IDERA | Technology Note

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

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With the release of ER/Studio 2016, the Repository is combined into a single installer and database implementation with Team Server. This document guides you through the upgrade of Repository versions 6.5 through 7.0 to Team Server 2016+ where only the Repository is being used.

PREREQUISITES:

- 64-bit operating system – Team Server/Repository 2016 and later is only supported on 64-bit machines
- Download the Team Server 2016+ installer
- *Highly recommended* that you back up the database
- Repository must be on version 6.5, 6.6, 6.7, or 7.0 – if you are on an earlier version, please refer to docs.embarcadero.com for upgrade instructions to version 7.0
- Database server where the current Repository database resides
- Database user who owns the Repository objects
- Database user currently must have db_owner (SQL Server), and DBA role (ORACLE)
- You will need the Repository Admin password
- ER/Studio Data Architect 2016+ must be installed on a separate client machine

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

STEPS:

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

2) Run the Team Server 2016+ installer.

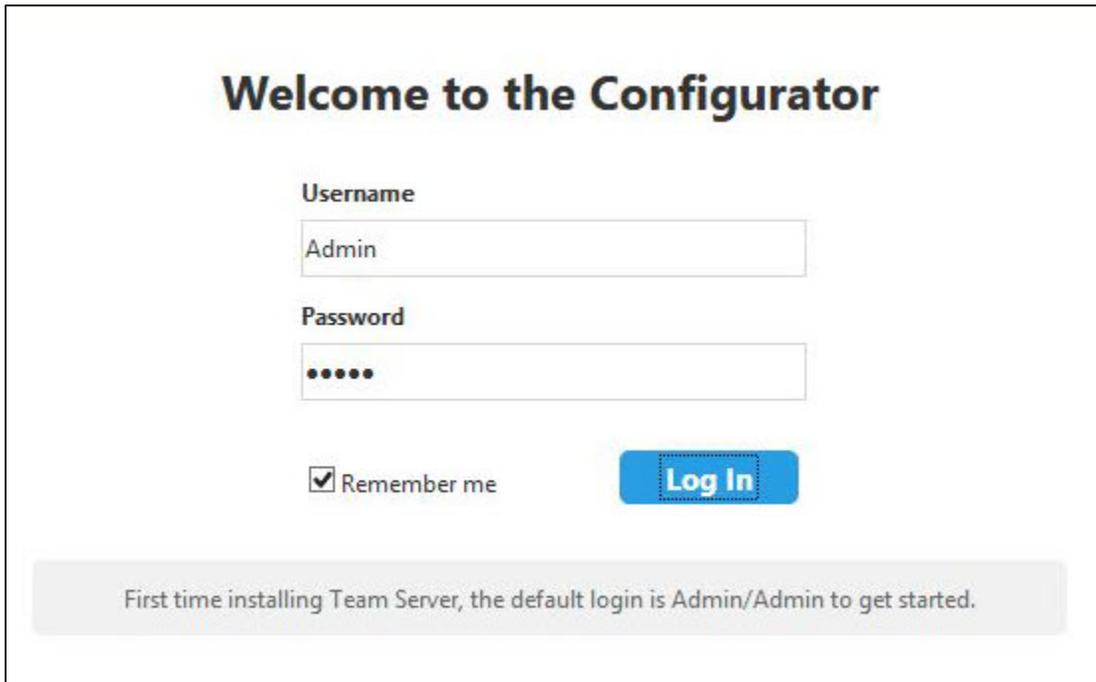3) If you want to change the installation location, click **Options**.

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

6) Click **Launch** to load the Team Server 2016+ Configurator. This step launches both the Web browser and Team Server Configurator, which may take a few minutes

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7) Once the Configurator opens, log in using Admin/Admin. Please note the capital "A".

8) On the Installation Options page, choose your installation options, and then click **Next**.

Note that the options change based on your selections. In the following example, we selected **Enterprise Team Edition** and **Upgrade from previous version**.

9) On the Repository Database Setup page, select or type:
- database platform
- host name and port where your current Repository resides
- (*SQL Server only*) alias
  Note: If SQL Server is the platform and a non-default port or named instance is used, an alias should be created with the SQL Server client utilities and specified in the setup page. Failure to create an alias will not prevent the completion of the Configurator but could cause Repository connection errors from Data Architect.
- database authentication credentials
- name of the Repository database
- (*Oracle only*) Oracle SID

10) *Optional*. Click **Test** to check your database connection and to create or update any tables necessary.
11) Click **Next.**

12) *Optional*. On the Migrate Team Server page, make the appropriate entries for your database *only if you are upgrading your Team Server from version 4.0.9 or earlier*.

13) Click **Next.**

14) *Optional*. On the Migrate Team Server page, make the appropriate entries for your database *only if you are upgrading from Portal 2.0.1 or earlier*.

15) Click **Next.**

16) On the Team Server Admin Account page, type the credentials for the Repository administrator account.

17) *Optional*. Click **Test** to check your Team Server credentials.
18) Click **Next.**
19) On the Windows Service Account page, type the credentials for the Windows user account you want to use within Team Server.

20) *Optional*. Click **Test** to check your Windows account credentials.
21) Click **Next.**

22) *Optional*. On the HTTPS Setup page, make the appropriate selections to enable secure communication using either HTTPS or a self-signed certificate.

23) Click **Next**.

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

25) Click **Next**.

26) *Optional*. On the Email Notification page, make the appropriate entries to enable users to send certain data from Team Server using SMTP.

27) *Optional*. Click **Test** to check your email server connection.
28) Click **Next**. The Configuration Execution page appears.

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

30) Once initialization is complete, click **Finish**.
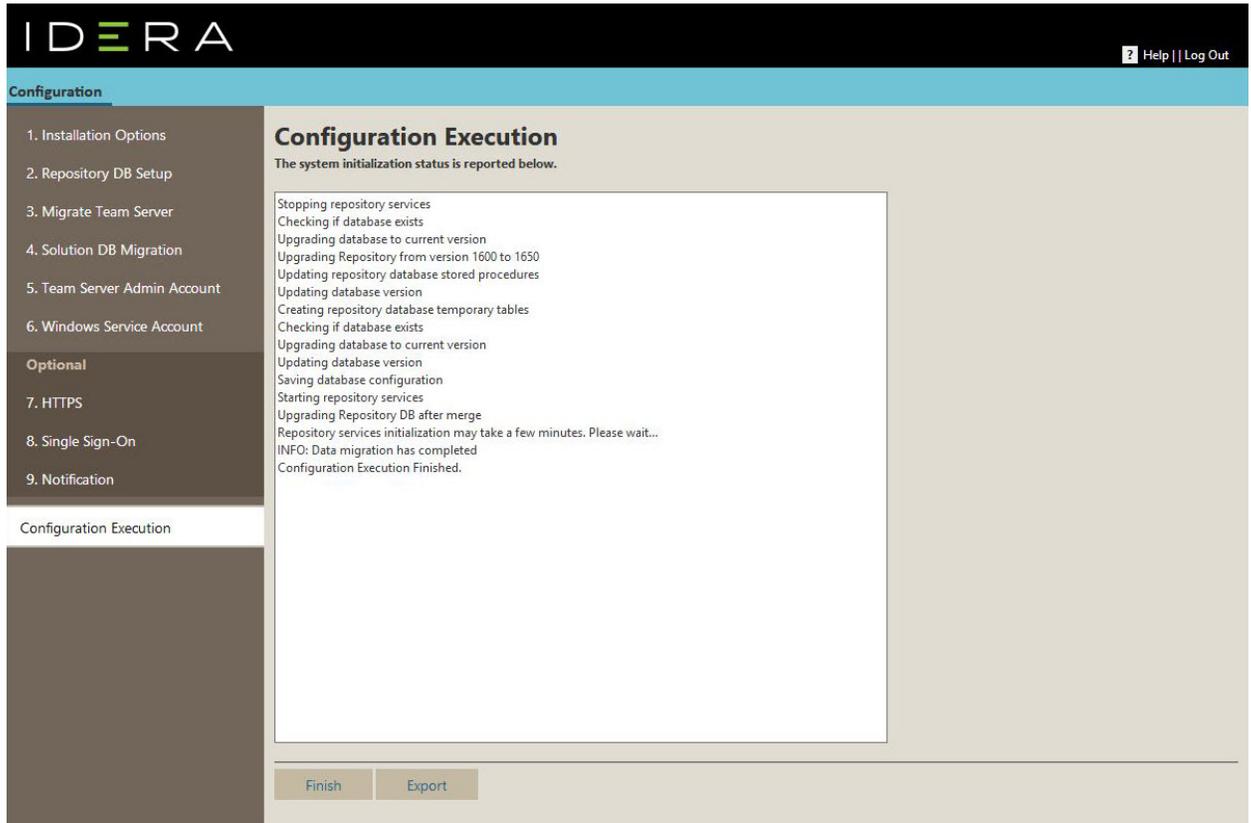
31) Launch ER/Studio Data Architect 16.5 (2016+) from the client machine. Log into the Repository with the Admin user credentials.

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

Note: Once you do upgrade your diagrams, you cannot open any of the diagrams using a previous version of ER/Studio Data Architect.
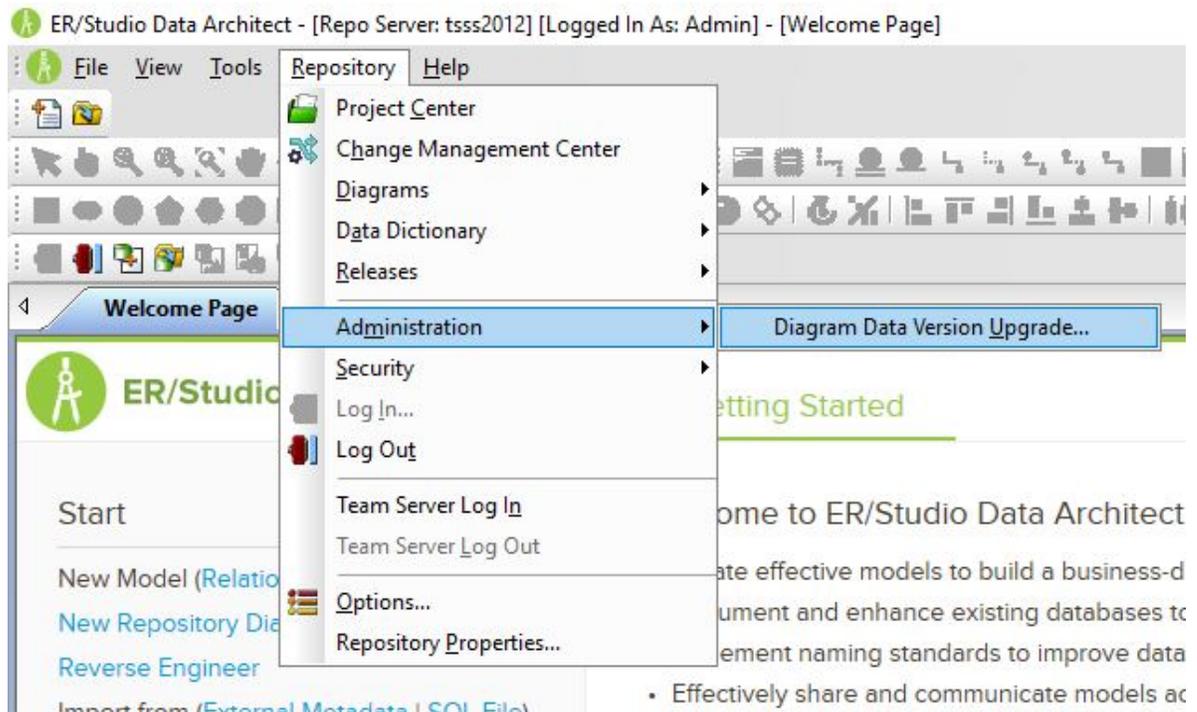
33) On the confirmation message window, review the information including the warning, and then click **OK**.
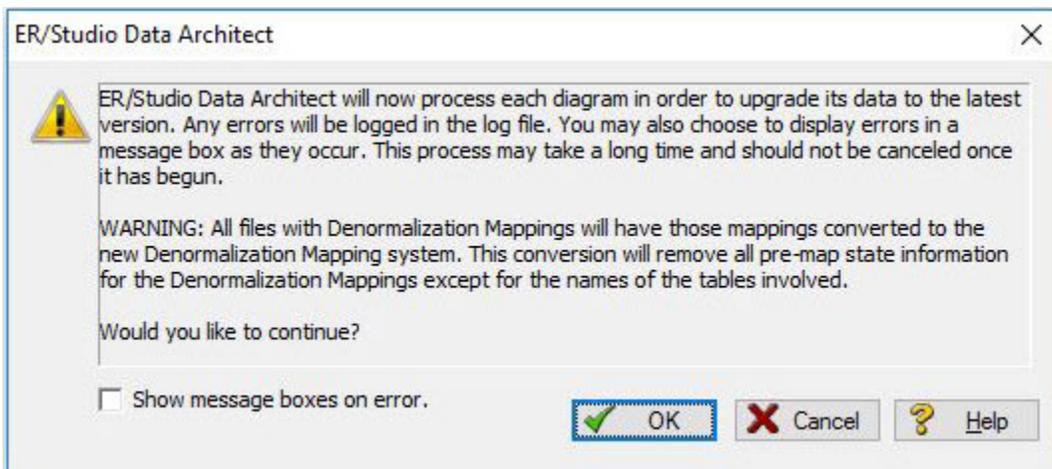
34) On the Select Log File Location window, choose a location to place the upgrade log in case issues occur during the upgrade.

35) Depending on the size and number of models in the Repository, the upgrade could take a few minutes.

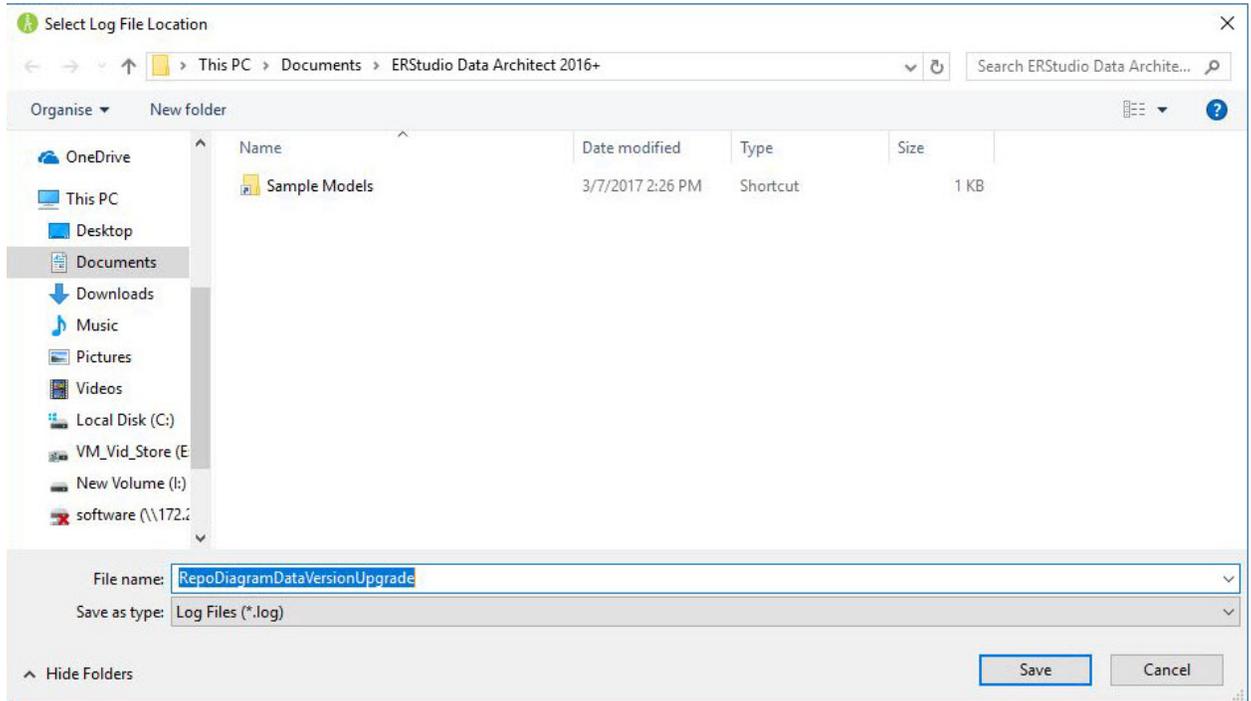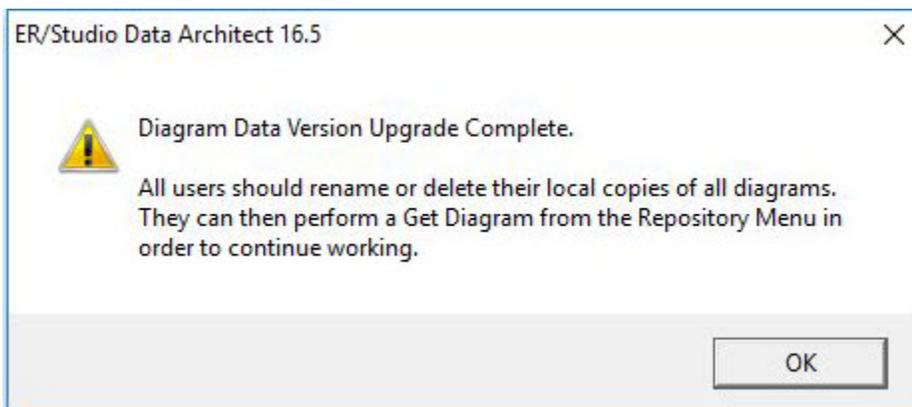Once the diagram upgrade is complete, users can log in and begin using Team Server 2016+ Repository. Note that after upgrading, diagrams must be published once in Team Server before they can be viewed by users in Team Server.

36) Launch a Web browser and connect to Team Server, logging in with the Admin user credentials.
37) Go to **My Settings > Admin**, and then click **ER/Studio Publications**.
38) Identify the diagrams that you want to publish, and then ensure that the Action for those diagrams is set to **Publish**.
39) Select these diagrams using the associated check boxes, and then click **Publish Selected.**
    Note: For those environments having more than 50 models, it is recommended that a single model be published first. After publishing that one model, you can select multiple models for publication.