erwin® Data Modeler

Installation Guide

Release 9.7

erwin

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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

Documentation Changes

The following updates have been made since the last release of this documentation:

- Change the Port Number (see page 17): Added a note about firewall settings.
- Review the System Requirements (see page 24): Updated to included the latest certified operating systems.
- Configure erwin DM to Use a Local License (see page 31): Updated to include information about Academic Edition license.
- Select a License for the Current Session (see page 32): Removed information about SQL Azure concurrent license.

The following updates have been made since the last release (r9.64) of this documentation:

- Install and Upgrade Considerations for erwin Data Modeler -Added the chapter that explains the installation and upgradation considerations.

The following updates have been made since the last release (r9.5) of this documentation:

- Review the Prerequisites—Added Microsoft Windows 8.1 as one of the supported operating systems.

The following updates have been made since the last release (r8.2) of this documentation:

- Edit the Options File—Added the new topic that provides information on editing the license options that help users borrow a license.
- Borrow a License—Added the new topic that describes how you can borrow a license from a pool of concurrent licenses.

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 r9.7 or upgrade from an earlier version.

This section contains the following topics

Install Considerations (see page 10)
Upgrade Considerations (see page 11)

Install Considerations

Before you install erwin Data Modeler r9.7 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 and 2016 operating systems .NET Framework is installed by default but sometimes may not 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 and 2016

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 r9.7. Install the version of your choice depending on the architecture of your operating system.

Installation Path

When you uninstall r9.7 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 r9.7 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 r9.7 (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 r9.7 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 r9.7 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

This section contains the following topics

Upgrading the License Server (see page 13)
Setting Up a Concurrent License (see page 14)
Using a Concurrent License (see page 22)
Using a Local License (see page 28)

Upgrading the License Server

If you are using an older version of the license server, upgrade the license server to use the new concurrent licensing feature.

Follow these steps:

1. Back up erwin DM r8 licenses in the Install folder of the license server. The licenses are stored in the following path of the Install folder:

   \erwin DM License Administrator\licenses\erwinmod

2. Upgrade to the erwin DM license server of r9.7.
3. Click erwin, erwin License Administrator, Create License Server to create the license server.

   The license server is created.

4. Click erwin, erwin License Administrator, Start License Server to start the license server.

   The license server is started.

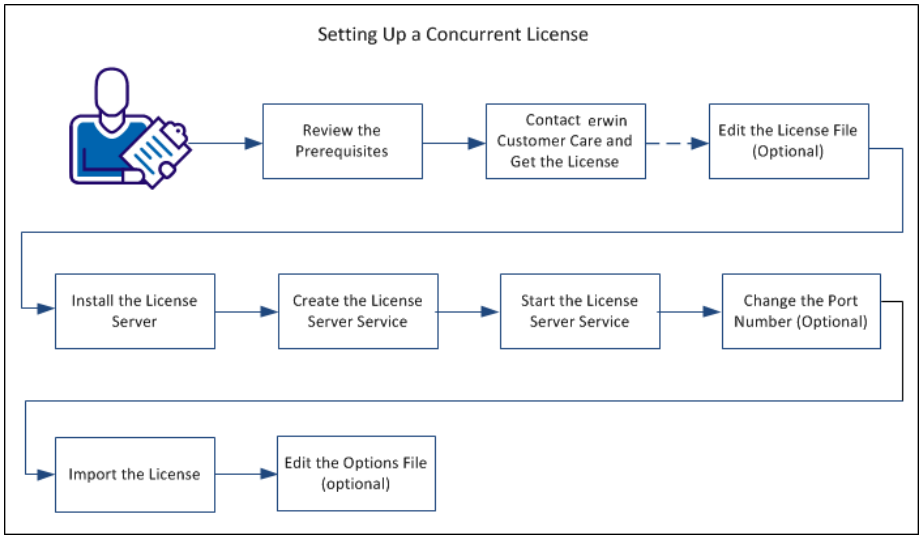
5. Import the backed up erwin DM r8 licenses to the license server.

The license server is successfully upgraded.

Setting Up a Concurrent License

Your organization plans to use erwin DM with the concurrent licensing model. In this model, licenses are stored in a server (License Server). When you set up licenses on the License Server, you create a web service to communicate with the erwin DM instances that users open.

The following diagram illustrates how to set up concurrent licenses:



Perform the following tasks to set up a concurrent license:

1. Review the prerequisites (see page 15).
2. Contact erwin Customer Care and get the license (see page 15).
3. Edit the license file (see page 15).
4. Install the License Server (see page 16).
5. Create the License Server service (see page 16).
6. Start the License Server service (see page 16).
7. (Optional) Change the Port Number (see page 17).
8. Import the license (see page 18).
9. (Optional) Edit the Options File (see page 19).

Review Prerequisites

To use the concurrent licensing model, install the License Server.

Review the following prerequisites:

- Select a computer in your local network or in a remote location.
- Verify that the computer meets the system requirements.
- Verify that the computer has enough disk space to archive log files.

Contact erwin Customer Care and Get the License

Contact erwin Customer Care by telephone or the web licensing form with the following items to receive your license files:

- License Server MAC address
- Name of the License Server

After you receive license files, copy them to a folder on the License Server.

Note: To get the MAC address, log on to erwin License Administrator and click the System Information tab. You can also open the Windows command prompt on the License Server and type IPCONFIG /ALL.

Edit the License File

If you change the License Server name, edit the license file and include the new name.

Note: erwin® Data Modeler opens only after you include the new name in the license file.

Follow these steps:

1. Locate and edit the license file.

   Typically, the name of the license file is in the *(license number) (Edition name) ("server" MAC address).lic* format. For example, 111111-2222 Workgroup (server xxxxxxxxxxx).lic.

2. Go to the line that starts with SERVER and change the name.

   Note: The SERVER line displays the computer name with a MAC address or any other node-locking identifier that you use. If you use only the computer name as the identifier, you cannot edit the file; contact erwin Customer Care to get a new license.

3. Save the changes.

Install the License Server

The License Server stores the concurrent license and helps you use erwin DM.

Follow these steps:

1. Double-click the erwin DM License Administrator.exe file. You downloaded this file when you downloaded the erwin Data Modeler.exe file.

   The Install License Server wizard opens.

2. Follow the instructions on the wizard pages.

   The program files are copied and the License Server is installed.

Create the License Server Service

You must create the License Server service after installing the License Server. This service enables the License Server to process requests to check in or check-out licenses.

To create the License Server service, click Start, All Programs, erwin, erwin License Administrator, Create License Server.

Start the License Server Service

Start the License Server service, before you use the License Server. You can start or stop the License Server service using the Windows Start menu.

Click Start, All Programs, erwin, erwin License Administrator, Start License Server. The services of the License Server service starts.

Optional--Change the Port Number

The default port number that is used for the License Server is 27000. You can change it if required.

Note: Ensure that you firewall settings are such that in and out traffic on port number 27000 is allowed.

Follow these steps:

1. Click Start, All Programs, erwin, erwin License Administrator, License Server Administrator.

   The erwin License Administrator window opens.

2. Click Administration.

   The Sign In dialog appears.

3. Enter *admin* in the User Name and Password fields. Click Submit.

   The Administration tab appears. You are prompted to change the password when you log in for the first time.

4. Click Server Configuration, License Server Configuration.

5. Click Use this Port and enter the port number. Click Save.

   You can enter any number that is valid for that computer.

6. Click Start, All Programs, erwin, erwin License Administrator, Stop License Server.

   The services of the License Server service stops.

7. Click Start, All Programs, erwin, erwin License Administrator, Start License Server.

   The services of the License Server service starts.

Import the License

After you have installed the License Server, import the license into it. Importing the license lets users use erwin® Data Modeler.

Follow these steps:

1. Click Start, All Programs, erwin, erwin License Administrator, License Server Administrator.

   The erwin License Administrator window opens.

2. Click Administration.

   The Sign In dialog appears.

3. Enter *admin* in the User Name and Password fields. Click Submit.

   The Administration tab appears. You are prompted to change the password when you log in for the first time.

4. Click Server Configuration, User Interface.

5. Select Concurrent and click Save.

   Concurrent is set as the default view for the erwin License Administrator Dashboard.

6. Click Vendor Daemon Configuration, Import License, Browse, and select the license file that you have received from erwin Customer Care.

7. Click Import License.

   The license is imported and any errors appear in the Alerts section.

8. Click Dashboard.

   The list of imported licenses appears.

   Your concurrent license is ready for use.

Remove a License from the License Server

After you import licenses to a License Server, many times you have to remove a specific license. Use this procedure to remove a license that is imported to the License Server.

Follow these steps:

1. Log in to License Server Administrator.
2. Click Administration, Vendor Daemon Configuration, Administer.
3. Click License File or Directory and locate the license that you want to remove.
4. Select the line for the license that you want to remove and delete the line.
5. Click Reread License Files.

   The deleted license does not appear.
6. Click Stop to stop the Vendor Daemon.
7. After the vendor daemon stops, click Administer and then click Start.
8. Check the Dashboard to help ensure that the license does not appear.

Edit the Options File

Use the concurrent licensing model and borrow licenses to use erwin DM on mobile devices that support erwin DM. When you borrow a license, the license rights are available on your local computer. You can open erwin DM using the borrowed license, regardless of whether you are connected to the License Server.

When you install the License Server, the *erwinmod.opt* file is copied to the installation folder. Edit this file and specify the number of licenses that cannot be borrowed and the maximum hours for which a license can be borrowed.

Important! If you change the erwinmod.opt file name, the file is ignored and users cannot borrow licenses.

Follow these steps:

1. Open the erwinmod.opt file from the following folder:

   <install folder>\erwin DM License Administrator\licenses\erwinmod

   The file opens and displays several lines of text in the following format:

   BORROW_LOWWATER license_name number.

   For example, BORROW_LOWWATER Standard 1.

2. (Optional) To set the number of licenses that cannot be borrowed, follow these steps:

   a. Go to the line that has the license name that you want to change.

   b. Change the number.

      The new number is the number of licenses that cannot be borrowed.

   Note: Do not reserve an uncounted license for borrowing. If you do so, you cannot borrow licenses.

3. (Optional) To set the maximum number of hours for which a license can be borrowed, add the following line:

   MAX_BORROW_HOURS license_name num_hours

   For example, MAX_BORROW_HOURS Standard 48 specifies that a license for erwin DM Standard Edition can be borrowed for a maximum period of 48 hours.

   Default: 168 hours (This value is specified in the license file.)

   Ensure that the new period is less than the period specified in the license. If multiple MAX_BORROW_HOURS keywords appear for the same license_name, only the last one is applied.

4. Save the file.

5. Open erwin License Administrator and click Administration.

6. Enter the administrator user name and password and click Submit.

7. Click Vendor Daemon Configuration, Administer.

   The Vendor Daemon Actions web page appears.

8. Click Stop.

   The Vendor Daemon is stopped.

9. Click Start.

   The Vendor Daemon is restarted and the changes you have made to the license options file come into effect.

Troubleshoot Borrowed Licenses

Symptom

erwin DM does not open with a borrowed license.

Solution

The reason for erwin DM not opening with a borrowed license is using different names in the license files.

Follow these steps:

1. Connect to the License Server and open the license files that you have imported into your License Server.
2. Verify if the name in the SERVER line is same in all the license files.

   Typically the name is the computer name, localhost, or this_host.
3. If the names are different, change the names to make them consistent.
4. Import the licenses again.

Using a Concurrent License

This section describes how erwin DM users can use a concurrent license with erwin DM Standard Edition or Workgroup Edition.

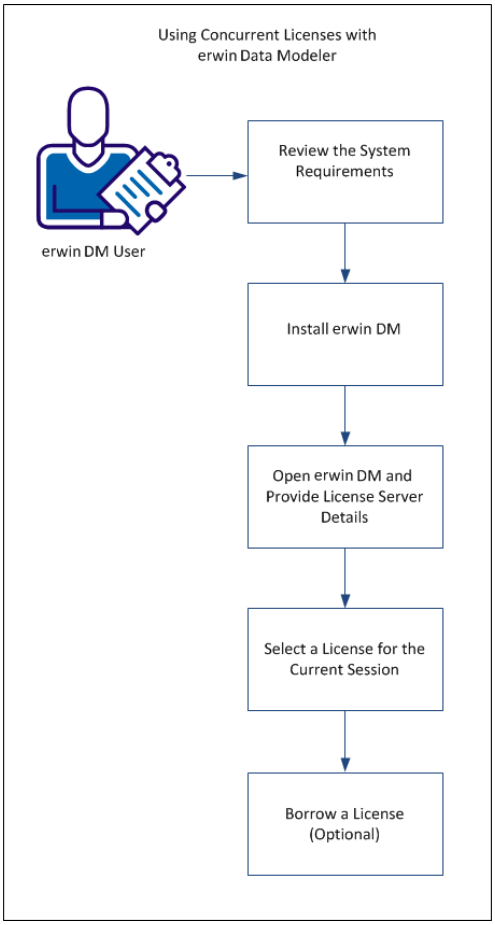
Note: Before you start this procedure, your System Administrator must set up the License Server and import the license to it. You have the License Server details and know which edition to use.

In the concurrent licensing model, licenses are stored in a License Server. You check out a license to use erwin DM; when you close the application, the license is checked in. The License Server increases or decreases the count of available licenses by one when you check in or check out a license.

Note: If all the licenses are checked out, you cannot open another instance of erwin DM.

When using erwin DM, if you lose connection to the License Server, the License Server recovers the license and erwin DM closes. The recovery happens after four hours of disconnection and several warning messages.

The following diagram illustrates how to use erwin DM with the concurrent licensing model:



Perform the following tasks to use concurrent licenses:

1. Review the System Requirements.
2. Install erwin DM.
3. Open erwin DM and Provide the License Server Details.
4. Select a License for the Current Session (see page 25).
5. Borrow a License (see page 26).

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 Vista SP2
- Microsoft Windows Server 2008 SP2, R2
- Microsoft Windows 7 SP1
- Microsoft Windows 8.1
- Microsoft Windows 10
- Microsoft Windows Server 2012, R2
- Microsoft Windows Server 2016

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.

Select a License for the Current Session

If you are using a concurrent license, when you close erwin DM or disconnect from your network, your license is checked in to the License Server. When you launch erwin DM again, select the license you want to use for that session.

Follow these steps:

1. Click Start, erwin, erwin Data Modeler.

   The erwin DM Licensing dialog appears.

2. Select one of the following options and click OK:

   Acquire concurrent Workgroup Edition license

   Connects to the License Server and acquires a concurrent license for the Workgroup Edition. Suppose the Workgroup Edition license is not available. If you have purchased the Standard Edition license, then select *If unavailable, attempt to acquire a concurrent Standard Edition license*. A concurrent Standard Edition license is checked out, if available.

Acquire concurrent Standard Edition license

Connects to the License Server and acquires a concurrent license for the Standard Edition.

3. Enter the path for your License Server in the Server Path field in the port@hostname or port@IP address format. Click OK.

   Example: 27000@remotecomp1, 27000@255.255.255.255

   erwin DM opens.

   Note: If no license is available, erwin DM Academic Edition opens.

You have selected a concurrent license to use erwin DM.

When you borrow a license, the License Administrator Dashboard the number of licenses that are borrowed for each edition. The Dashboard also displays a number under erwin DM. Here, erwin DM represents a license that is acquired from the erwin License Administrator. After a license is successfully acquired, the License Administrator continues to acquire a Workgroup Edition or Standard Edition license. erwin DM represents the sum of all licenses acquired from the erwin License Administrator. The erwin DM count does not include the licenses that have been borrowed.

Borrow a License

If you use the concurrent licensing model, you can borrow licenses to use erwin DM on mobile devices that support erwin DM. When you borrow a license, the license rights are available on your local computer. erwin DM opens using the borrowed license when you are not connected to the License Server.

You can borrow a license from the Licensing dialog at the time of opening erwin DM.

Note: To borrow a Navigator license, specify the server path that has a valid erwin DM Navigator license.

Follow these steps to borrow a license at the time of opening erwin DM:

1. Open erwin DM.

   The erwin® Data Modeler Licensing dialog appears.

2. Click Acquire concurrent use Workgroup Edition license or Acquire concurrent use Standard Edition license.

3. In the Server Path field, type the license server details.

   This Server Path detail is reflected in the Help, Licensing dialog.

4. Select the Return Date checkbox and specify the return date and time.

5. (Optional) Select the *Remember the licensing options and do not show this dialog again* checkbox.

6. Click OK.

   A license is checked out from the License Server and the rights are available on your local computer.

To return a license before it expires, start erwin DM and enter the server path in the erwin Data Modeler Licensing dialog. After erwin DM opens, click Help, Licensing, and then click Return Borrowed Licenses Early.

Note: If a license expires or is returned before it expires, you have four hours of buffer time to save your work. After four hours of the expiry of the license, erwin DM closes. Similarly, if you lose the connection to the License Server, the License Server recovers the license and erwin DM closes. The recovery happens after four hours of disconnection and several warning messages.

When the license expires, one of the following events happen:

- If the client computer is connected to the License Server and a concurrent license is available, erwin DM checks out a license. If no concurrent license is available, a warning dialog appears and erwin DM closes after four hours.
- If the client computer is not connected to the License Server, erwin DM notifies users about the loss of connectivity with the License Server.

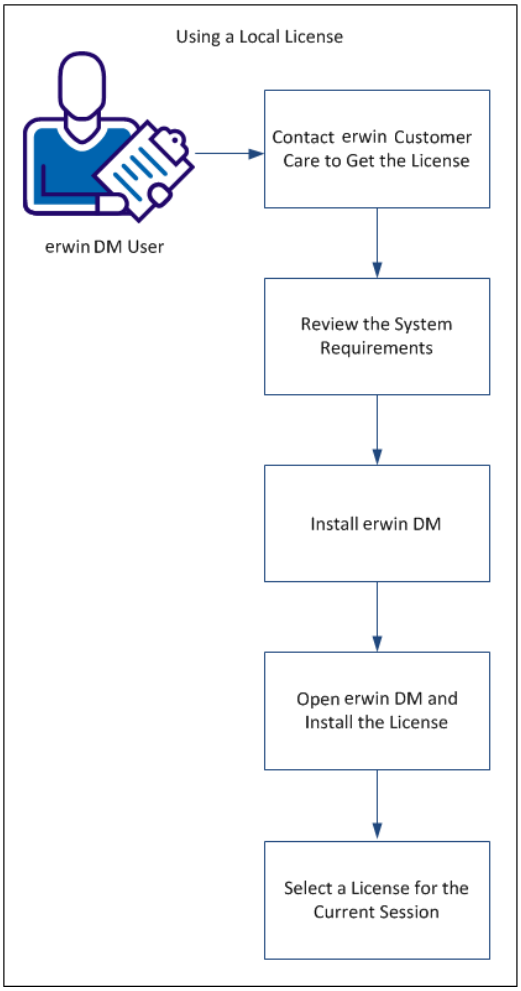
Using a Local License

Use a local license if one of the following requirements applies:

- You are the only user of erwin Data Modeler.
- You want to use erwin Data Modeler on a specific computer.
- You plan to use erwin Data Modeler when you are disconnected from your corporate network.

In this licensing model, the license is stored on your local computer.

The following diagram illustrates how to use a local license:



Perform the following tasks to use a local license:

1. Contact erwin Customer Care and get the license (see page 15).
2. Review the system requirements.

3. Install erwin DM.
4. Open erwin DM and install the license (see page 31).
5. Select a license for the current session (see page 32).

Contact erwin Customer Care and Get the License

Contact erwin Customer Care by telephone or the web licensing form with the following items to receive your license files:

- License Server MAC address
- Name of the License Server

After you receive license files, copy them to a folder on the License Server.

Note: To get the MAC address, log on to erwin License Administrator and click the System Information tab. You can also open the Windows command prompt on the License Server and type IPCONFIG /ALL.

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 Vista SP2
- Microsoft Windows Server 2008 SP2, R2
- 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.

Configure erwin DM to Use a Local License

When you first open erwin DM, the Academic Edition opens. To acquire a license for the Academic Edition, contact erwin Support.

Provide the details of the license to use the edition that you have purchased.

Follow these steps:

1. Open erwin DM.

   The erwin DM Academic Edition opens.

2. Click Help, Licensing.

   The Licensing dialog appears displaying the MAC addresses discovered on your computer.

3. Click Install License File.

4. Browse and select the license file you have received from erwin Customer Care. Click Open.

   A message appears indicating that your license file was successfully moved to the application's data directory.

5. Click OK. Click Close.

6. Close erwin DM.

You have configured erwin DM to use a local license.

If you need assistance with licensing, open an issue online at the erwin Data Modeler support site.

Select a License for the Current Session (Local License)

Every time you launch erwin DM, select the license you want to use for that session.

Follow these steps:

1. Click Start, erwin, erwin Data Modeler.

   The erwin DM Licensing dialog appears.

2. Select Use Local license and click OK.

   erwin DM opens using the license stored on your local computer. If a local license is not available, an error message appears.

   You can select the Do not show this dialog again check box, so that you always use the license available on your computer.

   Note: To restore the Licensing dialog, open erwin Data Modeler, click Tools, Options, Reset all Messages, and close erwin Data Modeler. The next time you open erwin Data Modeler, the Licensing dialog appears.

You have selected a local license to use erwin DM.