IDERA

IDERA Team Server / Repository

Installation and Upgrade Guide

Version 18.1.x
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Contents

Installation and upgrade notes

These notes provide important information about product requirements for Team Server and Repository installation and upgrade. You should read this document in its entirety before any install, upgrade, or uninstall procedure.

System requirements

Before installing or upgrading 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.

> 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.

> If upgrading an existing installation on the same application server, do not uninstall the previous version. The new version will back up the data from the previous version and restore it as part of the new Team Server/Repository installation procedure. This procedure allows published diagrams and workspaces to remain published after upgrade.

Minimum requirements

Hardware	Database Server	Application Server
Processor	As required by your database platform.	4 x 3.0 Ghz (8 x 3.0 Ghz recommended)
RAM		6 GB (8 GB recommended)
Disk Space		5 GB + 50 MB per Team Server diagram + additional database growth (if the database is on the same server)
DVD Reader		Depending on install medium.
Operating System	As supported by your database platform.	Any of the following (64-bit): • Windows Server 2008 • Windows Server 2008 R2 • Windows Server 2012 • Windows Server 2012 R2 • Windows Server 2016

Hardware	Database Server	Application Server
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	• DBMS privileges to create objects on the server • Local administrator privileges	

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)

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 11.0

- Microsoft Edge

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 the **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 for SQL Server 2014 (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 for SQL Server 2012 SP2 (https://support.microsoft.com/en-us/kb/3052468).

Installation and upgrade checklist

> Before running the installer for an upgrade, stop the **IderaTeamServer** service from the Services control panel.

- 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

> If upgrading an existing installation on the same application server, do not uninstall the previous version. The new version will back up the data from the previous version and restore it as part of the new Team Server/Repository installation procedure. This procedure allows published diagrams and workspaces to remain published after upgrade.

See also

- Install or upgrade Team Server/Repository

- Database server requirements

Database server requirements

Supported database platforms

> IBM DB2 is no longer supported as a Team Server/Repository platform.

Team Server and Repository databases may run on any of the following database platforms:

- Microsoft SQL Server 2012 to 2017.
- Oracle 11g, 12c, and 12c R2.

> The ER/Studio Team Server/Repository supports running from Amazon EC2 or Azure IaaS environments.

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

Oracle characteristics

- Install the 64-bit version of Oracle Client Utilities.
- Configure your server in one of the following Oracle configuration tools: Net Easy Config or Net Configuration Assistant.
- Create a connection alias.
- If you are upgrading using Oracle, 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 characteristics

- 64-bit client libraries are already installed on Windows machines.

- Ensure that the server and database 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.

- The database and server collation must be set to **SQL_Latin1_General_CP1_CI_AS**.

- 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 needs to be **dbo**. If you were using a different schema, please more the tables to **dbo** schema previous to install or upgrade.

> After configuring a new installation against a SQL Server 2014 or later database, it is recommended that you go into the properties of the new database and change the compatibility settings to 2012 or 2008. This step helps prevent significant performance degradation in many environments. For more information about this feature, see an IDERA forum post about this subject.

About Team Server and Repository upgrade

With the release of ER/Studio 16.0, the Repository is combined into a single installer and database implementation with Team Server.

Prerequisites

> Before running the installer for an upgrade, stop the **IderaTeamServer** service from the Services control panel.

- 64-bit OS. Team Server/Repository 16.0 and later are only supported on 64-bit machines.
- Download the latest Team Server 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 the ER/Studio documentation website for [upgrade instructions to version 18.x.x](#)
- 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)
- Repository Admin password
- ER/Studio Data Architect 18.x (corresponding to the version you to which you want to upgrade) must be installed on a separate client machine

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:
   a. Choose **Repository > Options** and make note of the Active File Directory.
   b. 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

Ensure no one is logged into the Repository, and then back up the current Repository database.

> 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

1. 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.

2. Depending on your installation location, you can find the license file in the program directory. For example: C:\Embarcadero\ERStudio Portal 2.0\license

   o If you have already used the uninstaller, you may also have a license backup in the following Windows locations:

      - 32-bit: C:\Program Files (x86)\Common Files\ersEnterprisePortalBackup\license

      - 64-bit: C:\Program Files\Common Files\ersEnterprisePortalBackup\license

3. 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 then click **Refresh** for Team Server to recognize your licenses.

> 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.

4. Uninstall the previous version.

Upgrade scenarios

First of all, prepare the upgrade for any scenario.

Upgrades from Team Server 16.x which includes Repository 7.0.1

1. DO NOT UNINSTALL the previous version of Team Server. The new version will back up the data from the previous version and restore it as part of the new Team Server/Repository installation procedure. This procedure allows published diagrams and workspaces to remain published after upgrade

2. Install Team Server 18.x.

Upgrades from Repository 7.0.X (Standalone)

1. Uninstall Repository 7.0.X.

2. Install Team Server 18.x.

3. On the ER/Studio Repository Database Setup page, select **Specify location for Team Server database...**, this will expand the information fields.

Upgrade from Repository prior to 6.5/6.6/6.7 (Standalone) and TS 4.0 or before

You can perform an upgrade to the latest version of Repository directly from versions 6.5 and later. There is no need for incremental upgrades before attempting to upgrade to Repository.

1.   Install the latest version of Team Server and Repository.

2.   On the ER/Studio Repository Database 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.

Upgrade configuration

If you are upgrading from Team Server 16.x or later, you already have one unique combined database, so you can 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.

1.   Check the ER/Studio Repository Database Setup page 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.

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 copy to the Repository database.

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 or Upgrade Team Server and Repository

- Uninstalling Team Server

Install or upgrade Team Server/Repository

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

	Repository 16.0 and later installations are now part of Team Server 16.0 and later (as appropriate) installations.

To install or upgrade Team Server and Repository, run the new installer and follow the steps. You need a user with administrative privileges to run the installation wizard.
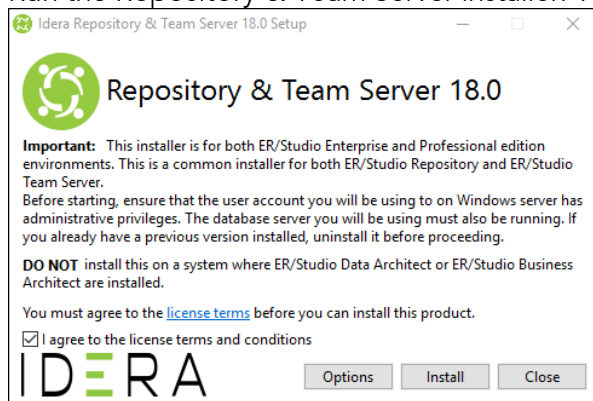
	Before running the installer for an upgrade, stop the **IderaTeamServer** service from the Services control panel.

	You may have to create a blank database before starting the installation, please check the [Installation and upgrade checklist](#).

1. Run the Repository & Team Server installer. The images are from version 18.0.

	If you need to change the default port or install location, click **Options**, and then make the appropriate changes before clicking **Install**.

2. Agree to the license terms, and then click **Install**.

3. After a successful setup, restart your machine to complete the installation process.

4. Launch the Team Server Configurator. This step launches both the Web browser and Team Server Configurator, which may take a few minutes.

5. Once the Configurator opens, log in using Admin/Admin (case-sensitive).
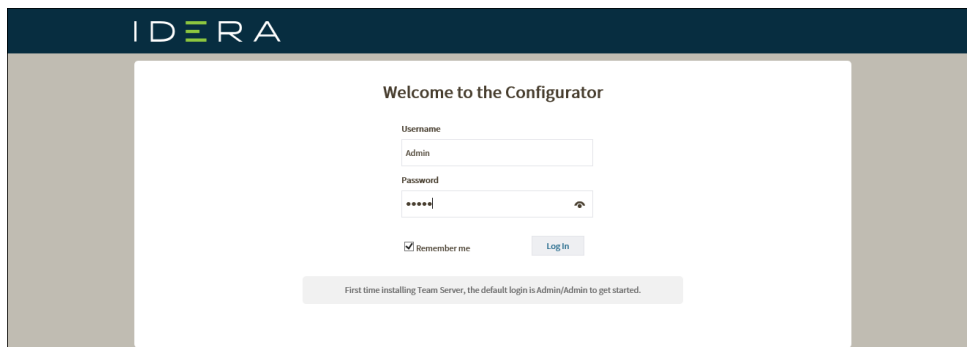
6. On the Installation Options page, choose your installation options.

Note that the options change based on your selections.

7. Complete the license information. Note that the server that you are installing on must have internet access to request a trial or register a serial number.

> If the machine does not have internet access, first connect with a machine that does have internet connectivity using your serial number (provided in the license email), the URL and registration code displayed in the **Unable to connect** section at the bottom of the Installation Options page.

a. In the **IDERA Login** or **Email Address** field, enter your existing account name. If you want to use the included trial license or want to request a custom trial license, select the option and complete the appropriate fields.

b. In the **Password** field, enter the password associated with your IDERA login.

c. If you already have a license, select that option and specify the serial number to register in the **Serial Number** field.

> If you have a license file, please select the appropriate option and use the **Import from File** button to register.

8. Click **Next**. The ER/Studio Repository Database Setup page appears.

9. In the Repository Database Setup page, select the DBMS platform on which you want to install, and then specify the information to connect to your Repository database.

> After configuring a new installation against a SQL Server 2014 or later database, it is recommended that you go into the properties of the new database and change the compatibility settings to 2012 or 2008. This step helps prevent significant performance degradation in many environments.

> If you have installed Team Server, CONNECT, or Portal in the past, please see Upgrading from Team Server 4.0.x, CONNECT 3.0.x or ER/Studio Portal 2.0.x

a. In the **Host Name** and **Port** fields, type the hostname of the machine that contains the Repository database. The port number appears by default.

   o If you selected SQL Server:

      ▪ If the database server is a named instance, specify the **Host Name** in the HostName\NamedInstanceName format. For example, DEWOW01\DBServer.

      ▪ Optionally, for Microsoft SQL Server 2012-2017, 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 the SSL enablement requirements.

      ▪ It is possible to have the installer create your MSSQL database for you. If you enter the name of a non-existent database, the installer pops up a confirmation window, and then creates the database.

b. (*SQL Server only*) If SQL Server is the selected platform and a non-default port or named instance is used, an alias should be created with the SQL Server client utilities and specified here in the **Alias** field. Failure to create an alias does not prevent the completion of the Configurator but could cause Repository connection errors from ER/Studio Data Architect.

c. In the **Username** and **Password** fields, enter the username and password used to access the Repository database.

d. In the **Database** field, enter the name of the database that you have previously created to be your Repository database.

e. (*Oracle only*) In 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.

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

11. *If you are installing for the first time,* skip ahead to Step 17. *If you are upgrading from a previous version of ER/Studio,* continue with the next step.

> Please note that the configurator displays the Migration and Team Server Admin Account tabs only if you are upgrading.

12. Click **Next**. The Migrate Team Server page appears.

> Do not compete the Migrate Team Server page unless you are upgrading from Team Server 4.0.9 or earlier.

If you are upgrading from Team Server 4.0.9 or earlier, specify the detail to connect to its database. The new installer copies the Team Server database tables into the Repository database, then both Repository and Team Server Web will share the same database.

13. Complete the fields with the Team Server database information with the same structure you introduced previously for repository database.

14. Click **Next**. The Team Server Administrator Account page appears.

15. In the Team Server Administrator Account page, enter the administrator Team Server login credentials. This account is typically the Admin user and password used when logging into Repository from ER/Studio Data Architect.

16. *Optional*. Click **Test** to check your Team Server credentials.

17. Click **Next**. The Windows Service Account page appears.

18. In the Windows Service Accounts page, type the credentials for the Windows user account you want to use within Team Server. This page works best as a service account that is not required to have regular password changes.

    Administrators need to ensure that the account used for the Windows Service Account has proper permissions on the application server. You can verify these settings by going to **Administrative Tools > Local Security Policy > Local Policies > User Rights Assignment**. The user account should have local administrative privileges, and specifically the following privileges are required:

    o **Act as part of the operating system**

    o **Create a token object**

    o **Log on as a batch job**

    o **Replace a process-level token**

    Note that this account *must not have* the **Deny log on locally** permission.

    a. 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".

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b. In the **Password** field, enter the password of the Windows user login credentials to be used by Team Server to interact with repository (case-sensitive):

- Leave it 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 is created.

19. *Optional*. Click **Test** to check your Windows account credentials.

20. Click **Next** to continue. The optional HTTPS Setup page appears.

21. In the optional HTTPS Setup page, you can choose to enable HTTPS (SSL). It is recommended that you enable secure communications as this will keep your password transmissions secure.

a. Optionally, select **Enable Secure Communication (HTTPS)** to enable it.

b. If you do not have SSL set up on your server, you can select the **Self-Signed** option to walk you through the short wizard that creates a Keystore file allowing you to use encryption. Fill out the fields of the Self-Signed wizard, and then click **Generate**. The Keystore file is created in the location of your choosing.

c. If you already have SSL set up on your server, directly enter the information required.

22. Click **Next**. The optional Single Sign-On page appears.

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23. In the optional Single Sign-On page, 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 any time later:

    a. In the **LDAP URL** field, enter the URL of the server running LDAP.

    b. 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

> In this example, **administrator** is 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.

    c. In the **Manager Password** field, enter the password for the administrative user.

    d. In the **Search Base** field, enter the name of the root node in LDAP from which to search for users. For example, CN=Users,DC=mydomain,DC=com.

    e. In the **Search Attribute** field, enter the attribute in LDAP holding the user's login name. For example, sAMAccountName (for ActiveDirectory).

    f. In the **Test User / Test Password** fields, 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.

    g. Click **Test**. If it is successful, this enables the **Next** button.

24. Click **Next**. The optional Enable Email notification page appears.
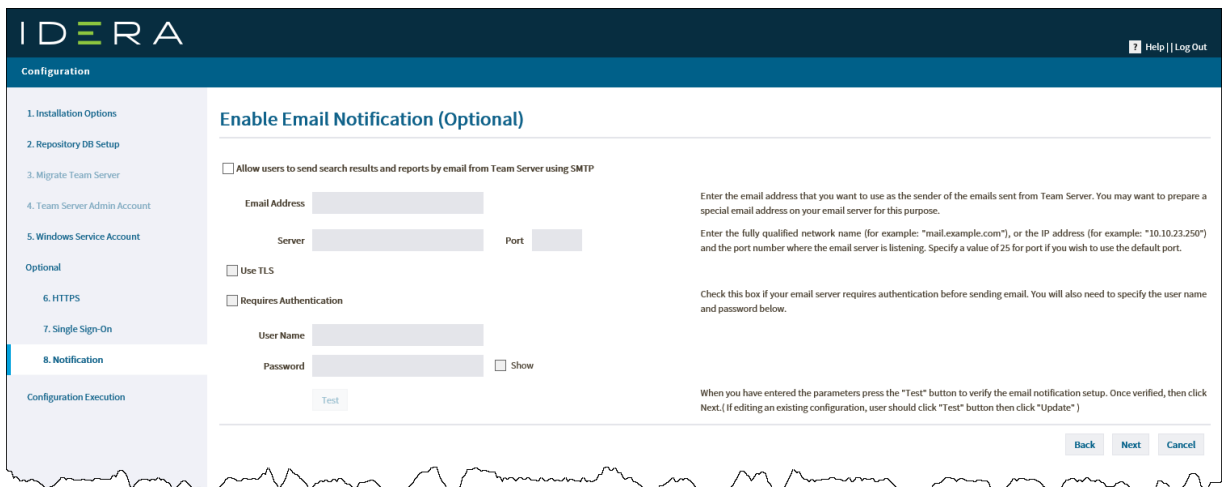
25. In the optional Enable Email Notification page, check **Allow users to send search results and reports by email from Team Server using SMTP**. You can enable notifications anytime later:

    I. 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.


II. In the **Server** and **Port** fields, 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.

III. *Optional*. 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 STMP server.

26. *Optional*. Click **Test** to check your email server connection.

27. Click **Next**. The Configuration Execution page appears.
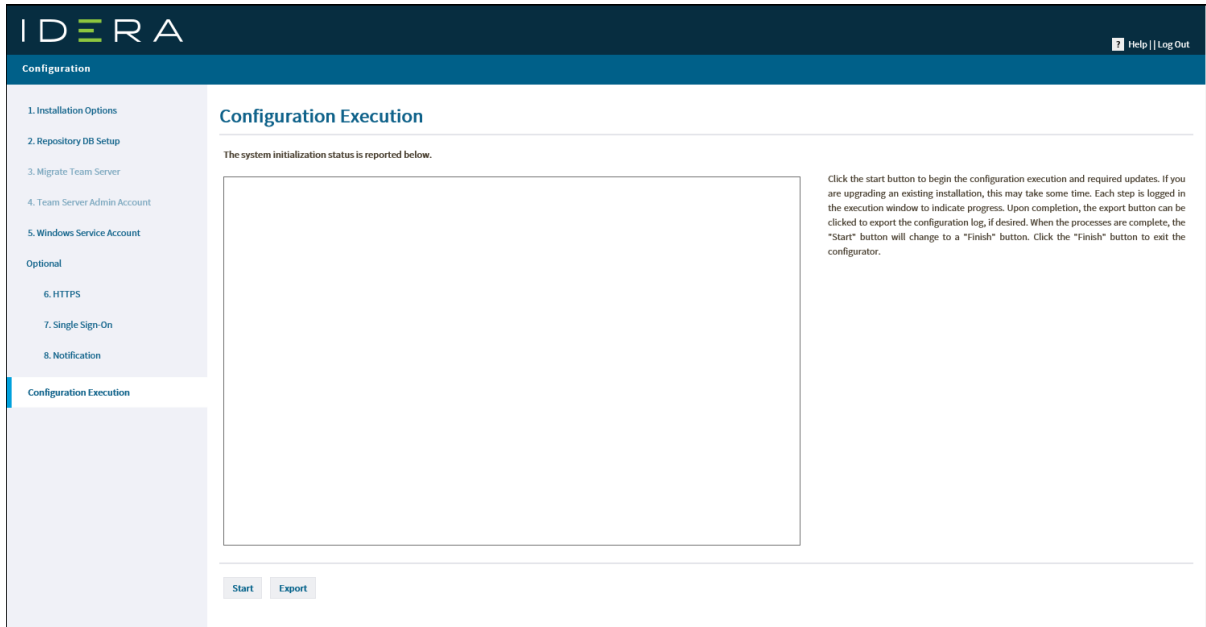
28. Click **Start** to execute initialization/migration. The following image is an example of a new installation configuration execution.
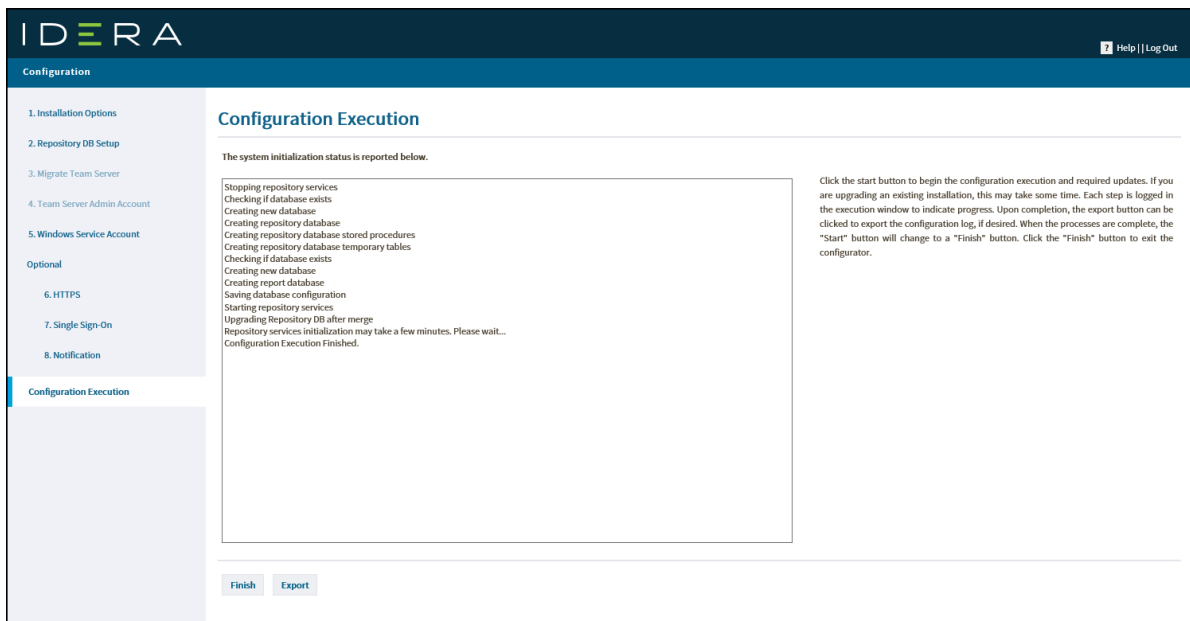
The following image is an example of an upgrade configuration execution.
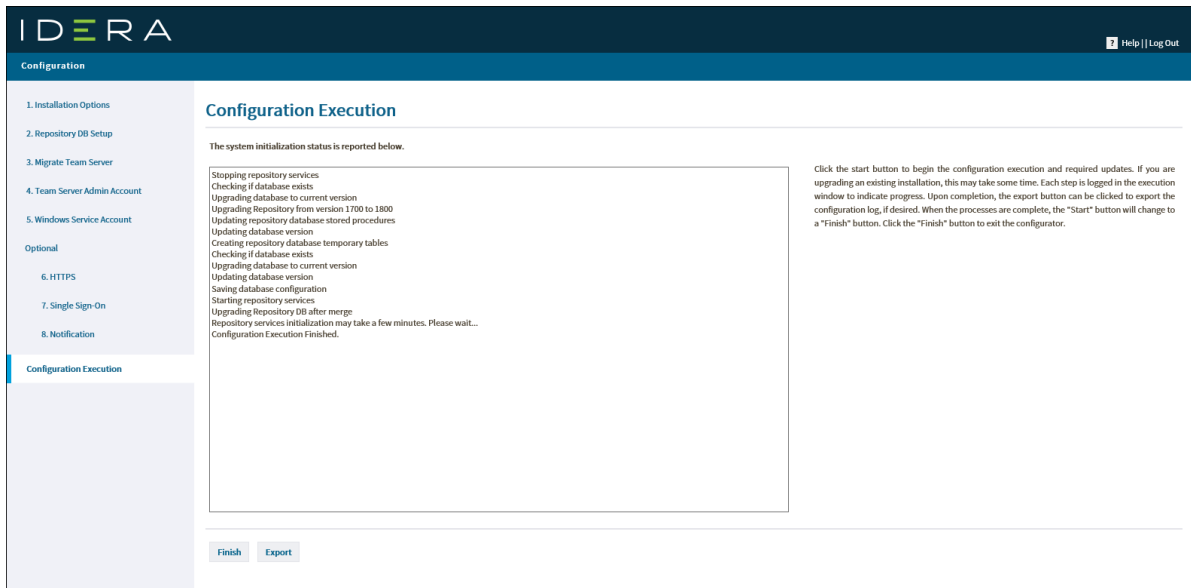
29. Click **Finish**. Team Server and Repository are now installed/configured on your system.

> ⚠️ *If you are upgrading from ER/Studio Team Server/Repository 16.1 or earlier*, you must [run the Diagram Data Version Upgrade in ER/Studio Data Architect](#) to upgrade your diagrams to the latest release.

Modify configuration

You can modify the configuration at any moment by going to the Configure Team Server shortcut in Windows at **Start > All Programs > Team Server x.x > Configure Team Server**.

See also

- [Tomcat Configuration Application](#)

# Upgrading diagrams in Data Architect (*16.1 or earlier upgrades only*)

If you are upgrading to the latest version of ER/Studio Enterprise Team Edition from Team Server/Repository 16.1 or earlier, you must run the Diagram Data Version Upgrade to upgrade your existing diagrams. This process assumes that you already upgraded Data Architect to the latest version.
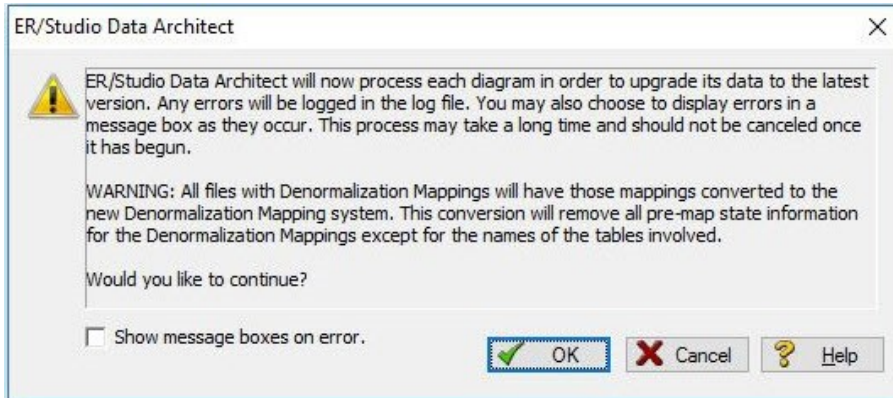
To upgrade diagrams:

1. After upgrading Team Server/Repository to the latest version, launch ER/Studio Data Architect from the client machine and log into the Repository with the Admin user credentials.

2. Go to **Repository > Administration > Diagram Data Version Upgrade** to upgrade your diagrams to the latest version.
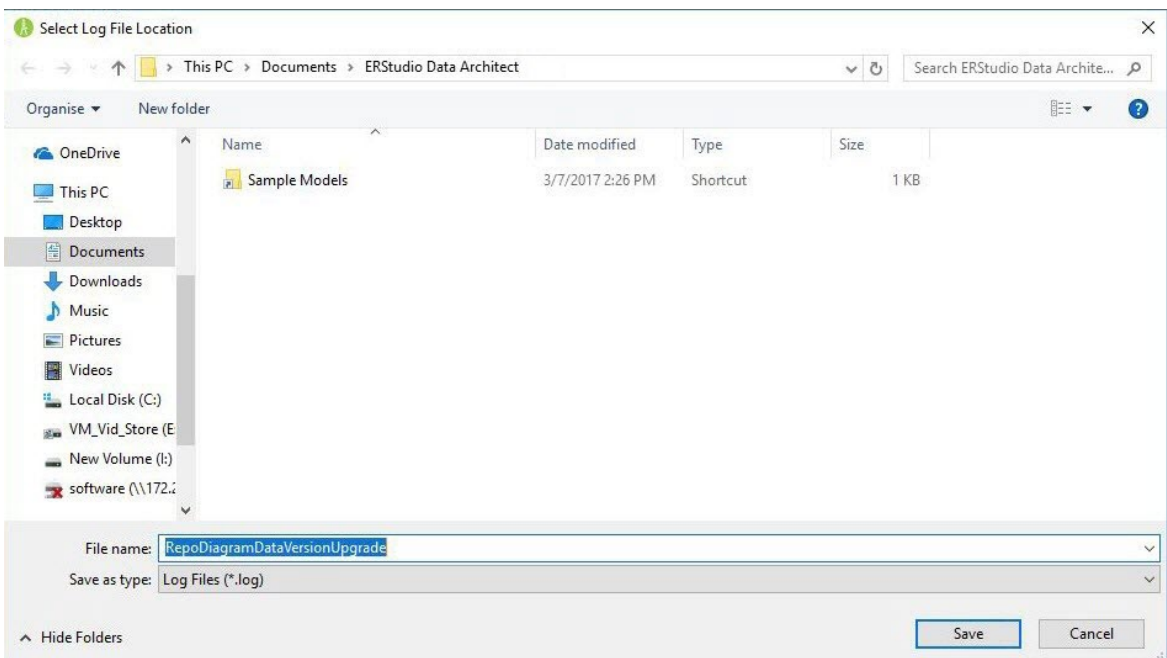
> Once you upgrade your diagrams, you cannot open any of the diagrams using a previous version of ER/Studio Data Architect.
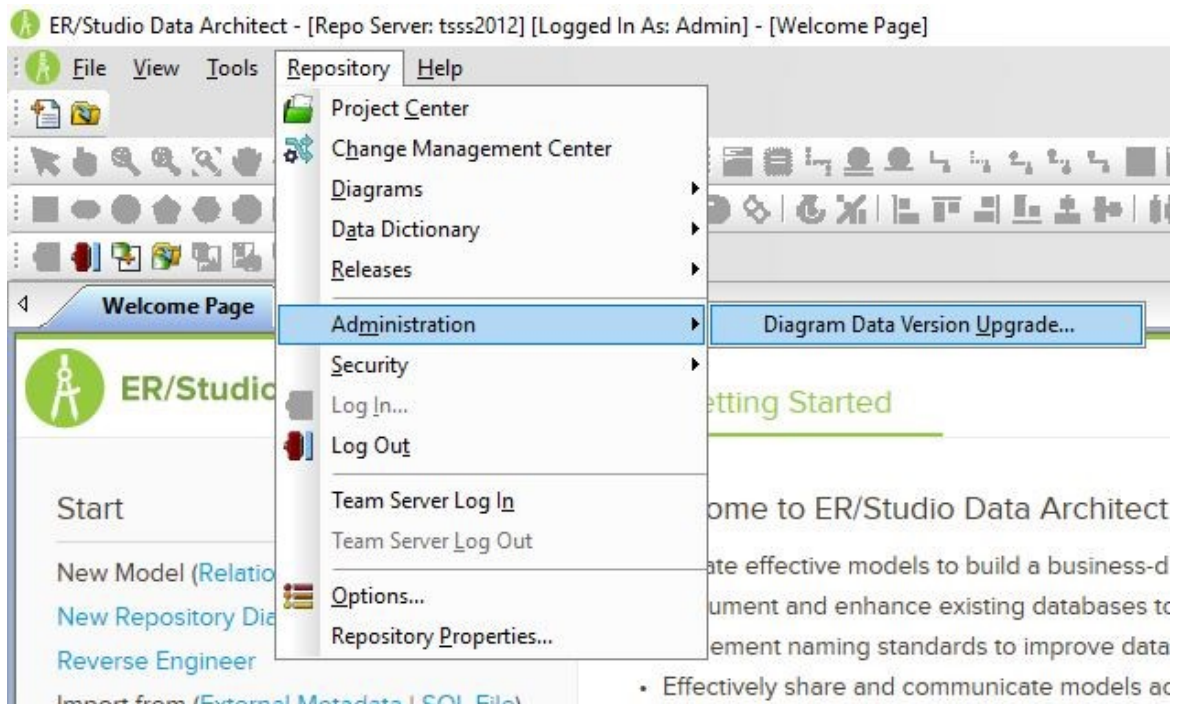
3. On the confirmation message window, review the information including the warning, and then click **OK**.

4. On the Select Log File Location window, choose a location to place the upgrade log in case issues occur during the upgrade.

5. 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 Repository. Note that after upgrading, diagrams must be published once in Team Server before they can be viewed by users.

6. Launch a Web browser and connect to Team Server, log in with Admin user credentials.

7. Go to **My Settings > Admin**, and then click **ER/Studio Publications**.

8. Identify the diagrams that you want to publish, and then ensure that the Action for those diagrams is set to **Publish**.

9. Select these diagrams using the check boxes, and then click **Publish Selected**.

> 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.

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

-   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 a backup folder in the following locations:

    o   Team Server 4.0.8 and previous versions: C:\Program Files (x86)\Common Files\ersEnterprisePortalBackup

    o   Team Server 4.1: C:\Program Files\Common Files\ersEnterprisePortalBackup

    o   Team Server 16.0 and later: C:\Users\username\AppData\Local\Temp\ersEnterprisePortalBackup (Please see known issue about backing up 16.0.0 or later versions.)

See also

-   Install or upgrade Team Server/Repository

-   About Team Server and Repository upgrade