
MDM Upgrade Options, Recommendations, and Upgrade Plan

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Abstract

The paper provides detailed guidance for MDM upgrade Options, Recommendations, and processes for the Master Data Management System, focusing on the IBM Infosphere MDM Server. And outlines the Importance of careful planning and execution of the Master Data Management Upgrade Project. Provides the pros and cons and recommended option from the available upgrade options. Finally describes the upgrade process steps for the recommended upgrade approach.

Keywords:

MasterData Management;Install MDM; Cost effective; downtime; Infrastructure; Infosphere MDM Server; Customizations;file system; Java Messaging Service (JMS); WebSphere Application Server (WAS); Messaging Queue(MQ);high availability.

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1. Introduction

This paper will introduce you to the MDM upgrade options, for successful MDM upgrade. Infosphere MDM upgrade presents a challenging task for the implementation team.

It requires careful planning and execution

Upgrade strategy will depend on many factors, including the following:

- Cost for the upgrade
- Downtime for the upgrade
- Migration time frame and consumer Impact
- Supported hardware and software upgrade
- Upgrade to avail the IBM Support

Each factor is important in determining the strategies to address each of these factors for upgrade completion within the time frame

2. Plan for an upgrade project

The plan for an upgrade project is like a plan for an implementation project. It will involve the following plans:

- Resource plan,

- Infrastructure plan,
- Functional test plan,
- Regression test plan,
- Performance test plan.

Upgrading Infosphere MDM typically requires new infrastructure, such as a new version of the application server, database, and messaging technology. The required stack of infrastructure must be prepared before MDM Server product installation Upgrade planning should include four passes, for a successful upgrade

- Base Installation Pass,
- Code Migration Pass,
- Server Migration Pass,
- Move to Production Pass.

3. Upgrade Options

Option 1	Option 2	Option 3
Install MDM on the same Server where the current MDM is installed with different file systems	Install MDM on the same Server where the current MDM in the same file systems	Install MDM on the new Server with the same file system names
Create New WAS profile	Stop the current MDM	Install New WAS and create WAS profile
Create New MQ Manager	Backup the Existing File systems, WAS and Database	Create New MQ Manager
Create new Database Schema	Create new Database Schema	Create new Database Schema

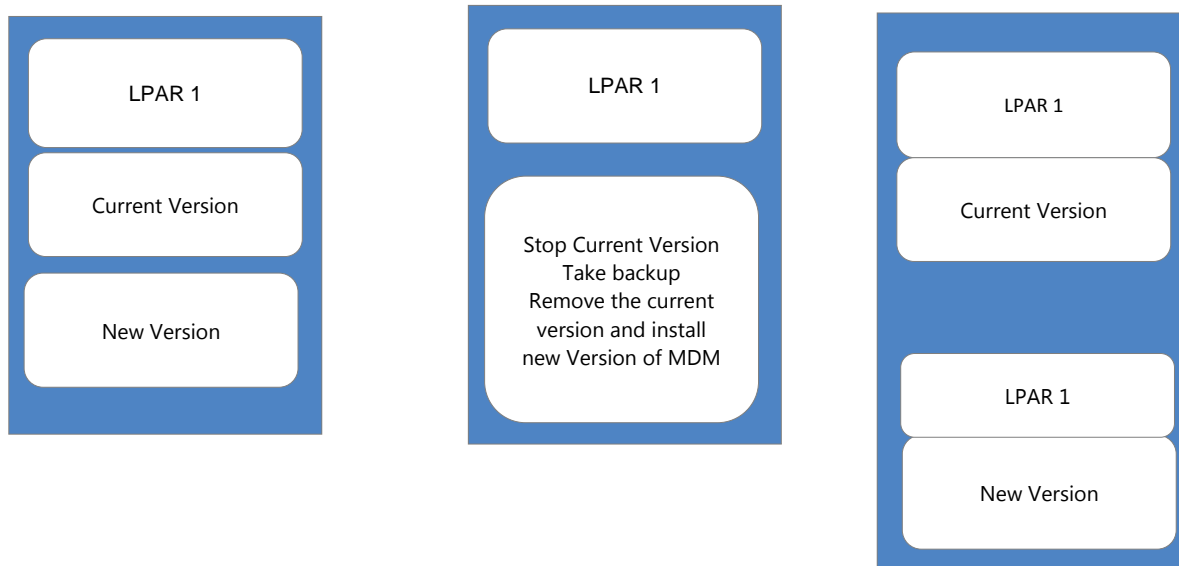



Figure 1. Upgrade Options

4. Pros and Cons

Option 1	Option 2	Option 3 
Install MDM on the same Server where the current MDM is installed with different file systems	Install MDM on the same Server where the current MDM in the same file systems	Install MDM on the new Server with the same file system names
Cost-effective	Cost-effective	More cost involved
Less downtime	More downtime,	Minimal downtime
Ideal when customers opt to save money for the additional Infrastructure	Ideal when no consumers are onboarded	Ideal when high availability is on priority and when cost is not a constraint
Proper care needs to be taken for not impact the current version	Need to make sure we are taking all the backups	Create a new Database Schema
Allows new version to be installed and tested whilst allowing maintenance of old version	Implemented for one of the leading banks in Australia	Implemented for one of the leading Banks in the US

5. Upgrade Process

Create additional Environment for MDM Installation

- Update the Infrastructure Design document
- Acquire the Storage and Create the New file systems, in line with existing File system
- Install New Version supported Software's
- Take backup of existing Schema.
- Create New Database Schema for new

Complete Base installation

- Install New Version of MDM pointing to the new Database schema
- Test the Base installation with client applications (Batch processor, Event Manager)

Apply Customizations to server

- Identify all the customizations
- Apply the JMS configurations on WAS and Deploy the cba files
- Apply the changes in the Client applications and Test the Customizations
- If all success.
- Conduct Performance Tests

Server Migration and Point to New Schema

- Apply the Upgrade scripts on OLD Schema,
- Migrate the Server connections to point to Old Schema.
- Compare the Table Structures from OLD and New Schemas, both should be identical.
- Restart the Servers and Test connections

6. Conclusion

In conclusion, keeping up with the vendor's new releases is key for any enterprise to keep their application up to date, and to avail new features. Selecting the correct upgrade approach plays a major role in addressing the cost, high availability, and infrastructure requirements, by optimizing the processes, and exploring new technologies for future upgrades helps the organizations to improve the customer experience and change process.

7. References

[Upgrading to the latest release - IBM Documentation](#)