Informatica

Informatica® Test Data Management
9.7.1

Upgrade Guide

Informatica Test Data Management Upgrade Guide
9.7.1
April 2016

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Publication Date: 2018-06-25

Table of Contents

Preface 6

Informatica Resources. 6

Informatica Network. 6

Informatica Knowledge Base. 6

Informatica Documentation. 7

Informatica Product Availability Matrixes. 7

Informatica Velocity. 7

Informatica Marketplace. 7

Informatica Global Customer Support. 7

Chapter 1: Test Data Management Upgrade Overview 8

Introduction. 8

Upgrade Options. 8

Guidelines for Multinode Installations. 9

Chapter 2: Before You Upgrade TDM 11

Read the Release Notes. 11

Back Up the TDM Repository. 11

Shut Down the TDM Server. 11

Upgrade Informatica Services. 12

Extract the Installer Files. 12

Extract the Installer Files on UNIX. 12

Extracting the Installer Files on Windows. 12

Set Up the X Window Server. 13

Chapter 3: TDM Upgrade 14

TDM Upgrade Overview. 14

Upgrade Task Flow. 14

Upgrading in Graphical Mode. 15

Upgrading in Console Mode. 16

Upgrading in Silent Mode. 17

Creating the Properties File. 17

Running the Silent Installer. 18

Chapter 4: After you Upgrade TDM 19

Enable the Test Data Manager Service and Upgrade the Content. 19

Copy the Non-English Locale Properties File. 19

Copy Dictionary Files. 20

Test Data Manager Service Logs. 20

Viewing Test Data Manager Service Logs. 20

Logging In to Test Data Manager. 21

Index. 22

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:

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- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
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- Find your local Informatica User Group Network and collaborate with your peers.

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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.

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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 https://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
- Guidelines for Multinode Installations, 9

Introduction

Use the Test Data Management (TDM) installer to upgrade from a previous version to TDM 9.7.1. 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.

Upgrade Options

You can use the same installer to install or upgrade Test Data Management. TDM 9.7.1 supports Informatica version 9.6.1 HotFix 3.

You can upgrade from TDM 9.7.0.

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.

If you have a TDM version other than 9.7.0, you must upgrade to version 9.7.0 before you can upgrade to TDM 9.7.1.

Note: The TDM installer does not upgrade Informatica services. You must upgrade Informatica services before you upgrade TDM.

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 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.

Installation and Upgrade

- Install TDM on the master gateway node first.
- You must create a Test Data Manager Service on the master node. You cannot create the Test Data Manager Service only on other nodes.
- 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 on a single 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.
- If you have configured a test data warehouse to create data sets, verify if the following statements are true:
  - You configured the master node and other nodes with different PowerCenter repository services.
  - The other nodes connect to the same test data mart and the same test data repository using the option **Use Existing Repository**.
  - You created the test data mart on the master node.

  If the statements are true, you must configure the test data mart connection in the Workflow Manager of the PowerCenter Repository Service that the other nodes connect to. You cannot run a plan to create a data set from the other nodes unless the test data mart connection is available in the 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.
- You cannot create a TDM multinode setup in a Kerberos environment.

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 Services, 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.

The installer updates the schema and table structures of 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 Services

TDM 9.7.1 supports Informatica service version 9.6.1 HotFix 3.

Ensure that you are on a supported version of Informatica service. Upgrade Informatica service before you run the TDM installer to upgrade TDM. Ensure that you apply any required EBFs.

Apply EBF 16302 on Informatica service 9.6.1 HotFix 3.

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, 17

TDM Upgrade Overview

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

The following upgrade paths are available for upgrade to TDM 9.7.1:

- TDM 9.7.0 on Informatica 9.6.1 HotFix 2 to TDM 9.7.1 on Informatica 9.6.1 HotFix 3.
- TDM 9.7.0 on Informatica 9.6.1 HotFix 3 to TDM 9.7.1 on Informatica 9.6.1 HotFix 3.

Upgrade Task Flow

You can upgrade from TDM 9.7.0 to TDM 9.7.1 on Informatica 9.6.1 HotFix 3.

Perform the following steps to complete the upgrade:

1. Stop and disable the Test Data Manager Service.
2. Stop the Informatica service.
3. If you are upgrading Informatica services to 9.6.1 HotFix 3, perform the Informatica service upgrade.
4. Apply Informatica EBF 16302.
5. Run the TDM installer to upgrade TDM to 9.7.1.
6. Start the Informatica domain.

7. Log in to Informatica Administrator. If you have upgraded Informatica service, upgrade the Data Integration Service content and the Model Repository Service content.

   The Test Data Manager Service prompts for a content upgrade.
8. Upgrade the Test Data Manager Service content from the service **Actions** menu.
9. Enable the Test Data Manager Service.

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

Related Topics:

- "Upgrading in Console Mode" on page 16
- "Upgrading in Graphical Mode" on page 15
- "Enable the Test Data Manager Service and Upgrade the Content" on page 19

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`

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

   The installer verifies that you applied the required Informatica EBFs. If applied, the installation information appears. If not applied, you must apply Informatica EBF 16302 and then upgrade TDM.
7. Click **Next**.

   The installer checks for the required files in the Informatica install directory.
8. Enter the install directory of the previous installed Informatica version.
9. Click **Next**.
10. 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.

11. Click **Done**.
12. Restart the Informatica domain.

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

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.

   The installer verifies that you applied the required Informatica EBFs. If applied, the installation information appears. If not applied, you must apply Informatica EBF 16302 and then upgrade TDM.
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 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.

To upgrade in silent mode, complete 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 to Informatica services 9.6.1 HotFix 3 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 installation log file `TDM_9.7.1_Services_InstallLog.log` 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:

- Enable the Test Data Manager Service and Upgrade the Content, 19
- Copy the Non-English Locale Properties File, 19
- Copy Dictionary Files, 20
- Test Data Manager Service Logs, 20
- Logging In to Test Data Manager, 21

Enable the Test Data Manager Service and Upgrade the Content

After you run the installer to upgrade Test Data Management, you must enable the Test Data Manager Service.

Perform the following steps to enable the Test Data Manager Service:

1. Log in to Informatica Administrator as an Administrator.
2. Select the Test Data Manager Service in the Domain Navigator to open the service properties.
3. Click **Actions** > **Enable Service** to enable the service.

   Warning messages appear if the repository content is of an older version.
4. Click **Actions** > **Upgrade Contents** to upgrade the service content.

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°.

Copy Dictionary Files

If you upgraded Informatica services to a different location, dictionary files from the previous version of TDM are not copied to the new location.

Copy the dictionary files from `<OLD_INFA_HOME>/server/infa_shared/LkpFiles` to the following folder:

`<NEW_INFA_HOME>/server/infa_shared/LkpFiles`.

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**.

INDEX

C

console mode
  upgrade procedure 16

E

environment variables
  DISPLAY 13

G

graphical mode
  installation requirements 13
  upgrade procedure 15

I

installation requirements
  X Window Server 13

L

logs
  Test Data Manager Service 20

P

post-upgrade task
  logging in to Test Data Manager 21
pre-upgrade task
  backing up the TDM repository 11
  shutting down the TDM Server 11
properties file
  non-English 19

U

upgrade options 8
upgrade procedure
  console mode 16
  graphical mode 15

X

X Window Server
  installation requirements 13