



Product Documentation

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# ER/Studio® XE/Enterprise

Upgrade Guide

Published September 15, 2014

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September 15, 2014

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# WELCOME

This upgrade guide helps you upgrade applications in the ER/Studio suite of products. The most current versions of the ER/Studio suite of products are as follows:

- ER/Studio Repository 6.7
- ER/Studio Data Architect 10.0
- ER/Studio Team Server 4.0.3
- ER/Studio Business Architect 1.7.2
- ER/Studio Software Architect 1.1 - When a new release is available, upgrade instructions will be available.

When you purchase an upgrade, Embarcadero support sends you an email that includes the download link for the product and instructions for obtaining the new license. Review that email and the notes found in:

## Best Practices

Where appropriate, step-by-step instructions are provided. Upgrade instructions are provided for the following applications:

- [ER/Studio Repository](#)
- [ER/Studio Data Architect](#)
- [ER/Studio Team Server](#)
- [ER/Studio Business Architect](#)
- [Upgrading AppWave Licenses for Embarcadero Apps](#)

## BEST PRACTICES

Familiarize yourself with the new features of the your products. New Features guides are available for each product. You can find them on their corresponding product page on [docs.embarcadero.com](https://docs.embarcadero.com).

Make sure you backup your Repository database before upgrading.

If you are running the Repository or Team Server on a virtual machine (VM), you should take a snapshot of the VM before upgrading.

You should create a test version of the new Repository. The Repo does not itself contain licensing (licensing is handled by the client) so it is quite easy for you to set up a test version of the Repository in order to validate it and to get familiar with new features before upgrading your entire environment.

You should always upgrade your ER/Studio Repository first.

If you are also using ER/Studio Portal, you must upgrade to the latest version (Embarcadero Team Server) to correspond with the latest ER/Studio Repository version.

If you have an Enterprise or XE license, you should upgrade and license ER/Studio DA before upgrading ER/Studio Business Architect or ER/Studio Software Architect. The Enterprise and XE licenses have licences for all these products and if you license ER/Studio DA first, then you will not need to re-license ER/Studio Business Architect and ER/Studio Software Architect.

## ER/STUDIO REPOSITORY

The following topics help you upgrade ER/Studio Repository

- [Important Notes](#)
- [ER/Studio Repository Upgrade Checklist](#)
- [Preparing to Upgrade the Repository](#)
- [Upgrading ER/Studio Repository](#)

## IMPORTANT NOTES

- Always backup the Repository database before upgrading.
- The Repository upgrade must be done incrementally from one major version to the next until the target version is reached. You cannot skip major versions during the Repository upgrade as the installer for each major version only contains the database changes between the new version and the previous one. When upgrading from earlier versions, such as from 5.0 to Repository 6.7, you must first uninstall version 5.0, upgrade the Repository to version 5.5, update the database, uninstall version 5.5, then upgrade to 6.0, update the database, then upgrade to Repository 6.7 and update the database. Once the Repository upgrade is complete and you have installed the latest version of ER/Studio Data Architect, then you should upgrade your diagrams with the latest version of ER/Studio DA. Consult Embarcadero Technical Support when upgrading from versions prior to 4.5.
- If you are upgrading to ER/Studio Repository, upgrade your version of ER/Studio Data Architect also. **Ensure the build date of ER/Studio Repository coincides with the build date of ER/Studio Data Architect.**
- If you are also using ER/Studio Portal or Embarcadero Connect, you must also upgrade it to the latest version of Team Server.
- You can install ER/Studio Data Architect 9.x and an earlier ER/Studio Data Architect version on the same workstation.

- Upgrading diagrams can be time consuming and memory intensive. The number and size of ER/Studio Data Architect diagrams managed in the upgraded Repository dictates how long the upgrade process takes.

## ER/STUDIO REPOSITORY UPGRADE CHECKLIST

Use the following checklist to ensure ER/Studio Repository is correctly upgraded.

- 1 Download ER/Studio XE Upgrade. To download the most current release, go to the Embarcadero Developer Network, <http://edn.embarcadero.com>. Log in and go to **Registered User Downloads** in the **Downloads** menu. and select your product. All the supported versions, starting with the most recent, are listed on this page.
- 2 Review the ER/Studio ReadMe. For the most current installation and usage information, see the ReadMe at <http://docs.embarcadero.com>.
- 3 Prepare to upgrade. For what to do before you upgrade to the latest version, see [Preparing to Upgrade the Repository](#).
- 4 Upgrade ER/Studio Repository. For ER/Studio Repository upgrade details, see [Upgrading ER/Studio Repository](#)

## PREPARING TO UPGRADE THE REPOSITORY

There are tasks both users and administrators must perform before upgrading the repository:

- [ER/Studio Data Architect User Preparations](#)
- [ER/Studio Repository Administrator Preparations](#)

## ER/STUDIO DATA ARCHITECT USER PREPARATIONS

- 1 Ensure you have backed up all your .dm1 files.
- 2 Check in all your diagrams and objects.
 

**NOTE:** If you try to check in a file from the previous version with the same name as a current file, the current file will become corrupted.
- 3 Rename all local copies of Repository diagrams in the active file directory as follows:
  - a. From the ER/Studio Data Architect Main menu, choose **Repository > Options**.
  - b. Make note of the **Active File Directory**.
  - c. Switch to the Windows Explorer and rename all the diagrams in the **Active File Directory**.

## ER/STUDIO REPOSITORY ADMINISTRATOR PREPARATIONS

- 1 Ensure no one is logged into the Repository.
- 2 Backup the current Repository database.
- 3 Shutdown the Repository services manually using the Services Control Panel. The following are the names of the services to shutdown:
  - Embarcadero Repository Communication Server
  - Embarcadero Repository Database Server
  - Embarcadero Repository Event and Dispatch Server
- 4 Uninstall the previous version of the Repository.
- 5 Restart the Repository host computer.

## UPGRADING ER/STUDIO REPOSITORY

This procedure is for ER/Studio XE/Enterprise installations only, which include the Repository. When you upgrade ER/Studio Data Architect you must also upgrade ER/Studio Repository to correspond with the same build date as ER/Studio Data Architect.

The Repository upgrade must be done incrementally from one major version to the next until the target version is reached. Please see: [Important Notes](#)

- 1 Log on to Windows with local administrator privileges.
- 2 Start the Repository installation program and follow the prompts.
- 3 When prompted to choose the installation directory, specify a directory other than that of an existing repository installation.

The installation program starts the following services:

- Embarcadero Repository Communication Server
  - Embarcadero Repository Database Server
  - Embarcadero Repository Event and Dispatch Server
- 4 On the **Run Database Wizard?** page, click **Yes**.
  - 5 When the wizard locates your existing database, select **Update previous Version Database to current version**.

The Repository services and your existing database will be upgraded to the current version.

**NOTE:** If you are upgrading from a Repository version prior to 4.0, you can delete the C:\Program Files\Embarcadero\Repository\Data directory. This directory is not used with Repository versions 4.0 and later.



# ER/STUDIO DATA ARCHITECT

See the following topics:

- [Upgrading from ER/Studio Portal/CONNECT to ER/Studio Team Server](#)
- [Upgrades for ER/Studio Repository 6.7 users](#)
- [Upgrades for version of ER/Studio Repository prior to 6](#)

## UPGRADING FROM ER/STUDIO PORTAL/CONNECT TO ER/STUDIO TEAM SERVER

For detailed instructions on upgrading to Team Server, see the Wiki-based [Team Server Upgrade Notes](#).

## UPGRADES FOR ER/STUDIO REPOSITORY 6.7 USERS

Keep the following in mind when updating for this release:

- Only a service upgrade is required
- No diagram data version upgrade is required.
- There are no database changes from version 6.5

## UPGRADES FOR VERSION OF ER/STUDIO REPOSITORY PRIOR TO 6

Use the following checklist to ensure ER/Studio Repository is correctly upgraded.

### Upgrade Checklist

- Download ER/Studio Enterprise Upgrade. To download the most current release, go to <http://www.embarcadero.com/upgrade/upgrade.html>.
- Review the ER/Studio ReadMe. For the most current installation and usage information, see the ReadMe at <http://docs.embarcadero.com>.
- Prepare to upgrade. For what to do before you upgrade to the latest version, see [Preparing to Upgrade the Repository](#).
- Upgrade ER/Studio Repository. For ER/Studio Enterprise installations, which include the Repository. For ER/Studio Repository upgrade details, see [Upgrading the Repository](#)

## Important Notes

- The Repository upgrade must be done incrementally from one major version to the next until the target version is reached. You cannot skip major versions during the Repository upgrade as the installer for each major version only contains the database changes between the new version and the previous one. When upgrading from earlier versions, such as from 5.5 to Repository 6.7, you must first upgrade the Repository to version 6.0, update the database, then upgrade to 6.7 and update the database. Once the Repository upgrade is complete and you have installed the latest version of ER/Studio Data Architect, then you should upgrade your diagrams with the latest version of ER/Studio DA.
- If you are upgrading to ER/Studio Repository, upgrade your version of ER/Studio Data Architect also. Ensure the build date of ER/Studio Repository coincides with the build date of ER/Studio Data Architect.
- If you are also using ER/Studio Portal, CONNECT or Team Server, you must also upgrade it to the latest version of Team Server.
- You can install ER/Studio Data Architect 9.x and an earlier ER/Studio Data Architect version on the same workstation.
- Any \*.dm1 files you use from the previous version will be copied and converted to 9.x format when you open them for the first time. You can then save the diagram with a different name or use the same name to write over the old file. Previous versions of ER/Studio Data Architect will not read 9.x and higher files.
- Upgrading diagrams can be time consuming and memory intensive. The number and size of ER/Studio Data Architect diagrams managed in the upgraded Repository dictates how long the upgrade process takes.
- Reference Models, supported in previous versions, are not supported in ER/Studio Data Architect 7.x and later versions.

## Preparing to Upgrade the Repository

- 1 Ensure you have backed up all your .dm1 files.
- 2 Check in all your diagrams and objects. **Note:** If you try to check in a file from the previous version with the same name as a current file, the current file will become corrupted.
- 3 Rename all local copies of Repository diagrams in the active file directory as follows:
  - Choose **Repository > Options**.
  - Make note of the Active File Directory.
  - Switch to the Windows Explorer and rename all the diagrams in the Active File Directory.
- 4 Ensure no one is logged into the Repository.
- 5 Backup the current Repository database.
- 6 Restart the Repository host computer.

## Upgrading the Repository

**Note:** This procedure is for ER/Studio Enterprise installations only, which include the Repository. When you upgrade ER/Studio Data Architect you must also upgrade ER/Studio Repository to correspond with the same build date as ER/Studio Data Architect.

- 1 Log on to Windows with local administrator privileges.
- 2 Start the **Repository** installation program and select **Repair Repository Services**. The installation program starts the following services:
  - Embarcadero Repository Communication Server
  - Embarcadero Repository Database Server
  - Embarcadero Repository Event and Dispatch Server

The Repository services and your existing database will be upgraded to the current version.

**Note:** If you are upgrading from a Repository version prior to 4.0, you can delete the C:\Program Files\Embarcadero\Repository\Data directory. This directory is not used with Repository versions 4.0 and later.

## ER/STUDIO TEAM SERVER

The following topics provide information for upgrading to ER/Studio Team Server from versions of ER/Studio Portal or CONNECT:

- [Upgrading from Embarcadero CONNECT](#)
- [Upgrading from ER/Studio Portal 2.0.x](#)
- [Upgrading from ER/Studio Portal 1.6.x](#)

These upgrade notes provide important information regarding the process of upgrading to ER/Studio Team Server from a previous version.

Regardless of the process that you must follow to back up your licenses, which depends on the previous version that you are upgrading from and other factors, after you restore your licenses in your new Team Server installation, you must log in as a super user and use the Manage Users page to assign different types of available licenses (Team Server, Portal, exclusive) to your users.

## UPGRADING FROM EMBARCADERO CONNECT

The Team Server installer will automatically handle the upgrade to ER/Studio Team Server from Embarcadero CONNECT, however CONNECT Author and Reader licenses are not converted. For a full walkthrough of the upgrade from Embarcadero CONNECT please see the Tech Note hosted on our docs website.

[http://docs.embarcadero.com/products/er\\_studio\\_team\\_server/4.0.1/ERS-TS-Transition-TechNote-070714.pdf](http://docs.embarcadero.com/products/er_studio_team_server/4.0.1/ERS-TS-Transition-TechNote-070714.pdf)

It is also a good precaution to take a manual backup of any licenses prior to the upgrade.

## UPGRADING FROM ER/STUDIO PORTAL 2.0.X

If your previous installation is ER/Studio Portal 2.x, you will need to back up your licenses manually.

Make a copy of the license files, for example: license.txt, ao\_12345678.txt or .slip until the upgrade has completed. Then copy to the license folder in the installation directory of the new ER/Studio Team Server installation folder.

Depending on your installation location, you can find the license file in the program directory. For example:

C:\Embarcadero\ERStudio Portal 2.0\license

If you have previously used the uninstaller, you may also have a license backup in the following location:

32-bit Windows: C:\Program Files (x86)\Common Files\ersEnterprisePortalBackup\license

64-bit Windows: C:\Program Files\Common Files\ersEnterprisePortalBackup\license

If you have installed ER/Studio Portal 2.0.x on one computer and now want to install Embarcadero Connect 3.0 on a different computer, there is no license to back up, so you must use the license file from the previous installation. Copy the license\license.txt file from the previous installation folder into the new ER/Studio Team Server installation folder.

After copying over the license.txt file to the license folder within the installation folder of ER/Studio Team Server, log in to Team Server as a super user, select **My Settings > Admin > Licenses** and click **Refresh** for Team Server to recognize your licenses.

## UPGRADING FROM ER/STUDIO PORTAL 1.6.X

ER/Studio Portal 1.6.x uses two databases, the solution and the reporting repositories. Because of this, you need to follow these steps to upgrade to ER/Studio Team Server:

- 1 Consolidate the two databases:
  - a Stop the Tomcat service and run the 1.6.x Portal Configuration Manager.
  - b Select the **Solution Database** tab.
  - c Change the connection information to match that of the Reporting database.
  - d Select **Initialize Existing Database** and click **Apply**.
  - e Click **OK**. The Solution tables will be placed into the Reporting database.
  - f Restart the Tomcat service.
- 2 Log in to the Portal and make sure that everything works okay.
- 3 Uninstall Portal 1.6.x.
- 4 Install ER/Studio Team Server.
- 5 When prompted to specify the Reporting Database information, specify the connection information, select **Connect to Existing Database**, and click **Next**. You are prompted to specify the Solution database information. It should default to the Reporting database.
- 6 Specify the password for the Reporting database and click **Next**.
- 7 Finish the installation.
- 8 After installing ER/Studio Team Server, synchronize Team Server with the ER/Studio Repository database to ensure that it is up to date.

## ER/STUDIO BUSINESS ARCHITECT

The following provides information for upgrading ER/Studio Business Architect:

[Upgrading ER/Studio Business Architect](#)

## UPGRADING ER/STUDIO BUSINESS ARCHITECT

- 1 Uninstall the previous version of ER/Studio Business Architect before upgrading to the latest version.
- 2 Run the ER/Studio Business Architect installation program and follow the prompts.

If you are upgrading from version 1.0 to version the latest version, you will be prompted to upgrade your workspace when you first open the workspace in the new ER/Studio Business Architect application.

### Important Notes

If you have an existing version of EA/Studio or ER/Studio Business Architect, the new version will install to a new directory labeled ER/Studio Business Architect 1.7.x by default.

**NOTE:** The setup program looks for existing user preferences previously set on the machine. These settings are automatically applied to the new installation configuration.

**CAUTION:** If you have installed the newer version of ER/Studio BA, your workspaces must be upgraded before they can be used. Therefore, it is not recommended to keep both versions on your computer as workspace files are not always compatible.

## UPGRADING APPWAVE LICENSES FOR EMBARCADERO APPS

When you renew or upgrade your Embarcadero licenses, such as for ER/Studio Data Architect or DB Power Studio, you need to update them in AppWave. Embarcadero customer service will send you an email containing a special login name, password, and license certificate number that you use to retrieve the upgraded license.

The following are the steps you take to upgrade your Embarcadero licenses on AppWave.

- [Retrieving and Hosting the New License](#)
- [Caching the New Version of the App](#)
- [Assigning Network Named User Licenses to Users and Groups](#)

## RETRIEVING AND HOSTING THE NEW LICENSE

- 1 From the **MANAGE LICENSES** menu, click **License Inventory**.

The **License Inventory** pane appears.


### License Inventory

License Title	License Type	Usage	Expiry Date	Certificate(s)
ER/Studio Data Architect 9.0	Concurrent	0/1	UNLIMITED (1)	281408
ER/Studio Data Architect 9.0 Oracle	Concurrent	0/1	UNLIMITED (1)	281408

- 2 On the **Set Up Licenses** pane, click **Retrieve License**.

The **Retrieve License** pane appears.

### Retrieve License

 **No backup license server configured.**

\* Login name:

\* Password:

Certificate number(s):

Enter one or more comma-separated Certificate numbers, to retrieve just those licenses you specified.

Host address:

This is the AppWave address used by clients for license requests. Ensure that it is correct. If not, specify the correct address as either a host name (hostname.hostdomain.com) or an IP address (123.123.12.1).

The fields indicated with an asterisk (\*) are required to complete your request.

- ▶ All hosted licenses are automatically downloaded under conf directory.
- ▶ You will need to reload server licenses manually if reload is not done during hosting.

#### Alternative Setup

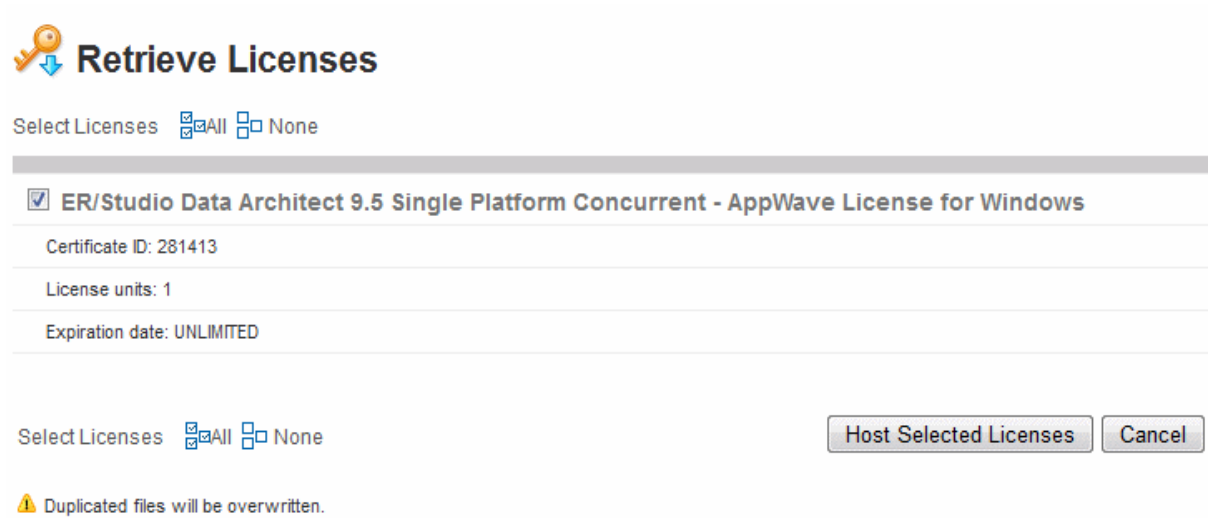
Please use Embarcadero's License Hosting site to retrieve your licenses if any of the following are true:

- 1) 'Retrieve License' returns an error.
- 2) You are using, or plan to use, a port other than 5567 as the ELC Communication Port.

[Embarcadero License Hosting](#)

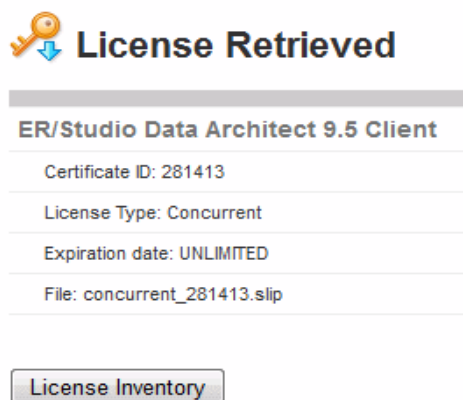
- 3 Enter the **Login name** and **Password** provided to you in the email Embarcadero sent to you with your license certificate number when you purchased the license.

- 4 Enter the license certificate number you received from Embarcadero in the email sent to you when you purchased the license. You may have more than one license certificate if you have previously purchased licensed products from Embarcadero. You can add these license certificates one at a time. Multiple certificates can be specified, separated by a comma.
- 5 Verify that the AppWave **Host address** name or IP number is correct. Enter the correct value if necessary.
- 6 Click **Retrieve** and the **Retrieve Licenses** pane appears



- 7 Click **Host Selected Licenses**.

The licenses will be registered with AppWave and Embarcadero License Center. The **License Retrieved** pane appears and AppWave is now licensed.



- 8 Click **Finish**.

Next, you'll want to cache the app to make it immediately available to your users. See [Caching the New Version of the App](#).



## CACHING THE NEW VERSION OF THE APP









- 1 From **MANAGE APPS**, select **App Inventory**.
- 2 In the search field, enter the name of the app and then select **Apps, Installers**, and **Only latest versions**.

### App Inventory

427 applications available on AppWave

Search Apps By: Name

Show:  Apps  Web Apps  Installers  Templates  
 Only latest versions  Show only catalog size restricted

<input type="checkbox"/>	Applications	Status
<input type="checkbox"/>	 <b>ER/Studio® Data Architect 10.0 x64</b> Installer in English for Windows Created by: <i>Embarcadero</i> on Sep 16, 2014	 Internet Available  
<input type="checkbox"/>	 <b>ER/Studio® Data Architect 10.0</b> Installer in English for Windows Created by: <i>Embarcadero</i> on Sep 16, 2014	 Internet Available  

- 3 Select the check box next to the new apps and then click **Cache Apps**.

If the upgrade license is Named Network User type, you must then assign the license to the users and/or groups who you want to permit to use the apps. For more information, see [Assigning Network Named User Licenses to Users and Groups](#).


## ASSIGNING NETWORK NAMED USER LICENSES TO USERS AND GROUPS

- 1 From **MANAGE USERS & GROUPS**, select **Groups**.


### Data Architects

Database Modelers


#### Members

 **Annie Rose**  
Annie Rose Rosignol

#### Licenses

 ER/Studio Data Architect 9.0 (14103:16)  
Concurrent

 ER/Studio Data Architect 9.0 Oracle (14103:24)  
Concurrent

 ER/Studio Data Architect 9.5 (14105:16)  
Concurrent

 ER/Studio Data Architect 9.5 Oracle (14105:24)  
Concurrent

Edit Group

Add Concurrent License

Add Named License



- 2 Click **Add Named License**.

## Add Named Users


Machine name: ANY

Offline usage: 0 days ▾

\* Licenses:

 [Add Licenses](#)  [Remove All](#)

\* Users and Groups:

 Data Architects
 

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 [Add Users & Groups](#)  [Remove All](#)

The fields indicated with an asterisk (\*) are required to complete your request.

- 3 From the **Offline usage** list, specify the number of days to permit a user to check out a license and use it when not connected to AppWave.
- 4 In the **Licenses** area, click **Add Licenses** and from the results of the AppWave search for Network Named Licenses, choose the relevant license, and then click **Select**.
- 5 In the **Users and Groups** area, click **Add Users & Groups** and from the list of all AppWave users and groups, select the checkbox for the appropriate users and groups, and then click **Select**.
- 6 Click **Save**.

