Upgrade Software

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Software setup

Steps:

Before you upgrade:

1. Inform users of the planned outage for the upgrade.

2. Please verify that all jobs have completed and that none is pending.
3. **Release 5.0 and earlier:** Check that there are no services issues in the Diagnostics page:

   > **NOTE:** You must be logged in as an admin user.

   ```
   http://<hostname>:<port_number>/diagnostics
   ```

   This feature is deprecated in Release 5.1 and later.
4. Shut down all Trifacta services:

   ```
   sudo service trifacta stop
   sudo killall -u trifacta
   ```

5. Untar the Dependencies folder. Command:

   ```
   tar -xvf trifacta_<x.y>_deps_<os_version>.tar
   ```

   where:
   `<x.y>` is the major-minor release version.
   `<os_version>` is the operating system version.

6. Move the `local.repo` file. Command:

   ```
   mv local.repo /etc/yum.repos.d/
   ```

7. Move the `trifacta/rpms` folder into `/var/local/trifacta/`. Overwrite the existing rpms folder.
   Command:

   ```
   cp -rf trifacta/rpms/ /var/local/trifacta/
   ```

8. Clear the yum cache. Command:

```
yum clean all
```

Upgrade other components

Depending on your upgrade path, you may be required to upgrade external components.

- For more information on supported Hadoop components, see *Install Reference* in the Install Guide.

Upgrade Trifacta software

1. Do not uninstall the database.
2. Upgrade:

> **NOTE:** During the upgrade, you should use the `upgrade` directive for Yum. Avoid using the `remove` and `install` directives, which require manual migration of your saved configuration afterward. Please verify that you have backed up your pre-release configuration files before proceeding.

   a. **Without Internet access:** If the Trifacta node does not have Internet access, you must install using the local dependencies.

      i. Instead of using the `install` directive for Yum, you must use the `upgrade` directive.
      ii. For more information, see *Install Dependencies without Internet Access* in the Install Guide.
      iii. When finished, please return to the next step in these instructions.
   b. **For CentOS/RHEL:** Upgrade the package with yum, using root. Please execute the following commands:

```
sudo yum upgrade trifacta
```

   c. **For Ubuntu:** Upgrade using apt-get, using root:

```
sudo dpkg -i <new-trifacta-binary>.deb
```

   The above might generate an error, which is ok. Continue:

```
sudo apt-get -f -y upgrade
```

3. Since the upgrade process does not modify the databases, the metadata for the older jobs should still persist.

If it is not already in the appropriate directory, move `license.json` into the deployment. Example:

```
cp /tmp/license.json /opt/trifacta/license/license.json
```

See *License Key* in the Install Guide.

Set File Ownership

> **All files in the Trifacta install directory and sub-directories must be owned by the same user that is used to run the Designer Cloud powered by Trifacta platform . Mismatches in ownership and execution permissions can cause services to fail to start.**

Steps:

Before you upgrade, please complete the following:

1. Login to the Trifacta node as the root user.
2. Execute the following command. The user that is being granted ownership of the install directory is `trifacta`, which is the default user that runs the platform. If you are using a different user to run your Trifacta deployment, please substitute that name.

```
chown -R trifacta:trifacta /opt/trifacta
```

> **Do not restart the platform yet. Additional configuration is required first.**