

ER/Studio: Upgrading from Repository (v6.5 - 7.0) to Team Server 17.x

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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.x 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.x 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.x
- 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.x (corresponding to the version you to which you want to upgrade) must be installed on a separate client machine

UPGRADING:

The following steps will walk you through upgrading the Repository to Team Server 17.x. 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.x installer. The following images use version 17.0 of the product as the process for version 17.1 and later is the same.



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



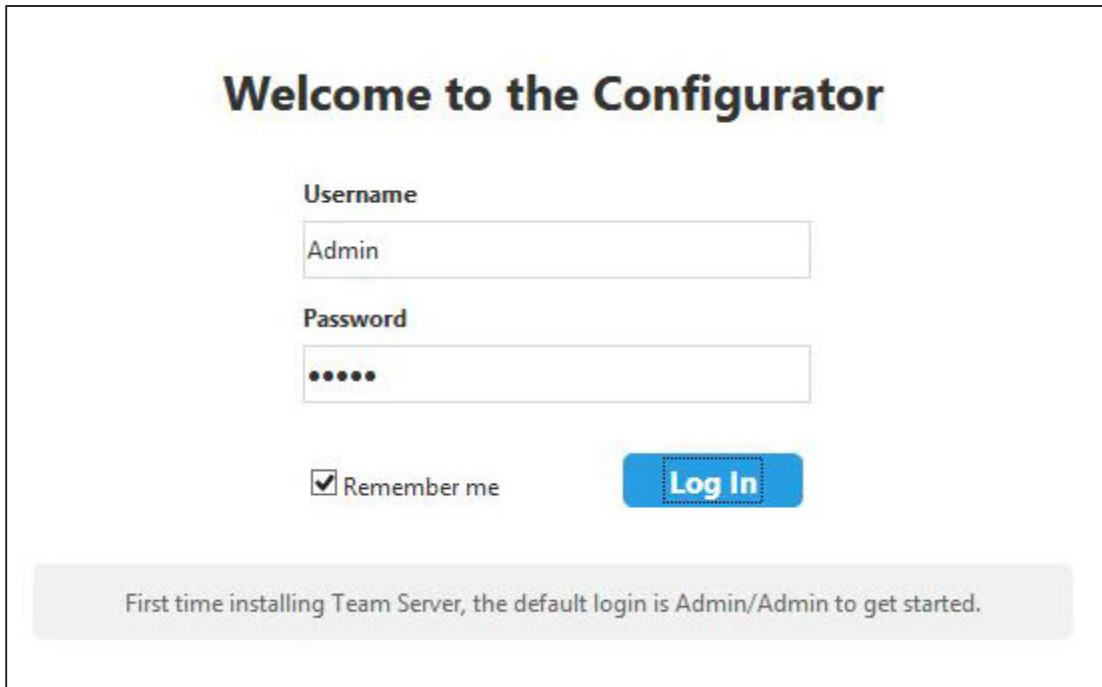
- 4) After browsing for and selecting the new location, click **OK**.
- 5) Agree to the license terms, and then click **Install**.



- 6) Click **Launch** to load the Team Server 17.x 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

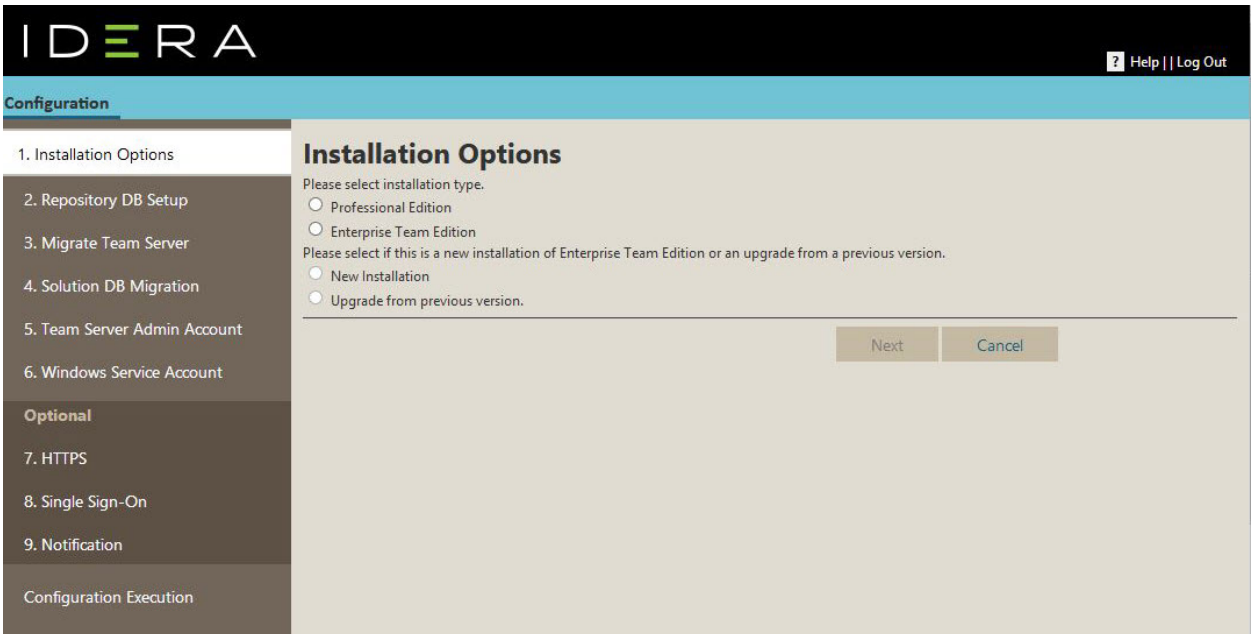
Username
Admin

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, an 'Optional' section containing 7. HTTPS, 8. Single Sign-On, and 9. Notification, and finally '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' (which is selected), and 'New Installation'. Below this is a sub-section 'Please select if this is a new installation of Enterprise Team Edition or an upgrade from a previous version.' with two radio buttons: 'New Installation' and 'Upgrade from previous version.' (which is 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 a form with 'EDN Login Or Email Address' (containing 'EMBT') and 'Password' (masked with dots, with a 'Show' checkbox). Below the form are three radio buttons for license selection: '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' (which is selected). There is a 'Serial Number' field with a masked value and an 'Import from file' button.
- Unable to connect?:** A section with instructions: 'Use the following to connect to the web registration from another machine. The serial number will be emailed to you. Registration code: 8532107. 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. On the left is a sidebar with a 'Configuration' section containing options 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', and an 'Optional' section with '7. HTTPS', '8. Single Sign-On', and '9. Notification'. Below these is 'Configuration Execution'. The main area is titled 'ER/Studio Repository Database Setup' and includes the instruction: 'Please select the DBMS type you would like to use for the Team Server repository'. Three radio buttons are present: 'MS SQL Server 2008-2016' (selected), 'Oracle 11g-12c', and 'IBM DB2 LUW 9.x-10.x'. Below are input fields for 'Host Name' (localhost) and 'Port' (1433), a 'Specify Alias' field, and a checkbox for 'Use SSL (uses ports 80 and 443)'. A section for 'Specify database user for Setup. Create database privilege required.' contains fields for 'Username' (TeamServerDBUser), 'Password' (masked), and 'Database' (TS1615), with a 'Test' button. At the bottom, there is a checkbox for 'Specify different credentials for runtime Team Server access to database' and fields for 'Username' and 'Password' (masked). Navigation buttons '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' and 'Password' (with a 'Show' checkbox).
- An input field for 'Database'.
- A 'Test' button below the database field.
- At the bottom right, three buttons: 'Back', 'Next', and 'Cancel'.

13) Click **Next**.

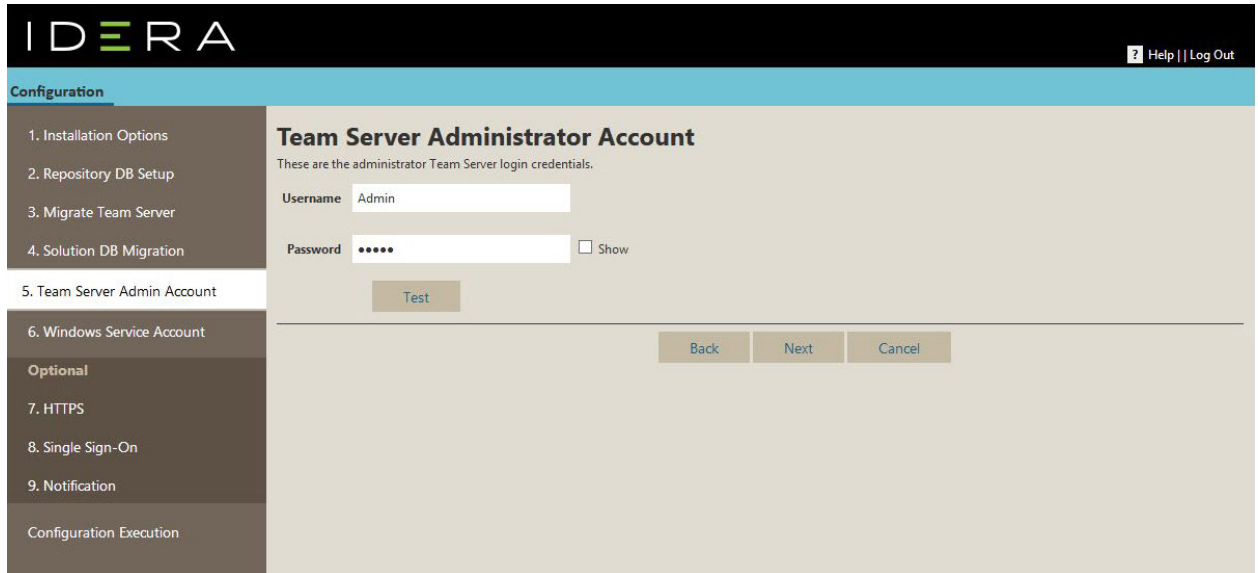
14) *Optional.* On the Migrate Team Server page, leave this page unchanged unless you are upgrading from a pre-2.0.1 Portal installation that used separate databases for reporting and solution databases. Usage of this page is very rare.

The screenshot shows the IDERA configuration interface. The navigation menu on the left is identical to the previous screenshot, but item 4, 'Solution DB Migration', is 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' and 'Password' (with a 'Show' checkbox).
- An input field for 'Database'.
- A 'Test' button below the database field.
- At the bottom right, three buttons: '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.

This page works best as a service account that is not required to have regular password changes. The user account should have local administrative privileges, and specifically the following privileges are required:

- **Act as part of the operating system**
- **Create a token object**
- **Log on as a batch job**
- **Replace a process-level token**

In addition, the service account should not have the **Deny log on locally** privilege.

The screenshot shows the IDERA configuration wizard 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 (highlighted), and an 'Optional' section containing 7. HTTPS, 8. Single Sign-On, 9. Notification, and Configuration Execution. The main content area is titled 'Windows Service Account' and contains the following text: 'Specify the Windows user account under which Team Server will run. A valid account is required. Windows User Access Control must be turned off in order for Team Server to work properly'. Below this is a form with 'Windows User (Domain\username)' set to '.\TeamServerUser' and a 'Password' field with masked characters. A 'Show' checkbox is next to the password field. A 'Test' button is located below the password field. At the bottom of the main area are 'Back', 'Next', and 'Cancel' buttons.

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 wizard interface at the 'HTTPS Setup (Optional)' step. 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, and an 'Optional' section containing 7. HTTPS (highlighted), 8. Single Sign-On, 9. Notification, and Configuration Execution. The main content area is titled 'HTTPS Setup (Optional)' and contains the following text: 'Enable Secure Communication (HTTPS)' with an unchecked checkbox. Below this is the instruction: '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' (selected) and 'Self-Signed'. At the bottom of the main area are 'Back', 'Next', and 'Cancel' buttons.

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. On the left is a navigation menu with the following items: 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 (highlighted), 9. Notification, and Configuration Execution. The main content area is titled "Single Sign-On (Optional)" and contains the following fields and options:

- Use LDAP server for authentication
- LDAP URL:
- Manager DN:
- Manager Password:
- Search Base:
- Search Attribute:
- Test User:
- Test Password:
-
- Navigation buttons:

25) Click **Next**.

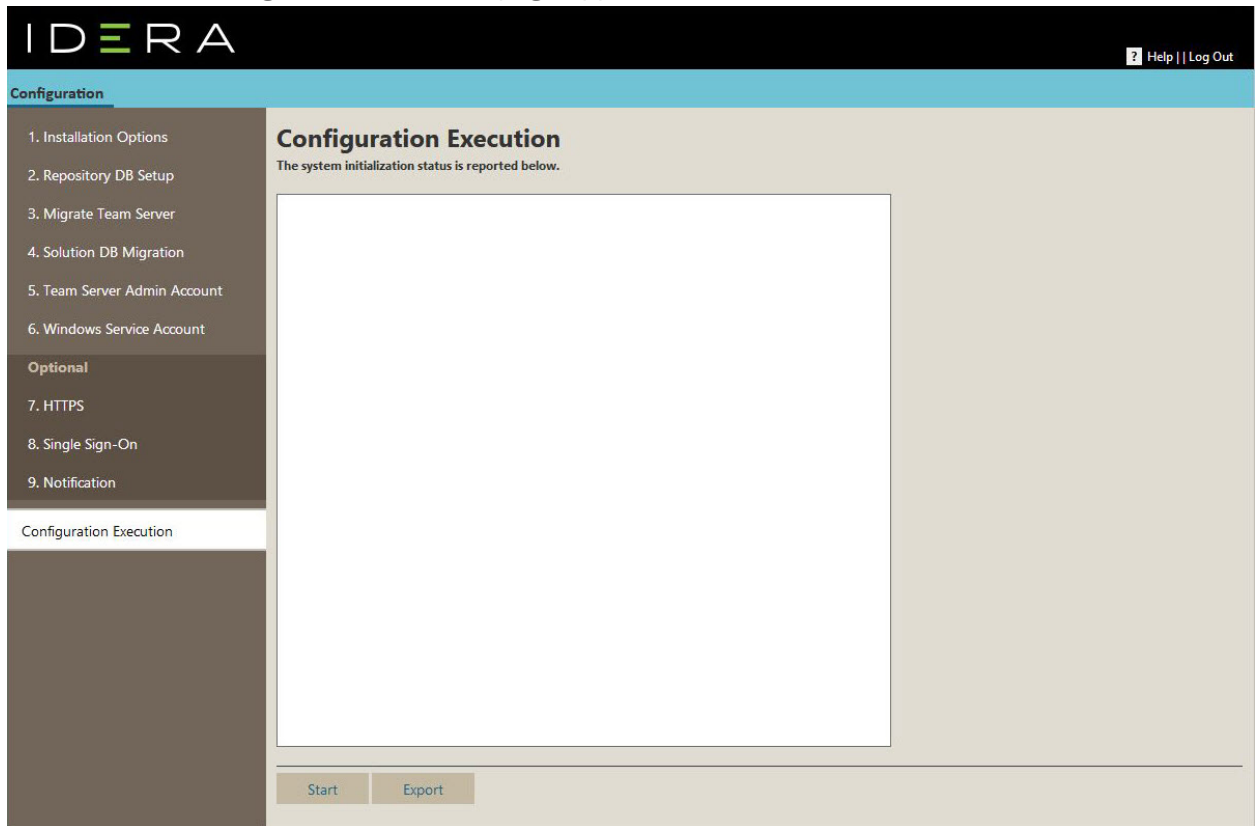
26) *Optional.* On the Email Notification page, make the appropriate entries to enable users to send certain data from Team Server using SMTP.

The screenshot shows the IDERA configuration interface. On the left is a navigation menu with the following items: 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 (highlighted), and Configuration Execution. The main content area is titled "Enable Email Notification (Optional)" and contains the following fields and options:

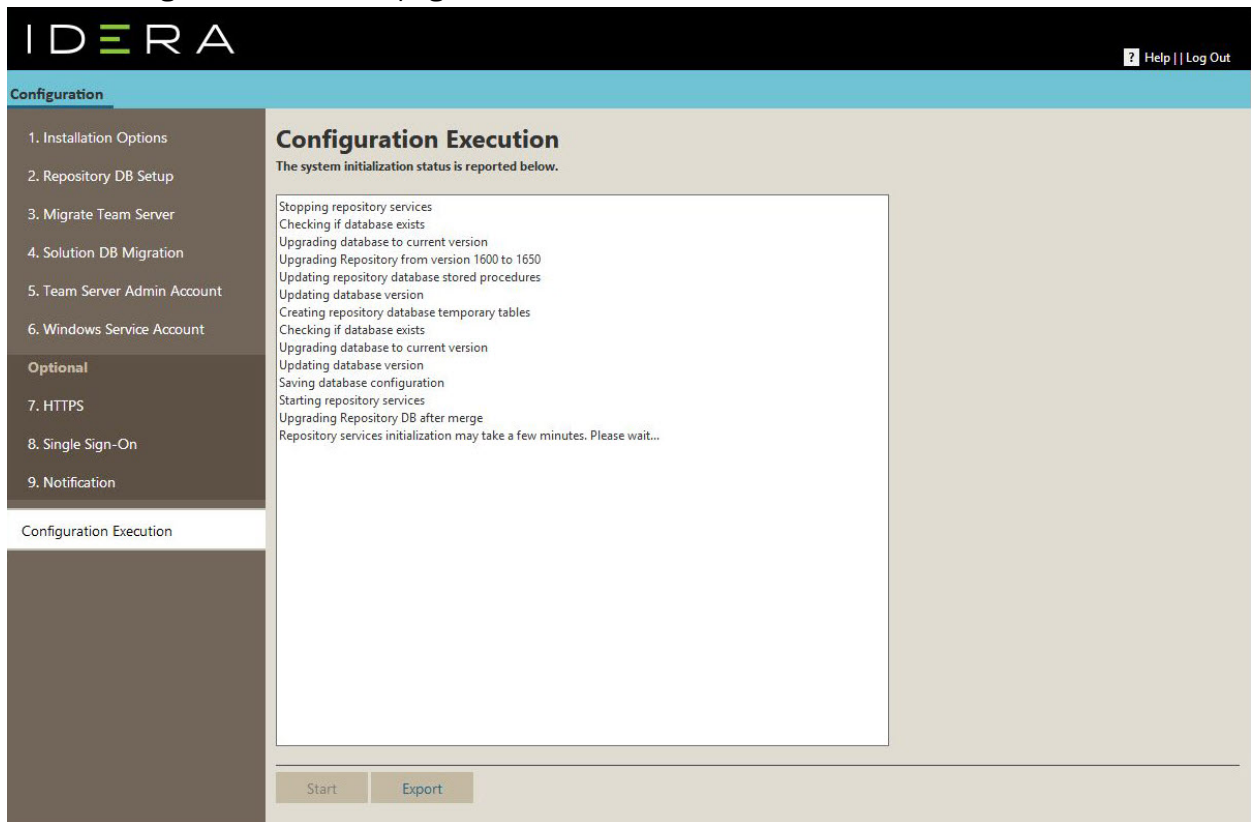
- Allow users to send search results and reports by email from Team Server using SMTP
- Email Address:
- Server: Port:
- Use TLS
- Requires Authentication
- User Name:
- Password: Show
-
- Navigation buttons:

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

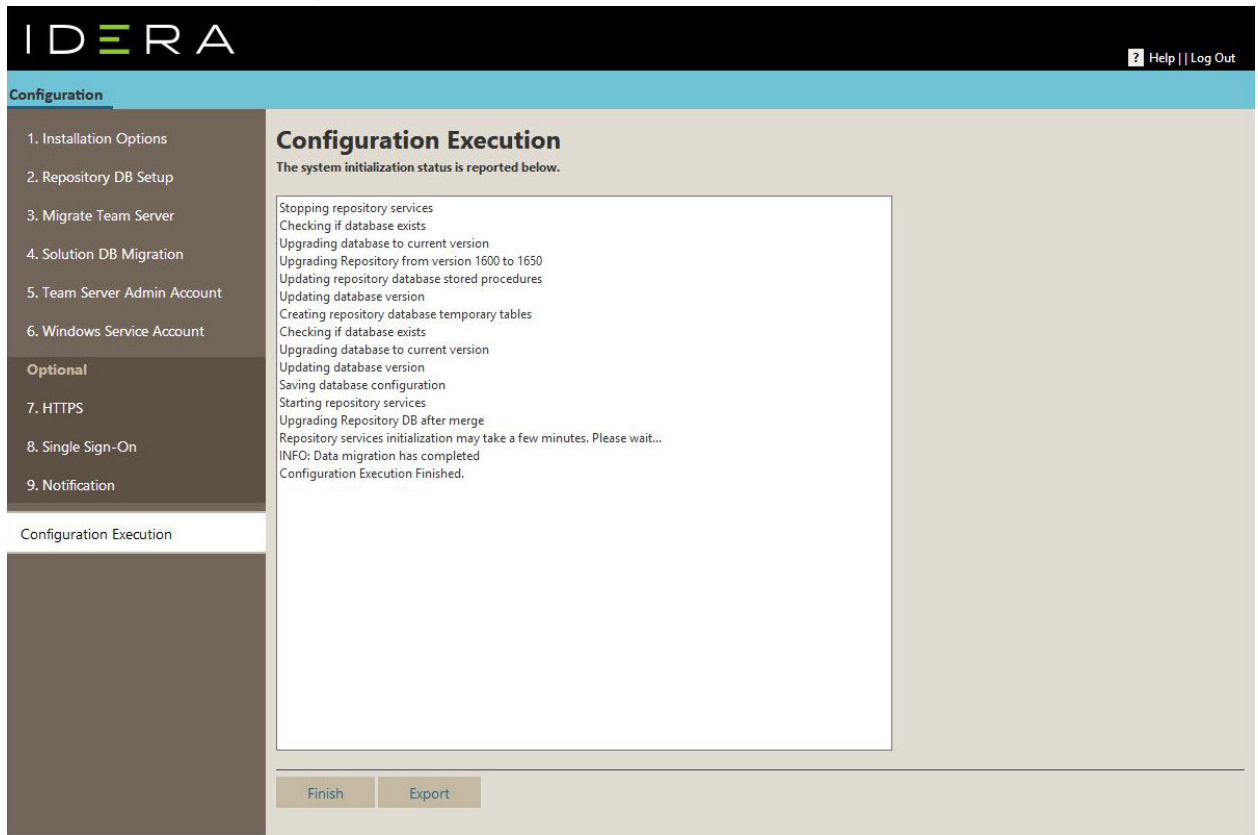
28) Click **Next**. The Configuration Execution page appears.



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



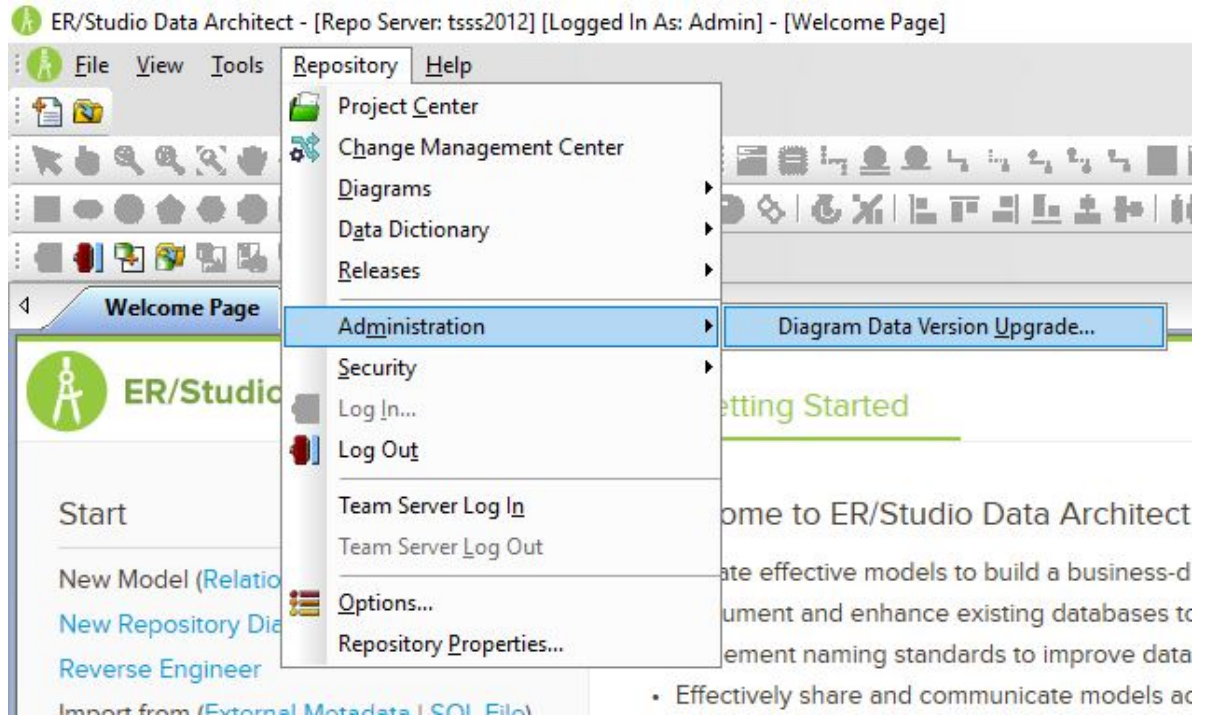
30) Once initialization is complete, click **Finish**.



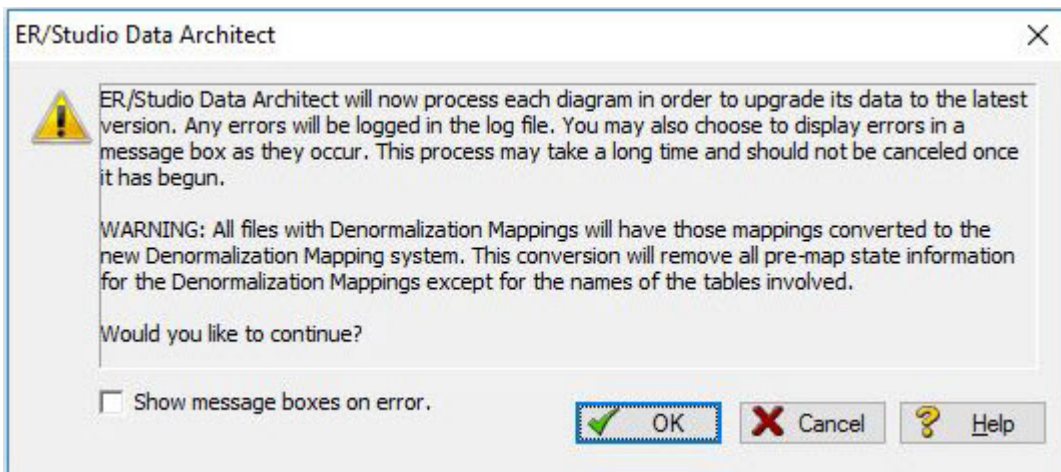
31) Launch ER/Studio Data Architect 17.x from the client machine. Log into the Repository with the Admin user credentials.

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

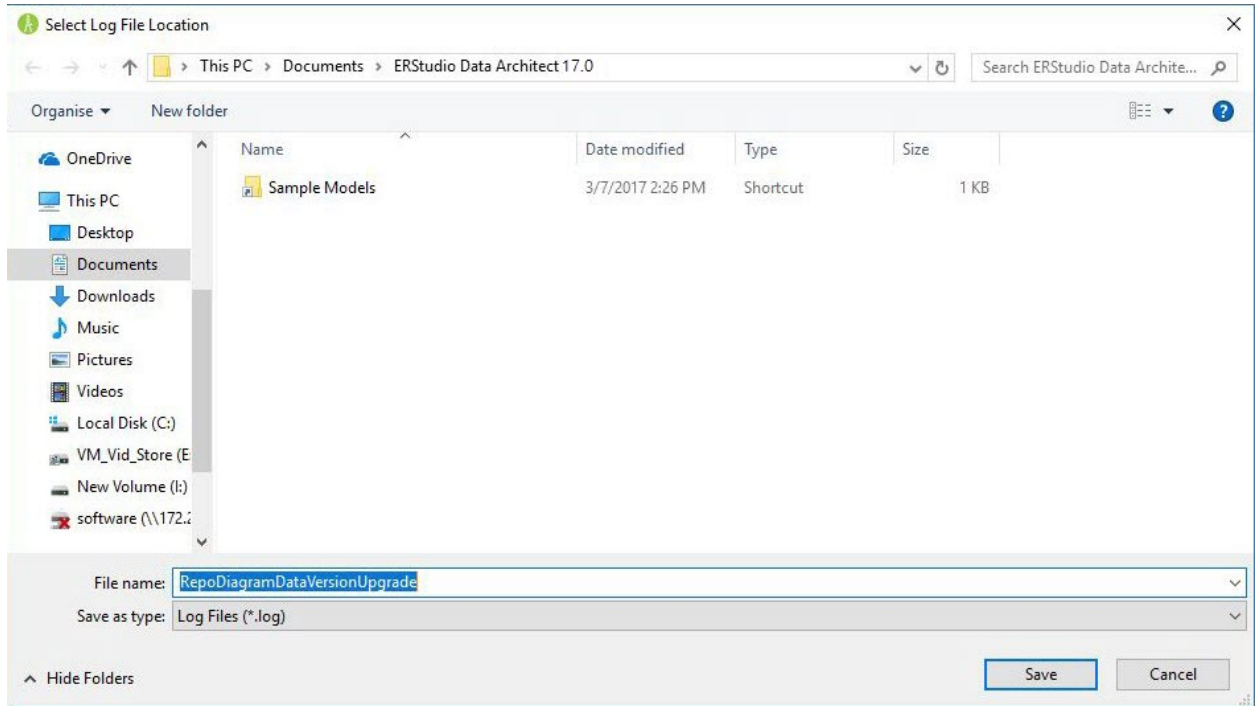
Note: Once you do upgrade your diagrams, you cannot open any of the diagrams using a previous version of ER/Studio Data Architect.



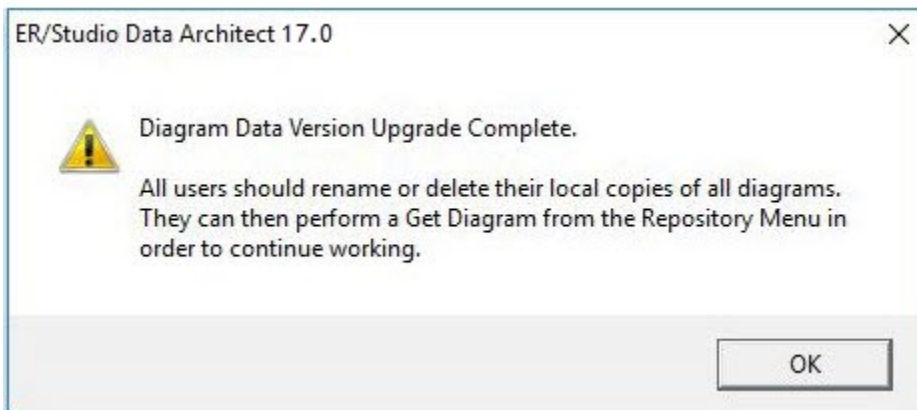
33) On the confirmation message window, review the information including the warning, and then click **OK**.



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.x 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.

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