

Installing ER/Studio Team Server Making the Transition from CONNECT

By Rob Loranger, Software Consultant / Associate Product Manager

Embarcadero Technologies

July 2014

INSTALLING ER/STUDIO TEAM SERVER

As a CONNECT customer, you may be wondering what to expect as you make the transition from CONNECT 3.0 to ER/Studio Team Server 4.0. This document will walk you through the steps to take to update and convert your licenses.

ER/Studio Team Server is a server-based technology that will install over top of your existing Embarcadero CONNECT environment. However, because ER/Studio Team Server has different license types and access control than CONNECT, CONNECT licenses are not supported by ER/Studio Team Server. (Note: ER/Studio Portal licenses are still supported by ER/Studio Team Server, and will provide access to only the Portal-licensed capabilities.)

CONVERSION

Here is a list of what is automatically converted from CONNECT to ER/Studio Team Server during installation:

- ER Objects (e.g. diagrams, models, entities/tables, attributes/columns, etc.)
- Business glossaries and terms
- ER Object and Term mappings
- Data sources
- Data source mappings
- Users (i.e. People)
- Activity streams
- Discussions
- ER/Studio Portal licenses
- Custom attributes

And here is what is not automatically converted from CONNECT to ER/Studio Team Server during installation:

- CONNECT Author and Reader licenses

TRANSITION STEPS

1. During installation, ER/Studio Team Server will need access to the ER/Studio Repository, CONNECT reporting databases, and the ER/Studio Repository database. Before installing ER/Studio Team Server, gather the names for the Repository and CONNECT reporting databases, and usernames/passwords for the Repository super user, Repository database, and CONNECT reporting database.
2. Also, before installation, make note of all users who were given CONNECT Reader licenses and CONNECT Author licenses. ER/Studio Team Server has preconfigured Author and Reader groups which provide the same level of

permissions as CONNECT Author and Reader licenses. You will want to add users to these groups appropriately. (Note: if you are using ER/Studio Portal licenses, also make note of which users have been given an exclusive or concurrent Portal license.)

3. Go to the Embarcadero Maintenance Portal and download the ER/Studio Team Server installer and your ER/Studio Team Server licenses. You should have received your userid and password from the Embarcadero Support team; contact them if you do not have this information.
4. Backup your CONNECT database before installing ER/Studio Team Server (this is a precautionary best practice).
5. Run the ER/Studio Team Server installer from the server that CONNECT is installed on. ER/Studio Team Server will detect and uninstall CONNECT.
6. Follow the installation wizard using the information gathered in step 1.
Important: In order to preserve your CONNECT data, be sure to select the option to connect to an existing reporting database.
7. Once the ER/Studio Team Server has been installed, log in as an administrator, go to My Settings > Admin > Licenses > Register Add-on License. Follow the registration steps provided.
8. While still logged in as an administrator, go to My Settings > Admin > Licenses > Manage Users and apply an ERSTeamServer license to all appropriate users. (Note: if you have ER/Studio Portal licenses, use the information gathered in step 2 to apply a Portal license to the appropriate users.)
9. Finally, while still logged in as an administrator, go to My Settings > Admin > Access Control List and, using the information gathered in step 2, add users appropriately to the Author or Reader groups.

COMPLETE!

That's all there is to it. If you have any questions or issues as you are going through the transition, please reach out to our [Support team](#) for assistance.

If you would like more details on the features that are available in ER/Studio Team Server please check out our [wiki page](#).

ABOUT THE AUTHOR

Rob Loranger is a Sr. Software Consultant and Associate Product Manager for Embarcadero. Although he currently focuses his time mainly on the ER/Studio family of products, for more than 7 years, Rob has been one of Embarcadero's leading experts for its database development, management, and architecture tools.



Embarcadero Technologies, Inc. is the leading provider of software tools that empower application developers and data management professionals to design, build, and run applications and databases more efficiently in heterogeneous IT environments. Over 90 of the Fortune 100 and an active community of more than three million users worldwide rely on Embarcadero's award-winning products to optimize costs, streamline compliance, and accelerate development and innovation. Founded in 1993, Embarcadero is headquartered in San Francisco with offices located around the world. Embarcadero is online at www.embarcadero.com.