



Product Documentation

Team Server / Repository

Installation and Upgrade Guide

Version 2016 (16.1.4)

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Installation Notes

These notes provide important information about installation requirements for new **Team Server** installer which includes **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 Team Server installations, please see [Upgrading Team Server and Repository](#) for important upgrade information.

System Requirements

Before installing **Team Server** and **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	Application Server	
Processor	As required by your database platform	4 x 3.0 Ghz (8 x 3.0 Ghz Recommended) 
RAM		6 GB (8GB Recommended) 
Disk Space		5 GB + 100mb per TS diagram + additional DB growth (if DB is in the same server)
DVD Reader		Depending on install medium
Operating System	As supported by your database platform	Any of the following: <ul style="list-style-type: none"> • Windows Server 2008 (64 bit) • Windows Server 2012 (64 bit)
Software	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
Privileges	<ul style="list-style-type: none"> • DBMS privileges to create objects on the server • Local administrator privileges 	



Note: To provide a great user experience, the following minimum configuration is strongly recommended for **Team Server**.

Additional Notes:

- If you install the Application and the Database on the same server, consider surpassing the hardware requirements described previously.
- Supported DBMS (see [Database Server Requirements](#))
- 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 Team Server. Other browsers may work, but are not officially supported:

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



Note: To be able to launch the [configurator](#) within Microsoft Edge, follow next steps:

1. Open the Control Panel -> Internet Options dialog.
2. Go to the Security tab.
3. Select 'Local intranet' zone and click "Sites" button.
4. Check the 'Automatically detect intranet network' box.

Encrypting / SSL enablement requirements

Team Server supports encrypting connections to SQL Server (SSL enabled) with the following environment:

- Windows Server 2008 R2, Microsoft® SQL Server® 2014 Service Pack 1 (SP1).

The hotfix needed is *Cumulative Update 7*: <https://support.microsoft.com/en-us/kb/3046038>

- Windows Server 2008 R2, Microsoft® SQL Server® 2012 Service Pack 2 (SP2):
<http://www.microsoft.com/en-US/download/details.aspx?id=43340>.

The hotfix needed is *Cumulative Update 6*: <https://support.microsoft.com/en-us/kb/3052468>

Installation Checklist

- The installation user account must have local administrative privileges.
- To install, you need to create first an empty database for 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 into **Team Server**, check that your LDAP server is up and running.
- If you want to enable **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 **Team Server** (that includes **Repository**) on a system where **ER/Studio Data Architect** or **ER/Studio Business Architect** is installed.
- If a previous version of **Team Server** is installed, please uninstall first.
- If the **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 **Repository** databases 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.

In order for the **Repository** to communicate with the database, the machine running **Team Server** must also have the corresponding RDBMS client utility installed.

Important Information

Oracle

- Install both 32-bit and 64-bit version of Oracle Client Utilities.
- Configure your server in one of the Oracle configuration tools: Net Easy Config or Net Configuration Assistant.
- Create a connection alias.
- If you are upgrading using Oracle you need to increase the number of processes (connections) to 200 before running.
- Minimum permissions for owner of Repository and Team Server schema:

- Roles:

SELECT_CATALOG_ROLE

- Privileges:

CREATE INDEXTYPE

CREATE PROCEDURE

CREATE SEQUENCE

CREATE SESSION

CREATE SYNONYM

CREATE TABLE

CREATE TRIGGER

CREATE TYPE

CREATE VIEW

UNLIMITED TABLESPACE

Microsoft SQL Server

- 64-bit client libraries are already installed on Windows machines.
- Ensure that the database and the instance are set to case-insensitive, as case-sensitive is not supported. Also set the SQL Server Configuration Properties to allow SQL Server authentication. 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

- The option **ANSI_NULLS** (Server Properties > Connections) needs to be set as **On**.
- The default schema for Team Server database needs to be **dbo**. If you were using a different schema please move the tables to **dbo** schema previous to [install](#) or [upgrade](#) Team Server.

IBM DB2

- Install 64-bit version of IBM DB2 UDB Client Utilities.
- Configure an ODBC data source entry for the IBM DB2 database that you want to access from Team Server.
- Create a connection alias. The data source name must match the connection alias specified in the client connection.
- For all versions of an IBM DB2 UDB server, to ensure optimal Repository performance, you must have a user temporary tablespace with a 32 KB page size and the database must be tuned so it does not run out of memory or log space.

See Also

- [Installation Notes](#)

Install and Configure Team Server and Repository

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



Note: Repository 2016 installation is now part of Team Server 2016 installation.

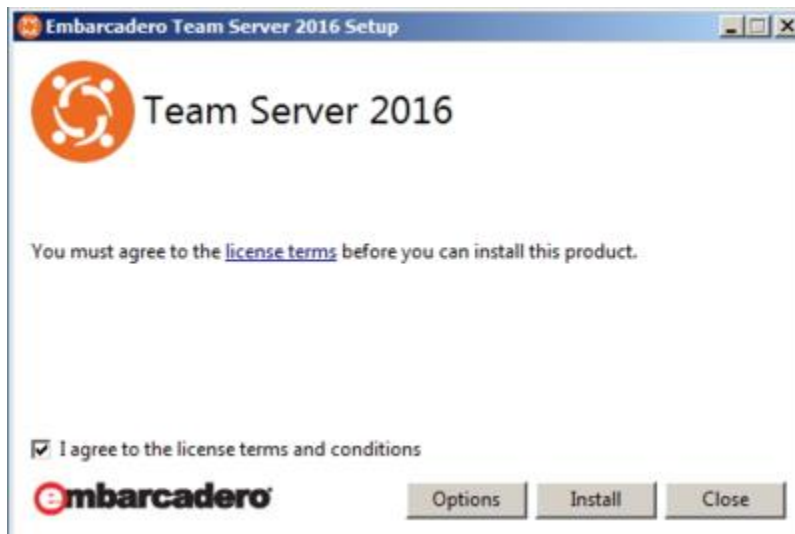
To install Team Server and Repository, you need to run the new installer and follow the steps. You need a user with administrative privileges to run the installation wizard.

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



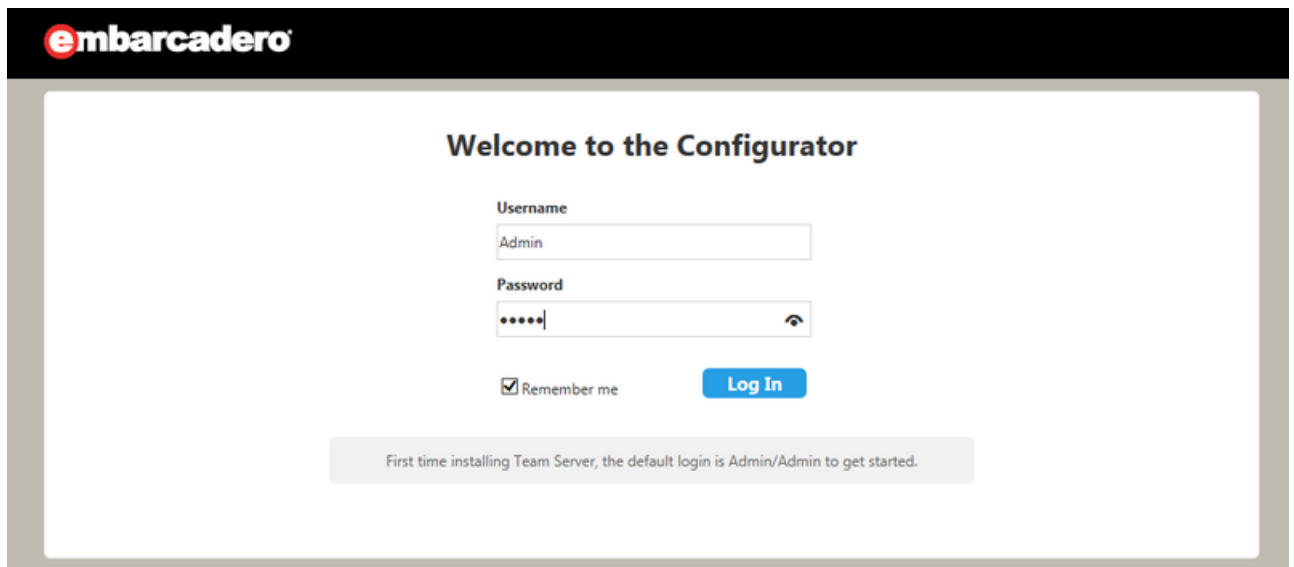
Tip: You may have to create a blank database before starting the installation, please check the [Installation Checklist](#).

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



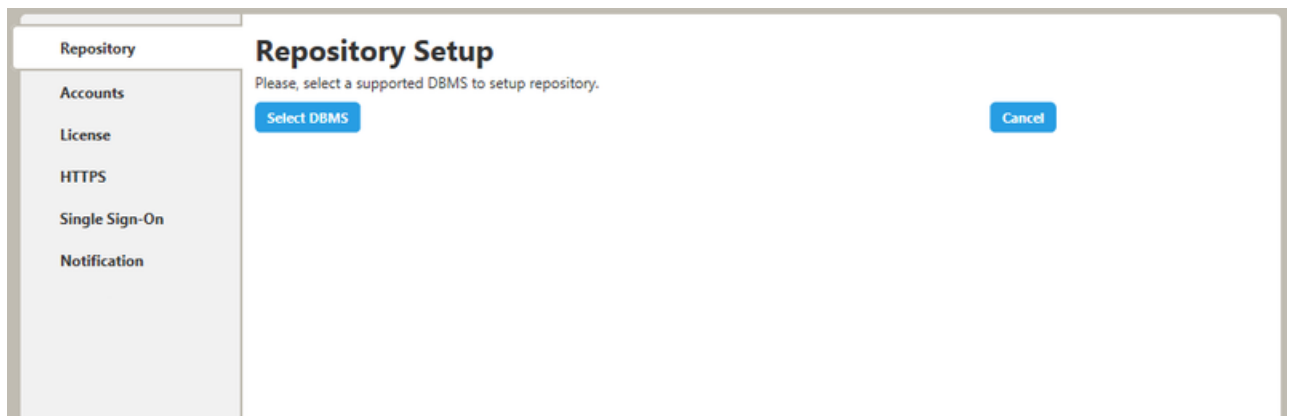
Note: In case you need to change the default Port or the Install location, please click **Options** previous to **Install**.

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



The image shows the 'Welcome to the Configurator' login screen for Embarcadero. It features a black header with the Embarcadero logo. The main content area is white and contains a login form with fields for 'Username' (pre-filled with 'Admin') and 'Password' (masked with dots). Below the password field is a 'Remember me' checkbox and a blue 'Log In' button. A light gray message box at the bottom states: 'First time installing Team Server, the default login is Admin/Admin to get started.'

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



The image shows the 'Repository Setup' page. On the left is a sidebar menu with options: 'Repository' (selected), 'Accounts', 'License', 'HTTPS', 'Single Sign-On', and 'Notification'. The main area is titled 'Repository Setup' and contains the instruction 'Please, select a supported DBMS to setup repository.' Below this instruction are two buttons: 'Select DBMS' and 'Cancel'.

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 the database (case-sensitive).

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**, the **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 `HostName\NamedInstanceName` format. For example, `DEWKBOW01\DBServer`.
 - Optionally, for Microsoft SQL Server 2012 and 2014 only, you can check **Use SSL** to enable the Secure Sockets Layer (SSL) communication protocol, which encrypts messages. When SSL is enabled, Team Server uses ports 80 and 443 for secure communications. Please check [SSL enablement requirements](#).
 - 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.

Install and Configure Team Server and Repository

Repository

Accounts

License

HTTPS

Single Sign-On

Notification

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
SUPESW2012R202	: 1433

☐ Use SSL

Authentication, create database privilege required

Login

sa

Password

.....

Database

TS_2016

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

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

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

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

[Next](#) [Cancel](#)

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
eslabertsRepo03	: 50000

Authentication, create database privilege required

Login

db2admin

Password

.....

Database

PORTAL

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

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

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

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

[Next](#) [Cancel](#)

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: eslabertsRepo02 Port: 1521

☐ Use Oracle Service Name

Authentication, create database privilege required

Login

PORTAL

Password


Oracle SID

orcl

☐ Specify Oracle Client service name for ER/Studio Repository

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

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

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

Next

Cancel



Note: If you want to just install the Repository, exit the configurator at this point and [stop](#) the Tomcat service (Team Server).

5. In the **Accounts** page:

1. In the **Windows User** field, enter the name of a Windows user that Team Server can use to log into 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 the login does not exist, it will be created.
4. Click **Next** to continue.

The screenshot shows the 'Windows Service Account' configuration page. On the left is a sidebar with navigation links: Repository, Accounts, License, HTTPS, Single Sign-On, and Notification. The main content area has a title 'Windows Service Account' and a subtitle '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)' with the value 'lauraserver\LocalAdmin' and 'Password' with masked characters. Below these is the 'ER/Studio Model Repository Account' section with a subtitle 'Have you changed the admin login password for ER/Studio Model Repository from Admin/Admin? If so specify updated credentials.' It has two input fields: 'Model Repository User' with the value 'Admin' and 'Model Repository Password' with masked characters. At the bottom right are 'Back', 'Next', and 'Cancel' buttons.

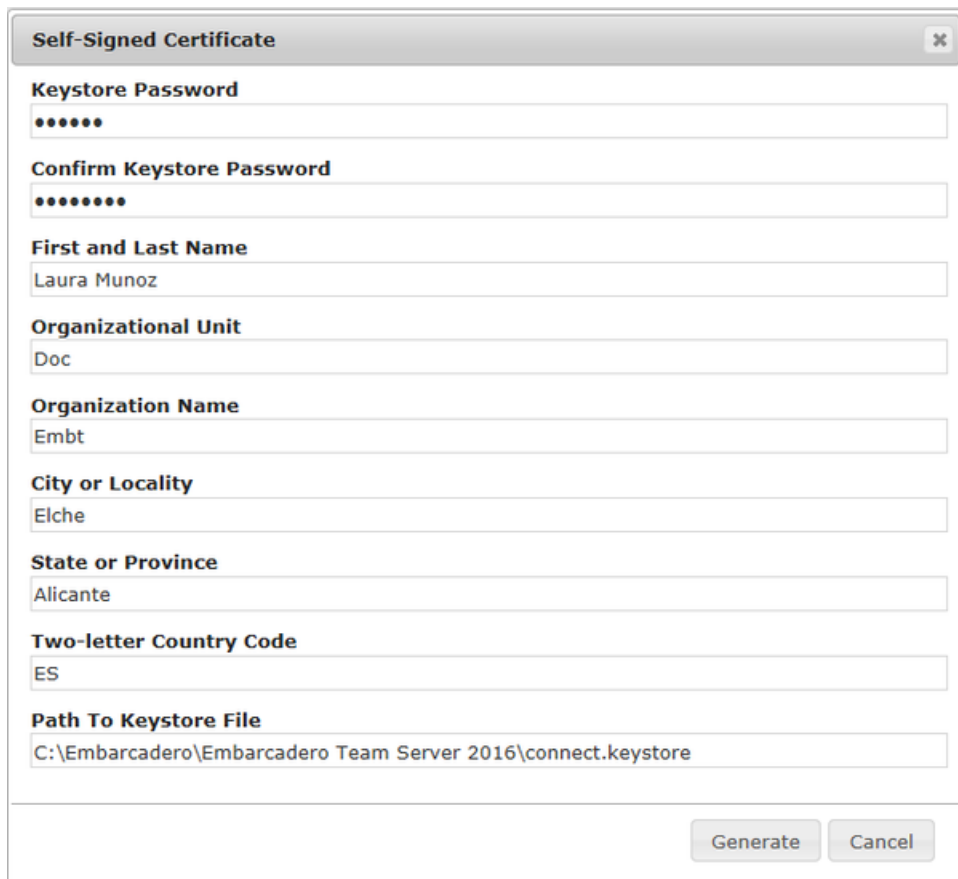
6. In the **License** page, you can register your licenses.
 1. In the **EDN Login or Email Address** field enter your existing Developer Network account. If you need a new user account, click **Create Account**. Fill in the required information.
 2. In the **Password** field, enter your EDN password.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



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

The screenshot shows the 'Retrieve a License (Optional)' page. On the left is a sidebar with navigation links: Repository, Accounts, License, HTTPS, Single Sign-On, and Notification. The main content area has a title 'Retrieve a License (Optional)' and a subtitle 'Using your Embarcadero Developer Network (EDN) account you can retrieve your purchased license or start a trial.' There are three input fields: 'EDN Login or Email Address' with the value 'laura.munozembarcadero.com', 'Password' with masked characters, and 'Serial Number' with the value 'Q1V18-MUOZ-4230H-VOL2'. To the right of the first field is a 'Create Account' button. Below the 'Serial Number' field is a 'Request Trial' button. At the bottom left is a link 'Trouble connecting? Use Embarcadero Web Registration' and an 'Import from file' button. At the bottom right are 'Back', 'Next', and 'Cancel' buttons.

7. 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 walk you through the short wizard that 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.



The image shows a 'Self-Signed Certificate' wizard dialog box. It contains several text input fields for user information and a path to a keystore file. At the bottom right, there are 'Generate' and 'Cancel' buttons.

Field Label	Value
Keystore Password	••••••
Confirm Keystore Password	••••••••
First and Last Name	Laura Munoz
Organizational Unit	Doc
Organization Name	Embt
City or Locality	Elche
State or Province	Alicante
Two-letter Country Code	ES
Path To Keystore File	C:\Embarcadero\Embarcadero Team Server 2016\connect.keystore

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

8. 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 into 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.
2. In the **Manager DN** field, enter the distinguished name for the user that is used to authenticate users. Team Server uses this to connect to the LDAP server and validate user credentials. For example, CN=administrator,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.

3. In the **Manager Password** field, enter the password for the administrative user.
4. 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.
5. In the **Search Attribute** field, enter the attribute in LDAP holding the user's login name. For example, sAMAccountName (for ActiveDirectory).
6. 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.
7. Click **Test Connection**. If it is ok, this will enable the **Next** button.
8. Click **Next**.

9. 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 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 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, "mail"), the fully qualified network name (for example: "mail.example.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, the **User Name** and **Password** fields are highlighted. Fill them with the required values to authenticate Team Server against your SMTP server.
 4. Click **Next**.

Install and Configure Team Server and Repository

The screenshot shows the 'Notification Enablement (Optional)' configuration page. On the left is a sidebar with navigation links: Repository, Accounts, License, HTTPS, Single Sign-On, Notification, and Migration. The 'Notification' link is selected. The main content area has the title 'Notification Enablement (Optional)'. Below the title, there is a checkbox 'Enable Email Notifications via SMTP' which is checked. A text box below it says 'Team Server can use SMTP to send notifications and alerts to users.' followed by an 'Email Address' field containing 'teamserver@escmlauram02.com'. Below that is a 'Server' field with '192.168.95.110' and a 'Port' field with '25'. There are checkboxes for 'Use TLS' (unchecked) and 'Requires Authentication' (checked). Below these are 'User Name' and 'Password' fields, both containing masked text. At the bottom right are three buttons: 'Back', 'Finish', and 'Cancel'.

10. In the **Migration** page, you perform the data migration during an upgrade. Click the **Start** button for this purpose. You can load or save the log file generated by clicking **Load log file**.

The screenshot shows the 'Migration' page. The sidebar on the left has the 'Migration' link selected. The main content area has the title 'Migration'. Below the title is a 'Status:' section with a large text area containing the following log entries:
Migration of data started
Update of Portal Users started
Portal Users have been updated
Sync of repository diagrams started
Comments from Repository step started for the diagram Adventure Works.dm1
Comments from Repository step finished for the diagram Adventure Works.dm1
Comments from Repository step started for the diagram AOE2.dm1
Comments from Repository step finished for the diagram AOE2.dm1
Comments from Repository step started for the diagram Model1.DM1
Comments from Repository step finished for the diagram Model1.DM1
Comments from Repository step started for the diagram AOE3.dm1
Comments from Repository step finished for the diagram AOE3.dm1
Comments from Repository step started for the diagram All_objects_diagram_adding_BDOs.dm1
Comments from Repository step finished for the diagram All_objects_diagram_adding_BDOs.dm1
search index update started
count of indexed objects 760
.....
At the bottom of the page are two buttons: 'Start' and 'Load log file'.



Note: Please note that the configurator will show the **Migration** tab only if you are upgrading.

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

Modify Configuration

You can modify the configuration at any moment:

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

See Also

- [Tomcat Configuration Application](#)
- [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 **Repository**.



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

Preparing the Upgrade

Repository 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*.

Repository Administrator Preparations

1. Ensure no one is logged into the Repository.
2. Backup the current Repository database.



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.

Upgrading from Team Server 4.0.x, CONNECT 3.0.x or ER/Studio Portal 2.0.x

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 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 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 Team Server, [log into Team Server](#) as Admin, select **My Settings > Admin > Licenses** and click **Refresh** for Team Server to recognize your licenses.



Note: We always recommend backing up your data before starting the process. You may have to back up your database and, for Team Server and Connect, export your [Glossaries](#) and [Terms](#).

[Uninstall](#) the previous version.

Upgrades scenarios

First of all, [prepare](#) the upgrade for any scenario.

Upgrades from Team Server 2016 (16.X) which includes Repository 7.0.1

1. Uninstall Team Server 2016 (16.X).
2. Install Team Server 2016 (16.1.3).

Upgrades from Repository 7.0.X (Standalone)

1. Uninstall Repository 7.0.X.
2. Install Team Server 2016 (16.1.3).
3. On the [repository setup](#) page, if you were also using Team Server 4.0 or previous, select **Specify location for Team Server database...**, this will expand the information fields to the ones explained [here](#).

Upgrades from Repository prior to 6.5/6.6/6.7 (Standalone) and Team Server 4.0 or previous

1. 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.
 - For example: When upgrading from earlier versions, such as from 5.5, you must first upgrade the Repository to version 6.0 using the repository 6.0 installer, uninstall version 6.0, then upgrade to 6.7 using the Repository 6.7 installer then, uninstall and install 7.0.1. Each time you install a major version it will update the database.
2. Install Team Server 2016 (16.1.3).
3. On the [repository setup](#) page, if you were also using Team Server 4.0 or previous, select **Specify location for Team Server database...**, this will expand the information fields to the ones explained [here](#).

Upgrade Configuration

- If you are upgrading from Team Server 2016 (16.x) you already have one unique combined database, directly follow the steps on the [repository setup](#).
 - If you have installed Team Server XE7 or any previous version, including CONNECT or Portal you need to specify the information to connect to its database. The new installer will copy the Team Server database tables into the Repository database, after which both Repository and Team Server Web will share the same database. Please, read first [Database Server Requirements](#).
1. Check the [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 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

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

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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

☐ 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.

Finishing the Upgrade

1. Perform the [migration](#) process.
2. [Update the search index](#).
3. [Update reports](#).
4. Click Update Solution Repository in **My Settings > Admin > Repository Management**.



Note: Wait until a message of successful update appears.

5. Once the **Team Server** upgrade is complete, you should upgrade your diagrams with the latest version of **ER/Studio Data Architect**.

Important Notes


- Always back up databases before upgrading.
- Upgrading diagrams can be time consuming and memory intensive. The number and size of the diagrams managed in the upgrade 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 Team Server](#)

Updating the Search Index

To update the search index:

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

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

See Also

- [Configuring the Search Index](#)
- [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

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

Uninstalling Team Server

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

1. Select **Start > Programs > 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:

- The Team Server uninstaller does not uninstall the [Team Server Reporting Repository database](#). It is the Database Administrator's responsibility to delete the Reporting Repository database if you decide to permanently delete Team Server.
- 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**
 - Team Server 2016:
C:\Users\username\AppData\Local\Temp\ersEnterprisePortalBackup
(Please see [known issue](#) about backing up 16.0.0 version.)

See Also

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