

ER/Studio: Upgrading from Repository (v6.5 - 7.0) to Team Server 17.0+

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With the release of ER/Studio 2016, the Repository is combined into a single installer and database implementation with Team Server. This document guides you through the upgrade of Repository versions 6.5 through 7.0 to Team Server 17.0 where only the Repository is being used.

PREREQUISITES:

- 64-bit operating system – Team Server/Repository 2016 and later are only supported on 64-bit machines
- Download the Team Server 17.0 installer
- *Highly recommended* that you back up the database
- Repository must be on version 6.5, 6.6, 6.7, or 7.0 – if you are on an earlier version, please refer to docs.embarcadero.com for upgrade instructions to version 17.0
- Database server where the current Repository database resides
- Database user who owns the Repository objects
- Database user currently must have db_owner (SQL Server), and DBA role (ORACLE)
- You will need the Repository Admin password
- ER/Studio Data Architect 17.0 must be installed on a separate client machine

UPGRADING:

The following steps will walk you through upgrading the Repository to Team Server 17.0. If all of the prerequisites are followed, then the upgrade process will run smoothly.

STEPS:

- 1) Uninstall Repository (v6.5 - 7.0). It is highly recommended to uninstall the Repository manually first.

- 2) Run the Team Server 17.0 installer.



- 3) If you want to change the installation location, click **Options**.



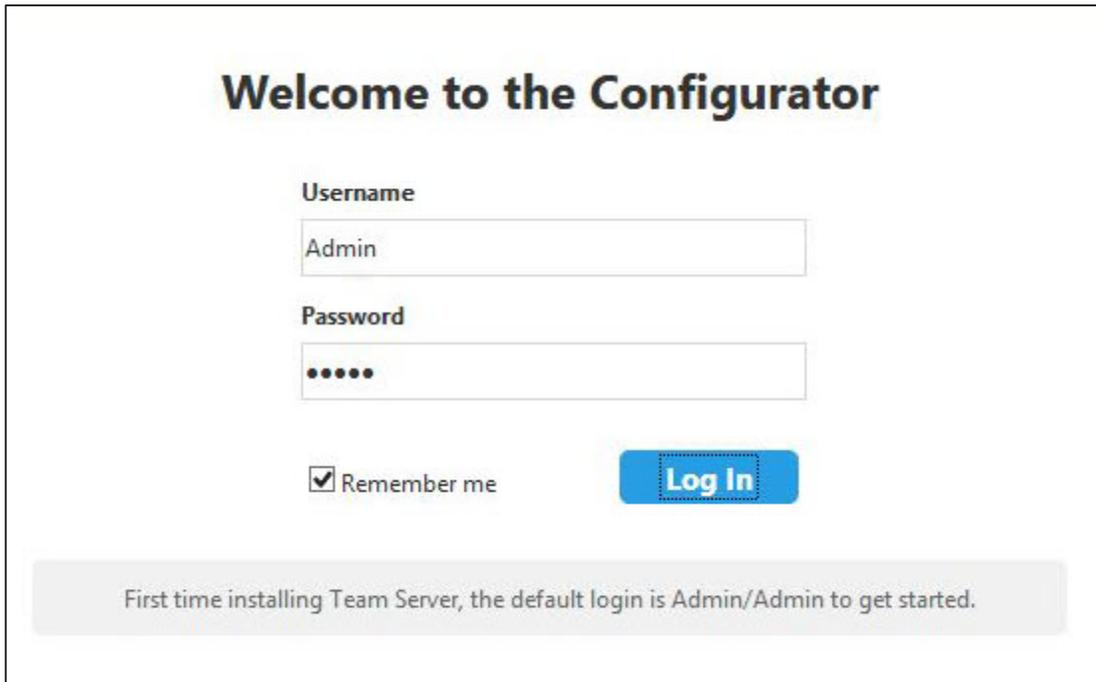
- 4) After browsing for and selecting the new location, click **OK**.
- 5) Agree to the license terms, and then click **Install**.



- 6) Click **Launch** to load the Team Server 17.0 Configurator. This step launches both the Web browser and Team Server Configurator, which may take a few minutes



- 7) Once the Configurator opens, log in using Admin/Admin. Please note the capital “A”.



Welcome to the Configurator

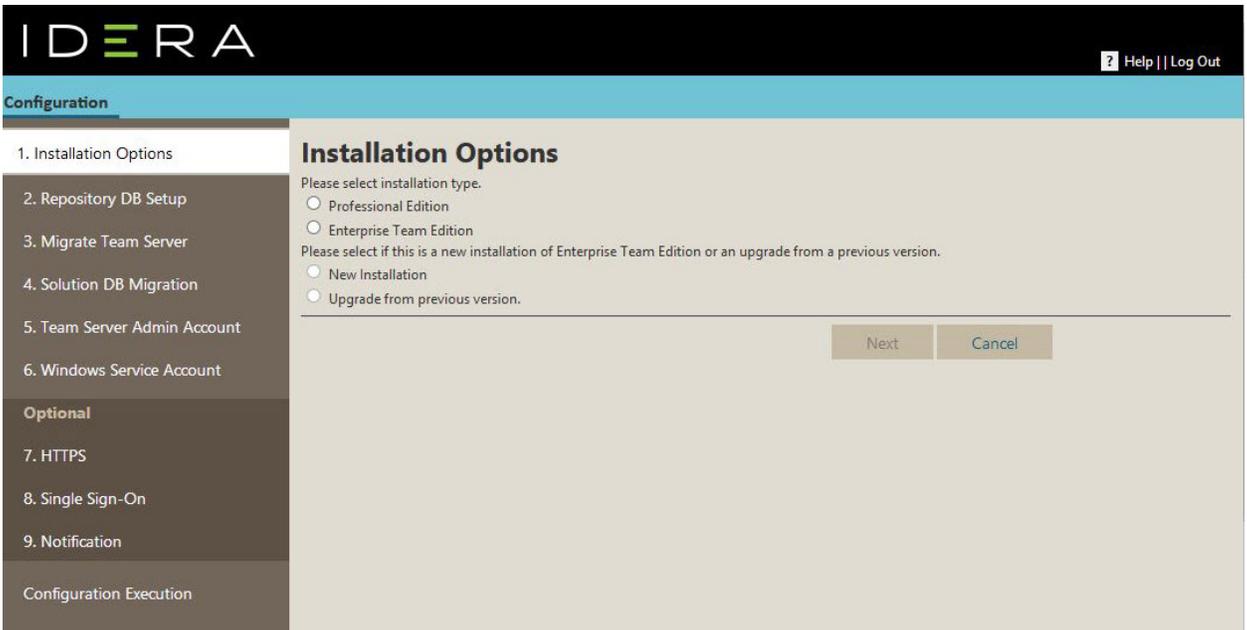
Username
Admin

Password
••••••

Remember me **Log In**

First time installing Team Server, the default login is Admin/Admin to get started.

- 8) On the Installation Options page, choose your installation options, and then click **Next**.



IDERA Help | Log Out

Configuration

- 1. Installation Options
- 2. Repository DB Setup
- 3. Migrate Team Server
- 4. Solution DB Migration
- 5. Team Server Admin Account
- 6. Windows Service Account
- Optional
- 7. HTTPS
- 8. Single Sign-On
- 9. Notification
- Configuration Execution

Installation Options

Please select installation type.

- Professional Edition
- Enterprise Team Edition

Please select if this is a new installation of Enterprise Team Edition or an upgrade from a previous version.

- New Installation
- Upgrade from previous version.

Next Cancel

Note that the options change based on your selections. In the following example, we selected Enterprise Team Edition and Upgrade from previous version.

The screenshot shows the IDERA Configuration web interface. On the left is a sidebar with the following menu items: 1. Installation Options (selected), 2. Repository DB Setup, 3. Migrate Team Server, 4. Solution DB Migration, 5. Team Server Admin Account, 6. Windows Service Account, Optional, 7. HTTPS, 8. Single Sign-On, 9. Notification, and Configuration Execution. The main content area is titled 'Installation Options' and contains the following elements:

- Installation Options:** A section with the heading 'Please select installation type.' containing three radio buttons: 'Professional Edition', 'Enterprise Team Edition' (selected), and 'New Installation'. Below this is another section with the heading 'Please select if this is a new installation of Enterprise Team Edition or an upgrade from a previous version.' containing two radio buttons: 'New Installation' and 'Upgrade from previous version.' (selected).
- Retrieve a Team Server License (Optional):** A section with the heading 'You can retrieve your purchased license or request a trial using your IDERA or Embarcadero Developer Network (EDN) account.' and a link 'Don't have an IDERA or Embarcadero Developer Network account? [Create Account](#)'. It includes input fields for 'EDN Login Or Email Address' (containing 'EMBT') and 'Password' (masked with dots), with a 'Show' checkbox. Below these are three radio buttons: 'I want to use the included 2-week trial license', 'I want to request a trial license', and 'I have purchased a license through my IDERA or Embarcadero Developer Network (EDN) account' (selected). There is also a 'Serial Number' input field and a radio button for 'I have a license file to import' with an 'Import from file' button.
- Unable to connect?:** A section with the text 'Use the following to connect to the web registration from another machine. The serial number will be emailed to you.' followed by 'Registration code: 8532107' and 'Web registration link: <https://reg.codegear.com/srs6/activation.jsp?key=8532107>'.

At the bottom right of the main content area are 'Next' and 'Cancel' buttons.

9) On the Repository Database Setup page, select or type:

- database platform
- host name and port where your current Repository resides
- (SQL Server only) alias

Note: If SQL Server is the platform and a non-default port or named instance is used, an alias should be created with the SQL Server client utilities and specified in the setup page. Failure to create an alias will not prevent the completion of the Configurator but could cause Repository connection errors from Data Architect.

- database authentication credentials
- name of the Repository database
- (Oracle only) Oracle SID

The screenshot shows the IDERA ER/Studio configuration interface. The main heading is "ER/Studio Repository Database Setup". Below the heading, there are radio buttons for selecting the DBMS type: MS SQL Server 2008-2016 (selected), Oracle 11g-12c, and IBM DB2 LUW 9.x-10.x. There are input fields for Host Name (localhost) and Port (1433). A "Specify Alias" field is present but empty. A checkbox for "Use SSL" is unchecked. Below that, there is a section for "Specify database user for Setup" with fields for Username (TeamServerDBUser), Password (masked with dots), and Database (TS1615). A "Test" button is located below the Database field. At the bottom, there is a checkbox for "Specify different credentials for runtime Team Server access to database" and corresponding Username and Password fields. Navigation buttons for "Back", "Next", and "Cancel" are at the bottom right.

10) *Optional.* Click **Test** to check your database connection and to create or update any tables necessary.

11) Click **Next**.

12) *Optional.* On the Migrate Team Server page, make the appropriate entries for your database *only if you are upgrading your Team Server from version 4.0.9 or earlier.*

The screenshot shows the IDERA configuration interface. On the left is a navigation menu with the following items: 1. Installation Options, 2. Repository DB Setup, 3. Migrate Team Server (highlighted), 4. Solution DB Migration, 5. Team Server Admin Account, 6. Windows Service Account, an 'Optional' section containing 7. HTTPS, 8. Single Sign-On, and 9. Notification, and finally Configuration Execution. The main content area is titled 'Migrate Team Server' and contains the following elements:

- Two checkboxes: 'Migrate the DB to this version if you have installed Team Server 4.0.x, CONNECT, or Portal in the past' and 'Same server and user as the Repository Database'.
- Input fields for 'Host Name' and 'Port'.
- A checkbox for 'Use SSL (uses ports 80 and 443)'.
- The text 'Specify database user for Setup.' followed by input fields for 'Username', 'Password', and 'Database'.
- A 'Show' checkbox next to the password field.
- A 'Test' button below the database field.
- Navigation buttons at the bottom: 'Back', 'Next', and 'Cancel'.

13) Click **Next**.

14) *Optional.* On the Migrate Team Server page, make the appropriate entries for your database *only if you are upgrading from Portal 2.0.1 or earlier.*

The screenshot shows the IDERA configuration interface. The navigation menu is identical to the previous screenshot, but '4. Solution DB Migration' is now highlighted. The main content area is titled 'Solution Database Migration' and contains the following elements:

- Two checkboxes: 'Migrate the Solution DB to this version if you previously installed portal with a separate Solution DB' and 'Same server and user as the Repository Database'.
- Input fields for 'Host Name' and 'Port'.
- A checkbox for 'Use SSL (uses ports 80 and 443)'.
- The text 'Specify database user for Setup.' followed by input fields for 'Username', 'Password', and 'Database'.
- A 'Show' checkbox next to the password field.
- A 'Test' button below the database field.
- Navigation buttons at the bottom: 'Back', 'Next', and 'Cancel'.

15) Click **Next**.

16) On the Team Server Admin Account page, type the credentials for the Repository administrator account.

17) *Optional.* Click **Test** to check your Team Server credentials.

18) Click **Next**.

19) On the Windows Service Account page, type the credentials for the Windows user account you want to use within Team Server.

20) *Optional.* Click **Test** to check your Windows account credentials.

21) Click **Next**.

22) *Optional*. On the HTTPS Setup page, make the appropriate selections to enable secure communication using either HTTPS or a self-signed certificate.

The screenshot shows the IDERA configuration interface. The top navigation bar includes the IDERA logo and 'Help | Log Out'. The left sidebar lists configuration steps: 1. Installation Options, 2. Repository DB Setup, 3. Migrate Team Server, 4. Solution DB Migration, 5. Team Server Admin Account, 6. Windows Service Account, 7. HTTPS (highlighted), 8. Single Sign-On, 9. Notification, and Configuration Execution. The main content area is titled 'HTTPS Setup (Optional)'. It contains a checkbox labeled 'Enable Secure Communication (HTTPS)'. Below this, a note states: 'Please select HTTPS if you have SSL setup on your server. Otherwise, select Self-Signed to create a Keystore file.' There are two radio buttons: 'HTTPS' and 'Self-Signed'. At the bottom right of the main area are three buttons: 'Back', 'Next', and 'Cancel'.

23) Click **Next**.

24) *Optional*. On the Single Sign-On page, make the appropriate entries to enable single sign-on using LDAP authentication.

The screenshot shows the IDERA configuration interface. The top navigation bar includes the IDERA logo and 'Help | Log Out'. The left sidebar lists configuration steps: 1. Installation Options, 2. Repository DB Setup, 3. Migrate Team Server, 4. Solution DB Migration, 5. Team Server Admin Account, 6. Windows Service Account, 7. HTTPS, 8. Single Sign-On (highlighted), 9. Notification, and Configuration Execution. The main content area is titled 'Single Sign-On (Optional)'. It contains a checkbox labeled 'Use LDAP server for authentication'. Below this are several input fields: 'LDAP URL', 'Manager DN', 'Manager Password', 'Search Base', 'Search Attribute' (with 'sAMAccountName' pre-filled), 'Test User', and 'Test Password'. A 'Test' button is located below the 'Test Password' field. At the bottom right of the main area are three buttons: 'Back', 'Next', and 'Cancel'.

25) Click **Next**.

26) *Optional*. On the Email Notification page, make the appropriate entries to enable users to send certain data from Team Server using SMTP.

The screenshot shows the IDERA configuration interface. On the left is a sidebar with a 'Configuration' menu containing items like '1. Installation Options', '2. Repository DB Setup', '3. Migrate Team Server', '4. Solution DB Migration', '5. Team Server Admin Account', '6. Windows Service Account', 'Optional', '7. HTTPS', '8. Single Sign-On', '9. Notification', and 'Configuration Execution'. The main content area is titled 'Enable Email Notification (Optional)'. It features a checkbox for 'Allow users to send search results and reports by email from Team Server using SMTP'. Below this are input fields for 'Email Address', 'Server', and 'Port'. There are also checkboxes for 'Use TLS' and 'Requires Authentication'. Further down are 'User Name' and 'Password' fields, with a 'Show' checkbox next to the password field. A 'Test' button is located below the password field. At the bottom right of the form area are 'Back', 'Next', and 'Cancel' buttons.

27) *Optional*. Click **Test** to check your email server connection.

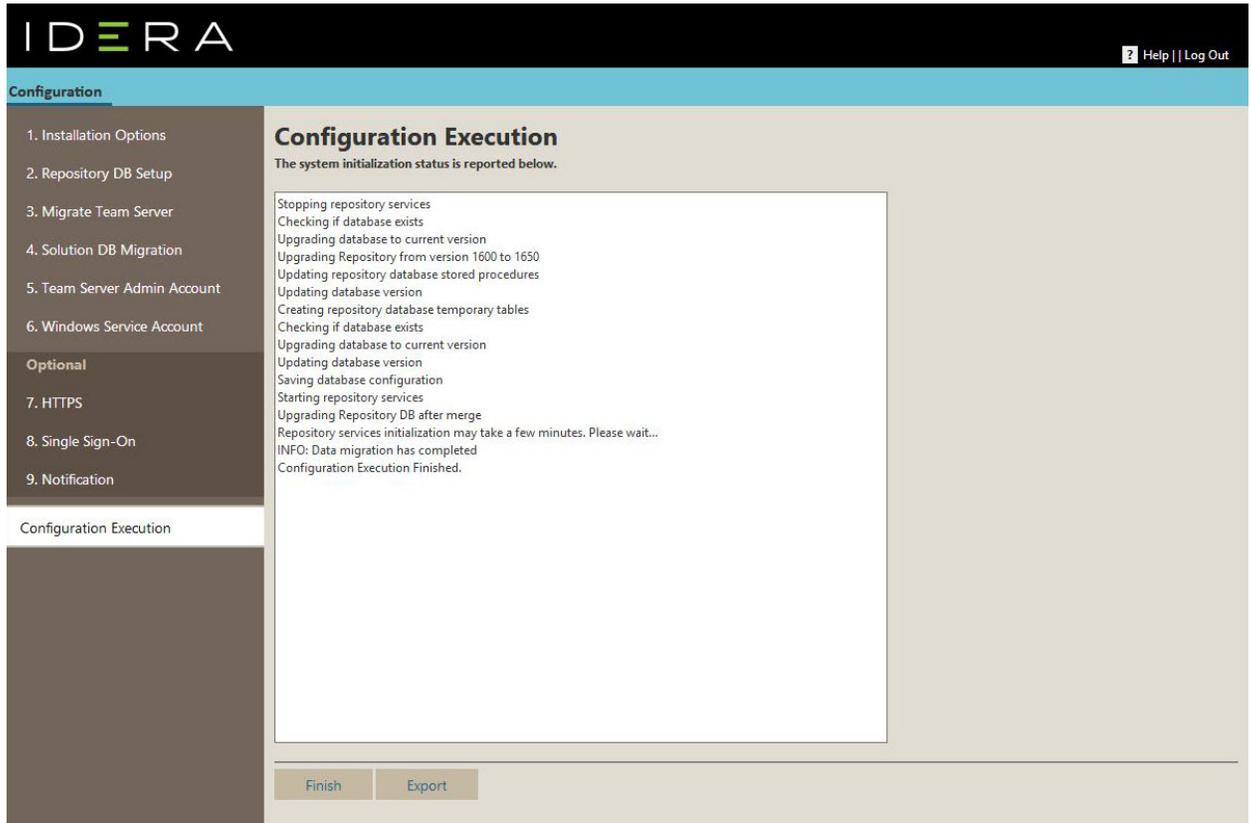
28) Click **Next**. The Configuration Execution page appears.

The screenshot shows the IDERA configuration interface at the 'Configuration Execution' step. The sidebar is similar to the previous screenshot, with 'Configuration Execution' highlighted. The main content area is titled 'Configuration Execution' and contains the text 'The system initialization status is reported below.' Below this text is a large, empty rectangular box intended for the status report. At the bottom of the main content area are 'Start' and 'Export' buttons.

29) On the Configuration Execution page, click **Start** to execute initialization.

The screenshot displays the IDERA Configuration Execution page. At the top, the IDERA logo is visible on the left, and a 'Help | Log Out' link is on the right. Below the logo is a 'Configuration' header. The left sidebar contains a list of configuration steps: 1. Installation Options, 2. Repository DB Setup, 3. Migrate Team Server, 4. Solution DB Migration, 5. Team Server Admin Account, 6. Windows Service Account, and an 'Optional' section with 7. HTTPS, 8. Single Sign-On, and 9. Notification. The 'Configuration Execution' section is highlighted. The main content area is titled 'Configuration Execution' and states 'The system initialization status is reported below.' A large white box contains the following list of steps: Stopping repository services, Checking if database exists, Upgrading database to current version, Upgrading Repository from version 1600 to 1650, Updating repository database stored procedures, Updating database version, Creating repository database temporary tables, Checking if database exists, Upgrading database to current version, Updating database version, Saving database configuration, Starting repository services, Upgrading Repository DB after merge, and Repository services initialization may take a few minutes. Please wait... At the bottom of the main content area, there are two buttons: 'Start' and 'Export'.

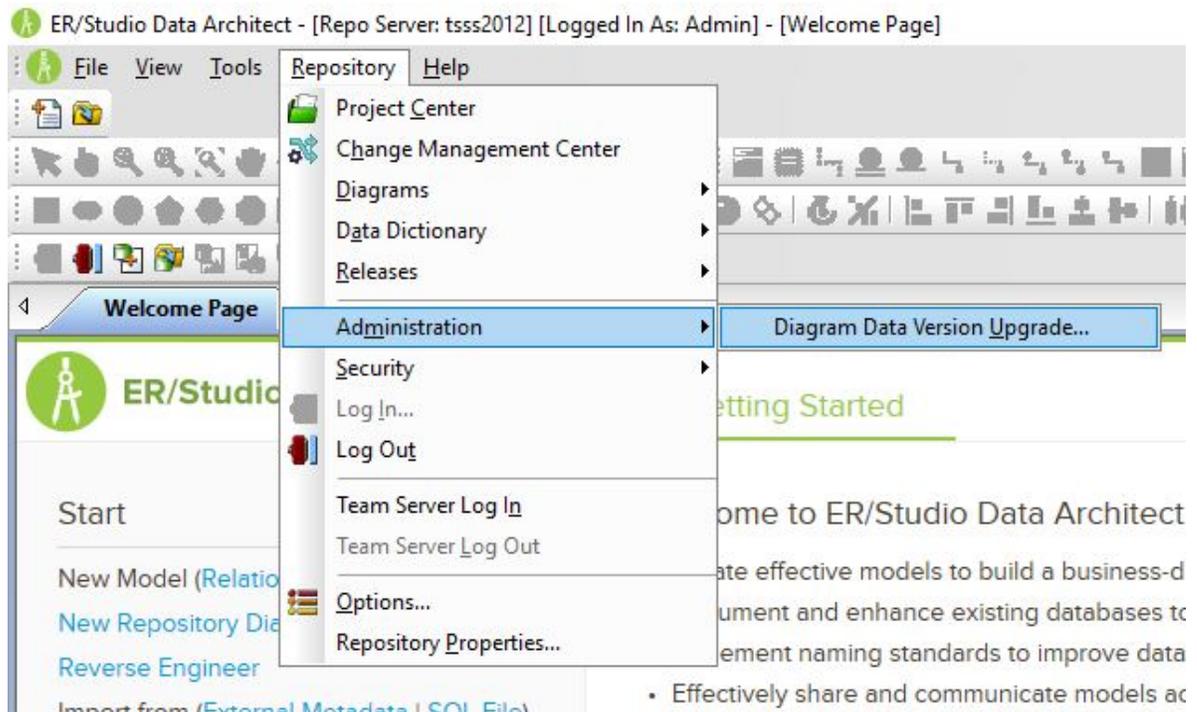
30) Once initialization is complete, click **Finish**.



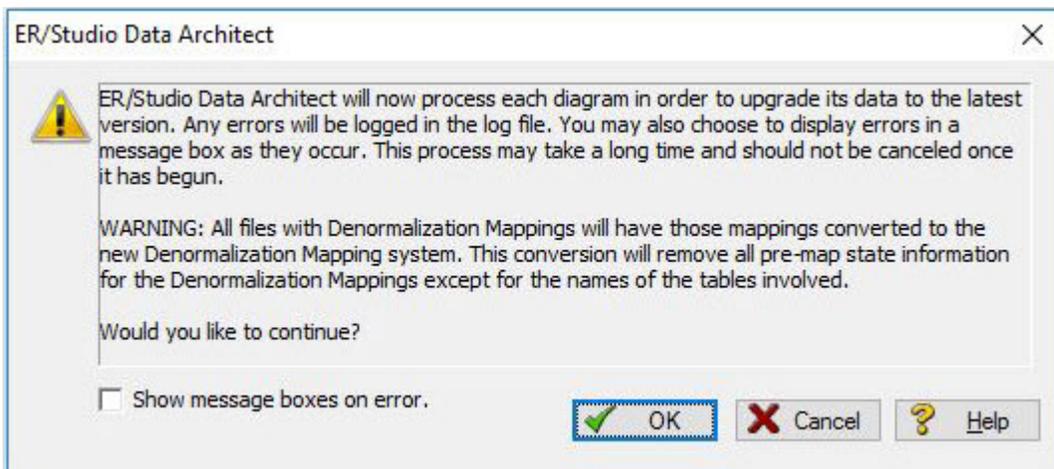
31) Launch ER/Studio Data Architect 17.0 from the client machine. Log into the Repository with the Admin user credentials.

32) Go to **Repository > Administration > Diagram Data Version Upgrade...** to upgrade your diagrams to the latest release.

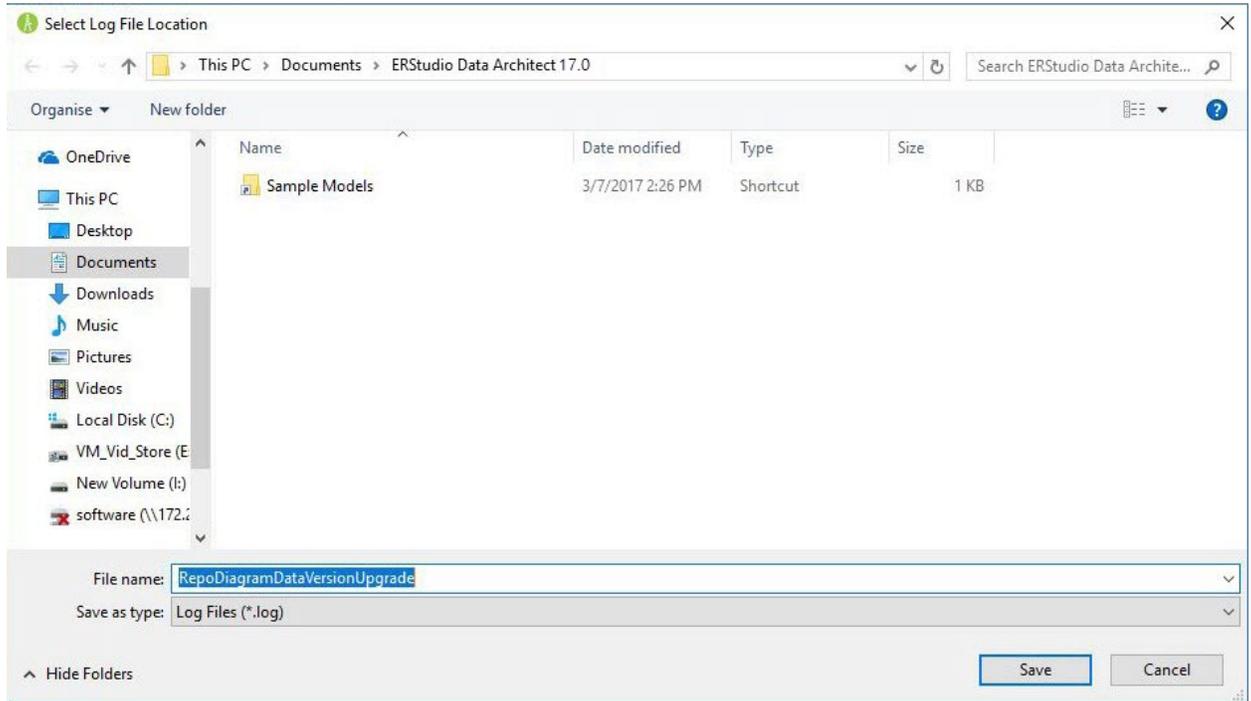
Note: Once you do upgrade your diagrams, you cannot open any of the diagrams using a previous version of ER/Studio Data Architect.



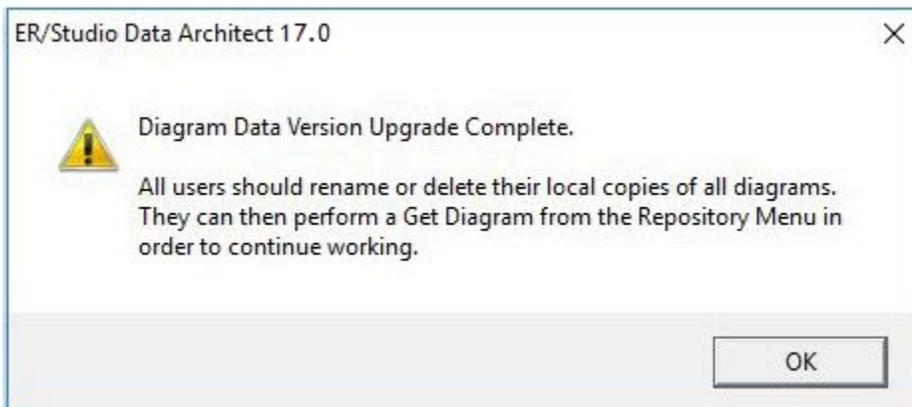
33) On the confirmation message window, review the information including the warning, and then click **OK**.



34) On the Select Log File Location window, choose a location to place the upgrade log in case issues occur during the upgrade.



35) Depending on the size and number of models in the Repository, the upgrade could take a few minutes.



Once the diagram upgrade is complete, users can log in and begin using Team Server 17.0 Repository. Note that after upgrading, diagrams must be published once in Team Server before they can be viewed by users in Team Server.

- 36) Launch a Web browser and connect to Team Server, logging in with the Admin user credentials.
- 37) Go to **My Settings > Admin**, and then click **ER/Studio Publications**.
- 38) Identify the diagrams that you want to publish, and then ensure that the Action for those diagrams is set to **Publish**.
- 39) Select these diagrams using the associated check boxes, and then click **Publish Selected**.
Note: For those environments having more than 50 models, it is recommended that a single model be published first. After publishing that one model, you can select multiple models for publication.

US	+1 713 523 4433 877 GO IDERA (464 3372)	WEB	www.idera.com
EMEA	+44 (0) 1753 218410	TWITTER	www.twitter.com/Idera_Software
APAC	+61 1300 307 211	FACEBOOK	www.facebook.com/IderaSoftware
MEXICO	+ 52 (55) 8421-7980	LINKEDIN	http://www.linkedin.com/company/idera-software
BRAZIL	+ 55 (11) 3280-1159		