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Read the *Informatica® MDM - Customer 360 Release Notes* to learn about known limitations and fixes associated with this release.

Installation and Upgrade

When you install or upgrade to Informatica MDM - Customer 360 version 10.5 HotFix 3, see the following documents:

- *Informatica MDM - Customer 360 10.5 HotFix 3 Installation and Configuration Guide*

Upgrade Overview

A Customer 360 environment can include a development environment, a test environment, and a production environment. You must upgrade each of these environments. As a best practice, upgrade

your development environment first. Identify and resolve any upgrade issues. After you successfully upgrade the development environment, you can upgrade the test and production environments with a high degree of confidence.

You can directly upgrade your Customer 360 version from the following previous Customer 360 versions installed:

- 10.4 including any hotfix
- 10.5 including any hotfix

You can upgrade the Customer 360 application in console or silent mode. When you upgrade Customer 360 in console mode, you need manual interaction to provide the required upgrade options during the process of upgrade. When you upgrade Customer 360 in silent mode, you do not need any interaction during the process of upgrade.

To learn about changes to the system requirements, review the Product Availability Matrix. You can find the Product Availability Matrix on Informatica Network:

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

Verify the Upgrade Paths

Use Version 10.5 HotFix 3 on a machine that does not have Customer 360 services installed or to upgrade from the previous version.

You can install 10.5 HotFix 3 if the machine does not have Customer 360 services installed.

You can directly upgrade to version 10.5 HF3 from the following previous Customer 360 versions installed:

- 10.4 including any hotfix
- 10.5 including any hotfix

Before You Install

Some known limitations can affect your installation experience. To avoid potential issues, ensure that you review the following issues and complete any workarounds before you install.

Software Requirements

Set up the Informatica Multidomain MDM environment before you install Informatica MDM - Customer 360.

Perform the following tasks:

1. Review the Product Availability Matrix for Customer 360 to discover the system requirements and supported versions for products, databases, and application servers. You can find all Product Availability Matrices at <https://network.informatica.com/community/informatica-network/product-availability-matrices>.

2. Install a supported version of Multidomain MDM and the embedded version of Informatica ActiveVOS[®] Server.
3. If you plan to use Informatica MDM - Product 360, install a supported version.

Extracting the Customer 360 Application Archive File

You receive the Customer 360 application as an archive file. Create the following directory structure and extract the contents of the Customer 360 archive file into it:

<MDM Installation Directory>/app/tcr

The extracted content contains the following files and folders:

File or Folder Name	Description
batchgroup	Contains the JAR file for the silent installation process.
bin/	Contains installation, upgrade, and database schema validation utilities.
bpm/	Contains the ActiveVOS default business process in a deployable format. The folder contains the following sub-folders: <ul style="list-style-type: none"> - pre_c360_10.2_hf2/. Directory that contains the default business processes for the data model based on the Party Role table. - source/. Contains the source files for business processes. - InfaCustomer360Workflow.bpr. Contains the default business process for the data model based on the Party table.
config/	Contains configuration properties files.
CustomerB2BPortal	Contains the files of the preconfigured Customer Portal for Organization business entity.
data/	Contains the scripts for inserting lookup or reference data.
datamodelmigration/	Contains the scripts and the change lists required to migrate from the data model based on the Party Role table to the data model based on the Party table.
docs/	Contains the data dictionary. The folder contains the following files and sub-folders: <ul style="list-style-type: none"> - C360_104HF1_DataDictionary_en.pdf. Data dictionary for the data model based on the Party table. - pre_c360_10.2_hf2. Directory that contains the data dictionary for the data model based on the Party Role table.
email-config	Contains the subdirectories that contain configuration files for customer portal email configuration. <p>Following are the list of the subdirectories:</p> <ul style="list-style-type: none"> - templates/. Contains the avos-templates with email body text templates for ActiveVOS. - emailConfig.xml. File containing the configuration properties for email templates.

File or Folder Name	Description
extensions	Contains the files for Customer 360 extensions.
externalcall	Contains the folders and files for SOAP services.
hub/	<p>Contains the subdirectories that contain the database schema and the configuration files to deploy. Following are the list of the subdirectories:</p> <ul style="list-style-type: none"> - change-xml/. Contains the MDM Hub metadata including components, such as landing tables, lookup tables, staging tables, base objects, and match and merge rules, cleanse functions, component instances, business entities, and business entity services. - cocs-config-xml/. Contains configuration files for the business entities and business entity services. - delta_change_xml/. Contains the newly added MDM Hub metadata. - entity360config-xml/. Contains copies of the Entity 360 component instance definitions that ship with Multidomain MDM.
idd/	Contains the message and error bundle files.
lib/	Directory for the external libraries. Copy the JDBC driver files for your database to the lib directory.
localizationScript	Contains the scripts for localizing labels and error messages.
lookuplocalization/	Contains the localized lookup data.
notices/	Contains the legal copyright file.
reporting/	Contains datamart folder which contains the data mart service and the chart configurations. The pre_c360_10.2_hf2/ directory in the datamart folder contains the data mart service for the data model based on the Party Role table.
resources/	Contains the resource bundle.properties files for each of the supported locales.
upgrade/	Contains the supporting files for the upgrade utility.
user_exit/	Contains the MDM Hub user exit archive.
was	Contains the Provisioning tool user interface for a WebSphere environment.
bundleLocalization.jar	JAR file for localization.
Customer360ExternalCall.ear	File for SOAP service to validate the customer data.
domain-validation.jar	JAR file for validating Customer 360 domain.
email-config-util	JAR file for email configuration.
MDMAppsServices.war	File that contains Customer 360 services.

File or Folder Name	Description
mdmappsview-ear.ear and uiwebapp-ear.ear	Files that contain Customer 360 user interface JBoss.
productversion.jar	JAR file for the product version.
provisioning-ear.ear	File that contains the Provisioning tool user interface.
store-credentials.jar	File that contains credential details.

Creating the Operational Reference Store

Create an Operational Reference Store (ORS) for Customer 360.

For more information about how to create an ORS, see the *Multidomain MDM Installation Guide*.

Before You Upgrade

Some known limitations can affect your upgrade experience. To avoid potential issues, ensure that you review the following issues and complete any workarounds before you upgrade.

Upgrading Multidomain MDM

Upgrade the Multidomain MDM environment to a supported version.

For more information about upgrading Multidomain MDM, see the *Multidomain MDM Upgrade Guide*.

Note: When you upgrade Multidomain MDM, ensure that the date and time match in the database server and the Hub Server.

Backing Up the Customer 360 Operational Reference Store and Database

Before you upgrade Customer 360, ensure that you perform the following tasks:

- Back up the Customer 360 Operational Reference Store.
- Export the Customer 360 database to a change list XML file. After you upgrade Customer 360, use the change list XML file to restore the extended data model objects. Use the Repository Manager tool to export the database.

Backing Up the Customer 360 Library and Configuration Files

Before you back up the Customer 360 library and configuration files, ensure that you close the Customer 360 user interface and the Provisioning tool.

1. Go to the following directory:

```
<MDM Installation Directory>/app
```

2. Rename the `tcr` folder.

For example, rename the folder to `tcr_backup`.

After you Install or Upgrade

Some known limitations can affect your installation or upgrade experience. To avoid potential issues, ensure that you review the following issues and complete any workarounds after you install or upgrade.

Importing the Localized Lookup Data

Customer 360 installation files include the localized lookup data. If you use a localized environment, import the localized lookup data into the database before you use Customer 360.

1. Copy the following files from the `<MDM installation directory>/hub/server/lib` directory to the `<MDM installation directory>/app/tcr/lookuplocalization/lib` directory:
 - `log4j-core-2.17.2.jar`
 - `log4j-1.2-api-2.17.2.jar`
 - `log4j-api-2.17.2.jar`
 - For Oracle. `ojdbc8.jar`
 - For IBM DB2. `db2jcc.jar`
 - For Microsoft SQL Server. `sqljdbc4.jar`
2. Go to the following directory:
`<MDM installation directory>/app/tcr/lookuplocalization/bin`
3. Run the following command:
 - On UNIX. `./lookup_localization.sh`
 - On Windows. `lookup_localization.bat`
4. At the prompts, enter the following parameters:

Parameter	Description
Database type	Type of database that you use. Use one of the following values: <ul style="list-style-type: none">- Oracle- DB2- MSSQL
User name	User name to access the Operational Reference Store database.
Password	Password for the user name.
Operational Reference Store database host name	Name of the host that runs the Operational Reference Store database.

Parameter	Description
Operational Reference Store database port number	Port number that the database listener uses.
Database name	For IBM DB2 and Oracle only. Name of the IBM DB2 database or Oracle service.

The localized lookup data is imported into the staging tables.

5. In the Utilities workbench of the Hub Console, click **Batch Group**.
6. Expand **Localized Lookup Data Load**, and select **Control & Logs**.
7. Click **Execute**.

The localized lookup data is imported into the base objects.

Improving Performance of Bulk Data Import

When you import a file in a workflow-enabled environment, the workflow triggers the approval process in parallel. The parallel processing of workflow might affect the performance of the import process when you import more than 5000 records with child records. To improve the performance of the import process in a workflow-enabled environment, you can now set a wait time for the workflow process to trigger. Based on the wait time, the workflow process gets triggered and avoids parallel processing.

1. Go to the following directory:
`<MDM installation directory>/app/tcr/config/`
2. In a text editor, open the `c360-portal-workflow-config.xml` file.

3. Update the following properties and save the file:

Property	Description
<pre><property name="portal.fileImport.wait">P0Y0M0DT2H0M0S</ property></pre>	<p>Optional. Wait time for the workflow to trigger after the import process starts. For example, if the wait time is 2 hours 30 minutes, then the workflow triggers after 2 hours 30 minutes after the import process starts.</p> <p>You can specify the wait time in the following format:</p> <p>P<n>Y<n>M<n>DT<n>H<n>M<n>S</p> <ul style="list-style-type: none"> - P - Indicates portal. - Y - Indicates number of years. - M - Indicates number of months. - D - Indicates number of days. - T - Indicates time. - H - Number of hours. - M - Number of minutes. - S - Number of seconds. <p>For example, the value P0Y0M0DT2H30M0S indicates 2 hours and 30 minutes.</p> <p>Ensure that you set the <code>portal.fileImport</code> property to <code>Y</code> for the wait time to be considered.</p> <p>Default is 2 hours.</p> <p>Note: Informatica recommends to use 1 hour 30 minutes for 5000 records and 2 hours 30 minutes for 10000 records.</p>
<pre><property name"portal.fileImport">Y</property></pre>	<p>Indicates whether to enable wait time for the workflow to trigger. Set to <code>Y</code> to enable the wait time. The wait time improves the performance of import process when you import more than 5000 records.</p> <p>Use this option during the file import or initial data load process. After the data load is complete, change the value from <code>Y</code> to <code>N</code>.</p> <p>Default is <code>N</code>.</p>

4. After you make changes to the properties, run one of the following redeploy scripts to view the changes:

- On UNIX. `redeploy.sh`
- On Windows. `redeploy.bat`

Note: Alternatively, you can log in to the ActiveVOS console, navigate to the **Catalog > Resources > Other** section to update the properties in the `c360-portal-workflow-config.xml` file.

5. Go to the following directory:

```
<MDM installation directory>/hub/server/resources
```

6. In a text editor, open the `cmxserver.properties` file.

7. Update the following properties and save the file:

Property	Description
<code>cmx.server.be-import.task-limit</code>	Specifies the maximum number of records users can import for the task approval workflow to trigger. Set <code>cmx.server.be-import.task-limit=10000</code> for users to import up to 10000 records and the task approval workflow to trigger. If a user attempts to import more than 10000 records, the task approval workflow does not trigger and displays an error.
<code>cmx.server.find-replace.task-limit</code>	Specifies the maximum number of replaced records that trigger the task approval workflow. Set <code>cmx.server.find-replace.task-limit=1000</code> for users to replace up to 1000 records and the task approval workflow to trigger. If a user attempts to import more than 1000 records, the task approval workflow does not trigger and displays an error.

8. Restart the application server.

Test Customer 360

You can log in to Customer 360 with your administrative user credentials.

1. Use the following URL format to access Customer 360:

```
http://<MDM Server host name>:<MDM Server port number>/mdmapps/  
com.informatica.tools.mdm.web.auth/login
```

2. Log in with your user credentials.

3. If prompted to select an application, select **Customer 360**.

The **Home** page appears.

10.5 HF3 Known Limitations

The following table describes known issues that were found in 10.5 HotFix 3:

Cumulative Known Limitations

This section contains known limitations that are carried forward from previous releases.

The following table describes known limitations that are carried forward from previous releases:

Reference Number	Description
TCR-6826	When you add one to many fields to the Selected fields tab, Portal Configuration tool UI displays incorrect fields. Workaround : Select individual attributes.
TCR-6825	When you repeatedly click within the Customer 360 interface after log in, the Customer 360 UI might unintentionally skip the required field wizard.
TCR-6796	Loss of content in structure panel after copy structure operation.
TCR-6762	Quick view page displays errors in the Network tab.
TCR-6731	The Submit button appears enabled in the drafted record even before the changes are applied.
TCR-6630	In the Customer portal, when you delete the default address or add a new address and save the changes on the registration form, the following error appears: One or more values are not valid. Enter valid values and try again.
TCR-6626	In the Portal Configuration tool, when you configure the filter property for a one-to-many field and set the field value containing ampersand (&), the following error appears: <pre>{"errorCode":"PORTAL606","errorSummary":"BE's APi - Error on invoking BE's Entity API via Proxy","errorCauses":["Bad Request"],"status":"BAD_REQUEST","errorData":[\n{"code":"SIP-50027","message":"SIP-50027: Can't parse Business Entity Query.","defaultMessage":"Bad Request"}\n],"path":"/infa-portal/proxy","host":"inwin201901","port":8080}</pre> Workaround: The system doesn't support ampersand (&) in the field value. Ensure that you remove ampersand (&) and configure the filter property.
TCR-6625	In the Portal Configuration tool, you can configure different filter properties for a one-to-many field in multiple sections. The last filter property that you configure in a section overrides the filter properties in all the other sections.
TCR-6605	In the Customer Portal, you can't create or edit records through keyboard. When you try to edit using keyboard shortcuts, the focus always remains on the section instead of the field.
TCR-6522	In the Customer Portal user interface, when you enter an incorrect city in the address field, the address verification process doesn't display the error in the city field, doesn't highlight the field with the error.
TCR-5996	In the Customer 360 user interface, you can't use the Tab key to access the calendar icon on the Dashboard page.

Informatica Global Customer Support

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

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

<https://www.informatica.com/services-and-training/customer-success-services/contact-us.html>.

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