



Product Documentation

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# Team Server / Repository

Installation and Upgrade Guide

Version 16.0.0

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# Installation Notes

These notes provide important information about installation requirement for new **Team Server** installer which includes **Model Repository**. You should read this document in its entirety before any [install](#) or [uninstall](#) procedure.



**Note:** The following information is for installation only. If you are upgrading from separate ER/Studio Repository and Embarcadero Team Server installations, please see [Upgrading Team Server and Repository](#) for important upgrade information.

## System Requirements

Before installing Embarcadero Team Server and ER/Studio Repository, verify that your environment meets the hardware and operating system requirements. Adhering to these requirements optimizes performance. These hardware requirements are based on a 5-10 user environment.





**Tip:** For more than 10 users, ensure your hardware surpasses the previously stated hardware requirements to accommodate the number of transactions that increase as the number of users increases.



**WARNING:** If you are installing the x64 version of our software, you must uninstall any previously installed x32 bit versions

## Minimum Requirements

Hardware	Database Server	Application Server
Processor	As required for your database platform	4 x 3.0 Ghz (8 x 3.0 Ghz Recommended) 
RAM		6 GB (8GB Recommended) 
Disk Space		5 GB + additional DB growth if included + 100mb per TS diagram
DVD Reader		Depending on install medium
<b>Operating System</b>	As supported for your database platform	Any of the following: <ul style="list-style-type: none"> <li>• Windows Server 2008 or 2012</li> <li>• Windows 8/8.1</li> <li>• Windows 7</li> </ul> For 64-bit OS, the 32-bit database client libraries are required if you are using the 32-bit Repository version.
<b>Software</b>	Transaction Control Protocol (TCP) up and running Single byte character sets are supported, as long as the database is set to the required code page (character set). (UNICODE and UTF8 are not supported)	TCP up and running
<b>Privileges</b>	<ul style="list-style-type: none"> <li>• DBMS privileges to create objects on the server</li> <li>• Local administrator privileges</li> </ul>	



**Note:** In order to provide a great user experience the following minimum configuration is strongly recommended for **Team Server**.

### Additional Notes:

- o If you install the Application and the Database on the same server, consider surpassing the hardware requirements described previously.
- o Supported DBMS (see [Database Server Requirements](#))
- o Should you be running the minimum spec requirements, it is advised to reduce the maxThreads to a single thread. To do this, edit `...tomcat>webapps>api>WEB-INF>ersportal-app.xml` and change the line `<property name="maxThreads" value="2" />`, to have a value of "1" (a restart is required after saving the change).

## Supported Web Browsers

The following web browsers are tested to work with Embarcadero Team Server. Other browsers may work, but are not officially supported:

- Mozilla Firefox
- Google Chrome
- Microsoft Internet Explorer (9.0 or later)

## Installation Checklist

- The installation user account must have local administrative privileges.
- In order to install, you need to create first an empty database for Embarcadero Team Server, unless you already have a database and will be reinitializing it during the install.
- The database server to be used must be running.
- If you want to configure LDAP authentication to allow directory service users to log in to Embarcadero Team Server, check that your LDAP server is up and running.
- If you want to enable Embarcadero Team Server email notifications, check that your SMTP server is up and running. You may want to prepare a special email address on your email server for this purpose.

## Conflicts

- Do not install Embarcadero Team Server on a system where **ER/Studio Data Architect** or **ER/Studio Business Architect** is installed.
- If a previous version of **Embarcadero Team Server** is installed please uninstall first.
- If the Embarcadero Team Server installer detects an installation of any of these applications, the installer asks you to uninstall these applications before you proceed.

## See Also

- [Install and Configure Team Server and Repository](#)
- [Database Server Requirements](#)
- [Upgrading Team Server and Repository](#)

# Database Server Requirements

## Supported Database Platforms

**Team Server** and **Model Repository** database may run on any of the following database platforms:

- Microsoft SQL Server 2008 to 2014.
- Oracle 11g and 12c.
- IBM DB2 UDB 9.x and 10.x Server.



**Note:** Monitoring functionality is not supported in IBM DB2 databases.

## Important Information

- Ensure that the database is set to case-insensitive, as case-sensitive is not supported. Also set the SQL Server Configuration Properties to allow SQL Server authentication. Embarcadero Team Server only supports SQL Server Authentication.
- When using SQL Server ensure the SQL Server Agent is running.
- **Team Server** on SQL Server only supports the following communication protocols:

Shared Memory

TCP/IP

Named Pipes

- If you are upgrading using Oracle you need to increase the number of processes (connections) to 200 before running.

## See Also

- [Installation Notes](#)

# Install and Configure Team Server and Repository

Please ensure that you have read the [Installation Notes](#) before proceeding.

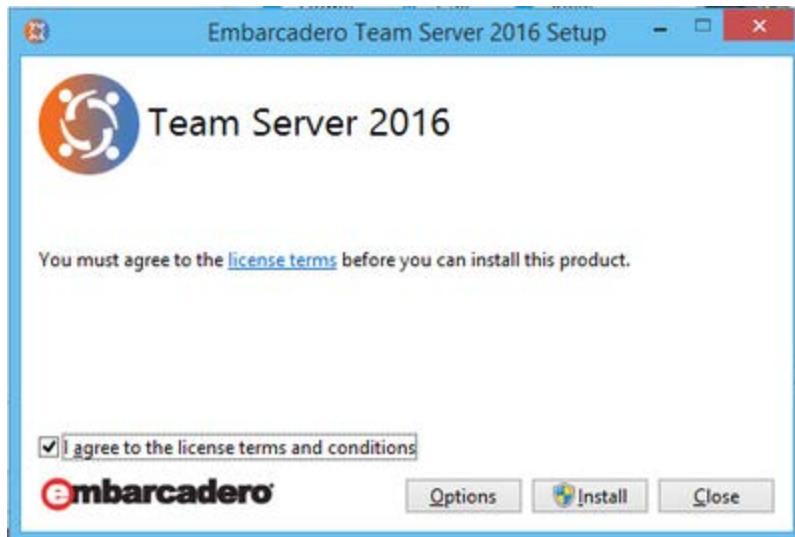
To install Embarcadero Team Server and Repository you need to run the new installer and follow the steps. You need a user with administrative privileges to run the installation wizard.

In this page you can find detailed information about the different steps of the installation wizard.



**Note:** You may have to create a blank database prior to starting the installation, please check the [Installation Checklist](#)

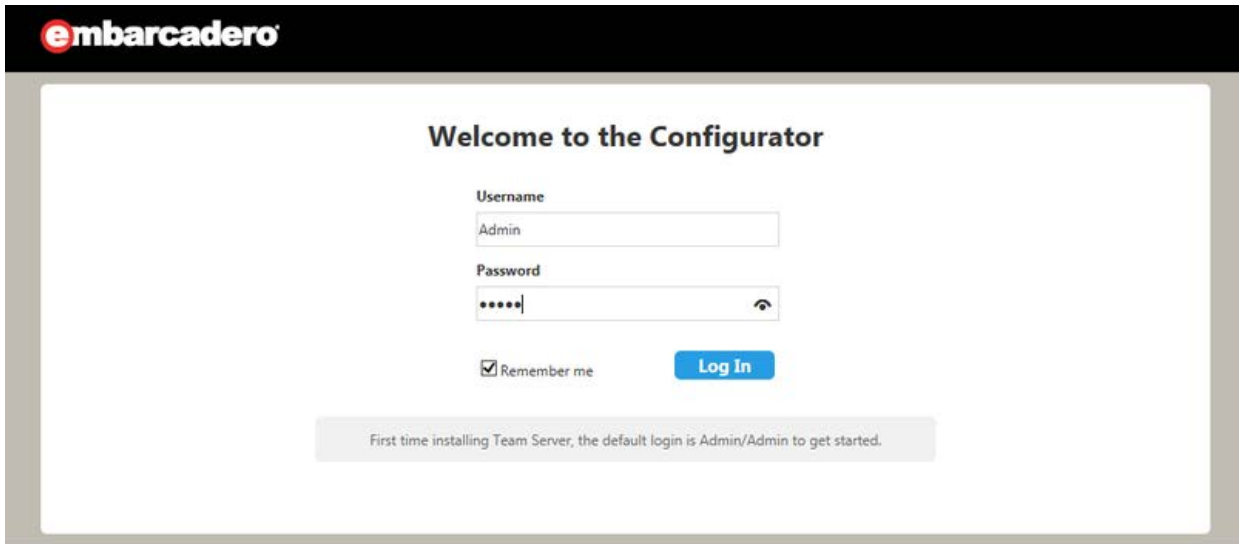
1. Run the installation wizard. Select **I agree...** and click **Install**.



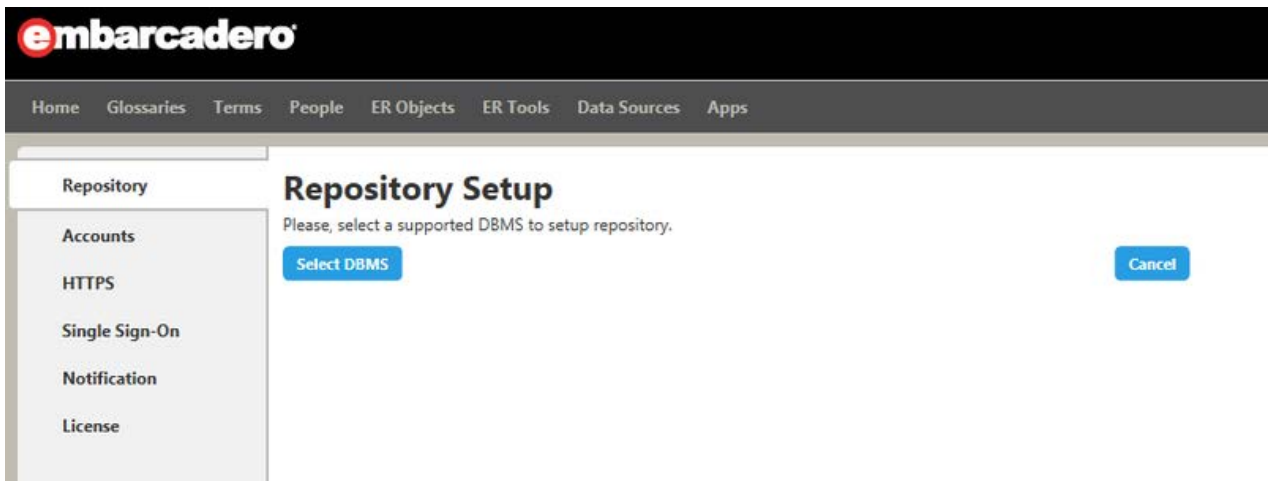
**Note:** In case you need to change the default **Port** or the **Install location**, please click **Options** previous to **Install**.

2. In the configurator Welcome Page use Admin/Admin (case sensitive) as the login and password and click *Login* to start the configuration wizard.





3. In the **Repository** page click on **Select DBMS** to start Database configuration.



4. In the **Repository Setup** page you need to specify the information to connect to your Repository database:
  1. Select the DBMS type.
  2. Complete the information about the Repository database:



**Note:** If you have installed Team Server, CONNECT or Portal in the past, please see [Upgrading Team Server and Repository](#).

1. In the **Host Name:Port** field, enter the hostname of the machine that contains the Repository database. The port number appears by default. Change it if needed.
2. In the **Login** field, enter the username to access the Repository database.

3. In the **Password** field, enter the password for the user specified earlier.
4. On the **DataBase** field, enter the name of the database that you have previously created to be your Repository database.
5. Login credentials to be used by Team Server to interact with database(case-sensitive):
  - Leave it in blank to keep using Admin/Admin to log into Embarcadero Team Server.
  - If you want to modify the super user login to Embarcadero Team Server introduce the information. If login does not exist it will be created.

**Additional Notes:** Depending on the database platform that you selected previously, complete the following fields:

If you selected **Oracle**:

- On the **SID** field, enter your database identifier.
- If you selected **Use Oracle Service Name** , **SID** field will be **Oracle Service Name**. Enter the service name you use.

If you selected **Microsoft SQL Server**:

- If the database server is a named instance, specify the **Host Name** in the format HostName\NamedInstanceName. For example, DEWKBOW01\DBServer.
- Optionally, for Microsoft SQL Server only, you can check "Use SSL" to enable the Secure Sockets Layer (SSL) communication protocol, which encrypts messages. When SSL is enabled, Embarcadero Team Server uses ports 80 and 443 for secure communications.
- It is possible to have the installer create your MSSQL database for you at this point. If you enter the name of a non-existent database, the installer will pop up a confirmation window and then create the database.

3. Click **Next** to continue.

**Repository Setup**

Please select the DBMS type you would like to use for Team Server repository

Oracle 11g-12c  
 MS SQL Server 2008-2014  
 IBM UDB 9.x-10.x (DB2 will not work with Performance IQ, choose either SQL Server or Oracle to host repository)

[Read about configuring ER/Studio Repository database >](#)

**Repository DB**

If you have installed Team Server, CONNECT or Portal in the past,

Specify location of Team Server database if it exists

**Host Name:Port**

ESVMLAURAM01W7X\SQLEXPRESS 1433

Use SSL

Authentication, create database privilege required

**Login**

sa

**Password**

••••••••

**Database**

teamserver

Use existing tables or create them if they do not exist  
 Overwrite existing tables or create them if they do not exist

Login credentials to be used by Team Server to interact with database

- If login does not exist it will be created
- Leave blank to use login specified above

**Login**

Admin

**Password**

•••••

**Team Server will restart after repository is created, you may be asked to log in again before you can continue.**

**Next** **Cancel**

5. In the **Accounts** page:
  1. In the **Windows User** field, enter the name of a Windows user that Embarcadero Team Server can use to log in to the system. The user account must have local administrative privileges. The name should be in the format "machine\_name\username".
  2. In the **Password** field, enter the password of the Windows user.
  3. Login credentials to be used by Team Server to interact with repository(case-sensitive):
    - Leave it in blank to keep using Admin/Admin to log into ER/Studio Repository.
    - If you want to modify the super user login to enter into ER/Studio Repository introduce the information. If login does not exist it will be created.
  4. Click **Next** to continue.

The screenshot shows a web-based configuration interface for the ER/Studio Model Repository. On the left is a vertical navigation menu with the following items: Repository, Accounts, HTTPS, Single Sign-On, Notification, and License. The main content area is titled "Windows Service Account" and includes the instruction: "Specify the user name and password that Team Server should run under. A valid user account is required." Below this is a warning icon and text: "Windows User Access Control must be turned off in order for Team Server to work properly". There are two input fields: "Windows User (domain\user name)" containing "lauraserver\Admin" and "Password" with masked characters. Below this is a section titled "ER/Studio Model Repository Account" with the instruction: "Have you changed the admin login password for ER/Studio Model Repository from Admin/Admin? If so specify updated credentials." It contains two input fields: "Model Repository User" containing "Admin" and "Model Repository Password" with masked characters. At the bottom right are three buttons: "Back", "Next", and "Cancel".

6. In the **HTTPS Setup** page you can optionally choose to enable HTTPS (SSL). It is recommended that you enable secure communications as this will keep your password transmissions secure.
  1. Optionally, select **Enable Secure Communication (HTTPS)** to enable it.
  2. If you do not have SSL set up on your server, you can click the **Self-Signed** button to take you through the short wizard which will create a Keystore file allowing you to use encryption.
    - Fill out the fields of the *Self-Signed wizard* and click **Generate**. The Keystore file will be created in the location of your choosing.

3. If you already have SSL set up on your server, directly enter the information required.
4. Click **Next**.

7. In the **Single Sign-On via LDAP** page, optionally, check **Use LDAP server for authentication** to use the *Lightweight Directory Access Protocol* (LDAP) and enable the ability for users to [log in to Embarcadero Team Server](#) using their domain username and password. You can [enable LDAP authentication anytime later](#):

1. In the **LDAP URL** field, enter the URL of the server running LDAP.

- In the **Manager DN** field, enter the distinguished name for the user that is used to authenticate users. Embarcadero Team Server uses this to connect to the LDAP server and validate user credentials. For example, CN=adminimator,CN=Users,DC=mydomain,DC=com.



**Note:** In this example, administrator has been used. In which case, **Users** is defined as a container rather than an organizational unit as is the Microsoft Active Directory default. Your user accounts may be in an organizational unit, in this case you would specify it differently, for example, CN=user1,OU=sales,DC=mydomain,DC=com.

- In the **Manager Password** field, enter the password for the administrative user.
- In the **Search Base DN** field, enter the name of the root node in LDAP from which to search for users. For example, CN=Users,DC=mydomain,DC=com.
- In the **Search Attribute** field, enter the attribute in LDAP holding the user's login name. For example, sAMAccountName (for ActiveDirectory).
- In the **Test User/Password** field, enter the username and password of a sample user to attempt to authenticate against the LDAP server. The installer uses this information to validate the given LDAP information before moving to the next page.
- Click **Test Connection**. If it is ok, this will enable **Next** button.
- Click **Next**.

- In the **Notification Enablement** page, optionally, check **Enable Email Notifications via SMTP** to allow users to send search results and reports by

email directly from Embarcadero Team Server. You can [enable notifications anytime later](#):

1. In the **Email Address** field, enter the email address that you want to use as the sender of the emails sent from Embarcadero Team Server. You may want to prepare a special email address on your email server for this purpose.
2. In the **Server/Port** field, enter the host name of the email server (for example: ETMAIL01), the fully qualified network name (for example: ETMAIL01.embarcadero.com), or the IP address (for example: 10.10.23.250) and the port number where the email server is listening. The default port is 25.
3. Optionally, check "Requires Authentication" if your email server requires authentication. When you check this option **User Name** and **Password** fields are highlighted. Fill them with the required values to authenticate Embarcadero Team Server against your SMTP server.
4. Click **Next**.

**Notification Enablement (Optional)**

Enable Email Notifications via SMTP

Team Server can use SMTP to send notifications and alerts to users.

Email Address  
teamserver@esvmlauram02.com

Server:Port  
192.168.95.110 25

Use TLS

Requires Authentication

User Name  
teamserver

Password  
\*\*\*\*\*

Back Next Cancel

9. In the **Retrieve a License** page you can register your licenses.
  1. In the **EDN Login or Email Address** field enter your existing Developer Network account. If you need a new user account click **Create Account**. Fill in the required information.
  2. In the **Password** field enter your EDN password.
  3. Specify the serial number to register in the **Serial Number** field.
  4. Click **Next**.



**Note:** If you have license file please use **Import from file** button to register.

**Retrieve a License (Optional)**

Using your Embarcadero Developer Network (EDN) account you can retrieve your purchased license or start a trial.

EDN Login or Email Address  
laura.munozembarcadero.com [Create Account](#)

Password  
••••••••

Serial Number  
[License Key]

[Request Trial](#)

[Trouble connecting? Use Embarcadero Web Registration](#)

[Import from file](#) [Back](#) [Next](#) [Cancel](#)

Embarcadero Team Server and Model Repository are now installed and configured on your system.

### Modify Configuration

You can modify the configuration at any moment:

- o Use Configure Team Server. From Windows: **Start > All Programs > Embarcadero Team Server 2016 > Configure Team Server**
- o Select **My Setting > Configurator** once you are logged as Admin in Embarcadero Team Server.

### See Also

- o [Tomcat Configuration Application](#)
- o [Upgrading Team Server and Repository](#)



# Upgrading Team Server and Repository

This **Upgrade Guide** provides important information regarding the process of upgrading from previous versions using the new **Team Server** installer which includes **Model Repository** .



**Note:** Please note that with this new installer **Model Repository** and **Team Server** will be installed in the same server machine. If in your current installation they are on separate machines please be sure to uninstall both before upgrading. Run upgrade on the machine that was previously running **Team Server** .

## Preparing Repository Upgrade

### User preparations

1. Ensure you have backed up all your.dm1 files.
2. Check in all your diagrams and objects. 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:
  1. Choose **Repository > Options**.
  2. Make note of the Active File Directory.
  3. Switch to the Windows Explorer and rename all the diagrams in the Active File Directory in order to protect them of being overwritten.  
Example: *Backup\_diagramname.dm1*

### Administrator preparations

1. Ensure no one is logged into the Repository.
2. Backup the current Repository database.
3. [Uninstall](#) previous version.
4. Restart the Repository host computer.



**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.

## Upgrades from ER/Studio Repository 6.5/6.6 users to ER/Studio Repository 6.7

Keep the following in mind when updating for this release:

- Only a service upgrade is required. The installer will perform this step.
- No diagram data version upgrade is required. [User preparations](#) are not required.
- There are no database changes from version 6.5 or 6.6.

## Upgrades from ER/Studio Repository 6

- [Prepare](#) Repository to upgrade
- The Repository services and your existing database will be upgraded to the current version.

## Upgrades from ER/Studio Repository prior to 6

- [Prepare](#) Repository to upgrade
- 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 using the separate installer, that will update the database, uninstall version 6.0, then upgrade to 6. using the new installer.
- Once the Repository upgrade is complete you should upgrade your diagrams with the latest version of ER/Studio Data Architect.

## Preparing Team Server Upgrade

[Uninstall](#) previous version.

## Upgrading from Embarcadero Team Server 4.0.x or CONNECT 3.0.x

- We always recommend backing up your data before starting the process. You may have to back up your database and export your [Glossaries](#) and [Terms](#).
- The installer will automatically back up and use your existing add-on license files.

## 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 Embarcadero 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`

- o If you have already 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`

After copying over the `license.txt` file to the `license` folder within the installation folder of Embarcadero Team Server, [log in to Embarcadero Team Server](#) as Admin, select **My Settings > Admin > Licenses** and click **Refresh** for Embarcadero Team Server to recognize your licenses.

## Upgrade configuration

If you have installed Team Server, CONNECT or Portal in the past you need to specify the information to connect to its database. The new installer will copy the Team Server database tables into the Model Repository database. After which both Model Repository and Team Server Web will share the same database.

1. Check [repository setup](#), and introduce repository database information.
2. Select **Specify location for Team Server database...**, this will expand the information fields to include Team Server database information.
3. Fill the fields with the Team Server database information with the same structure than you have introduced previously for repository database.

## Upgrading Team Server and Repository

[Read about configuring ER/Studio Repository database »](#)

### Repository DB

If you have installed Team Server, CONNECT or Portal in the past,

Specify location of Team Server database if it exists

#### Host Name:Port

ESVMLAURAM01W7X\SQLEXPRESS 1433

Use SSL

Authentication, create database privilege required

#### Login

sa

#### Password

.....

#### Database

Combined

Use existing tables or create them if they do not exist

Overwrite existing tables or create them if they do not exist

Login credentials to be used by Team Server to interact with database

- If login does not exist it will be created
- Leave blank to use database admin

### Report DB

If you originally installed Portal with a separate Solution database,

Specify location of Solution database if it exists

Team Server database will be merged into Model Repository, after which it can be removed.

#### Host Name:Port

ESVMLAURAM01W7X\SQLEXPRESS 1433

Use SSL

Authentication, create database privilege required

#### Login

sa

#### Password

.....

#### Database

TeamServer403

4. If your Portal installation was using a separate Solution database, select **Specify the location of Solution database...**
5. Specify Portal Solution database details so the tables can also be copied to the Model Repository database.

[Read about configuring ER/Studio Repository database »](#)

### Repository DB

If you have installed Team Server, CONNECT or Portal in the past,

Specify location of Team Server database if it exists

#### Host Name:Port

ESVMLAURAM01W7X\SQLEXPRESS 1433

Use SSL

Authentication, create database privilege required

#### Login

sa

#### Password

.....

#### Database

Combined

Use existing tables or create them if they do not exist

Overwrite existing tables or create them if they do not exist

Login credentials to be used by Team Server to interact with database

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### Report DB

If you originally installed Portal with a separate Solution database,

Specify location of Solution database if it exists

Team Server database will be merged into Model Repository, after which it can be removed.

#### Host Name:Port

ESVMLAURAM01W7X\SQLEXPRESS 1433

Use SSL

Authentication, create database privilege required

#### Login

sa

#### Password

.....

#### Database

RepDB

### Solution DB

#### Host Name:Port

ESVMLAURAM01W7X\SQLEXPRESS 1433

Use SSL

Authentication, create database privilege required

#### Login

sa

#### Password

.....

#### Database

SolDB

**Note for Oracle:** Once the upgrade is done, the alias in the tnsnames file must be updated to point the new database server in case you had Team Server and Repository old databases in different machines.

**Note for DB2:** Once the upgrade is done, create a System DSN with the ODBC Data Source Administrator to point the new database server in case you had Team Server and Repository old databases in different machines.

## After you upgrade Embarcadero Team Server

- [Update the search index.](#)
- [Update reports.](#)
- Click **Update Solution Repository** in **My Settings > Admin > [Repository Management](#)**.

Wait until a message of successful update appears.

## Important Notes


- Always backup databases before upgrading.
- Upgrading diagrams can be time consuming and memory intensive. The number and size of the diagrams managed in the upgraded dictates how long the upgrade process takes.
- 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 installation, you must [log in](#) as a [super user](#) and use the [Manage Users](#) page to assign different types of available licenses to your users.

## See Also

- [Install and Configure Team Server and Repository](#)
- [Uninstalling Embarcadero Team Server](#)

# Updating the Search Index

To update the search index:

- o Select **My Settings > Admin > [Repository Management](#)**.
- o Click **Update Search Index** ()
- o Click **OK** on the confirmation dialog that appears.

A dialog box appears confirming that Embarcadero Team Server successfully completed the task.

## See Also

- o [Configuring the Search Index](#)
- o [Repository Management](#) page

# Updating Reports

This section explains how to deal with the upgrade from previous versions when the adhoc report metadata changes with respect to the new version. Changes include adding new model into an adhoc report, or changing field name in the existing adhoc report.



**Note:** The following instructions affect the upgrade from previous versions in which the adhoc report metadata changes with respect to the actual version. For example, the **Connect Model** option is not available until Connect 3.0.2. For this reason, when upgrading from releases prior to Connect 3.0.1 to versions Connect 3.0.2 or higher, you should follow these steps. Particularly, when upgrading from Connect 3.0.2, the **Connect Model** option appears on the **New Report** page but if you move to the next page, the custom attribute options are missing until these steps are executed.

If the adhoc report metadata changes when you upgrade from a previous version, you should follow the following steps after installing the new version:

1. Select **My Settings > Admin > [Repository Management](#)**.
2. Click **More** button.
3. Click on the options in the following order:
  1. **Refresh Reporting Metadata**.
  2. **Execute Global Action**.
  3. **Refresh System Settings**.
4. Click **Close**.

## See Also

- o [Configuring the Search Index](#)
- o [Repository Management](#) page

# Uninstalling Embarcadero Team Server

To remove an [installation of Team Server and Repository](#):

1. Select **Start > Programs > Embarcadero Team Server X.X > Uninstall Team Server** to start the uninstallation wizard.
2. On the **Welcome** page, click **Next**.
3. On the **Summary Information** page, review the information and click **Uninstall**.
4. Once the uninstallation process is completed, click **Finish** to close the uninstallation wizard.
5. After you close the uninstallation wizard, you are given the choice to reboot immediately or at a later time. For a complete uninstallation, a system reboot may be required. Make your selection and click **Finish**.

## Notes:

- o The Embarcadero Team Server uninstaller does not uninstall the [Embarcadero Team Server Reporting Repository database](#). It is the Database Administrator's responsibility to delete the Reporting Repository database if you decide to permanently delete Embarcadero Team Server.
- o When Team Server is uninstalled, the backup folder remains in the disk. In case you are uninstalling Team Server with no plans to install it again, remember you can delete this folder manually. You may find backup folder in the following location:
  - Team Server 4.0.8 and previous versions: `C:\Program Files (x86)\Common Files\ersEnterprisePortalBackup`
  - Team Server 4.1: `C:\Program Files\Common Files\ersEnterprisePortalBackup`

## See Also

- o [Install and Configure Team Server and Repository](#)
- o [Upgrading Team Server and Repository](#)