to users and user groups from the Administrator tool.

TDM roles are available as default custom roles in the Informatica domain. There is no option to add or edit users or user groups in Test Data Manager. The **Administrator | Security** view is removed from Test Data Manager.

Previously, you created TDM users in the Administrator tool. You then synchronized the users in Test Data Manager with the Informatica domain from the **Administrator | Security** view of Test Data Manager. You assigned and managed roles and privileges from Test Data Manager.

## Test Data Manager Roles and Privileges

Effective in 9.6.0, Test Data Manager roles and privileges are changed. The roles are available as custom roles in the Informatica domain. After you upgrade, you must log in to the Administrator tool and reassign roles and privileges to users.

TDM 9.6.0 includes a Test Data Specialist role. The role includes the following privilege groups:

- Policies
- Rules
- Data Domains
- Projects
- Data Masking
- Data Subset
- Data Generation
- Administration

The Administrator role in previous releases is called the Test Data Administrator role:

Role in Previous Versions with associated Privilege groups	Role in 9.6.0 with associated Privilege Groups
Administrator <ul style="list-style-type: none"><li>- Projects</li><li>- Administration</li><li>- Connection</li></ul>	Test Data Administrator <ul style="list-style-type: none"><li>- Projects</li><li>- Administration</li></ul>

The Developer role in previous releases is called the Test Data Developer role:

Role in Previous Versions with associated Privilege groups	Role in 9.6.0 with associated Privilege Groups
Developer <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li></ul>	Test Data Developer <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li></ul>

The Project DBA role in previous releases is called the Test Data Project DBA role:

Role in Previous Versions with associated Privilege groups	Role in 9.6.0 with associated Privilege Groups
Project DBA <ul style="list-style-type: none"><li>- Projects</li><li>- Connection</li></ul>	Test Data Project DBA <ul style="list-style-type: none"><li>- Projects</li><li>- Administration</li></ul>

The Project Developer role in previous releases is called the Test Data Project Developer role:

Role in Previous Versions with associated Privilege groups	Role in 9.6.0 with associated Privilege Groups
Project Developer <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li><li>- Data Masking</li><li>- Data Subset</li><li>- Connection</li></ul>	Test Data Project Developer <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li><li>- Data Masking</li><li>- Data Subset</li><li>- Data Generation</li><li>- Administration</li></ul>

The Project Owner role in previous releases is called the Test Data Project Owner role:

Role in Previous Versions with associated Privilege groups	Role in 9.6.0 with associated Privilege Groups
Project Owner <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li><li>- Data Masking</li><li>- Data Subset</li><li>- Connection</li></ul>	Test Data Project Owner <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li><li>- Data Masking</li><li>- Data Subset</li><li>- Data Generation</li><li>- Administration</li></ul>

The Risk Manager role in previous releases is called the Test Data Risk Manager role:

Roles in Previous Versions with associated Privilege groups	Roles in 9.6.0 with associated Privilege Groups
Risk Manager <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li></ul>	Test Data Risk Manager <ul style="list-style-type: none"><li>- Policies</li><li>- Rules</li><li>- Data Domains</li><li>- Projects</li></ul>

TDM 9.6.0 includes a Test Data Generation privilege group. The group includes the following privileges

- Manage data generation
- View data generation

The following table lists the privilege groups with associated privileges in previous releases and the corresponding privilege groups in 9.6.0:

Privilege Groups in Previous Versions with associated Privilege groups	Privilege Groups in 9.6.0 with associated Privilege Groups
Administration <ul style="list-style-type: none"> <li>- Administration</li> </ul>	Administration <ul style="list-style-type: none"> <li>- Manage preferences</li> <li>- View connections</li> <li>- Manage connections</li> </ul>
Connections <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> </ul>	Connection privileges are a part of the Administration privilege group. To assign connection privileges, you must assign the Administration privilege group.
Data Domains <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> </ul>	Data Domains <ul style="list-style-type: none"> <li>- Manage data domains</li> <li>- View data domains</li> </ul>
Data Masking <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> </ul>	Data Masking <ul style="list-style-type: none"> <li>- Manage data masking</li> <li>- View data masking</li> </ul>
Data Subset <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> </ul>	Data Subset <ul style="list-style-type: none"> <li>- Manage data subset</li> <li>- View data subset</li> </ul>
Policies <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> </ul>	Policies <ul style="list-style-type: none"> <li>- Manage policies</li> <li>- View policies</li> </ul>
Projects <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> <li>- Discover</li> <li>- Execute</li> <li>- Monitor</li> <li>- Audit</li> <li>- Import metadata</li> </ul>	Projects <ul style="list-style-type: none"> <li>- Manage project</li> <li>- View project</li> <li>- Discover project</li> <li>- Generate project. This is new.</li> <li>- Execute project</li> <li>- Monitor project</li> <li>- Audit project</li> <li>- Import metadata</li> </ul>
Rules <ul style="list-style-type: none"> <li>- Manage</li> <li>- View</li> </ul>	Rules <ul style="list-style-type: none"> <li>- Manage masking rules</li> <li>- View masking rules</li> <li>- Manage generation rules</li> <li>- View generation rules</li> </ul>

## TDM Licenses

Effective in 9.6.0, the TDM license is available as an incremental license with the Informatica license. You add the license from the Administrator tool. There is no option to add a license in Test Data Manager. The **Administrator | License** view is removed from Test Data Manager.

Previously, TDM had a separate license. You added the license from the **Administrator | License** view.

## Exception Handling for Standard Masking Rules

Effective in 9.6.0, you can create additional exceptions in standard masking rules. You can configure these options for any of the standard masking rules that you create.

You can configure pre-processing expression parameters to define changes to make to the data before masking. You can define post-processing expression parameters to define changes to make to masked data before saving the data to the target.

Previously, you could not configure any pre-processing or post-processing parameters for standard masking rules.

## Data and Metadata Patterns in Policy Packs

Effective in 9.6.0, TDM includes the data and metadata patterns of the data domains in the policy packs shipped with TDM.

You can view the regular expression strings that define the search patterns in TDM policy packs. You can view the search patterns for column data values and column names in a source. Use the patterns to profile data and discover sensitive columns in your data. When you derive the sensitive columns, you can assign the associated rules to the columns for masking. The PCI, PII, and PHI policy packs are available in the TDM/Content/Policies location.

Previously, the policy packs did not include the data and metadata patterns.

## Override Owner Name and Target Prefix

Effective in 9.6.0, you can override the name of the table owner and target prefix at the data source level. When you provide the name at the data source level, each table within the data source is updated with the name of the owner.

Previously, you could not provide the name of the owner at the data source level. When you created a plan, you selected each table within the data source and changed the name of the table owner and target prefix.

## TDM Accelerators

Effective in 9.6.0, you can install TDM Accelerators in any system that has access to Test Data Manager.

Effective in 9.6.0, the TDM Accelerators have the following changes:

- You install accelerators from Test Data Manager.
- The software is packaged as tar.gz installation files.
- After you install TDM Accelerator, you can read the logs from the **Monitor | Accelerator Logs** view.

Previously, there was a separate installer to install TDM Accelerators. The software was packaged as zip files. You could read the logs from the **Installation Summary** file that appeared at the end of the installation.

## Edit Entity

Effective in 9.6.0, when you select multiple links in the graphical representation of the entity in the **Entity Map** view, the corresponding rows get selected in the **Relationships** view. You can also select the rows in the **Relationships** view to highlight specific links in the **Entity Map** view.

Previously, when you wanted to select some rows, you had to click each row in the **Relationships** view. When you selected rows in the **Relationships** view, the corresponding links were not highlighted in the **Entity Map** view.

## TDM Web UI

Effective in 9.6.0, the TDM web user interface is called Test Data Manager and referred to as Test Data Manager in the TDM documentation.

Previously, the TDM web user interface was called Persistent Data Masking and Data Subset and referred to as the TDM Workbench in the TDM documentation.