

Oracle® Enterprise Data Quality for Product Data

Oracle DataLens Server Upgrade Guide

Release 11g R1 (11.1.1.6)

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This document describes how to upgrade Oracle DataLens Server from Oracle Enterprise Data Quality for Product Data previous releases to Release 11g R1 (11.1.1.6). This document contains the following:

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The Enterprise DQ for Product (EDQP) upgrade methodology is designed to upgrade your Oracle DataLens Administration Server, while maintaining the ability to revert to your existing server. You should *not* uninstall your existing Oracle DataLens Administration Server until you have tested and verified that your new Oracle DataLens Administration Server operates correctly in your environment.

Supported Upgrade Paths

The previous EDQP releases 5.1, 5.5.*n*, 5.6.0, 5.6.1, and 5.6.2 can be upgraded to the 11g release.

Identifying Your Oracle DataLens Server Version

You can identify which product release your existing Oracle DataLens Administration Server is running by logging into the **Oracle DataLens Administration** web pages for the server you want to upgrade. The Home page displays the version of the Oracle DataLens Administration Server at the top of the page as in the following example:

```
Oracle DataLens Server
Oracle DataLens Server 5.6.0.0, build 2,622, on Feb 14, 2011 at 4:21 PM
Java JVM Version 1.6.0_21 from Sun Microsystems Inc.
JSP Server Apache Tomcat/6.0.29
```

For more information, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide* for the release you have installed.

Before you Upgrade

You should review the following to ensure that you are familiar with the EDQP terms, functionality, installation, and administration:

- *Oracle Enterprise Data Quality for Product Data Getting Started Guide*
- *Oracle Enterprise Data Quality for Product Data Security Guide*
- *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Installation Guide*
- *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide*

Oracle recommends that you create a test environment for your upgrade before attempting to upgrade your production environment.

Note: An upgrade should be a planned migration to ensure the retention of your EDQP Server Group Topology, data repository, DSAs, data lenses, and data.

Review the following points of consideration and actions:

- If you plan on installing your 11g server on the same physical server as your 5.x Oracle DataLens Server, then you *must* stop the server prior to running the 11g server to ensure that there is not a port conflict between the two server releases.
- You can create an export Data Service Application (DSA) that includes all of the data lenses in the system as a package import by selecting all the data lenses with only the default unit conversion and standardization types.
- The configuration database schema has been enhanced for release 11g. In 11g the configuration database capabilities are enhanced with Derby as the default configuration database and also providing a secure and high availability option by using an Oracle database. The configuration database schema resides in Derby in 5.5.x systems, and in MySQL 4.x in 5.1 systems. Due to these new 11g features and other schema enhancements, and the variation in infrastructure in prior releases, you cannot directly copy your existing repository to your new 11g system. Instead, this guide provides a process that allows you to export your configuration database DSAs and data lenses and import them into your new 11g system.
- The 11g release provides a new highly secure Oracle standard user authentication facility using Oracle WebLogic. As part of the upgrade process you will re-create your Oracle DataLens Server users in WebLogic. Then you will assign the roles to your users using the Oracle DataLens Server Administrative web page. This provides you with the capability to integrate your user administration with the rest of your enterprise using standard Oracle WebLogic authentication.
- If you need to audit or report on job history or data lens or DSA check-in history, then you must either keep your configuration database and repository file system for future reporting, or archive your configuration database information. Oracle does not provide a direct way to import this history into your 11g Oracle DataLens Server.
- On DSA import, Data Lens Groups are created and reconciled.

Upgrading Your Oracle DataLens Server

This section provides upgrade instructions for the following upgrade paths for your Oracle DataLens Administration Server:

1. Create a baseline regression with the existing server to compare the results to the upgraded server.

Oracle recommends that you start with a known set of sample data to create the baseline on the current server. The sample data set should be fully representative of the input data used in production and with sufficient volume to provide good coverage for the comparison. It should ideally have data that would cause each of your production data lenses to produce a result. You may want to have a small sample set and a large sample set because the small sample set enables quick iterative checks and comparisons.

You can create this baseline by running a DSA that outputs the results to a text file, Excel Worksheet, or database. For example, you could use the regression set creation and comparison tools in Services for Excel. These tools are included on the **Tools** menu in Services for Excel and are fully explained in the *Oracle Enterprise Data Quality for Product Data Services for Excel Reference Guide*.

2. Record your existing Administration Server settings for use on your 11g Administration Server as follows:

- Users and Roles
- Configuration
- Database Connections
- File Transfer Protocol (FTP) connections
- Web Services
- Scheduled Jobs
- User Access settings for data lenses and DSAs
- Individual Server Configuration settings (Administration, Development, Quality Assurance (QA), and Production)

For more information, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide* for the release you have installed.

3. Check-in all data lenses and DSAs from local clients to ensure that you have the most current prior to export.

Each user should coordinate with members of the team to confirm that if they are checking in the latest version to ensure that are not overwriting a more current version from another user.

4. Check out each DSA that you want to use in your new 11g Oracle DataLens Server topology using the Application Studio. All of the DSAs checked out from your Oracle DataLens Administration Server is located on the local machine in the `... \DataLens\data\workflow` directory. For example, on Windows 7 the directory is:

```
... \User\Application%Data\Roaming\DataLens\data\workflow
```

For more information, see *Oracle Enterprise Data Quality for Product Data Application Studio*.

5. Export each data lens that you want to use in your new 11g Oracle DataLens Server topology using the Knowledge Studio. You can do this by selecting the **File** menu, and then selecting **Export Data Lens** in each open data lens. The exported files are located on the local machine in the `... \DataLens\export` directory. For example, on Windows 7 the directory is:

... \User\Application%Data\Roaming\DataLens\export

For more information, see *Oracle Enterprise Data Quality for Product Data Knowledge Studio*.

6. (Optional) Oracle recommends that you retain your EDQP 5.x database tables so that your Oracle DataLens Server information is archived for future reference. Additionally, you may want to archive your current server log files.
7. Install the Oracle DataLens Administration 11g Server using the instructions in the installation guide.

Note: Oracle recommends that you install your new 11g Oracle DataLens Administration Server on a separate physical server from your existing installation.

If you do install both releases on the same physical server, you must stop your 5.x server prior to installing your 11g server.

8. Create Users in WebLogic corresponding to the users in the previous DataLens server. Associate the appropriate roles in the Administration Server to the users created in WebLogic.
9. Verify that your 11g Administration Server is running by logging into the **Oracle DataLens Administration** web page and clicking the **Administration** tab. This tab displays the version of the Oracle DataLens Administration Server at the top of the page as in the following example:

Server Information

```
Version: 11.1.1.6.0, build 120820.1745
Built on: Aug 20, 2012 at 6:54 PM
Datalens Admin Server: slc.us.oracle.com:2229
EDQP Home Directory: /scratch/Oracle/Middleware/user_projects/domains/dls_
domain/opdq
JVM Information: Sun Microsystems Inc.:1.6.0_33
Application Server: WebLogic Server 10.3.6.0
```

10. Import data lenses and DSAs into your 11g Administration Server using AutoDeploy with the following steps:
 - a. Copy the DSAs that you checked out in step 4 to the following locations on your 11g Oracle DataLens Administration Server in the WebLogic `dls_domain` directory. By default, the directory you copy to is:

The Middleware home directory is referenced as `MW_HOME` in Fusion Middleware documentation and the following steps.

On Linux and UNIX: `MW_HOME/user_projects/domains/dls_domain/opdq/autodeploy/dsa`

On Windows: `MW_HOME\user_projects\domains\dls_domain\opdq\autodeploy/dsa`
 - b. Copy the data lenses that you exported in step 5 to the following locations on your 11g Oracle DataLens Administration Server in the WebLogic `dls_domain` directory. By default, the directory you copy to is:

On Linux and UNIX: `MW_HOME/user_projects/domains/dls_domain/opdq/autodeploy/lens`

On Windows: `MW_HOME\user_projects\domains\dls_domain\opdq\autodeploy/lens`

- c. Wait 10 minutes to ensure that the server templates have been autodeployed.

By copying the files to the `autodeploy` directory, you have set them to autodeploy your EDQP DSAs and data lenses to your Oracle DataLens Administration Server. The server polls the `autodeploy` directory every 10 minutes and attempts to autodeploy the data lens and DSA files that are placed in the respective folders under the `autodeploy` parent folder.

11. Verify that your DSAs and data lens contained in the `EDQP_HOME\autodeploy\` directory have been autodeployed.

Your EDQP installation directory for your Oracle DataLens Server is referenced as `EDQP_HOME`.

12. Manually recreate the following on your 11g Oracle DataLens Administration Server:

- Update Configuration settings in the DataLens Constants if necessary (typically, the defaults are sufficient). You may want to change the String Constants to configure email addresses that will receive server information.
- Database Connections
- FTP Connections
- Web Services
- Create Scheduled Jobs
- Define any User Access requirements for data lenses and DSAs as necessary
- Configure individual server settings where necessary (for example, Max memory setting for Global Parse Cache)

For more information, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide for 11g (11.1.16)*.

13. Using the Development area, run regression tests on your 11g Oracle DataLens Administration Server to compare that the results with those in your previous EDQP release.

Create this regression set by running a DSA that outputs the results in the same manner as your baseline regression set in step 1. Compare the two sets using the appropriate tool.

Differences are expected because EDQP 11g release provides new and improved functionality. For example, the regular expression logic is improved so if you have implemented regular expressions you may need to revise them.

14. Upgrade any Oracle DataLens Transform Servers in your topology by installing the EDQP 11g release, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Installation Guide*. Since your data including data lenses and DSAs reside in the centrally managed repository on the Oracle DataLens Administration Server you must create your entire EDQP topology in order to promote deploy your data lenses and DSAs.
15. Promote the data lenses to the various areas (QA and Production) and deploy them.
16. Using the QA and/or Production areas, run regression tests on your entire 11g Production Server topology to compare that the results with those in step 1.

17. (Optional) If you have installed your 11g Oracle DataLens Administration Server on the same physical server as your 5.x Oracle DataLens Server that is running a Tomcat Application Server, ensure that you disable the automatic startup of the Tomcat service using one of the following:

On Linux:

- a. Log into your 5.x Oracle DataLens Server as an administrator user that has root privileges.
- b. Run `chkconfig` to delete the `dls-tomcat` service from the list of services to be started with the specified run levels by entering:

```
chkconfig --del dls-tomcat
```

If a different run level scheme is required, then the `dls-tomcat.sh` script must be adjusted accordingly and is found in the `/etc/init.d` directory at the `dls-tomcat` soft link.

On Windows:

- a. Click **Start**, click in the **Start Search** box, enter `services.msc`, and then press **ENTER**.
- b. In the details pane, right-click the Tomcat service, and then click **Properties**. For example, `tomcat6opdq`.
- c. On the **General** tab, in Startup type, select **Manual**.
- d. Click **OK**.

Next Steps

- **Decommissioning**—Once you have tested and verified the operation of your 11g Oracle DataLens Servers you can decommission the previous release servers by uninstalling EDQP. Additionally, you should remove any network file system mounts, ports, and other items configured for the previous server.
- **Recommendations**—Oracle recommends that you keep your configuration database and repository file system for future reporting or archive your configuration database information.

Reverting to a Previous Release

Should it be necessary to revert to the previous release after executing an upgrade, you must fully stop all 11g servers and ensure that it does start automatically to avoid conflicting with the previous release server. see step 17 in "[Upgrading Your Oracle DataLens Server](#)". Next, start your previous release servers.

Related Documents

For more information, see the following documents in the documentation set:

- *The Oracle Enterprise Data Quality for Product Data Getting Started Guide* provides information about how to get started with EDQP.
- *The Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Installation Guide* provides detailed Oracle DataLens Server installation instructions.

- The *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide* provides information about installing and managing an Oracle DataLens Server.

See the latest version of this and all documents listed at the Oracle Enterprise Data Quality for Product Data Documentation Web site at:

http://download.oracle.com/docs/cd/E20593_01/index.htm

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