ER/Studio® 8.0 Installation Guide

Contents

About this Guide

This guide contains information for installing, upgrading, and uninstalling the following ER/Studio products and add-on products:

- **ER/Studio**: Provides a complete environment for analyzing, designing, creating, and maintaining database applications. For more information, see [ER/Studio](#).

  NOTE: When upgrading ER/Studio Enterpirse, you must also upgrade the Repository to the corresponding release.

- **ER/Studio Repository**: The server-side Repository provides for improved teamwork and enterprise collaboration. The Repository is included in the Enterprise edition of ER/Studio. For more information, see [ER/Studio Repository](#).

  NOTE: ER/Studio Enterprise also includes EA/Studio, Embarcadero's business process and conceptual modeling tool. EA/Studio installation details are described in the *EA/Studio Installation Guide*.

- **ER/Studio Enterprise Portal**: This browser-based solution allows organizations to share, browse, and report on the metadata contained in the ER/Studio Repository for improved data and metadata management practices. For more information, see [ER/Studio Enterprise Portal](#).

- **Metawizard**: Integrate metadata across modeling tools, business intelligence, ETL platforms and industry-standard exchange formats (XMI, XML and XSD). This tool enables ER/Studio to integrate with more than seventy other applications by sharing meta-data through an import-export capability. For more information, see [Metawizard](#).

- **Universal Data Models**: Standard and Industry data model templates for ER/Studio that reduce the development time of database-related projects by an average of 60 percent, as well as improve the quality of existing and new data models. For more information, see [Universal Data Models](#).

- **ER/Studio Viewer**: View, navigate and print ER/Studio models in a view-only environment. ER/Studio Viewer features the same sophisticated and advanced viewing, navigation and printing functionality. For more information, see [ER/Studio Viewer](#).

ER/Studio

This section is comprised of the following topics:

- [Installing ER/Studio](#)

- [Licensing ER/Studio](#)

- [Upgrading ER/Studio](#)

- [Uninstalling ER/Studio](#)

Installing ER/Studio

Use the following checklist to ensure ER/Studio is correctly installed and configured.

Done	N/A	Requirements
		Download ER/Studio You can download a 14-day trial version of ER/Studio, which you can license later, from www.embarcadero.com/downloads/download.html
		Review ER/Studio ReadMe For the most current installation and usage information, see the ReadMe at www.embarcadero.com/resources/release_notes/ER/Studio.html.
		Ensure System Compatibility For system requirements, see System Requirements.
		Install ER/Studio For installation details, see Install ER/Studio.
		License ER/Studio For ER/Studio licensing details, see Licensing ER/Studio.
		Run and Test ER/Studio For step-by-step instructions on using ER/Studio, see the *ER/Studio Evaluation Guide* at www.embarcadero.com/products/ER/Studio/erdocs.html.

System Requirements

Review the requirements before starting to install ER/Studio. Adhering to these requirements optimizes ER/Studio's performance.

ER/Studio Requirements	
Hardware	
Processor	Pentium III, 600 MHz or higher
RAM	1 GB
Disk Space	340 MB
	175 MB in the System TEMP directory for temporary file storage during installation
Operating System	Any of the following: • Windows Vista • Windows XP Professional • Windows 2003 (32-bit mode) • Windows 2000 Pro Server • Advanced Server with Service Pack 2
Software	If you want to use an Open Data Base Connectivity (ODBC) database as a datasource, you must install the ODBC driver on your client computer. To connect to the DBMS using native connectivity, install the native client libraries available from the DBMS vendor.
Privileges	Local Administrator Privileges (required for installation only)

Install ER/Studio

> **NOTE:** If you are installing Repository 5.0, you must install ER/Studio 8.x or later. Previous versions of ER/Studio are not compatible with Repository 5.0. It is important that release dates of the Repository and ER/Studio are the same.

1 Log on to Windows with local administrator privileges.

2 Start the **ER/Studio** installation program

3 Walk through the installation wizard.

   The following are notes on those parts that require some additional explanation.

- Default Notation: By default, displays the model with the notation type you choose during the installation.

  - **IDEF1X** – Data modeling technique used by many branches of the United States Federal Government.

  - **IE (Martin/Finkelstein)** – Information Engineering (IE) as developed by Martin and later revised by Finkelstein.

  - **IE (Crow's Feet)** – Uses IE notation and represents relationships with connecting lines between entities, and symbols at the ends of those lines to represent the cardinality of the relationship. This notation used in Oracle texts and in other applications such as Visio. Foreign keys are displayed in entity boxes.

  - **IE (Hide Foreign Keys)** – Uses IE notation, but foreign keys are not displayed in entity boxes.

  > **NOTE:** You can change the notation setting at a later time by clicking **Tools > Options** from the ER/Studio **Main** menu, and then clicking the **Logical** or **Physical** tab.

- **Shared Application Data Location**: By default, ER/Studio installs shared directories and application files such as the `DatatypeMapping`, `Macros`, and `Sample Models` directories n the following locations:

  - **Windows XP:** `C:\Documents and Settings\All Users\Application Data\Embarcadero\ERStudio_X.X`

  - **Windows Vista:** `C:\ProgramData\Embarcadero\ERStudio_X.X`

  If you prefer to store these files in another directory, follow the procedure below:

- For step-by-step instructions on using ER/Studio, see the **ER/Studio Evaluation Guide** at www.embarcadero.com/products/ER/Studio/erdocs.html.

Change the location of ER/Studio shared files

> **NOTE:** You must have local administrator privileges to change the location where ER/Studio stores and searches for shared application data.

1   Select **Help > About ER/Studio** and then click **File Path**.

2   In the **File Path** dialog, browse to an existing directory where you want to store your shared files.

> **NOTE:** The directory path you choose must be the location where you have created an `Embarcadero\ERStudio_X.X` directory or where you want ER/Studio to create this directory.

ER/Studio creates the `Embarcadero\ERStudio_X.X` directory, if it doesn't already exist.

3   In the **File Path** dialog, click **OK** and then in the **About ERStudio** dialog, click **OK** again.

ER/Studio will now look for theDatatype Mapping maps in this directory.

4   Select **Tools > Options > Directories**, specify where you want to store your macros, and then click **OK**.

5   Copy the contents of the `DatatypeMapping`, `Macros`, and `Sample Models` directories to the new location.

6   To effect the changes, restart ER/Studio.

Licensing ER/Studio

ER/Studio requires one or more licenses in order to run. A baseline license provides basic feature support for the product. In addition, incremental licenses may be required to support specific DBMS platforms, product add-ons, or other functions.

ER/Studio supports three kinds of licenses: Trial, Workstation, and Networked.

Trial licenses: A license for a 14-day, full-featured trial version of the product. The trial license must be registered before you can use the product.

Workstation licenses: A license or set of licenses is tied to a particular workstation. The product can only be used on that workstation.

Networked licenses: Networked licenses are administered and distributed by a central License Server (Embarcadero License Center or Acresso FLEXnet Publisher). There are two types of networked licenses: *Concurrent* and *Networked Named User*. With Concurrent licensing, users on different machines take turns using licenses from a shared pool. With Networked Named User licensing, licenses are pre-assigned to specific users setup on the license server's user list. Those users are guaranteed to have licenses available any time.

Registering a Trial or Workstation License at Application Startup

Shortly after downloading a trial version of an Embarcadero product, you should receive an email with a serial number, which you must register as follows. These instructions also apply if you have purchased a product and received a serial number prior to running the application for the first time, or if the trial period has expired.

1   Start the application. An **Embarcadero License Registration** dialog appears.

2   Copy the serial number from the email and paste it in the **Serial Number** field.

3   Enter your Embarcadero Developer Network account credentials in the **Login or Email** and **Password** fields. If you have not previously created an EDN account, or have forgotten your password, click **I need to create ...** or **I've lost my password**.

4   Click **Register**.

Your activation file should be downloaded and installed automatically. If this does not happen, click the **Trouble Connecting? Try Web Registration** link and follow the prompts. If you still have problems, see Registering by Phone.

Registering a Workstation License after Application Startup

The following instructions assume that you have received a workstation license by email and that you currently have a valid trial license. If you did not install a trial version or the trial period has expired, follow the instructions in Registering a Trial or Workstation License at Application Startup instead.

1   Select **Help > Launch License Manager**.

2   In the License Manager dialog, select the version of ER/Studio the license applies to (Standard, Developer, or Enterprise).

3   Select **Serial > Add**.

4   Copy the serial number from the email and paste it in the **Add Serial Number** dialog, then click **OK**.

5   Expand **Unregistered Serial Numbers**, right-click the serial number you just added, and select **Register**. A registration dialog opens.

   NOTE: The **Registration Code** box shows a machine-specific identifier required with other registration methods.

6   Ensure that the **Register using Online Registration** radio box is selected.

7   Provide Developer Network credentials in the **Login name or Email** and **Password** boxes.

8   Click **Register**.

Your activation file should be downloaded and installed automatically. If this does not happen, click the **Trouble Connecting? Try Web Registration** link and follow the prompts. If you still have problems, see Registering by Phone.

Registering by Phone

If you have problems with either of the above procedures, you can register licenses by phone. You will have to provide Developer Network credentials; the registration code displayed in the Embarcadero License Registration dialog that appears when you start an unlicensed application; the product base license serial number; and the license serial numbers for any additional features you have purchased.

For North America, Latin America and Asia Pacific, call (415) 834-3131 option 2 and then follow the prompts. The hours are Monday through Friday, 6:00 A.M. to 6:00 P.M. Pacific time.

For Europe, Africa and the Middle East, call +44 (0)1628-684 494. The hours are Monday to Friday, 9 A.M. to 5:30 P.M. U.K. time

Shortly after phoning in, you will receive an email containing an activation file. Then do the following:

1   Save the file to the desktop or a scratch directory such as c:\temp.

2   Select **Help > Launch License Manager**.

3   Select **License > Import**.

4   Navigate to the directory where you saved the activation file and double-click it.

5   Click the **Import** button to import the activation file and when complete, click the **Finish** button.

Registering a Networked License

If you work in an organization using Networked licensing, an administrator, department head, or someone providing a similar function will provide you with an activation file.

Once you receive the file, save it to the `license` subfolder of your product's main installation folder (typically `C:\Program Files\Embarcadero\<product><version>\license\`), then restart the application.

No additional steps are necessary.

Upgrading ER/Studio

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

Upgrade Checklist		
Done	**N/A**	**Requirements**
		Download ER/Studio Upgrade To download the most current release, go to www.embarcadero.com/upgrade/upgrade.html
		Review ER/Studio ReadMe For the most current installation and usage information, see the ReadMe at www.embarcadero.com/resources/release_notes/ER/Studio.html.
		Prepare to Upgrade For what to do before you upgrade to the latest version, see Prepare to Upgrade.
		Upgrade ER/Studio For ER/Studio upgrade details, see Upgrade ER/Studio.
		Upgrade ER/Studio Diagrams For ER/Studio diagram upgrade details, see Upgrading Your Diagrams.

Important Notes

• If you are upgrading to Repository 5.0, you must also upgrade your version of ER/Studio to 8.x or later. Previous versions of ER/Studio are not compatible with Repository 5.0.

• You can install ER/Studio 8.x and an earlier ER/Studio version on the same workstation.

• If you have an ER/Studio Enterprise installation, which includes the Repository you must also upgrade the Repository to coincide with the build date of ER/Studio.

- Any *.dm1 files you use from the previous version will be copied and converted to 8.x format when you open them for the first time. Previous versions of ER/Studio will not read 8.x files.

- The Diagram Upgrade can be time consuming and memory intensive. The number and size of ER/Studio diagrams managed in the upgraded Repository will dictate how long the upgrade process takes.

- Reference Models are not supported in ER/Studio 7.x and later releases.

- If you decide to uninstall a previous version, you will be given the option of saving your existing license. If you decide to reinstall the previous version, you will have the option of restoring it or using a trial license.

Prepare to Upgrade

1   Ensure you have backed up all your (or earlier version) dm1 files.

2   Make a backup copy of the `license.txt` file in case you need to reinstall your previous version of ER/Studio.

    NOTE: The steps that follow are for ER/Studio Enterprise installations only, which include the Repository.

3   Check in all your diagrams and objects.

    NOTE: Attempting to check in a previous-version file with the same name as an existing file will corrupt your current file.

4   Rename all local copies of Repository diagrams in the active file directory as follows:

    From the ER/Studio Main menu, click **Repository > Options**.
    Make note of the **Active File Directory**.
    Switch to the **Windows Explorer** and rename all the diagrams in the **Active File Directory**.

    NOTE: The steps that follow are application to ER/Studio Repository users only.

5   Make sure no one is logged into the Repository.

6   Make a backup of the current Repository database.

7   Remove the previous version of the Repository application.

    Select **Control Panel > Add Remove Programs > Repository x.x** and then click **Remove**.

8   Restart the Repository host computer.

Upgrade ER/Studio

Follow the instruction for installing ER/Studio, see Installing ER/Studio.

Upgrading Your Diagrams

- *If you have an ER/Studio installation that does not include the Repository*, see Upgrade Your ER/Studio Diagrams.

- *If you have a ER/Studio Enterprise, which includes the Repository*, see Upgrade Your ER/Studio Enterprise Diagrams.

Upgrade Your ER/Studio Diagrams

NOTE: This procedure is for ER/Studio Standard installations only, which do not include the Repository.

Once you have installed the new version of ER/Studio, open each one of your old *.dm1 files in the new version of ER/Studio and then save them.

NOTE: ER/Studio automatically updates diagrams to the latest version when you save them.

Upgrade Your ER/Studio Enterprise Diagrams

NOTE: This procedure is for ER/Studio Enterprise installations only, which include the Repository.

NOTE: You must update your existing diagrams before you check-out any diagrams or do any work with the new version.

NOTE: The Diagram Upgrade can be time consuming and memory intensive. The number and size of ER/Studio diagrams managed in the upgraded Repository will dictate how long the upgrade process takes.

1   Start **ER/Studio**.

2   Update the **Repository Options** to recognize the new Repository as follows:

From the ER/Studio **Main** menu, select **Repository > Repository Options**.
In the **Server Machine** box, type the host name or IP address of the Repository machine and then click **OK**.

3   Log on to the **Repository** using an account with Super User privileges.

By default, the Super User role is assigned to the Admin user. The default Admin user name and password are: **Admin** and **Admin**.

4   Run the **Diagram Data Version Upgrade** utility as follows:

From the ER/Studio **Main** menu, select **Repository > Administration > Diagram Data Version Upgrade**.

This will update your existing diagrams to the latest version.

NOTE: The Diagram Data Version Upgrade does not upgrade Named Releases. The system prompts you to upgrade named releases the first time you open them after upgrading ER/Studio.

NOTE: After the diagrams are updated, each user must perform a clean get of all Repository diagrams they were working on previously.

Uninstalling ER/Studio

If you no longer need them, uninstall the previous version of ER/Studio and ER/Studio Repository.

> **NOTE:** Be sure to backup any custom SQL files or other work files in the `Program Files\Embarcadero\ERStudio` directory because they will be removed during this process.

Uninstall ER/Studio

Uninstall ER/Studio from the Window Add/Remove Programs application. Uninstalling the application does not remove shared and user-specific application data, such as macros, sample diagrams, and user diagrams.

ER/Studio Repository

The ER/Studio Repository is comprised of two components:

- **Repository Server** – The link between ER/Studio and the Repository Database. The Server is responsible for creating the SQL code necessary to query the database to retrieve data, or to insert data into the database. The Repository Server consists of the following components:
  - Repository Communication Server
  - Repository Event and Dispatch Server
  - Repository Database Server
- **Repository Database** – Stores information about the Repository Diagrams and their objects.

This section is comprised of the following topics:

- [Installing ER/Studio Repository](#)
- [Upgrading ER/Studio Repository](#)
- [Uninstalling ER/Studio Repository](#)

Purchasing ER/Studio Repository

NOTE: Trial versions of ER/Studio Enterprise include a 14-day license. You must purchase a license at the end of the trial to continue using the product.

To purchase ER/Studio Enterprise, which includes a license for ER/Studio and the Repository, contact Embarcadero Sales:

Embarcadero Sales Contact Information		
Region	Telephone	E-mail
North America, Latin America and Asia Pacific	415.834.3131 ext. 3	sales@embarcadero.com
Europe, Africa, and the Middle East	+44 (0) 1628 684400	uk.sales@embarcadero.com

Installing ER/Studio Repository

Use the following checklist to ensure ER/Studio is correctly installed and configured.

Done	N/A	Requirements
		Download ER/Studio Repository You can download a 14-day trial version of ER/Studio, which you can license later, from www.embarcadero.com/downloads/download.html
		Review ER/Studio ReadMe For the most current installation and usage information, see the ReadMe at www.embarcadero.com/resources/release_notes/ER/Studio.html.
		Ensure System Compatibility For system requirements, see System Requirements.
		Optimize the Repository Database For information on optimizing Repository performance, see Preparing to Install the Repository
		Plan for Repository Growth For information on estimating the required size of the Repository database and Planning for Repository Database Growth
		Install ER/Studio Repository Optional. If you have purchased or are evaluating ER/Studio Enterprise, which includes the Repository, for ER/Studio Repository installation details, see ER/Studio Repository.
		Connect to the Repository Optional. If you have purchased or are evaluating ER/Studio Enterprise, which includes the Repository, for ER/Studio Repository connection details, see Connect to Repository.
		Run and Test ER/Studio For step-by-step instructions on using ER/Studio, see the *ER/Studio Evaluation Guide* at www.embarcadero.com/products/ER/Studio/erdocs.html.

System Requirements

Review the requirements before starting to install ER/Studio Repository. Adhering to these requirements optimizes ER/Studio's performance.

ER/Studio Repository Requirements		
Repository Database Server		**Repository Server**
Hardware		
Processor	Pentium 4 or higher	Pentium 4 or higher
RAM	1 GB	2 GB
Disk Space	350 MB, with the possibility for expansion	50 MB
Operating System	Any of the following: • Windows Vista • Windows XP • Windows 2000 • Windows 2003 (32-bit mode) • Linux • UNIX	Any of the following: • Windows Vista • Windows XP • Windows 2000 • Windows 2003 (32-bit mode)
Software	Transaction Control Protocol (TCP) up and running. Western European character set (UNICODE and UTF8 are not supported) Supported DBMS (see Database Server Requirements)	TCP up and running
Privileges	DBMS privileges to create objects on the server	DBMS privileges to create objects on the server
	Local administrator privileges	Local administrator privileges

Database Server Requirements

The following table lists the databases the Repository supports. In order for the Repository to communicate with the database, the machine running the Repository must also have the corresponding RDMS client utility installed. The RDMS client utilities must also be installed on the machine running ER/Studio if you want to use ER/Studio to reverse engineer databases originating at any of these platforms.

ER/Studio Repository Database Server Requirements	
Supported Repository DBMS	**Corresponding RDBMS Client Utility Software**
IBM DB2 UDB LUW 7.x *, 8.x, and 9.x Server	Corresponding version of IBM DB2 UDB Client Utilities (7.x, 8.x, or 9.x)
Microsoft SQL Server 2005	SQL Server 2005 Client Access
Microsoft SQL Server 2000	SQL Server 2000 Client Access
Microsoft SQL Server 7.0	Microsoft Data Access Component (MDAC) 2.6 or later
Oracle 8.1.x Server	Oracle 8.1.7.4 Client Utilities
Oracle 9.0.x Server	Oracle 9.0.x Client Utilities
Oracle 9.2.0.x Server	Oracle 9.2.0.x Client Utilities
Oracle 10g Server	Oracle 9.2.0.x or 10g Client Utilities
Sybase ASE 12.x or 15.x	Sybase 11.9 or later Client Utilities

Important Notes

- The hardware requirements are based on an ER/Studio Repository with five to 10 users. For more than 10 users, your hardware should surpass the previously statement hardware requirements to accommodate the increased number of ER/Studio Repository Server transactions necessitated by the increased number of users.

- If you install the ER/Studio Repository Server and the ER/Studio Repository database on the same machine, you should consider augmenting the hardware requirements described.

- You must use ER/Studio 8.0 or later with ER/Studio 5.0.

- If you're upgrading your Repository to version 5.0 and are also using the ER/Studio Enterprise Portal application, you must upgrade the portal to version 1.0.2.

- The RDBMS Client Utility software must be installed before you can install the Repository Server.

- If you are using Microsoft SQL Server AND use case-sensitive nomenclatures, you may get connection error messages from the Repository. To avoid this problem, create an empty database with a non-case-sensitive character set (such as Latin_General_CI_AS), then initialize the database with the Repository Database Maintenance utility.

- For IBM DB2 UDB 7.x server, the machine where your DB2 instance resides must have the C++ compiler for the Stored Procedures to work correctly.

- For all versions of IBM DB2 UDB server, to ensure optimal Repository performance, you must have a user temporary tablespace and the database must be tuned so it does not run out of memory or log space. For more information, see Preparing to Install the Repository.

Planning for Repository Database Growth

Regardless of the platform, you should allocate at least 300 MB of space to the database and implement auto extend so that the database can accommodate increases in the size and number of your models. You should also allocate 50 MB of space to the database's logfile.

The table below describes the initial size of some sample Repository databases before any diagrams are added, and the approximate database sizing for sample small, medium, and large diagrams.

> **NOTE:** All sizes in megabytes (MB) unless otherwise specified.

RDBMS	Initial Size	Small Diagram	Medium Diagram	Large Diagram
Oracle 8	6	0.5	14	64
Microsoft SQL Server 7	7.8	0.7	14.7	40.9
Sybase ASE 12	3.9	0.8	28.9	89.1
IBM DB2 UDB	3.2	0.8	14.6	50

The table below describes the characteristics of small, medium, and large sample diagrams:

Sample Diagrams	Entities	Attributes	Views	Relationships	DM1 File Size (KB)
Small	22	125	2	20	184
Medium	302	2516	32	606	2153
Large	722	10629	0	1542	6967

To ensure the Repository is installed correctly, see the following:

- [Preparing to Install the Repository](#).

- [Install ER/Studio Repository](#).

> **NOTE:** If you are installing Repository 5.x, you must install ER/Studio 8.x or later. Previous versions of ER/Studio are not compatible with Repository 5.x.

Preparing to Install the Repository

For IBM DB2 UDB for LUW

If your Repository will be stored on IBM DB2 UDB for LUW , there are two procedures you must perform to ensure optimal performance of the Repository:

- [Create an IBM DB2 UDB User Temporary Tablespace](#).

- [Tune the IBM DB2 UDB Database](#).

For Microsoft SQL Server

If you are using Microsoft SQL Server and use case-sensitive nomenclatures, you can get connection error messages from Repository. To remedy this, create an empty database with a non-case-sensitive character set (such as Latin_General_CI_AS), then initialize the database with the Repository utility.

Create an IBM DB2 UDB User Temporary Tablespace

The DB2 UDB database must have a user temporary tablespace with at least a 4 KB page size to create the temporary tables.

> **TIP:** You should use a system managed user temporary tablespace because when managed by the system, the user temporary tablespace can grow automatically.

> **TIP:** You can use Embarcadero's DBArtisan to create a system managed user temporary tablespace.

You can create a user temporary tablespace using the tool of your choice, or you can use the following SQL

> **NOTE:** Before running this script, you must modify the path for the container.

```
CREATE USER TEMPORARY TABLESPACE REPOTEMP
    PAGESIZE 4096
    MANAGED BY SYSTEM
    USING('D:\DB2\NODE0000\SQL00002\SQLT0004.0')
// here you specify the physical location of the table space
    EXTENTSIZE 32
    PREFETCHSIZE 16
    BUFFERPOOL IBMDEFAULTBP
    OVERHEAD 24.10
    TRANSFERRATE 0.90
;
```

Tune the IBM DB2 UDB Database

This procedures tunes the DB2 database so that it does not run out of memory and log space.

1   Increase the application heap size and application control heap size to 2048×4KB.

> **TIP:** You can increase the application heap size by right-clicking the database in the **Control Center** and selecting **Configure**. Switch to **Performance** and modify the values for **Application Heap Size** (`applheapsz`) and **Application Control Heap Size** (`appctlheapsz`).

2   Increase the log file space to 10,000×4 KB (or 40 MB). In addition, you should change the number of primary and secondary log files from 3 and 2 to 10 and 10. This gives a total of 400 MB of primary log space, which should be sufficient for medium to large diagrams.

> **TIP:** You can increase primary and secondary log file sizes using the **Logs** tab of the **Database Configuration** page in **Control Center**.

Install ER/Studio Repository

1   Log on to Windows with local administrator privileges.

2   Start the **Repository 5.x** installation program.

3   Walk through the installation wizard.

> **NOTE:** You need an account on the DBMS server Database with administrator privileges to create a new Repository database.

The options are straightforward, but make sure you choose the following:

- **Create new Repository database**

> **NOTE:** For details on select options of the Repository Installer, see <u>Notes</u>.

4   To run and test the ER/Studio Repository, see the **ER/Studio Evaluation Guide** at
    www.embarcadero.com/products/ER/Studio/erdocs.html.

Notes

The installation adds tables, indexes, views, and stored procedures. The installer is for the most part self-explanatory, and you can simply follow the instructions on screen. The following are notes on those parts that require some additional explanation.

- **Database name**: If you are installing more than one Repository Server on a single DBMS server, type a unique database name. Any changes to the database name are also applied to the data and log file names.

- **Automatic Growth for Microsoft SQL Server 7.0 or later**: If you want to allow automatic growth of the file, select the **Allow Growth** check box, enter a Growth Rate. Express the growth rate as either a percentage of the current database size or the number of MB to add to the database when the database is becoming full. Select the maximum size of the file: as either Unlimited or select SIze and type the maximum file size in MB.

- The **New Oracle User** dialog box lets you create a new user and provide temporary tablespace information for the user. The dialog is self-explanatory, except for the following user identification options:

  - **Password:** Indicates that Oracle should identify the user with the password you provide.

  - **Externally:** Indicates that Oracle should verify the database user name against an existing operating system user name.

  - **Globally:** Indicates that Oracle will permit access to the user by obtaining user name and password information from the security domain central authority. This option is only available for Oracle 8.

- **Error Log Viewer**: The Error Log View appears if there is a problem creating your Repository database. If you get an error, review the Repository Database requirements to make sure you meet them. For further assistance with creating your Repository Database, contact Embarcadero Technologies Technical Support.

Once you have purchased ER/Studio Enterprise, you must enter the licensing information when you start ER/Studio for the first time.

Connect to Repository

NOTE: This section applies if you have purchased or are evaluating ER/Studio Enterprise, which includes the Repository or ER/Studio Viewer/

1   Start **ER/Studio**.

2   From the ER/Studio **Main** menu, select **Repository > Repository Options**.

3   In the **Server Machine** box, type the host name or IP address of the Repository machine and then click **OK**.

4   Log on to the Repository as follows:

    Select **Repository > Log In**, type your user name and password and then click **OK**.

    You are now ready to use ER/Studio with the Repository. For details on using the Repository, see the *ER/Studio Evaluation Guide* at www.embarcadero.com/products/ER/Studio/erdocs.html.

Upgrading ER/Studio Repository

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

Upgrade Checklist		
Done	**N/A**	**Requirements**
		Download ER/Studio Upgrade
		To download the most current release, go to www.embarcadero.com/upgrade/upgrade.html
		Review ER/Studio ReadMe
		For the most current installation and usage information, see the ReadMe at www.embarcadero.com/resources/release_notes/ER/Studio.html.
		Prepare to Upgrade
		For what to do before you upgrade to the latest version, see Prepare to Upgrade.
		Upgrade ER/Studio Repository
		For ER/Studio Enterprise installations, which include the Repository. For ER/Studio Repository upgrade details, see Upgrade the Repository.

Important Notes

- If you are upgrading to Repository 5.x, you must also upgrade your version of ER/Studio to 8.x or later. Previous versions of ER/Studio are not compatible with Repository 5.x.

- You can install ER/Studio 8.0 and an earlier ER/Studio version on the same workstation.

- If you have an ER/Studio Enterprise installation, which includes the Repository you must also upgrade the Repository to coincide with the build date of ER/Studio.

- Any *.dm1 files you use from the previous version will be copied and converted to 8.0 format when you open them for the first time. Previous versions of ER/Studio will not read 8.0 and higher files.

- The Diagram Upgrade can be time consuming and memory intensive. The number and size of ER/Studio diagrams managed in the upgraded Repository will dictate how long the upgrade process takes.

- Reference Models are not supported in ER/Studio 7.x and later versions.

- If you decide to uninstall a previous version, you will be given the option of saving your existing license. If you decide to reinstall the previous version, you will have the option of restoring it or using a trial license.

Prepare to Upgrade

1 Ensure you have backed up all your dm1 files.

2 Make a backup copy of the `license.txt` file in case you need to reinstall your previous version of ER/Studio.

> **NOTE:** The steps that follow are for ER/Studio Enterprise installations only, which include the Repository.

3 Check in all your diagrams and objects.

> **NOTE:** Attempting to check in a previous-version file with the same name as an existing file will corrupt your current file.

4   Rename all local copies of Repository diagrams in the active file directory as follows:

Click **Repository > Options**.
Make note of the **Active File Directory**.
Switch to the **Windows Explorer** and rename all the diagrams in the **Active File Directory**.

   NOTE: The steps that follow are application to ER/Studio Repository users only.

5   Make sure no one is logged into the Repository.

6   Make a backup of the current Repository database.

7   Remove the previous version of the Repository application.

Select **Control Panel > Add Remove Programs > Repository x.x** and then click **Remove**.

8   Restart the Repository host computer.

Upgrade the Repository

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

1   Log on to Windows with local administrator privileges.

2   If you haven't already, remove the previous version of the Repository application.

Click **Control Panel > Add Remove Programs > Repository x.x** and then click **Remove**.

Restart the Repository host computer.

3   Start the **Repository** installation program and follow the prompts.

The installation program will start 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**.

   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 folder is not used with Repository versions 4.0
and later.

Uninstalling ER/Studio Repository

From the Windows **Add or Remove Programs Control Panel**, select **Embarcadero Repository X.X**, click **Remove**, and then follow the prompts to remove all ER/Studio Repository components.

> **NOTE:**   This does not remove the Repository database.

ER/Studio Enterprise Portal

Installing the ER/Studio Enterprise Portal

This section covers the installation requirements for the Embarcadero's ER/Studio Enterprise Portal. Before installing the Enterprise Portal ensure your system meets the application's minimum technical requirements.

Technical Requirements

The Enterprise Portal is a 32-bit application that runs in a Microsoft Windows environment. Before installing the Enterprise Portal, verify that your environment meets the hardware and operating system requirements.

Hardware Requirements

The minimum recommended hardware requirements:

Hardware	Minimum Requirement
CPU	Pentium Class 4-CPU or higher
RAM	3 GB minimum
Disk Space	Hard Drive space - 300 MB minimum for installation

Supported Database Platforms

The Reporting Repository is the database the portal uses to store the information it gathers from the ER/Studio Repository. The Solution Repository is the location where the reports from previous queries and the metadata they rely on is stored and maintained.

The supported database platforms for the Reporting and Solution databases are listed below:

- Oracle 9i and 10g

- IBM DB2 UDB 8.x and 9.x Server

    NOTE: Before installing the portal on the DB2 platform, you must first create the reporting and solution databases. Allocate at least 16k for the size of the **page**, **user tablespace, and system temp tablespace**.

- Microsoft SQL Server 2000 & 2005

Operating System Requirements

The Enterprise Portal supports the following operating system requirements:

- Microsoft Windows 2003 Server (32-bit only)

   NOTE: It is recommended that the reporting and solution databases be put on a separate machine from the one running the ER/Studio Repository database. The ideal setup would be if the portal application server is put on the same machine as the ER/Studio Repository server, as long as it has enough RAM.

- An available TCP/IP port. The default is 80. However, if it is already in use by another application, use an unused port between 0 and 65535. For more details, see the [Installation Wizard - Host and Port](#) topic.

Client System Requirements

- Mozilla Firefox 2.0 (or later), Microsoft Internet Explorer 6.0 (or later), Netscape 7.2 (or later), and Safari 1.0.

Installing the Enterprise Portal

The Enterprise Portal wizard-based installer guides you quickly through the installation process. This section describes installation prerequisites and the Installation Wizard. It also covers some basic decisions you must make during installation.

You must have administrative privileges to run the install. To complete the installation, you need to complete each panel of the Installation Wizard.

The Installation Wizard is a multi-panel wizard whose primary function is to install the Enterprise Portal, along with other third-party software that it is dependent upon, such as Pentaho BI Platform and Apache Tomcat.

In this installation you are setting up access to the ER/Studio Repository, and the Reporting and Solution Repositories.

Installation Wizard - Welcome

To start the installation process:

1   Download the zip file from the web page to your local hard drive.

2   Unzip the installation file.

   NOTE: The ER/Studio Enterprise Repository server and the database servers to be used for the reporting and solution repositories must be running before installing the Enterprise Portal.

3   Double-click **setupwin32.exe** and the InstallShield Wizard dialog is displayed. Click **Next** to open the Software License and Support Agreement panel.

   NOTE: There may be a slight delay between when you double-click the file and when the InstallShield wizard opens.

The Welcome panel of the Installation Wizard offers introductory information.

   NOTE: You cannot install the portal on a system where you have installed ER/Studio or where you have previously installed the portal. If the portal installer detects an installation of ER/Studio Enterprise Portal or ER/Studio, you must exit the wizard and uninstall these applications before proceeding.

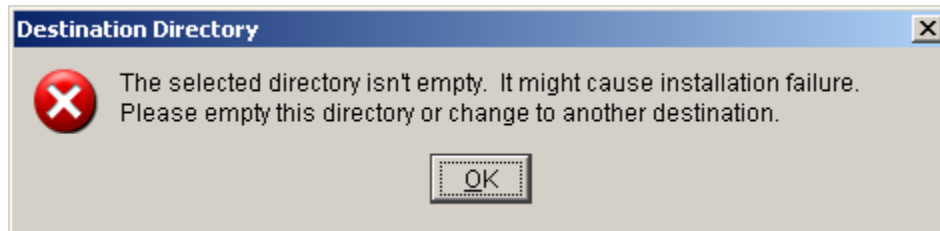**Installation Wizard - Software License and Support Agreement**

The Software License and Support Agreement panel of the Installation Wizard displays the Embarcadero Technologies license agreement. You must accept the agreement to proceed with the installation.

1   Click **I accept the terms of the license agreement** option and then click **Next** to open the Directory Panel.

Installation Wizard - Directory

Choose the destination directory where you want to install the Enterprise Portal.

> **NOTE:**   If the selected directory contains other files, an error dialog appears. The installation cannot continue unless the destination directory is empty. Click **OK** to close the dialog and ensure that the selected directory is empty.

2   Click **Next** to advance to the **Host and Port** panel.

Installation Wizard - Host and Port

The value in the Host field must be the host name, for example DEWKBROW01, the fully qualified network name, for example DEWKBROW01.embarcadero.com, or the IP address of the system you are installing on.

The default port number is 80. If another application such as another browser-based application is already using port 80 on this system, enter an unused port number between 0 and 65535. For example, 0 and 139 are used for the NetBios Session Service in Windows. The ports in use depend on the platform and the services installed on the system. A commonly-used alternative is 8, although using a high number such as 10000 will probably reduce the chance of a conflict.

OPTIONAL. To enable users to log in to the Portal using their domain names and passwords and the Lightweight Directory Access Protocol (LDAP), select Enable LDAP Authentication. Additional fields will appear on the dialog where you must specify the following:

- **LDAP UR**L: The URL of the server running LDAP, such as `ldap://10.40.40.94:389`.

- **Manager DN**: The domain name for the administrative user that is used in order to authenticate users. This is the account that the portal will use to connect to the LDAP server to validate the user's credentials, for example, `CN=User1,OU=Users,OU=ER STUDIO,DC=Torlabdomain,DC=com`.

- **Manager Password**: In order to search for users, uses this password.

- **Search Base DN**: Name of the root node in LDAP from which to search for users, such as `OU=Users,OU=ER STUDIO,DC=Torlabdomain,DC=com`.

- **Search Attribute**: The attribute in LDAP holding the user's login name, such as `sAMAccountName` (for ActiveDirectory).

- **Test User/Password**: A sample user/password to attempt to authenticate against LDAP server, such as `user/password`. The installer uses this information to validate the given LDAP information.

Click **Next** to advance to the **Repository Information** panel.

> If the specified port is invalid or in use by another application, you will receive an error message and need to change the Port setting to an unused port number before proceeding.

Install Wizard - Repository

Specify the target ER/Studio Repository that is the information source for the Reporting Repository. The Reporting Repository is the database the Enterprise Portal uses to store the information it gathers from the ER/Studio Repository.

> **NOTE:** It is recommended that you gather the ER/Studio Repository information before proceeding.

Field	Description
Repository Server	
Version	Select the corresponding version of the ER/Studio Repository, 4.0, 4.5 or 5.0.
Repo Server Name	Specify the name of the machine where the ER/Studio Repository is installed.
Super User Login	Specify the user name for a user with the Super User role in the ER/Studio Repository.
Password	Specify the password for a user with the Super User role in the ER/Studio Repository.
Repository Database	
DBMS Server Type	Select the server type: • Oracle • IBM DB2 Universal Database • Microsoft SQL Server
DBMS Host/Port	Specify the host name of the machine that contains the ER/Studio repository database. This information is supplied by the DB Administrator.
DataBase Name	Enter the name of the ER/Studio Repository database.
User Name	Enter the user name for the ER/Studio Repository database.
Password	Enter the password for the ER/Studio Repository database. **Note**: The password fields are preserved when navigating back and forth during the installation process.

1 After you have entered the required information, click **Connect** to test the JDBC connection.

   The installation cannot continue until this connection has been established and the ER/Studio Repository login and password have been validated.

2 After all tests are passed and the connection is established, the Next button becomes available.

3 Click **Next** to advanced to the Reporting Repository page.

Install Wizard - Reporting Repository

On this page specify the details for the Reporting Repository.

> **NOTE:** There may be naming conflicts between the ER/Studio Repository and the Reporting Repository. If both repositories are installed on the same database server, different schema owners should be used.

1   Enter the information as indicated below.

Field	Description
DBMS Server Type	Select the server type: • Oracle • IBM DB2 Universal Database • Microsoft SQL Server **Note**: The DBMS server type must match that of the ER/Studio Enterprise Repository.
DBMS Service Host: Port	Enter the host name and port number of the DBMS Service. The DB Administrator can provide you with this information.
The information requested depends on the server type selected: **Database Name** (if MSSQL is selected) **SID** (if Oracles is selected) **DBName** (if IBM DB2 is selected)	This information is supplied by the DB Administrator. **Note**: If you select the Server Type **IBM DB2,** an additional field appears where you must enter Tablespace information. With **DB2**, the tablespace must exist in the database and must be usable by this user with the input database name. If you select the Server Type **Oracle** an additional field appears asking for Tablespace information. With **Oracle**, the tablespace must exist in the database and it can be used by the input admin user.
Database Admin User	This information is supplied by the DB Administrator. The Admin User must have the privilege to create reporting database tables, etc.
Database Admin Password	This information is supplied by the DB Administrator.
Same as Admin (This is only available for the MSSQL database.)	If the **Same as Admin** is not checked (default setting), you need to enter a User Name and Password for read/write access to the reporting database and click **Next**. If the **Same as Admin** is checked the User Name/Password fields disappear and the Admin Name and Password are used as User Name and Password.
User Name (This is only available for the MSSQL database.)	Enter the User Name necessary to access the Enterprise Portal's Reporting Repository.
Password (This is only available for the MSSQL database.)	Enter the Password necessary to access the Enterprise Portal's Reporting Repository.

2   Select one of the three options for connecting to the Reporting repository and click **Connect**.

Option	Description
Create new Repository database or initialize an existing, empty database	This assumes that the Reporting Repository database exists and it is empty with no tables. The "Admin" user must have the privilege to create Reporting Repository schema. The Installer will run the SQL to create the Reporting Repository. **Note**: If the server type is MSSQL, the database is created by the installer. If the server type is Oracle or DB2, the Reporting Repository is the Database Administrator's responsibility. The portal installer is now ready to insert the Reporting Repository tables. An Oracle DB, the SID must exist for the installer to insert the tables with the given user as the Owner.
Connect to an existing Repository database	If you choose this option, the Reporting Repository must exist and all Reporting Repository tables must be ready to be accessed by the Enterprise Portal. **Note**: If you are upgrading your Enterprise Portal installation, select this option to retain your connection to the ER/Studio Repository.
Reinitialize current Repository database	The Reporting Repository database exists. The install will drop all reporting tables and create a new reporting schema. The "Admin" must have the privilege to drop the tables and create the Reporting Repository schema. **Caution**: This is a destructive action.

3   After the connection is established the Next button becomes available. Click **Next** to advance to the Solution Repository page.

Installation Wizard - Solution Repository

You must specify the details for the runtime database called the Solution Repository. This is the location where the access control list, report settings, and other runtime information is stored and maintained. Requests made to the platform to have actions executed rely on the action being defined in the Solution Repository.

1   Enter the information as indicated below.

Field	Description
DBMS Server Type	Select the server type: • Oracle • IBM DB2 Universal Database • Microsoft SQL Server **Note**: The DBMS server type must match that of the ER/Studio Enterprise Repository.
DBMS Service Host: Port	Enter the host name and port number of the DBMS Service. The DB Administrator can provide you with this information.
Information requested here depends on the server type selected: **Database Name** (if MSSQL is selected) **SID** (if Oracles is selected) **DBName** (if IBM DB2 is selected)	This information is supplied by the DB Administrator. **Note**: If you select the Server Type IBM DB2, an additional field appears where you must enter Tablespace information. With DB2, the tablespace must exist in the database and must be usable by this user with the input database name. If you select the Server Type Oracle an additional field appears asking for Tablespace information. With Oracle, the tablespace must exist in the database and must be usable by the input admin user.
Database Admin User	This information is supplied by the DB Administrator. The Admin User must have the privilege to create solution database tables, etc.
Database Admin Password	This information is supplied by the DB Administrator.
Same as Admin (This is only available for the MSSQL database.)	If Same as Admin is not selected (default setting), you need to enter a User Name and Password for read/write access to the solution database and click Next. If Same as Admin is selected, the User Name/Password fields disappear and the Admin Name and Password are used as User Name and Password.
User Name (This is only available for the MSSQL database.)	Enter the User Name necessary to access the Enterprise Portal's Solution repository.
Password (This is only available for the MSSQL database.)	Enter the Password necessary to access the Enterprise Portal's Solution repository.

2   Select one of the three options for connecting to the repository and click **Connect**.

Option	Description
Create new Repository database or initialize an existing, empty database	The Solution Repository exists and is empty. The "Admin" user must have the privilege to create Solution Repository schema. The Installer will run the SQL to create the Solution Repository. **Note**: If the server type is MSSQL, the database is created by the installer. If the server type is Oracle or DB2, the Solution Repository is the Database Administrator's responsibility. The portal installer is ready to insert the Solution Repository tables. With Oracle DB, the SID must exist for the installer to insert the tables with the given user as the Owner. **Note**: If you are upgrading your Enterprise Portal installation and select this option you will lose any permissions setup and all obsolete logs will be purged.

Option	Description
Connect to an existing Repository database	The Solution Repository exists and all Solution Repository tables are ready to be accessed by the Enterprise Portal.
	Note: If you are upgrading your Enterprise Portal installation, select this option to retain your connection to the ER/Studio Repository. Permissions will be preserved but some of the solution repository information such as logs, will become obsolete. If you choose this option, at the end of the installation you will be prompted to update the solution repository via the Admin dashboard.
Reinitialize current Repository database	The Solution Repository database exists. The install will drop all solution tables and create a new solution schema. The "Admin" must have the privilege to drop the tables and create the Solution Repository schema.
	Caution: This is a destructive action.

3   Once the connection is established the Next button becomes available. Click **Next** to advanced to the Summary Information page.

Installation Wizard - Summary Information

The Summary Information page summarizes the install information.

1   Review all the summary information. Click **Back** if you want to make any changes; otherwise, click **Install** to start the install process. A panel appears showing the progress of the installation.

2   When the Installation Wizard finishes, the final page appears.

You may see a message indicating that start up of the Apache Tomcat (ER/Studio Enterprise Portal) service is in progress. However this occurs only if the service is still in the process of starting when the installation is complete.

3   Click **Finish**.

> **NOTE:**   If any errors occur during the installation, an Error page opens, which directs you to the log file located in the directory where you were installing the application - for example: `C:\Program Files\Embarcadero\ERStudioEnterprisePortal1.0\log.txt`.

Starting the Enterprise Portal Application

Once the installation is complete, open a supported Web browser (see Client System Requirements) and browse to `http://<host>:<port>/ersportal/`, where <yourhost> and <your port> are the values you specified in the Installation Wizard - Host and Port fields above. The browser will show the portal Login page. Enter a valid login and password for the ER/Studio Repository as specified in the Enterprise Portal installer. If you have chosen to enable LDAP (Lightweight Directory Access Protocol) during the installation, you will need to provide your domain name as part of your username in the format of *domain name\username*. The login must be a user with the Super User role in the ER/Studio Repository to access the Admin functionality in the portal.

Licensing ER/Studio Enterprise Portal

After installing the Enterprise Portal, you must set up the licensing. The Enterprise Portal has a standard license that allows one administrator connection. You can then purchase additional add-ons with 5, 10, 20, or 50 connections. Each add-on has a serial number that must be registered for validation.

You can also set up an Evaluation License.

The Enterprise Portal uses **Concurrent User Connection-**based licensing. The total number of connections at one time are restricted to the number purchased. However there is no restriction on a login name being used more than once.

Additional License Information

Inactive users are automatically timed out 30 minutes after the last user interaction. This is so licenses/connections are freed up even if a user forgets to close the browser or logout.

The Administrator can view the current sessions logged into the portal on the License Admin interface.

The License Admin interface displays the amount of time the users have been inactive.

The user activity is archived so that the Admin can see activity over time and determine if more licences need to be purchased.

Managing Licenses

The elements of the License Administration page are explained below:

1. Displays the license Add-on Status that indicates how many user sessions are allowed.

2. Lists all registered and activated license add-ons.

3. There are two functional links:

    - **Refresh**: updates the licensing module by rereading the license file from the disk.

    - **Register add-on license**: opens the registration page and populates the registration code with a unique number that identifies the machine on which the portal is installed and is generated by the licensing module.

4. Lists the users that are currently using the application. This table also shows the remote host id, remote IP address, the date and time when the user logged in, and how long the user has been inactive.

    NOTE: If the maximum number of connections is reached, the next login attempt will get the following error message: "Too many open sessions, please contact your administrator or Key@embarcadero.com to purchase more licenses."

5. Allows to the administrator to log off (disconnect) users. The current user cannot disconnect himself.

Registering Purchased Licenses

1   Log in to the application as an Administrator.

2   On the Dashboard, click **Admin** to open the Admin Services page, then click **License Admin.**

3   Under Actions, click **Register add-on license** and a **Product Registration Page** appears.

4   Enter the serial number that you received from Key@embarcadero.com and click **Next**.

> **NOTE:**   You must have a serial number for each add-on. For example if you bought 25 licenses you would receive two serial numbers, one for 20 connections and one for five. You must register each serial number in order to have the 25 connections. You must complete all the licensing steps for each serial number to register each add-on.

5   The Registration Code is a number that identifies the machine and is generated by the licensing module.

6   On the **Embarcadero Product Registration Login** page, you can login to your existing Developer Network account or create a new account.

- • If you have an existing account enter your login name or e-mail address, your password, and click **Next**.

- • Click **Create Account** if you need a new user account. Fill in the required information and click **Next**.

7   Review the Product, Serial Number, and Registration Code information on the Product Registration page and then select either to download or e-mail the activation file.

8   If you select **Download**, a File Download dialog opens. Click **Save** and save the file in the appropriate folder WIndows folder: [product install folder]\license, for example `C:\Program Files\ERStudioEnterprisePortal1.0\license`.

9   If you choose to have the activation file e-mailed to you, you will get an auto-generated message from Embarcadero-licensing. Open the e-mail and save the attached *reg*.txt* file in the appropriate WIndows folder: [product install folder]\license, for example `C:\Program Files\ERStudioEnterprisePortal1.0\license`, before starting the product:

10 Close the Product Registration Page.

11 Click **Refresh** on the License Administration page and the add-on license information is updated.

Requesting an Evaluation License

The product is shipped with a base license that allows one administrator connection with no expiration date. An evaluation license is effective for 30 days with unlimited connections. At expiration, those connections are no longer included when calculating the number of available connections. The evaluation license add-on status displays how many days are left in the evaluation period.

To request an Evaluation license contact Key@embarcadero.com

Recommended Next Steps

Once the Enterprise Portal is licensed, the next step is to synchronize the reporting repository. The first time you synchronize the reporting database, it is recommend that you execute it manually via the *Execute Synchronization Process* action on the Synchronization Admin page. When synchronizing with a large repository, use the filtering mechanism to enable you to access diagrams you are most interested in reporting on immediately. The synchronization process can be quite lengthly depending on the size of the ER/Studio Repository. For more information, see in the "Filtering Diagrams" in the *User Guide*.

Once the initial synchronization is complete, you can then schedule a daily synchronization using the default schedule via the *Schedule Synchronization Process* action on the Synchronization Admin page or set up a custom schedule using the Subscription Admin page. For more information please refer to *Executing the Synchronization Process* and *Scheduling the Synchronization Process* in the Administrator's Guide located in the online help.

> **NOTE:** The initial synchronization takes much longer than subsequent synchronizations.

You may also want to set up user permissions where levels of access can be set for groups or individuals. For more information please refer to *Administering Permissions* in the Administrator's Guide located in the online help.

Uninstalling the ER/Studio Enterprise Portal

After you install the Enterprise Portal, you can remove the application by using the uninstall option in the InstallShield Wizard.

1   Select **Start > Programs > ERStudioEnterprisePortal1.0 > Uninstall Enterprise Portal** to start the InstallShield wizard.

2   Click **Next** to advance to the Summary Panel.

3   Review the information in the Summary Information panel and click **Uninstall**.

4   Once the uninstall is completed click **Finish** to close the InstallShield wizard.

5   For a complete uninstall, a system reboot may be required. You will be given the choice to reboot immediately or at a later time. Make your selection and click **Finish**.

The Enterprise Portal uninstaller does not uninstall the database. It is the Database Administrator's responsibility to delete the repository solutions and databases if you decide to permanently delete the Enterprise Portal.

Backing Up License Registration, Diagram Images, and Created Reports

When you uninstall, the uninstaller backs up user-created reports and diagram images. When you reinstall, if you choose to "Connect to existing repository database" on the Reporting Repository wizard page the user-created reports and diagram images are available again.

Also, if the current portal has the license registration, you do not have to re-register for the next installation.

> **CAUTION:** This restoration function only works for the files backed up immediately prior to reinstallation.

Metawizard

The Metawizard is installed in both the standard and enterprise editions of ER/Studio and merely needs to be licensed to be activated.

To purchase ER/Studio Metawizard, contact Embarcadero Sales:

Embarcadero Sales Contact Information		
Region	Telephone	E-mail
North America, Latin America and Asia Pacific	415.834.3131 ext. 3	sales@embarcadero.com
Europe, Africa, and the Middle East	+44 (0) 1628 684400	uk.sales@embarcadero.com

Universal Data Models

The Universal Data Models are .dm1 files that can be simply copied to your storage device. They do not need to be installed or uninstalled, just copied and deleted.

ER/Studio Viewer

This section is comprised of the following topics:

- Installing ER/Studio Viewer

- Upgrading ER/Studio Viewer

- Uninstalling ER/Studio Viewer

Installing ER/Studio Viewer

Use the following checklist to ensure ER/Studio Viewer is correctly installed and configured.

Done	N/A	Requirements
		Download ER/Studio Viewer You can download a 14-day trial version of ER/Studio Viewer, which you can license later, from www.embarcadero.com/downloads/download.html
		Review ER/Studio Viewer ReadMe For the most current installation and usage information, see the ReadMe at www.embarcadero.com/resources/release_notes/ER/Studio.html.
		Ensure System Compatibility For system requirements, see System Requirements.
		Install ER/Studio Viewer For installation details, see Install ER/Studio.
		License ER/Studio Viewer For ER/Studio licensing details, see Licensing ER/Studio.
		Run and Test ER/Studio For step-by-step instructions on using ER/Studio, see the *ER/Studio Evaluation Guide* at www.embarcadero.com/products/ER/Studio/erdocs.html.

System Requirements

Review the requirements before starting to install ER/Studio. Adhering to these requirements optimizes ER/Studio's performance.

ER/Studio Requirements	
Hardware	
Processor	Pentium III, 600 MHz or higher
RAM	1 GB
Disk Space	340 MB
	175 MB in the System TEMP directory for temporary file storage during installation

ER/Studio Requirements	
Operating System	Any of the following: • Windows 2003 Server • Windows XP • Windows 2000 • Windows 98 • Windows NT
Software	If you want to use an Open Data Base Connectivity (ODBC) database as a datasource, you must install the ODBC driver on your client computer. To connect to the DBMS using native connectivity, install the native client libraries available from the DBMS vendor.
Privileges	Local Administrator Privileges (required for installation only)

Install ER/Studio Viewer

1 Log on to Windows with local administrator privileges.

2 Double-click **setup.exe** inside the ER/Studio installation folder.

3 Walk through the installation wizard.

   The options are straightforward, but make sure you choose the following:

• **Do not select a Repository Server**.
   If you have a Repository Server, we'll configure and connect to the Repository in <u>Connect to Repository</u>.

   NOTE: Before the 14-day trial period expires, purchase ER/Studio Viewer. For details, see <u>Purchasing ER/Studio Viewer</u>

Purchasing ER/Studio Viewer

NOTE: Trial versions of ER/Studio Viewer include a 14-day license. You must purchase a license at the end of the trial to continue using the product.

To purchase ER/Studio Viewer, contact Embarcadero Sales:

Embarcadero Sales Contact Information		
Region	**Telephone**	**E-mail**
North America, Latin America and Asia Pacific	415.834.3131 ext. 3	<u>sales@embarcadero.com</u>
Europe, Africa, and the Middle East	+44 (0) 1628 684400	`uk.sales@embarcadero.com`

Once you have purchased ER/Studio and optionally installed the License Server, you must enter the licensing information in **Help > About ER/Studio > License**.

Upgrading ER/Studio Viewer

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

Upgrade Checklist		
Done	**N/A**	**Requirements**
		Download ER/Studio Viewer Upgrade To download the most current release, go to www.embarcadero.com/upgrade/upgrade.html
		Review ER/Studio Viewer ReadMe For the most current installation and usage information, see the ReadMe at www.embarcadero.com/resources/release_notes/ER/Studio.html.
		Prepare to Upgrade For what to do before you upgrade to the latest version, see Prepare to Upgrade.
		Upgrade ER/Studio For ER/Studio Viewer upgrade details, see Upgrade ER/Studio.

Upgrade ER/Studio Viewer

1   Log on to Windows with local administrator privileges.

2   Start the **ER/Studio Viewer Upgrade** installation program.

3   Walk through the installation wizard.

    The options are straightforward, but make sure you choose the following:

- If you have a 7.1.x or later license, specify **Yes** when asked if you have a valid license, otherwise specify that you **do not have a valid license** and follow the installation instructions in Installing ER/Studio.

- **Do not select a Repository Server**.
  If you have a Repository Server, to configure and connect to the Repository, see Connect to Repository.

Uninstalling ER/Studio Viewer

If you no longer need it, uninstall the previous version of ER/Studio Viewer.

    From the ER/Studio program group, select **Uninstall ERStudio Viewer** and then follow the prompts to uninstall all ER/Studio Viewer components.