

ER/Studio: Upgrading from Repository (v6.5 - 7.0) to Team Server 2016+

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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 2016+ where only the Repository is being used.

PREREQUISITES:

- 64-bit operating system – Team Server/Repository 2016 and later is only supported on 64-bit machines
- Download the Team Server 2016+ 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 7.0
- 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 2016+ must be installed on a separate client machine

The following steps will walk you through upgrading the Repository to Team Server 2016+. If all of the prerequisites are followed, then the upgrade process will run smoothly.

STEPS:

- 1) Uninstall Repository (v6.5 - 7.0). The installer will check this but it is highly recommended to uninstall the Repository manually first.

- 2) Run the Team Server 2016+ installer.



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



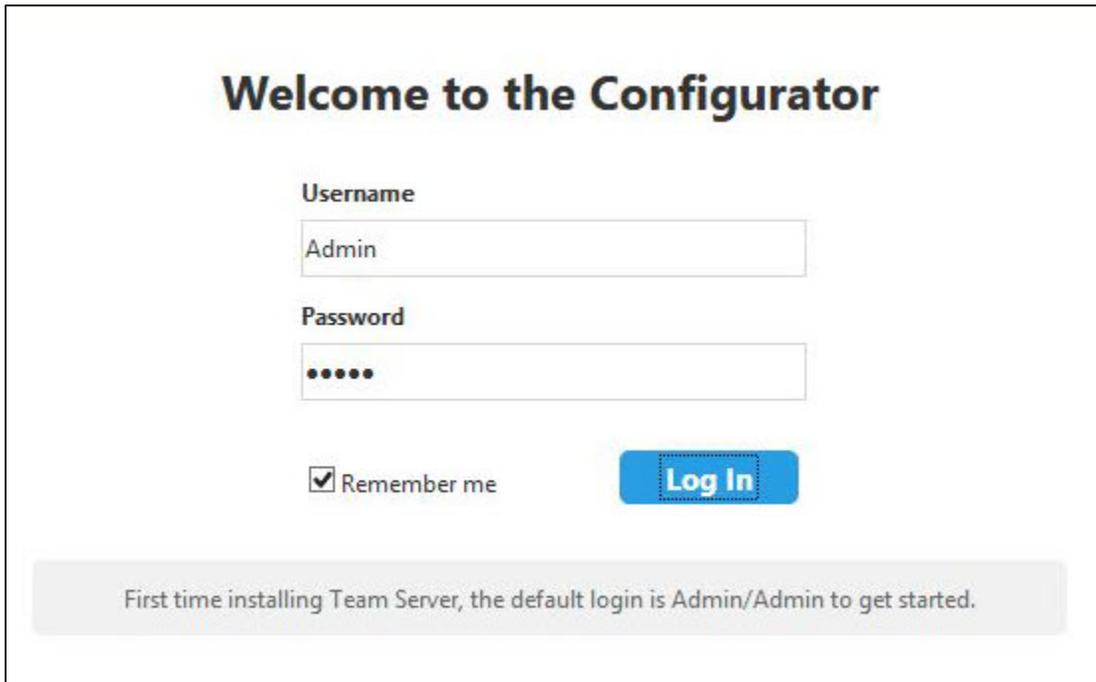
- 4) After browsing for and selecting the new location, click **OK**.
- 5) Agree to the license terms, and then click **Install**.



- 6) Click **Launch** to load the Team Server 2016+ 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

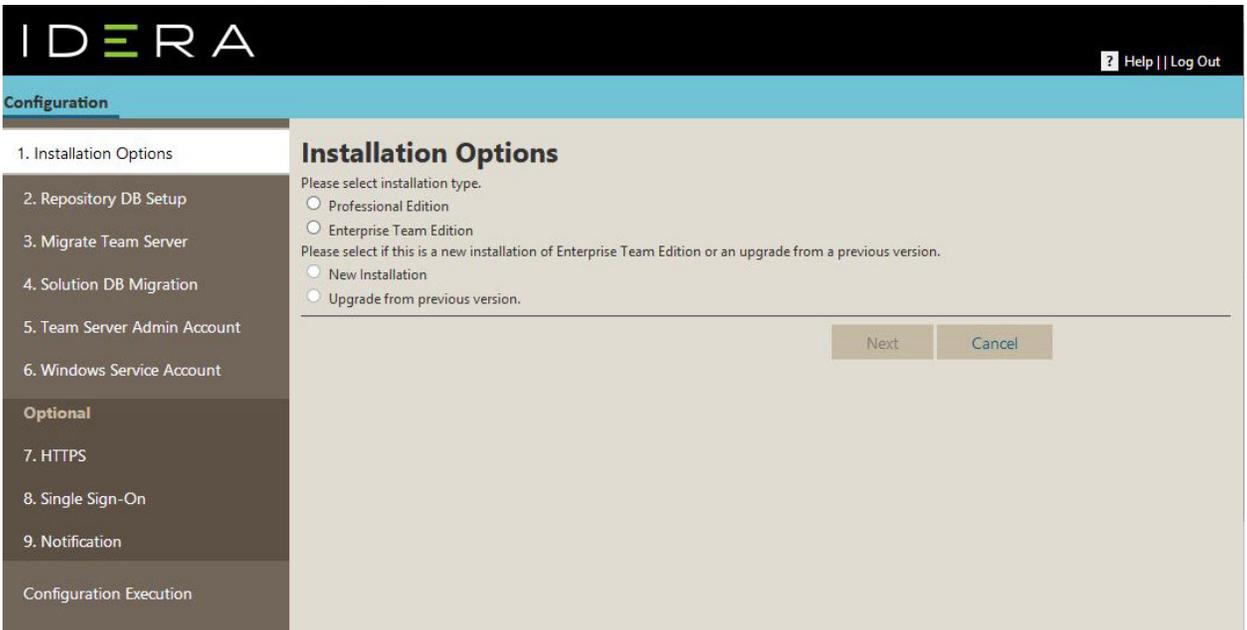
Username
Admin

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 with 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' (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 a form with 'EDN Login Or Email Address' (value: 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' (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.' It provides a 'Registration code: 8532107' and a '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 configuration interface for setting up a repository database. The sidebar on the left lists various configuration steps, with '2. Repository DB Setup' currently selected. The main panel is titled 'ER/Studio Repository Database Setup' and includes the following elements:

- DBMS Selection:** Radio buttons for 'MS SQL Server 2008-2016' (selected), 'Oracle 11g-12c', and 'IBM DB2 LUW 9.x-10.x'.
- Host and Port:** Text boxes for 'Host Name' (localhost) and 'Port' (1433).
- Alias:** A text box labeled 'Specify Alias'.
- SSL:** A checkbox for 'Use SSL (uses ports 80 and 443)'.
- Database User:** A section titled 'Specify database user for Setup. Create database privilege required.' containing a 'Username' field (TeamServerDBUser) and a 'Password' field (masked with dots) with a 'Show' checkbox.
- Database Name:** A 'Database' field containing 'TS1615' and a 'Test' button.
- Runtime Credentials:** A checkbox for 'Specify different credentials for runtime Team Server access to database' with associated 'Username' and 'Password' fields.
- Navigation:** 'Back', 'Next', and 'Cancel' buttons 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.
- 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 on the left is identical to the previous screenshot, but item 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' and 'Password' (with a 'Show' checkbox).
- An input field for 'Database'.
- 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.

The screenshot shows the IDERA configuration interface. On the left is a sidebar with 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 (highlighted), 6. Windows Service Account, and an 'Optional' section containing 7. HTTPS, 8. Single Sign-On, 9. Notification, and Configuration Execution. The main content area is titled 'Team Server Administrator Account' and contains the text: 'These are the administrator Team Server login credentials.' Below this are two input fields: 'Username' with the value 'Admin' and 'Password' with masked characters. A 'Show' checkbox is next to the password field. A 'Test' button is located below the password field. At the bottom right of the main area are three buttons: 'Back', 'Next', and 'Cancel'. The top of the page features the IDERA logo and a 'Help | Log Out' link.

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.

The screenshot shows the IDERA configuration interface for the 'Windows Service Account' step. The sidebar highlights step 6, 'Windows Service Account'. The main content area is titled 'Windows Service Account' and contains the 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 are two input fields: 'Windows User (Domain\username)' with the value '.\TeamServerUser' and 'Password' with masked characters. A 'Show' checkbox is next to the password field. A 'Test' button is located below the password field. At the bottom right of the main area are three buttons: 'Back', 'Next', and 'Cancel'. The top of the page features the IDERA logo and a 'Help | Log Out' link.

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.

23) Click **Next**.

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

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 web interface. At the top, the IDERA logo is on the left and 'Help | Log Out' is on the right. Below the logo is a 'Configuration' header. A sidebar on the left 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, 9. Notification, and Configuration Execution. The main content area is titled 'Enable Email Notification (Optional)'. It contains 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 input fields for 'User Name' and 'Password', with a 'Show' checkbox next to the password field. A 'Test' button is located below the password field. At the bottom right of the main area are 'Back', 'Next', and 'Cancel' buttons.

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

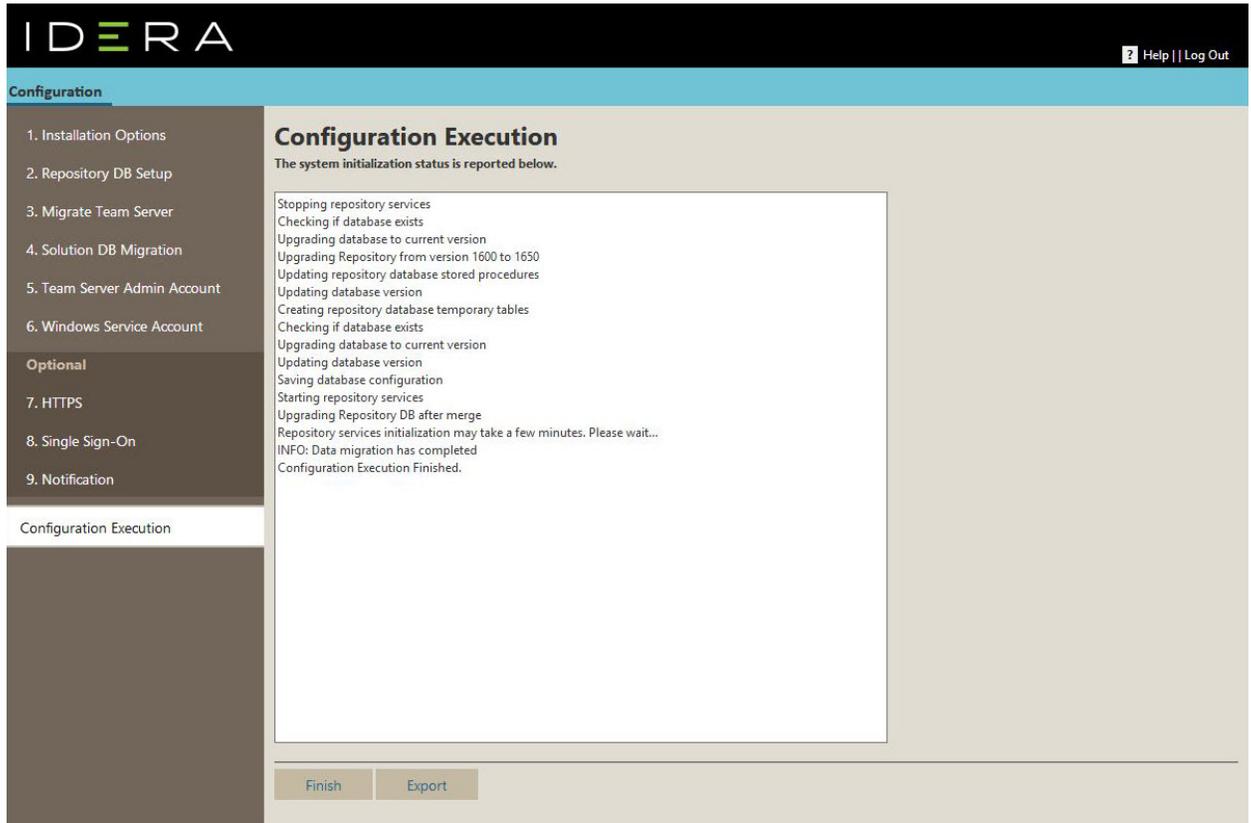
28) Click **Next**. The Configuration Execution page appears.

The screenshot shows the IDERA web interface. At the top, the IDERA logo is on the left and 'Help | Log Out' is on the right. Below the logo is a 'Configuration' header. A sidebar on the left 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, 9. Notification, and Configuration Execution. 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. At the bottom of the main area are 'Start' and 'Export' buttons.

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

The screenshot shows the IDERA Configuration Execution page. The top navigation bar includes the IDERA logo and a 'Help | Log Out' link. 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, 8. Single Sign-On, and 9. Notification. The 'Configuration Execution' section is highlighted. The main content area is titled 'Configuration Execution' and contains the text: 'The system initialization status is reported below.' Below this is a 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 area are 'Start' and 'Export' buttons.

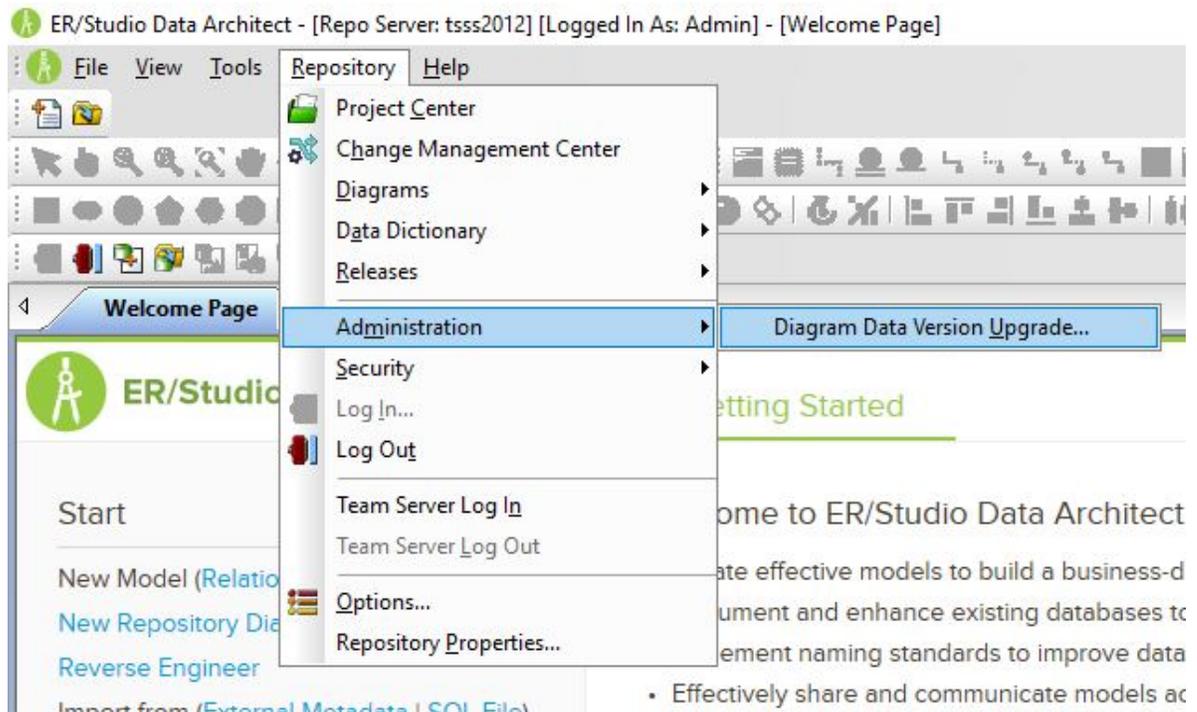
30) Once initialization is complete, click **Finish**.



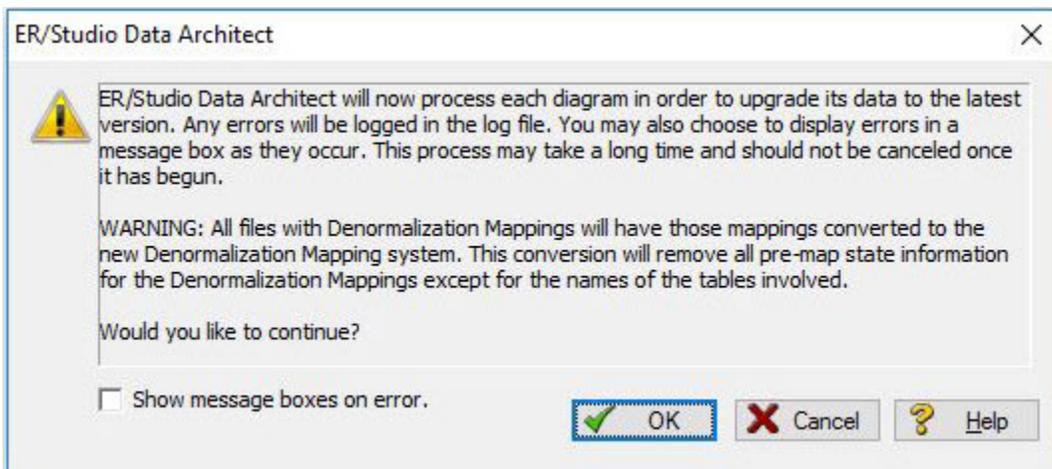
31) Launch ER/Studio Data Architect 16.5 (2016+) from the client machine. Log into the Repository with the Admin user credentials.

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

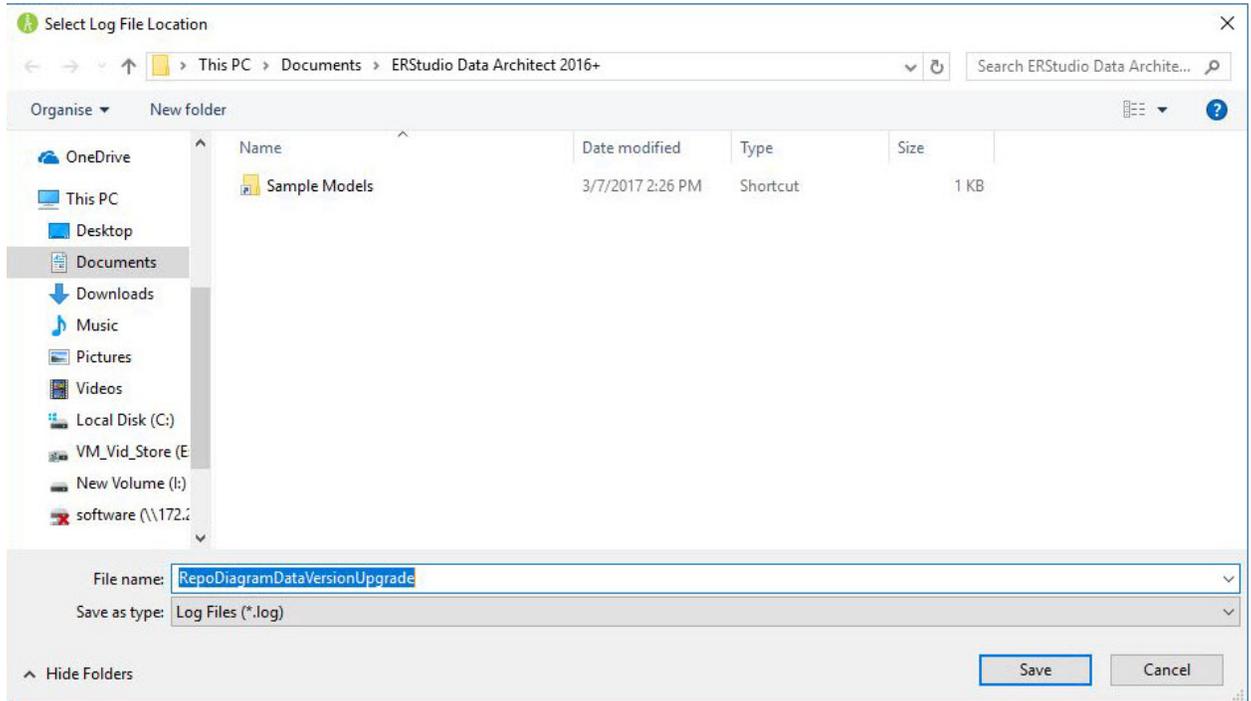
Note: Once you do upgrade your diagrams, you cannot open any of the diagrams using a previous version of ER/Studio Data Architect.



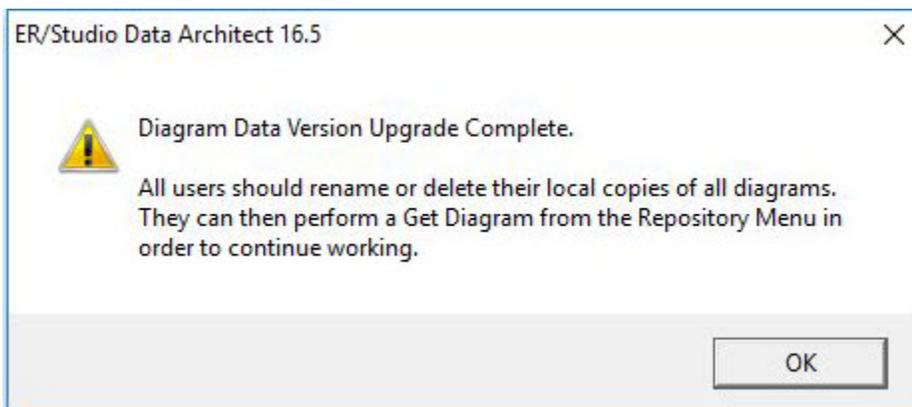
- 33) On the confirmation message window, review the information including the warning, and then click **OK**.



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 2016+ 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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