

erwin[®] Data Modeler

Installation Guide

Release 2018 R1

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erwin Product References

This document references the following erwin Inc. products:

- erwin® Data Modeler Standard Edition
- erwin® Data Modeler Workgroup Edition
- erwin® Data Modeler Navigator Edition

Contact erwin

Understanding your Support

Review [support maintenance programs and offerings](#).

Registering for Support

Access the [erwin support](#) site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for all editions of [erwin Data Modeler](#), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit <http://erwin.com/products>.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to techpubs@erwin.com.

erwin Data Modeler News and Events

Visit www.erwin.com to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

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Chapter 1: Install and Upgrade Considerations for erwin Data Modeler

Consider the following factors before you install erwin Data Modeler r9.8.1 or upgrade from an earlier version.

This section contains the following topics

[Install Considerations](#) (see page 8)

[Upgrade Considerations](#) (see page 9)

Install Considerations

Before you install erwin Data Modeler 2018 R1 on your computer, consider the following factors:

Enable .NET Framework

The Microsoft .NET Framework 3.5 is a prerequisite for erwin Data Modeler, Mart Server, and Navigator editions. For Windows 8.1, 10, and Windows Server 2012 operating system .NET Framework is installed by default but sometimes may not be enabled. You must manually enable the .NET Framework before you install erwin Data Modeler for the following operating systems.

- Windows 8.1 and 10
- Windows Server 2012

Note: You cannot install erwin Data Modeler when .NET Framework is disabled.

Follow these steps:

1. Click Windows Start icon.
2. Do one of the following:
 - For Windows 8.1 and 10:
Type **optionalfeatures.exe** in the Search bar and press Enter.
 - For Windows Server 2012 and 2016.
Click Control Panel, Programs and Features, and Turn Windows features on or off.

The Windows Features window appears.
3. Select Microsoft .NET Framework 3.5 and click OK.
The Microsoft .NET Framework is enabled.
4. Restart the computer to configure the changes take effect.

You can now install erwin edition of your choice.

Navigator and Data Modeler Compatibility

If you want to install Navigator and Data Modeler editions on a computer, we recommend you to select the Navigator edition features from the features selection list of Data Modeler installer.

Install from a DVD

The Installation Wizard from the DVD allows you to install 32-bit or 64-bit version of erwin Data Modeler r9.8. Install the version of your choice depending on the architecture of your operating system.

Installation Path

When you uninstall r9.8 version of erwin products manually, sometimes the installation folders are not removed from the installation directory. You must manually remove the folders from the installation directory.

Upgrade Considerations

You can upgrade to erwin Data Modeler 2018 R1 32-bit or 64-bit edition from an earlier version. During the upgrade process for a 64-bit version, you may encounter the following situations:

Note: If you want to upgrade erwin Data Modeler from an earlier 9.x version to 2018 R1 (64-bit), we recommend you to first uninstall the earlier version of erwin Data Modeler manually and then install the latest version.

erwin Model Icons

When you install or upgrade to erwin Data Modeler 2018 R1 64-bit version, sometimes the erwin Model icons may appear differently. After you open a model for the first time, all the Model icon file associations are restored and the Model icons appear normally.

Start Menu Cleanup

When you upgrade to erwin Data Modeler 2018 R1 from any earlier release of r9 series, erwin-related shortcuts and folders may remain in the Start menu. You may manually delete the folders and shortcuts of the delete versions from the Start Menu.

Chapter 2: Installing erwin Data Modeler

Once you have ensured that all the installation or upgrade considerations are in place, you can go ahead with the installation. You will need the erwin Data Modeler (DM) installer and its corresponding license. The following figure illustrates the process that you need to follow to install and start using the DM.

This section contains the following topics

[Licensing](#) (see page 11)

[Installation](#) (see page 13)

Licensing

erwin uses a cloud-based software licensing service to cater to licenses for all the erwin Data Modeler (DM) editions. Multiple mechanisms and types of licenses are available, from which you can choose the one that suits your needs.

To understand the types of licenses and available mechanisms, and obtaining a suitable one, refer to the following topics:

1. Understand Licensing
2. Obtain and Activate a License
3. View or Return a License

Understand Licensing

erwin offers the following license types based on the erwin Data Modeler (DM) editions:

- Standard
- Workgroup
- Navigator
- API
- Trial
- Evaluation (15 days)
- Academic (365 days)
- Industry Reviewer (60 days, full-featured)
- Partner (365 days, full-featured)

Further, each edition-based license can belong to either of the following licensing models:

Concurrent

This licensing model is based on a pool of licenses shared between several users. Simultaneous access to the DM is available to as many users as the number of allowed users on a concurrent license. For example, if you have a ten-user concurrent license, ten users can access the DM at a time using the license. Therefore, if an 11th user tries to use the DM, access is denied. To avoid such situations, erwin allows overdraft licenses that temporarily allow you to exceed the maximum number of users.

Node-locked

This licensing mechanism uses your device ID to let you use the license and grant access to the DM. Such licenses cannot be shared between users on different devices unless a user returns the license. However, there is a restriction on the number of times you can return a node-locked license. If you are unable to return your license, submit a request to [erwin Support](#).

Next, both the above licensing models let you activate licenses using either of the following mechanisms:

Online

This method connects to the licensing service over the Internet. The licensing service then validates and activates the license code that you entered.

Offline

This method uses a multi-step activation process as follows:

1. User generates an activation certificate and sends it to the license administrator.

2. License administrator generates a license certificate and sends it to the user.
3. User imports the license certificate to activate the license code.

Each license comes with a maintenance period. Along with product, a year of support is included. Any product updates that are released during the registered maintenance/support period are allowed. Once the maintenance/support period is over, you need to renew the maintenance plan to be able to receive updates and support. To keep a track of the maintenance period, erwin DM lets you set a maintenance expiration reminder.

Note: Your license administrator needs to ensure that the Maintenance End Date is set. Else, your license will fail.

Obtain a License

To obtain a license contact erwin Customer Care by [telephone](#) or the [web licensing form](#), or contact your license administrator. Provide the required information to submit a license request. Once the request is verified, you will receive a license code. Ensure that you keep a note of the license code. To use erwin Data Modeler (DM) using this license code, you first need to install the DM and activate the license code.

To understand how to install the DM and activate the license code, refer to the [Installation](#) (see page 13) topic.

Installation

To start using erwin Data Modeler (DM), you need to perform a three-step process as follows:

1. [Review the system requirements](#) (see page 14)
2. [Install erwin DM](#) (see page 15)
3. Activate the license

Review the System Requirements

Review the system requirements for the computer on which you want to install erwin DM.

Verify that you have installed one of the following operating systems:

- Microsoft Windows Server 2008 R2 SP1
- Microsoft Windows 7 SP1
- Microsoft Windows 8.1
- Microsoft Windows 10
- Microsoft Windows Server 2012, R2
- Microsoft Windows Server 2016

Note: Running the erwin API in a 64-bit environment requires some changes to the workstation registry. For more information about changing the registry, see the erwin® Data Modeler WE Implementation and Administration Guide.

The following requirements must be met or exceeded for erwin Data Modeler to install and run correctly:

- Microsoft-based workstation, Intel Dual Core processor or equivalent
- 5 GB available hard drive space
- 4 GB RAM minimum; more is recommended for larger models
- DVD-readable device (only if installing from DVD media)

Note: The minimum screen resolution supported is 1024 x 768. If your screen resolution is less than the minimum supported, some portions of the screen will not be visible.

Install erwin DM

Install erwin DM to create, update, and maintain conceptual, logical, physical, and dimensional models. For the Workgroup Edition, install erwin DM on each computer that accesses Mart. Install erwin DM using the same executable file for Standard and Workgroup Editions.

Follow these steps:

1. Log in to the computer where you want to install the product as an Administrator user.

If you run an install without Administrative privileges, all files may not be installed or upgraded, and users can encounter problems when running the software.

2. Do one of the following tasks:
 - Insert the installation DVD
 - Download the erwin.exe file from the online erwin product page and run it.

The Installation Wizard opens.

3. Follow the instructions on the wizard pages.

The program files are copied and erwin DM is installed.

Note: You can install erwin DM Navigator from the erwin.exe file or from a separate Navigator.exe file.

Activate License

After you have installed erwin Data Modeler (DM), you need to activate the license code that you received from erwin Support or your license administrator.

When you first open erwin Data Modeler, the erwin Data Modeler Licensing dialog box appears.

On the erwin Data Modeler Licensing dialog box, do the following:

1. Under Licensing, enter the License Code that you received from erwin Support or your license administrator.
2. Under Customer Information, enter your email address and other information.
3. Activate the license. You can activate the license in two ways:

Online

This method is the default and connects to the licensing service over the Internet. The licensing service then validates the license code that you entered. To activate a license online, perform steps 1 and 2 mentioned above and click OK.

You can also connect to the licensing service using a proxy server. To do so, do the following:

- a. Under Network, on the Proxy tab, set your proxy server's parameters (server IP and port numbers, and the credentials).
- b. On the General tab, select the Use Proxy check box.
- c. Click OK.

Offline

This method requires you to perform multiple steps before you can start using the product. To activate a license offline:

1. On the erwin Data Modeler Licensing dialog box, select the Do Offline Activation check box and click OK. The Offline Activation dialog box appears.

2. Under Activation Certificate, click Generate. An activation certificate is generated and displayed.
3. Click Copy to Clipboard and save the contents to a text file. Send this activation certificate file to your license administrator. Based on this file, the license administrator will send you the License Certificate.
4. Under License Certificate, copy and paste the license certificate that you receive from the license administrator.
5. Click Import.

If you have limited or restricted internet access, you can use the LAN Daemon to activate the license. The LAN daemon enables you to manage licenses that run on a local area network (LAN). It is a local server that runs on a virtual machine. In other words, the LAN daemon is a local implementation of the cloud-based licensing service. For information on setting up the LAN Daemon, submit a request to [erwin Support](#).

To use the LAN Daemon, do the following:

1. Under Network, on the LAN tab, set your LAN daemon's parameters:
 - a. **Daemon IP:** Specifies the local IP address of the daemon on your LAN
 - b. **Daemon Port:** Specifies the port on which the daemon is listening
 - c. **Daemon User:** Specifies the user name
 - d. **Daemon Password:** Specifies the password
2. On the General tab, select the Use LAN Daemon check box.
3. Click OK.