

Oracle® Fusion Middleware

Upgrade Guide for Oracle Data Profiling and Oracle Data Quality for ODI

Release 11.1.1

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This document provides a high-level overview of the Oracle Data Profiling and Oracle Data Quality for Oracle Data Integrator upgrade process. The Oracle Data Profiling and Oracle Data Quality for Data Integrator components are also referred to as Oracle Data Quality Products.

Steps in the Oracle Data Profiling and Data Quality Upgrade Process

[Table 1](#) describes each of the steps in the upgrade process. The table also provides information on where to go to get more information on each step in the process.

Table 1 Steps in the Oracle Data Profiling and Data Quality Upgrade Process

Step	Description	More Information
Install and Configure Oracle Data Integrator 11g	In 11g Oracle Data Integrator and the Oracle Data Quality products are installed and configured separately.	For installation steps, refer to <i>Oracle Fusion Middleware Installation Guide for Oracle Data Integrator</i>
Understand the Oracle Data Profiling and Oracle Data Quality Upgrade Starting Points	Before you upgrade the Oracle Data Profiling and Oracle Data Quality components for Oracle Data Integrator, ensure that your environment meets the installation and configuration requirements.	See Task 1: Understand the Supported Upgrade Starting Points .
Backup the Repository	Oracle recommends that you create a backup copy of the entire Oracle Data Quality Products Repository before performing the upgrade	See Task 2: Backup the Existing Repository .
Install Oracle Data Profiling and Quality 11g	Use the Oracle Installer to install Oracle Data Profiling and Quality. Do not create any metabases until the upgrade has completed successfully.	See Task 3: Install Oracle Data Profiling and Oracle Data Quality for Data Integrator .

Table 1 (Cont.) Steps in the Oracle Data Profiling and Data Quality Upgrade Process

Step	Description	More Information
If the Oracle Data Quality 11g repository is not installed on the same server as Oracle Data Quality installation, copy the entire repository directory to the new Oracle Data Quality installation.	If your Oracle Data Quality installation is on a different server than your previous installation, you must copy the entire existing repository directory (including all subdirectories) to a temporary location on the Oracle Data Quality server. You can delete this temporary directory after you complete the migration task.	See Task 4: Copy the Existing Repository to the Oracle Data Quality Server .
Remove any user-defined metabases, users, or loader connections from the 11g repository	The 11g target repository must not contain any user-defined metabases, users, or loader connections. Although the upgrade process alerts you if any of these items exist, it is recommended that you check the repository before beginning the upgrade process.	See Task 5: Remove User-Defined Metabases and Users .
Upgrade the Metabase Repository	Run the Oracle Data Profiling and Quality upgrade executables after all of the pre-upgrade tasks have been completed.	See Oracle Data Quality Upgrade Instructions
Perform any required post-upgrade configurations.	You may need to reapply custom settings and reconnect to your metabases after the upgrade.	See Task 1: Update Metabase Connections
Validate the Upgrade Process	Validate that the metabases and loader connections are available in the Control Admin panel.	See Task 2: Validate the Upgrade Operation

Oracle Data Profiling and Data Quality for 10g Users

The following sections describe changes in the Oracle Data Profiling and Oracle Data Quality for Oracle Data Integrator 11g environment for 10g Release 3 (10.1.3.x) users:

Components of the Oracle Data Quality 11g Release 1 Installation

If you are upgrading your Oracle Data Quality products from 10g Release 3 to 11g Release 1, there are some significant changes you should be aware of. This section describes those changes.

The Oracle Data Profiling and Data Quality 10g Release 3 (10.1.3) default installation provided the following components:

- Oracle Data Integrator
- Oracle Data Profiling
- Oracle Data Quality for Data Integrator

Oracle Fusion Middleware 11g provides updates to all these components, but not in a single installation. In Oracle Fusion Middleware 11g, your Oracle Data Profiling and

Oracle Data Quality components are packaged and installed separately, but they still provide the same resources and services.

Note: For information on installing and configuring Oracle Data Integrator components, see the *Oracle Fusion Middleware Installation Guide for Oracle Data Integrator*.

Oracle Data Profiling and Oracle Data Quality for Oracle Data Integrator 11g Release 1 (11.1.1) provides the following components:

- **Oracle Data Profiling and Data Quality Client User Interface**

The Oracle Data Profiling and Oracle Data Quality user interface is available for Windows 32-bit operating systems only. This client can be configured to connect to a Metabase Server installed on a separate machine.

- **Oracle Data Profiling and Quality Server**

The Oracle Data Profiling and Quality server installation includes the following components:

- Metabase Server

The Metabase Server contains the profiling data and metadata.

- Data Quality Server (Windows 32-bit operating system only)

The Data Quality Server is the run-time component for Oracle Data Quality processes.

- ODBC Server (Windows 32-bit operating system only)

Oracle Data Quality ODBC Adapter is used to connect ODBC data sources. This optional component can be installed on Windows platforms only.

Upgrading Your Oracle Data Profiling and Quality Environment

This section explains how to migrate to Oracle Data Quality 11g from Oracle Data Quality 10g. Specifically, this section describes the following steps required to upgrade Oracle Data Quality products:

- [Preparing to Upgrade](#)
- [Oracle Data Quality Upgrade Instructions](#)

Preparing to Upgrade

Before you begin the upgrade process, review the following sections to ensure that you have performed all of the required pre-upgrade tasks:

- [Task 1: Understand the Supported Upgrade Starting Points](#)
- [Task 2: Backup the Existing Repository](#)
- [Task 3: Install Oracle Data Profiling and Oracle Data Quality for Data Integrator](#)
- [Task 4: Copy the Existing Repository to the Oracle Data Quality Server](#)
- [Task 5: Remove User-Defined Metabases and Users](#)

Task 1: Understand the Supported Upgrade Starting Points

Any Oracle Data Quality repository, residing on a platform supported under the Oracle Data Profiling and Quality version 10.1.3.5.0 hardware requirements, can be migrated to the Oracle Data Quality 11g version as long as the following conditions are met:

- The existing repository must reside on the same server as Oracle Data Quality 11g
- The existing repository must be compatible with the Oracle Data Quality 11g server.

Task 2: Backup the Existing Repository

Oracle recommends that you create a backup copy of the entire ORACLE_HOME/oracledq/metabase_data directory before you upgrade.

Task 3: Install Oracle Data Profiling and Oracle Data Quality for Data Integrator

For installation steps, refer to the *Oracle Fusion Middleware Installation Guide for Oracle Data Profiling and Oracle Data Quality for Oracle Data Integrator*.

Task 4: Copy the Existing Repository to the Oracle Data Quality Server

If the existing repository is not installed on the same server as Oracle Data Quality installation, copy the entire repository directory to the new Oracle Data Quality 11g installation server (this includes all E<n> directories). Make sure that the two servers are running the same operating system.

For Example:

If you have an Oracle Data Quality 10.1.3.5 repository residing in the ORACLE_HOME/oracledq/metabase_data directory on a server named *oracle1* and your Oracle Data Quality 11g installation is on a server named *oracle2*, you need to copy the entire repository directory ORACLE_HOME/oracledq/metabase_data (including subdirectories) from *oracle1* to a temporary location on *oracle2*.

When you migrate an existing repository to an Oracle Data Quality 11g server, everything is migrated except for bookmarks.

Task 5: Remove User-Defined Metabases and Users

The target repository must not contain any user-defined metabases, users, or loader connections. (Verify that the Oracle Data Quality 11g repository only contains the `_control` metabase.) Although the migration process alerts you if any of these items exist, Oracle recommends that you check the repository before beginning the migration process.

Caution: Only perform these steps on the Oracle Data Quality 11g repositories.

1. Log on to the ODP/ODQ Metabase Manager as the metabase administrator (for example, *madmin*).
2. From the Explorer pane, expand the Control Admin folder.
3. From the Explorer pane, double-click **Metabases**.

The List View pane displays a list of all metabases defined in the repository. If there are metabases other than the `_control` metabase listed, you must delete them before migrating your metabases.

4. Select the first user-defined metabase, right-click, and select **Delete...**
5. Repeat step 4 until all metabases (except `_control`) are deleted.
6. From the Explorer pane, double-click **Users**.

The List View displays a list of all users defined in the repository.

7. In the List View, select all users except the metabase administrator.
8. Right-click and select **Delete...**
9. From the Explorer pane, double-click **Loader Connections**.

The List View displays a list of all loader connections defined in the repository.

10. In the List View, highlight all loader connections.
11. Right-click and select **Delete...**

Oracle Data Quality Upgrade Instructions

The following steps are used to upgrade Oracle Data Quality repositories.

1. Log on to the metabase server with an administrator account.

Oracle recommends that you do not use a remote server to migrate your existing repository.

2. Open a command line shell.
3. From the command line, change directories to `ORACLE_HOME/oracledq/metabase_server/bin`.
4. At the prompt, type one of the following commands on a single line and then press **Enter**.

- On UNIX operating systems:

```
./mtb_admin -user <Metabase Administrator User Name> -password <Metabase Administrator User Password> -level INFO -migrate repository "<Existing Repository Path>" ddl upgrade.ddl
```

- On Windows operating systems:

```
mtb_admin -user <Metabase Administrator User Name> -password <Metabase Administrator User Password> -level INFO -migrate repository "<Existing Repository Path>" ddl upgrade.ddl
```

In the commands above:

- **<Metabase Administrator User Name>** corresponds to the metabase Admin user name (for example *madmin*)
- **<Metabase Administrator User Password>** corresponds to the metabase Admin user password
- **<Existing Repository Path>** corresponds to the `/metabase` sub-directory of the directory into which the repository was copied.

The migration command processes the entities in the metabase, and reports its progress. For example:

```
...
Converting entity 30 table "mask"
Converting entity 30 table "metaphone"
Converting entity 30 table "pattern"
...
```

The time required for the migration is comparable to the time it took to originally load the data into the original metabase(s). Your existing repository is left untouched after the migration. When the migration ends, it displays information and recommendations. For example:

```
ODBC loader connection "odbc" must have its PORT updated
Don't forget to migrate entity sources using the "updateentitysource",
"updateconnection" or "updateallconnections" commands
Press any key to continue. . .
```

If you received a message at the end of your migration to update a loader connection port (for example ODBC loader connection "odbc" must have its PORT updated), connect to the metabase administrator and edit the loader connection to update the connection port.

To migrate entity sources, see [Task 1: Update Metabase Connections](#).

Oracle Data Profiling and Quality Post-Upgrade Tasks

This section describes additional tasks that may be required after you have performed the upgrade.

- [Task 1: Update Metabase Connections](#)
- [Task 2: Validate the Upgrade Operation](#)

Task 1: Update Metabase Connections

The following commands allow you to update your loader connections after migrating the repository:

- `updateconnection` - updates the details of a specific connection
- `updateallconnections` - updates the details of all migrated connections

Oracle recommends using the `updateconnection` command to update your migrated loader connections.

To update the metabase connections:

1. Start the Metabase Server Administrator Prompt
 - On UNIX operating systems:
`./mtb_admin`
 - On Windows operating systems:
Select **Programs > Oracle > Oracle Data Profiling and Quality > Metabase Server > Administrator Command Prompt** from the Start menu.
2. When prompted, supply your username, password, and metabase name.
Use the `_control` metabase name.
3. Enter one of the following commands:

- To update a specific migrated connection in all the metabases:
updateconnection <connection name>
- To update all migrated connections in all the metabases.
updateallconnections

4. Respond to the system prompts by typing a new value and pressing **Enter**. To keep the current value, press **Enter** at the prompt.

After you respond to all the prompts, the command locates the specified connection in all the metabases and updates them with the new information.

Example of a connection update:

1. Start the Metabase Server Administrator and log on to the `_control` metabase:

```
/.mtb_admin -user madmin -password ***** -metabase _control
```

2. At the `_control` prompt, enter the `updateconnection` command and press **Enter**:

```
updateconnection myconnection
```

The following prompt appears:

```
Please enter the connection description. Just enter for the original
"this is my connection">
```

3. Press **Enter** to use the same description, or type a new description and then press **Enter**.

The following prompt appears:

```
Please enter the path to data files. Just enter for the original
"/data/data">
```

4. Press **Enter** to use the same path, or type a new path and then press **Enter**. The following prompt appears:

```
Please enter the path to the schema files. Just enter for the original
"/data/schemas">
```

5. Press **Enter** to use the same path, or type a new path and then press **Enter**. The following message appears:

```
Successfully updated loader connection
Updating entities in metabase "demo"
username>
```

6. Respond to the prompts for your username and password. Progress messages appear as the command updates the connections named `myconnection` in each metabase. For example:

```
Successfully updated entity 11
Successfully updated entity 12
Successfully updated entity 13
Successfully updated entity 14
Updating entities in metabase "oracledq"
Successfully updated entity 1
_control:
```

Task 2: Validate the Upgrade Operation

Start Metabase Manager and verify that your metabases and loader connections are available in the Control Admin pane.

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