erwin **Data Intelligence (DI)**

Version 13.0

Software Upgrade Guide

This document provides the instructions to upgrade the erwin DI software from your current version to the new 13.0 version.

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Determine if you are ready to upgrade to v13.0

***** VERY IMPORTANT *****

If you are using the **erwin automation framework** or **any smart connectors** in your current version of erwin DI, please reach out to your erwin Professional Services SME, Implementation SME, or Customer Success Manager to determine the upgrade path and ensure your smart connectors work on the latest 13.0 version so you can have a smoother upgrade experience and limit the production downtime.

We recommend that **you do not** upgrade directly to the latest 13.0 version without involving an erwin SME especially in cases where you have Smart Connectors configured in your environment.

License Key Readiness

- Version 13.0 works with a v12.1 key but any new capabilities released in v13.0 will require a 13.0 key to unlock the new features
- Ensure that you have the compatible license key specific to v13.0 available with you before you start the upgrade process.

Prerequisites to Upgrade to the 13.0 version

Eclipse Temurin Adoptium Java JRE and Tomcat webserver are standard prerequisites to install and deploy the erwin Data Intelligence application .

The erwin Data Intelligence 13.0 software is certified to run on the following versions of Tomcat and Java.

Tomcat Webserver	Tomcat 9.0.73/74/75
Java	Eclipse Temurin Adoptium 17.0.x

* Important Note:

- The erwin Data Intelligence v13.0 has been officially certified on Tomcat 9.0.73 and Java 17.0.x. We recommend that you install tomcat 9.0.73/74/75 versions to avoid any compatibility issues.
- If you are on the older Tomcat 8.5x version, it is mandatory that you upgrade to Tomcat 9.0. 73/74/75 for security compliance and to avoid any unexpected compatibility issues.

Additional Note: We recommend that you use the certified versions of Tomcat and Java for the best experience. In case you need to use a point version that is above or below the certified versions, the product might still work as expected on the non-conformant point versions, but we recommend that you reach out to your erwin support or professional services contact so we can provide a recommendation on the compatibility.

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If upgrading from Tomcat 8x version to Tomcat 9.0.68. Ensure that you backup the entire webapps folder

Once you have completed installing Tomcat 9.0.73/74/75 and Eclipse Temurin Adoptium 17.0.x, you may proceed with the next steps.

Upgrading to erwin Data Intelligence v13.0 from v12.1.x, v12.0.x or v11.1/v11.0

Backups to be taken

Database Backup

1. **IMPORTANT** - Take a backup of the existing v12x or v11x DI Database, the **erwinDISuite.war** file and **erwinDISuite** folder (present in Tomcat home/webapps folder).

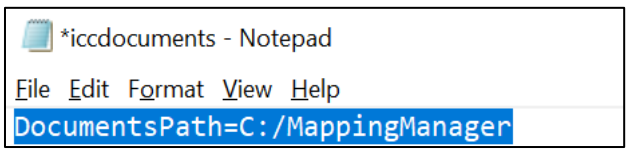
Application Configuration Backup

1. Take a backup of the **database.properties** file from the following folder
   Folder: C:\Program Files\Apache Software Foundation\Tomcat 9.0\webapps\erwinDISuite\WEB-INF\Database\

2. Take a backup of **iccdocuments.properties** file from the following folder
   Folder: C:\Program Files\Apache Software Foundation\Tomcat 9.0\webapps\erwinDISuite\WEB-INF\configuration\properties

3. Take a backup of the entire application folder

   Open the **iccdocuments.properties** file and go to the specified location mentioned in the **DocumentsPath** variable and take a backup of the entire physical folder



   Example: backup the entire *C:/MappingManager* folder

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Upgrade Steps for Database

1. From the newly downloaded **software build → SQL** folder

   For SQL Server database
   - Execute the **erwinDISuite_SqlServer.sql** script against the existing DI SQL Server database.
   - Important - Please wait for the script to complete fully before proceeding with the next step.

   For Oracle database
   - Execute the **erwinDISuite_Oracle.sql** script against the existing DI Oracle database.
   - Important - Please wait for the script to complete fully before proceeding with the next step.

Upgrade Steps for the erwin DI application on the Tomcat Server

1. ****IMPORTANT**** - **Stop** the tomcat server
2. From the tomcat/webapps/ folder, delete the existing **erwinDISuite.war** file and the **erwinDISuite** folder.
3. Go into the *Tomcat Directory\work\Catalina\localhost* folder and delete the **erwinDISuite** folder.
4. From the newly Downloaded **software build → WAR** folder, copy the **erwinDISuite.war** file and paste into the *tomcat/webapps* folder.
5. ****IMPORTANT**** - **Start** the Tomcat server.
6. You will now see an expanded **erwinDISuite** folder in the *tomcat/webapps/* directory. Please wait for a few minutes for the folder to explode completely.
7. Update the **Database Properties** file (the **database.properties** file is present in the *Tomcat home\webapps\erwinDISuite\WEB-INF\database folder*)

   Note: Do not replace the 13.0 file with the older 12.x/11.x file. Please update the connection parameters separately in the new 13.0 file as the 13.0 version has new properties that have been added.

If using SQL Server

a. Update the parameters highlighted in yellow below with the actual values at your end.

```
DriverName=com.microsoft.sqlserver.jdbc.SQLServerDriver
URL=jdbc:sqlserver://localhost:1433;databaseName=ClientDBName; encrypt=true;trustServerCertificate=true
UserName=ClientUserID
Password=Client_Unencrypted_Password
PasswordEncrypted=false
DBType=SQLSERVER
```

b. Set PasswordEncrypted=false
c. Save changes to the **database.properties** file

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If using Oracle

a. Update the parameters highlighted in yellow below with the actual values at your end.

DriverName=oracle.jdbc.OracleDriver
URL=jdbc:oracle:thin:@//**IP_ADDRESS**:**1521**/**ClientDBName**
UserName=**ClientUserID**
Password= **Client_Unencrypted_Password**
PasswordEncrypted**=false**
DBType=ORACLESERVER

b. Set PasswordEncrypted=false
c. Save changes to the **database.properties** file

8. Update the **iccdocuments.properties** file. This is present in the *Tomcat home\webapps\erwinDISuite\WEB-INF\configuration\properties* folder

   Note: Do not replace the 13.0 file with the older 12.x file. Please update the parameters separately in the new 13.0 file

   a. DocumentsPath=**Client_Path** (For example: DocumentsPath=C:\MappingManager)
   b. ApplicationURL= **Client_DI_URL** (For example: ApplicationURL= http://erwintest:9191/erwinDISuite)
   c. ApplicationTempPath=**Provide_New_Path_For_Temp_Files** (this path is used to store all the temp files uploaded into the application (typically outside the tomcat directory) and can be periodically deleted by an admin)
      For example: ApplicationTempPath= C:\DISuiteTemp

9. From the newly downloaded **software build → DIMigrator** folder, copy the **DIMigrator** folder to any temporary folder on the server - e.g. C:\Temp\DIMigrator

10. Go to the folder Tomcat home\webapps\erwinDISuite\WEB-INF\database and Copy the latest 13.0 **database.properties** file. Paste this into the **DIMigrator/Config** folder (e.g. C:\Temp\DIMigrator\config)

    ****Important**:** Ensure that you have entered the password in plain text format and have set the **PasswordEncrypted** field to false i.e. **PasswordEncrypted=false**

    Only then, the utility will be able to connect to the backend database to migrate the required data.

```
### SQL Server Begin
DriverName=com.microsoft.sqlserver.jdbc.SQLServerDriver
URL=jdbc:sqlserver://localhost:1433;databaseName=erwinDI_v12_GA
UserName=<USER_ID>
Password=<PLAIN_UNENCRYPTED_PASSWORD>
PasswordEncrypted=false
DBType=SQLSERVER
ConnectionPartitions=1
MinimumConnectionsPerPartition=50
MaximumConnectionsPerPartition=150
#ConnectionPoolType=BONECP
ConnectionPoolType=HIKARI
```

The above screenshot is for SQL Server. Follow the same process for Oracle as well

11. Go to the folder Tomcat home\webapps\erwinDISuite\WEB-INF\ configuration\properties and copy the latest 13.0 **iccdocuments.properties** file. Paste this into the **DIMigrator/Config** folder (e.g. C:\Temp\DIMigrator\config)

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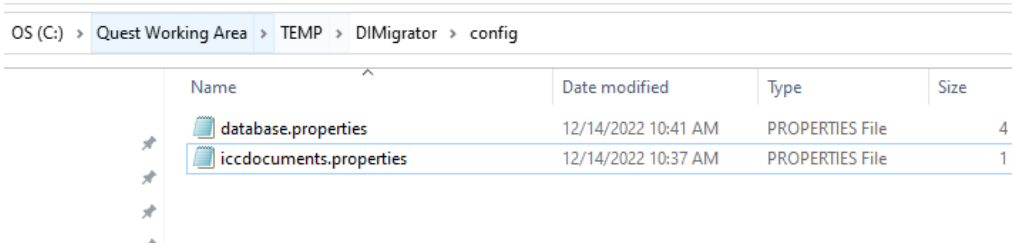
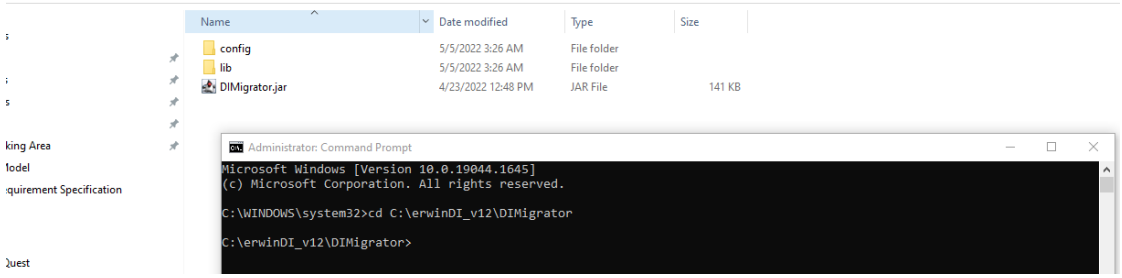
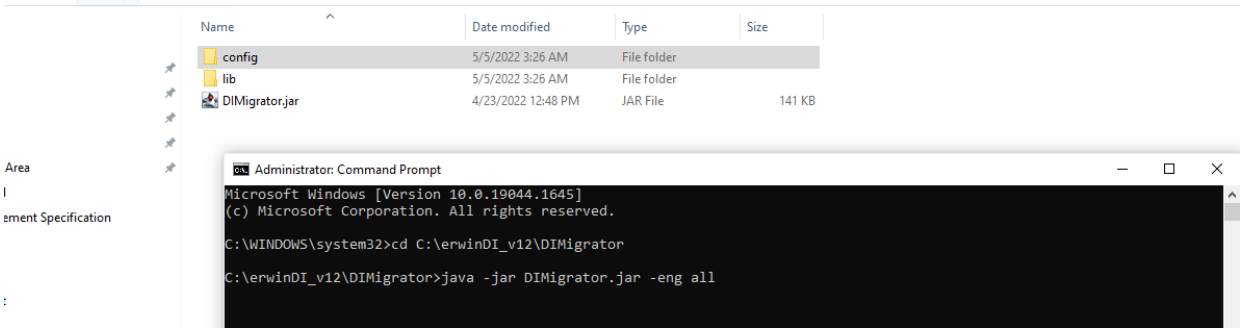


12. Open the command prompt in Administrator mode and point to the temp folder where this DIMigrator folder exists e.g. C:\Temp\DIMigrator



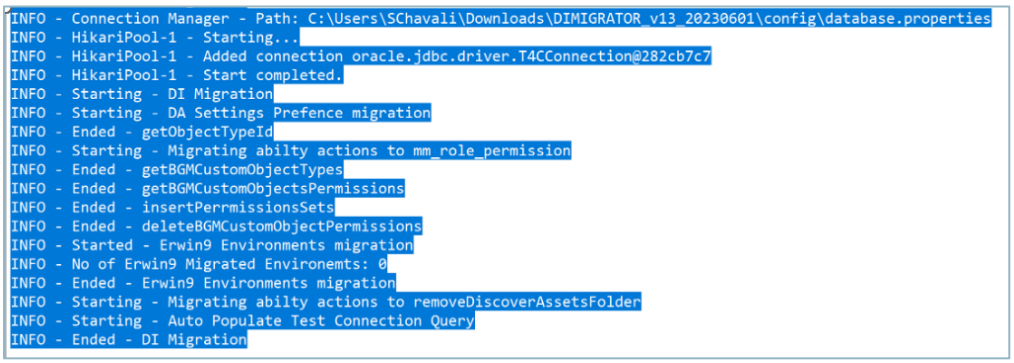
13. Execute the command: **java -jar DIMigrator.jar -eng all**



Note: The DIMigrator needs to be executed as part of the 13.0 upgrade process.

14. You should see the following screenshot upon successful execution of the **DIMigrator** utility.

If you are upgrading from v12.1x to 13.0, you should see the following screenshot.



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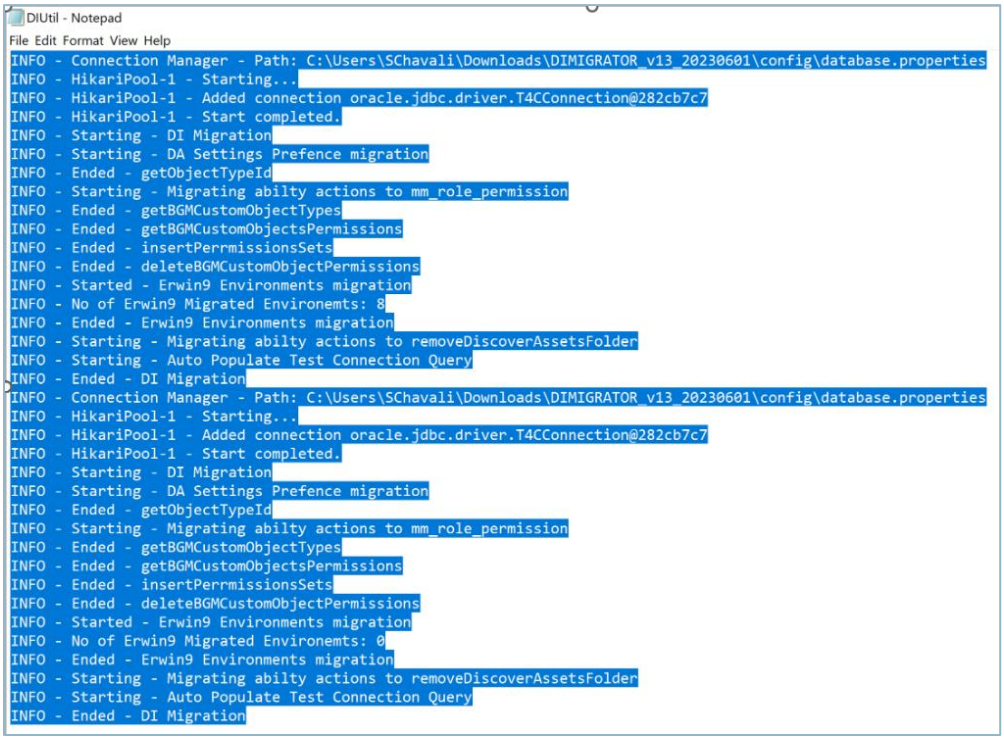
If you are upgrading from v12.0x (or an older version) to 13.0, you should see the following screenshot.



****IMPORTANT**:** In case you encounter any errors in this process, please reach out to the erwin support team immediately.

15. Delete the **DIMigrator** folder once the above step has completed successfully.
16. Update the LDAP and SAML properties sections if you are using these additional configurations.
17. Restart the Tomcat Server.
18. Login to the application.

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Upgrading to the erwin DI Suite 13.0 version from 10.2 or older versions

If you are on an older 10.x version (10.0, 10.1 or 10.2) of the erwin Data Intelligence and Business User Portal applications, you will need to follow a custom upgrade path and perform two upgrade scenarios

1. You need to first upgrade to the erwin Data Intelligence v11.0 and Business User Portal v11.0.5 versions. (This is required to bring all your DI and BUP data into a single backend database and in a structure that can then be upgraded to 12.0 subsequently)
2. Then, you can upgrade to the version 13.0 of the Data Intelligence application using the instructions provided in the upgrade instructions above (upgrade

Prior to upgrading from v10x to v13.0, ensure you have gone through the below steps to determine if you are ready to upgrade or not

1. Determine if your Smart connectors in v10x are certified to work on v13.0
2. If you do not have the required go-ahead from your erwin SME/Automation Team, work with this team till the Smart connectors are ready to be deployed on v13.0
3. If you have the required go-ahead from your erwin SME/Automation Team, proceed with the next steps
4. You need to first upgrade to the erwin Data Intelligence v11.0 and Business User Portal v11.0.5 versions. (This is required to bring all your DI and BUP data into a single backend database and in a structure that can then be upgraded to 13.0 subsequently)
5. Then, you can Upgrade to the 13.0 version by following the standard 13.0 upgrade instructions.

As part of this 10.x to v13.0 upgrade process, you need to

1. Upgrade to and deploy the erwin Data Intelligence 11.0 version – Download erwin DI 11.0 Download Link
    - This includes running the SQL DDL, deploying the DI war file, and running the DIMigrator utility to encrypt and migrate passwords to the new AES algorithms used in v11.0
2. Upgrade to and deploy the BUP 11.0.5 version – Download BUP 11.0.5 Download link
    - This is required to create the required BUP tables in the backend database
3. Installing the Logstash and Elastic Distro is not needed in this case
4. Once you have upgraded to erwin Data Intelligence 11.0 and Business User Portal 11.0.5 versions, you can now proceed with the upgrade to the 13.0 by following the standard 13.0 upgrade instructions.

Follow the process listed in the Upgrade instructions for erwin Data Intelligence and BUP 11.0 to help you upgrade from v10x to v11

1. Click here to view the upgrade and deployment instructions for erwin Data Intelligence v11.0
2. Click here to view the upgrade and deployment instructions for BUP 11.0.5

If you are on a version older than v9.0, reach out to your erwin by Quest SME (Sales, Support or Professional Services) to determine the best upgrade options available.

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