

# How to Upgrade to TDM 4.9

30 Minute Coffee Talk

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# Agenda

- Benefits of Upgrades
- TDM Features in detail
- Support Life Cycle and upgrade path
- Upgrade Process

# Benefits of Upgrades



# Benefits of Upgrades

- Reduce Masking Time
  - Scaled Masking gives you the ability to run masking job across multiple FDM engines to speed up the masking process
  - Masking is now a feature in the portal which makes the masking functionality more accessible to teams using a single tool
- Enabling teams to find their own test data
  - The Find and Reserve Model pre fetch functionality is now an option
  - Data reservations can now be across data sources
  - Find data forms now have additional functions and simpler queries
- Simpler reporting
  - Dashboard reporting can now be used to show TDM usage and downloadable telemetry data
- Simpler Deployment
  - Ability to deploy with Docker containers
- Maintaining Support Status and patch level

# TDM Features in Detail



# CA Test Data Manager Summary Feature Matrix

Key Features	4.9	4.8.1	4.7	4.6	4.5	4.4	4.3
Data Modeling							
<a href="#">PII Scan of discovered Data Model</a>	Yes	Yes	Yes	Yes	No	No	No
<a href="#">The Data Model in CA TDM Portal</a>	Yes	Yes	Yes	Yes	Yes	No	No
<a href="#">PII Audit Using CA TDM Portal</a>	Yes	Yes	Yes	Yes	Yes	Yes	No
Tester Self Service							
<a href="#">Create and Edit a Find &amp; Reserve Model</a>	Yes	Yes	Yes	Yes	No	No	No
<a href="#">Find and Reserve - View Data From Related Columns</a>	<b>Yes</b>	No	No	No	No	No	No

# CA Test Data Manager Summary Feature Matrix

Key Features	4.9	4.8.1	4.7	4.6	4.5	4.4	4.3
Data Masking							
<a href="#">Scalable masking with Docker</a>	Yes	Yes	No	No	No	No	No
<a href="#">Mask Data with CA TDM Portal</a>	Yes	Yes	Yes	Yes	No	No	No
Configuration Enhancements							
<a href="#">Configure Telemetry</a>	Yes	Yes	Yes	Yes	No	No	No
Integration Enhancements							
<a href="#">TDM Portal in Linux</a>	Yes	Yes	Yes	No	No	No	No

# TDM 4.9 Features Deep Dive

- TDM Portal
  - Data Pre fetch Off
    - You have the option to switch Data Pre fetch off, and let TDM query your source database directly.
  - Related Tables
    - You can now view columns from related tables when finding & reserving data. You can also export these related tables as part of the CSV file.
  - Linked Form Fields
    - Related Find & Reserve form fields are now linked so they do not show inapplicable combinations. For example, after selecting a "country", the "city" form only lists entries related to that country.
  - Ability to apply Null / Not Null query

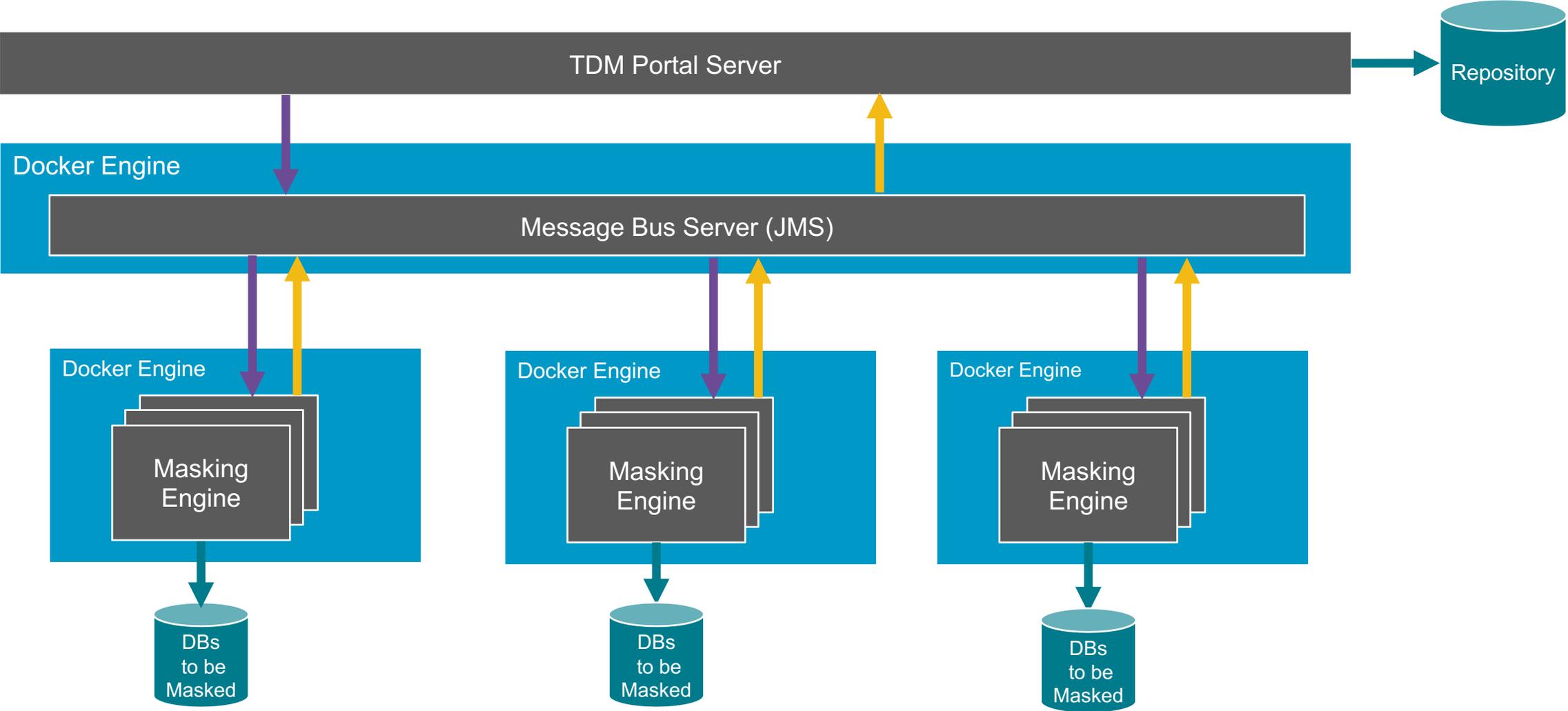
# TDM 4.9 Features Deep Dive

- Fast Data Masker
  - Scaled Masking – Large Table Support
    - The configuration parameters now allow a large table to be split into blocks for processing by the FDM engine. Each block is then processed by a separate CPU thread, allowing for maximum parallelization
    - [Fast Data Masker Scaled Masking best practice guide](#)
  - RC Extract – TDM On Mainframe
    - Extracted data remains secure through intelligent data masking -- a unique method of creating a structurally similar but inauthentic version of an organization's data. With this new capability, you can specify the columns to be masked either in flight or in place. Additionally, you can define and subset Db2 data as part of the data masking process
  - New Masking Functions
    - We have added several masking functions including Formatluhn and Hashsin for the Mainframe, and Formatencrypt1 that lets you specify custom keys for masking

# TDM 4.8.1 Features – Deep Dive

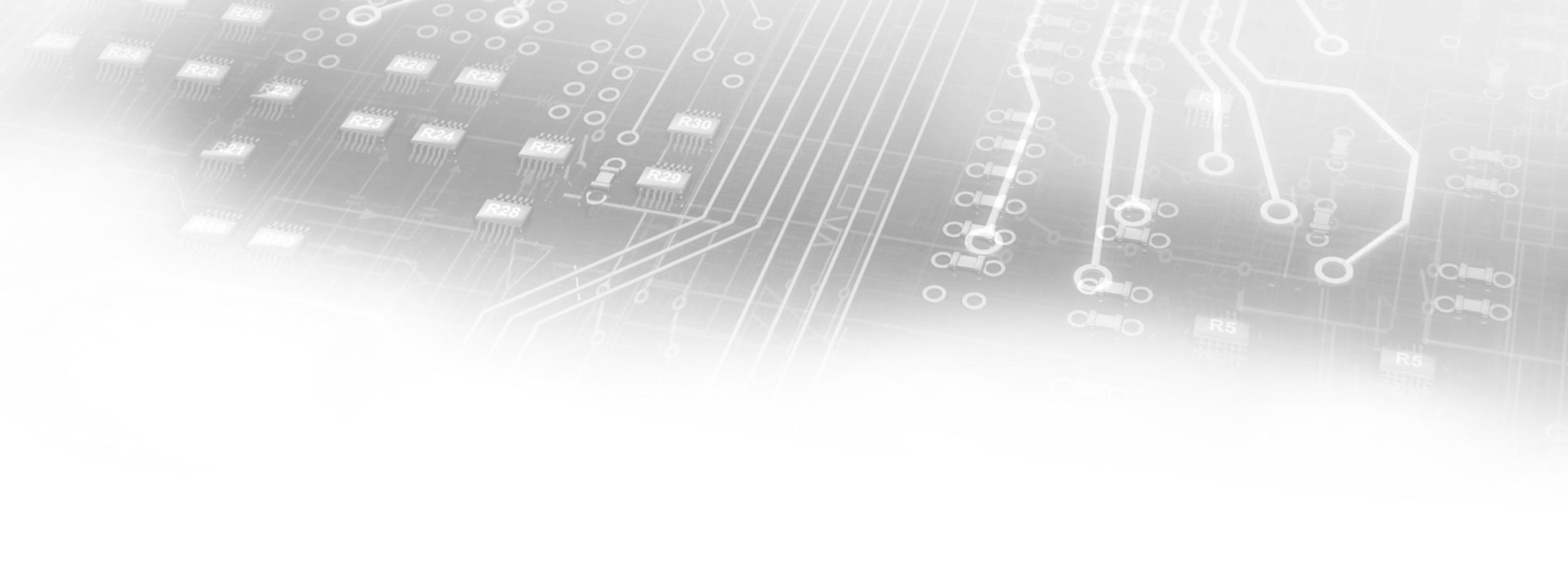
- CA TDM Portal
  - Horizontally scalable masking with TDM Portal in Docker
  - New TDM Portal Homepage and Insights Dashboard
  - License Management in TDM Portal
  - TDM Repository Upgrade via Portal
  - AD/LDAP Configuration Improvements
  - Find & Reserve: Show More Properties than Model Keys
  - Find & Reserve: DB2/AS400, LUW and AIX support
  - Data Model & PII Discovery Improvements
  - Telemetry - TDM Usage Tracking
- TDM For Mainframe
  - Documentation of process of Data Masking with Brightside

# TDM Deployment with Docker



# TDM 4.7 Features – Deep Dive

- CA TDM Portal
  - Support for TDM Portal in Docker (allows functionality on Linux and Mac)
  - Data Model
    - Documentation of process of Data Masking with Brightside
  - Find and Reserve
    - Support for comparison operators for the following data types:
      - Numeric
      - Date/Time
- Postgres
  - Postgres is now supported for:
  - Synthetic Data Generation
  - Data Model discovery
  - PII profiling / PII audit
  - Masking in TDM Portal



# Support Life Cycle and upgrade path





# CA Test Data Manager Release and Support Lifecycle Dates

[Click here to display the index of Product Release and Support Announcements.](#)

Last Updated: May 11, 2020

Product	Release	Service Pack/Genlevel	GA Date/ Announcement	End of Service (EOS), End of Life (EOL) or Stabilization Date
CA Test Data Manager	4.9	-	February 13, 2020	Not Announced
	4.8	-	April 26, 2019	Not Announced
	4.7	-	November 05, 2018	February 18, 2021 EOS
	4.6	-	August 03, 2018	August 24 2020 - (OLD)EOS October 31, 2020 - (NEW)EOS
	4.5	-	March 29, 2018	August 24 2020 - (OLD)EOS October 31, 2020 - (NEW)EOS
	4.4	-	December 29, 2017	August 24 2020 - (OLD)EOS October 31, 2020 - (NEW)EOS
	4.3	-	September 29, 2017	August 24 2020 - (OLD)EOS October 31, 2020 - (NEW)EOS
	4.2	-	July 06, 2017	August 24 2020 - (OLD)EOS October 31, 2020 - (NEW)EOS
	4.1	-	March 31, 2017	April 02, 2019 - EOS
	4.0	-	December 16, 2016	January 08, 2019 - EOS
	3.8	-	October 03, 2016	April 01, 2018 - EOS
	3.6	-	June 30, 2016	January 01, 2018 - EOS
	3.5	-	April 08, 2016	October 01, 2017 - EOS
	3.2.2	-	February 10, 2016	June 01, 2017 - EOS
	3.2.1	-	January 08, 2016	June 01, 2017 - EOS
	3.2	-	November 30, 2015	June 01, 2017 - EOS
	3.1.3	-	November 06, 2015	April, 2017 - EOS
3.1.2	-	October 16, 2015		

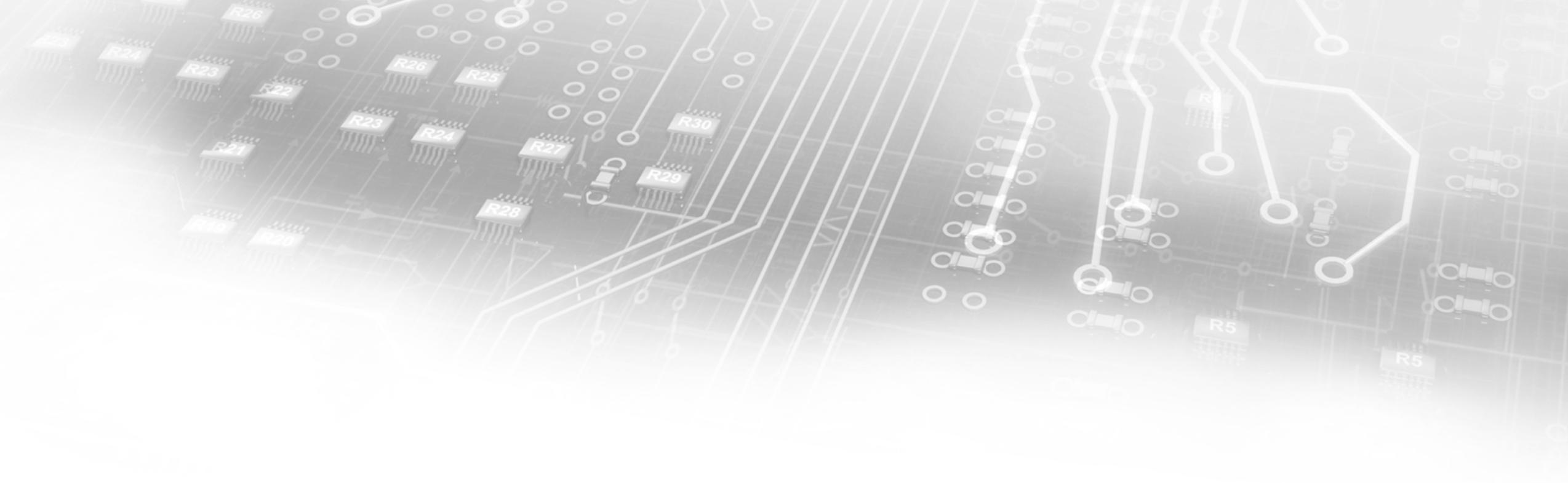
- <https://support.broadcom.com/external/content/release-announcements/CA-Test-Data-Manager-Release-and-Support-Lifecycle-Dates/7096>



# TDM Upgrade Path to 4.9

- Upgrades support moving between two major releases
- To upgrade from older environments may require a multi hop upgrade
  - The chart shows some typical upgrade paths

Installed Version	Suggested Upgrade Path
4.2	4.2 -> 4.4->4.6->4.7->4.9
4.3	4.3 -> 4.5 -> 4.7->4.9
4.4	4.4 -> 4.6-> 4.7->4.9
4.5	4.5->4.7->4.9
4.6	4.6->4.7->4.9
4.7	4.7 -> 4.9
4.8	4.8 -> 4.9



# Upgrade Process



# Upgrade Preparation - Windows

## Upgrade Preparation

1	Create Support ticket and request latest TDM Build
2	Download CA TDM Install Media
3	Backup TDM Repository
4	Backup TDoD Configuration using editor backup option
5	Backup Remote Publish Configuration using Configuration editor
6	Backup profiles.xml from %AppData%/Grid-tools/ folder
7	Backup rep.xml from %AppData%/Grid-tools/ folder
8	Delete profiles.xml from %AppData%/Grid-tools/ folder
9	Delete rep.xml from %AppData%/Grid-tools/ folder and c:\program Files (x86)\Grid-Tools\GTDatamaker
10	Backup C:\Program files\CA CA Test Data Manager Portal\conf\application.properties
11	Backup OrientDB Database C:\Program files\CA CA Test Data Manager Portal\orientdb\databases
12	Optional: If using custom SSL certificates with TDM Portal, Backup Certificates

# Test Data Manager Upgrade - Windows

## Upgrade Process

1	Stop Remote Publish Service
2	Stop TDoD Service
3	Stop CA Portal Service
4	Disconnect and close existing DataMaker windows
5	Start GT setup and install all components as per the documentation
6	Run Portal installer to upgrade TDM Portal and the Repository
7	Start Portal Service
8	Note: The first time the portal starts after an upgrade or installation the repository is created / updated. The portal will not come ready until the upgrade is complete
9	Login to the Portal and accept the License question (PLA Questions) Note: A License key is no longer required
10	Start Data Maker and validate the connection to the repository
11	Start Remote Publish Service
12	Start TDoD Service

# Upgrade Preparation – Windows with Docker Masking engines

## Upgrade Preparation

1	Create Support ticket and request latest TDM Build
2	Download CA TDM Install Media
3	Copy Docker images to Repository
4	Backup TDM Repository
5	Backup TDoD Configuration using editor backup option
6	Backup Remote Publish Configuration using Configuration editor
7	Backup profiles.xml from %AppData%/Grid-tools/ folder
8	Backup rep.xml from %AppData%/Grid-tools/ folder
9	Delete profiles.xml from %AppData%/Grid-tools/ folder
10	Delete rep.xml from %AppData%/Grid-tools/ folder and c:\program Files (x86)\Grid-Tools\GTDatamaker
11	Backup C:\Program files\CA CA Test Data Manager Portal\conf\application.properties
12	Backup OrientDB Database C:\Program files\CA CA Test Data Manager Portal\orientdb\databases
13	Optional: If using custom SSL certificates with TDM Portal, Backup Certificates

# Test Data Manager Upgrade Process - Docker

## Upgrade Process

1	Create Support ticket and request latest TDM Build
2	Download CA TDM Install Media
3	Upload Docker images to the Docker repository
4	Backup TDM Repository
5	Backup OrientDB Database from Docker Volume
6	Stop running TDM docker containers using the supplied docker-compose files
7	Modify docker-compose files to reference new images
8	Start TDM using the docker-compose files
8	Note: The first time the portal starts after an upgrade or installation the repository is created / updated. The portal will not come ready until the upgrade is complete
9	Login to the Portal and accept the License question (PLA Questions) Note: A License key is no longer required
10	Upgrade is complete

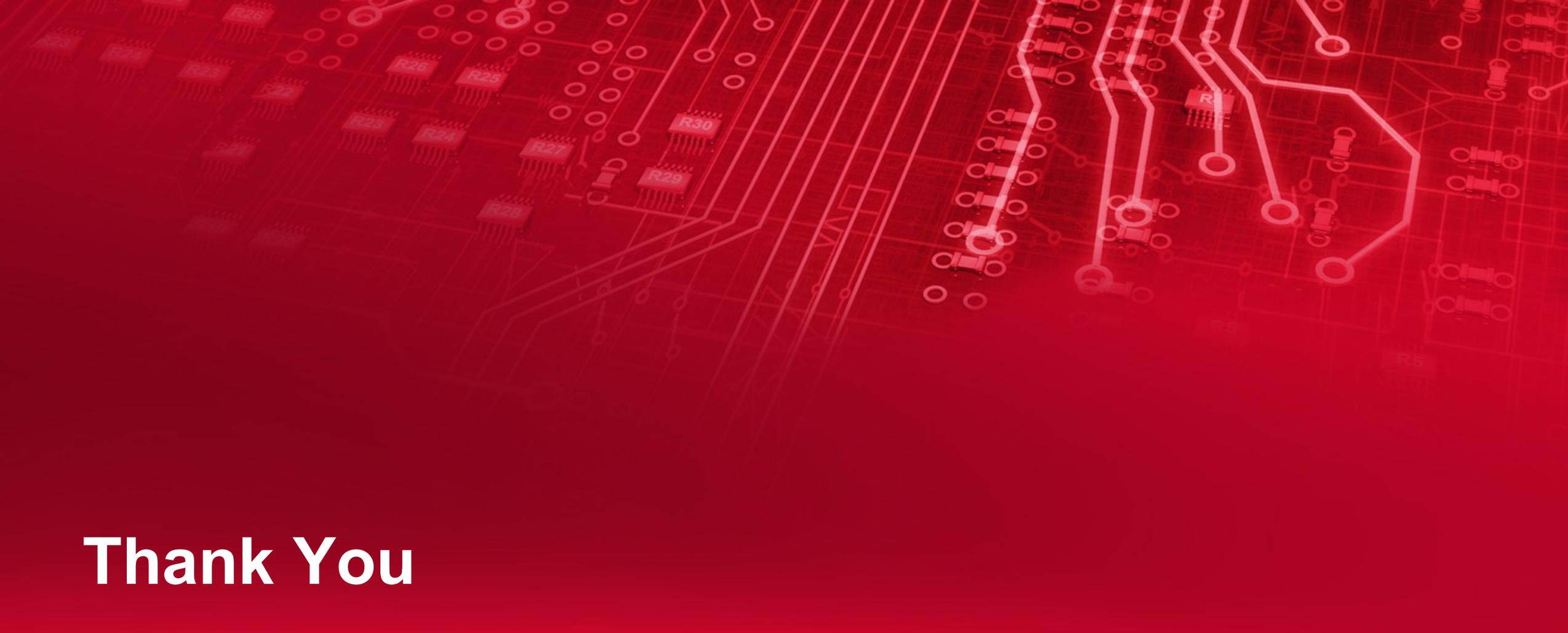
# Test Data Manager Upgrade – Windows with Docker masking engines

## Upgrade Process

1	Stop Remote Publish Service
2	Stop TDoD Service
3	Stop CA Portal Service
4	Disconnect and close existing DataMaker windows
5	Start GT setup and install all components as per the documentation
6	Stop running TDM Docker containers using the supplied Docker-compose files
7	Modify Docker-compose files to reference new images
8	Start TDM Messaging and Masking containers using the Docker-compose files
6	Run Portal installer to upgrade TDM Portal and the Repository
7	Start Portal Service
8	Note: The first time the portal starts after an upgrade or installation the repository is created / updated. The portal will not come ready until the upgrade is complete
9	Login to the Portal and accept the License question (PLA Questions) Note: A License key is no longer required
10	Start Data Maker and validate the connection to the repository
11	Start Remote Publish Service
12	Start TDoD Service

# Further upgrade information

- [Test Data Manager Community site](#)
  - A great resource to share your experiences and ask questions
- [Test Data Manager Upgrade site](#)
  - The TDM Upgrade site on the Broadcom communities site contains links to documents that can be used for planning and implementing upgrades.



# Thank You

