

ORACLE PRIMAVERA P6 V7.0

STAND-ALONE INSTALLATIONS AND UPGRADES

Version 7.0.0.0.1

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OVERVIEW

The purpose of this document is to provide a roadmap for installing and upgrading the stand-alone components of Oracle Primavera P6 v7.0.

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REQUIRED DOWNLOADS AND REFERENCE DOCUMENTATION

Media Pack Downloads: Compressed archive files for software and documentation downloads. Access <http://edelivery.oracle.com> and follow prompts to Primavera P6 Professional Project Management (v7.0) Media Pack for Microsoft Windows.

From within the media pack, download the following:

- ▶ Primavera P6 Professional Project Management Quick Install Guide
- ▶ Primavera P6 Client Applications 7.0
- ▶ Primavera P6 Documentation

Note: If you are upgrading from Primavera V5.0 you also need to download Primavera P6 Professional Project Management (v6.2.1) Media Pack

Reference Documentation:

- ▶ **Quick Install Guide:** General installation information.
Location - <http://edelivery.oracle.com> as part of the P6 downloads
- ▶ **Administrator's Guide:** Installation and configuration instructions required for the Oracle Primavera P6 Client Applications v7.0 and is part of the P6 downloads.
Location – Primavera P6 Documentation download, Documentation\<language>\Product Manuals\adminguide.pdf
- ▶ **Tested Configurations Document:** Contains tested environment configurations and version information for tested platforms, operating systems, and third-party software components for the Primavera P6 Client Applications v7.0.
Location – Primavera P6 Documentation download, Documentation \<language>\Tested Configurations\Tested Configurations.pdf

RESOURCES NEEDED FOR INSTALLATION

Stand-alone installations require preparation and may take as little as an hour to complete but, depending on the organization and accessibility of the system administrator rights, it may take longer.

Note: To complete the installation you must have full administrative rights to the machine on which you are installing the software. It is recommended that locally installed firewall and anti-virus software is disabled for the duration of the installation.

With the stand-alone option, the installation wizard installs the database server component along with the databases and the client application software in one process and configures the connectivity between the client software and the databases at the conclusion of the installation.

The talents of your IT staff may be required to assist you with the installation and configuration of Oracle Primavera software in your organization. An Information Technology professional or an end user with a familiar degree of computer knowledge can complete a stand-alone installation without assistance when this documentation is utilized as part of the preparation.

Please see the P6 Administrator's Guide on page 35 for details on minimum client configurations.

COMPONENT DESCRIPTIONS AND INSTALLATION INSTRUCTION REFERENCES

System Architecture: Installing Oracle Primavera P6 stand-alone means you are using your machine for both the client application software and the server and database functionality required for the software to operate in a stand-alone environment.

Tested Configurations: For information on any platform versions, operating systems, environments, and third-party software versions for components listed below, please see the Tested Configurations document.

Components: The following is a list of components that are installed with the P6 stand-alone Installation option:

- ▶ Database Server
- ▶ Databases
- ▶ Desktop Client

Database server:

The stand-alone installation of Oracle Primavera P6 software, installs Oracle Database Express Edition (Oracle Database XE). This database server component of the stand-alone installation is required to store the P6 project management databases on an individual computer.

There will be three default default users for both Project Management and Methodology Management:

- ▶ For Project Management, the default users are ADMPRM\$PM, PRIVPRM\$PM, and PUBPRM\$PM.
- ▶ For Methodology Management, the default users are ADMPRM\$MM, PRIVPRM\$MM, and PUBPRM\$MM.

Databases:

A database is required to store the Oracle Primavera P6 data:

- ▶ The project management database stores the Project Management data used by Oracle Primavera P6 software. It is a required database installed via the stand-alone installation.
- ▶ The methodology management database stores project templates that can be used when creating new projects. It is an optional database installed by default via the stand-alone installation.

The names of the default database aliases shown on the login screen are ORAPMDB and ORAMMDB.

Desktop client:

- ▶ The Project Management desktop client enables users to access the Project Management database to plan and control a large number of projects.
- ▶ The Methodology Management desktop client enables users to access the Methodology Management database to create project templates if this optional functionality is being implemented.

NEW INSTALLATION INFORMATION

Administrator’s Guide installation instructions

- ▶ Installation instructions are on pages 264 and 265, continued on page 280.
- ▶ Industry Type descriptions may be found in the Quick Install Guide as well as on page 28 of the Administrator’s Guide.

Location in Media Pack

The installation wizard utility may be run from the following location:

Client_Applications\setup.exe - choose Primavera stand-alone as the setup type.

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INSTALLATION OVERVIEW

Instructions for performing a stand-alone installation are included in the Administrator's Guide. For your convenience, the steps are also included here.

Notes:

- ▶ To complete the installation you must have full administrative rights to the machine on which you are installing the software. It is recommended that locally installed firewall and anti-virus software is disabled for the duration of the installation.
- ▶ Even though you are running Oracle Primavera P6 software as a stand-alone product, a network interface card or modem must be installed and TCP/IP networking software must be running on the computer.
- ▶ Before you begin, make sure your computer is running Windows XP Professional (SP3), Windows Vista (SP2), or Windows 7.

INSTALLATION

- 1) Double-click **setup.exe** in the Client_Applications folder of the P6 physical media or download to launch the installation wizard.
Note: Click **Next** on each wizard dialog box to advance to the next step. Click Cancel at any time to exit the wizard.
- 2) On the **Welcome** screen, click **Next**.
- 3) On the **Industry Selection** dialog box, choose the appropriate industry.
The industry you select determines application defaults, calculation settings, and the sample data that is installed with the client modules.
- 4) On the **Setup Type** dialog box, choose Primavera Stand-alone.
- 5) On the **Choose Destination Location** dialog box, enter or select the destination folder for the client modules. By default, the installation location is: <local drive>\Program Files\Oracle\Primavera P6\ .
- 6) On the **Choose Destination Location** (Common) dialog box, enter or select the destination folder for Primavera common files. By default, common files are installed in the Primavera Common folder created during installation. You can choose a different folder.
- 7) On the **Select Features to install** dialog box, mark the checkbox next to **Sample Projects** if you want to install sample projects.
- 8) Select the program folder name in which the P6 icons will be stored on the Start menu. If you make no changes, these icons are stored under Programs, Oracle - Primavera P6.

- 9) After the client modules installation, you may be prompted to either enter or create a password for the database. If you are installing the stand-alone version for the first time on this computer and already have Oracle Database Express Edition (Oracle Database XE) installed, you will be prompted to enter the password for Oracle Database XE's administrative (system) user. If you are installing the stand-alone version for the first time on this computer and do not have Oracle Database Express Edition (Oracle Database XE) already installed, you will be prompted to create a password for Oracle Database XE's administrative (system) user. After entering the password, click **Run** to install Oracle Database XE.

Note: Make sure to remember the password that you create for Oracle Database XE. The password used for Oracle Database XE's administrative (system) user will also be the password for the Project Management and Methodology Management default users. Oracle database passwords are not supported with multi-byte characters.

- 10) Click **Install** to complete the installation.
- 11) During the installation, the setup program installs the project management and methodology management databases. Setup also installs and configures Oracle Database XE.
- 12) On the **InstallShield Wizard Complete** dialog box, choose whether to restart your computer now or later, and then click **Finish**.
- 13) After the installation is complete, you must restart your computer before you can use the software.
- 14) Launch a module by clicking Start, Programs, Oracle – Primavera P6, then select the module of your choice.

UPGRADE INFORMATION

Administrator’s Guide installation instructions

- ▶ Installation instructions are on pages 264 and 265, continued on page 280.
- ▶ Industry Type descriptions may be found in the Quick Install Guide as well as on page 28 of the Administrator’s Guide.

Location in Media Pack

The installation wizard utility may be run from the following location:

Client_Applications\setup.exe - choose Primavera stand-alone as the setup type.

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INSTALLATION OVERVIEW

Instructions for performing a stand-alone installation are included in the Administrator's Guide. For your convenience, the steps are also included here.

Upgrade Version Considerations:

- ▶ Versions of Oracle Primavera P6 stand-alone software prior to v5.0 are no longer supported and cannot be upgraded.
- ▶ To upgrade from P6 v6.0 or above follow Parts I and Part III below.
- ▶ Upgrading Oracle Primavera P6 stand-alone v5.0 to v7.0 is a three step process that requires an intermediate installation of version 6.2.1. You will need to follow all three parts below.
- ▶ Upgrades result in SQL Server Express as the P6 database. If you wish to migrate to Oracle XE as the database see **Migrating Microsoft SQL Server Express to Oracle XE**.

Process:

- ▶ Part I - Backup Database SQL Server/MSDE database
- ▶ Part II – Upgrade Primavera 5.0 to Oracle Primavera P6 v6.2.1 (Required only for Primavera 5.0)
- ▶ Part III – Upgrading P6 v6.0 or above to Oracle Primavera P6 v 7.0
- ▶ (Optional) Migrating Microsoft SQL Server Express to Oracle XE

PART I - BACKUP DATABASE SQL SERVER/MSDE DATABASE

- 1) Open a DOS command window by clicking **Start**, then **Run**, then type CMD and press **Enter**.
- 2) In the DOS command window type the following:
`osql -E -S localhost\primavera`
Press **Enter**.
Note: If this command fails with a warning " 'disk' is not a recognized device type option" run the command as a windows administrator.
- 3) When the I> appears, type the following (where <path> is the directory where the backup file will be created):
`backup database pmdb$primavera to disk = 'c:\<path>\pmdb.bak'`
Press **Enter**.
- 4) Type **go**, and press **Enter**:
- 5) For Methodology Management, repeat steps 3 and 4 using the database name mmdb\$primavera

**PART II – UPGRADE PRIMAVERA 5.0 TO PRIMAVERA ORACLE PRIMAVERA P6 V6.2.1
(REQUIRED ONLY FOR PRIMAVERA 5.0)**

- 1) In the P6 v6.2.1 Client_Applications folder, double-click on the file **setup.exe**.
- 2) Click **OK** to following message: A previous version of Primavera has been detected. Continuing the setup will upgrade it.
- 3) On the Welcome screen, click **Next**.
Note: Click **Next** on each wizard dialog box to advance to the next step. Click **Cancel** at any time to exit the wizard.
- 4) On the Select Type dialog box, choose the second option, **Primavera Stand-alone**.
- 5) On the Choose Destination Location dialog box, enter or select the **destination folder** for the client modules.
- 6) On the Choose Destination Location (Common) dialog box, enter or select the **destination folder for Primavera common files**.
By default, common files are installed in the Primavera Common folder created during installation. You can choose a different folder.
- 7) Select the program folder name in which the Primavera icons will be stored on the Start menu. If you make no changes, these icons are stored under **Programs, Primavera**.
- 8) If you have kept the default password for logging into MSDE ("prima" for P5), your password for logging into Microsoft SQL Server Express will automatically update to "Prima123Vera," in accordance with strong password policy requirements.
If you are upgrading the stand-alone version and have a different password other than the default for MSDE, you will be prompted to enter the password. After entering the password, your password will automatically be changed to "Prima123Vera."
- 9) Click **Install** to begin the installation.
- 10) Microsoft SQL Server 2005 Express will automatically begin to install/update.
- 11) The setup also upgrades the default Project Management and Methodology Management databases to the latest database schema.
- 12) Click **Next** at the Validate Database Connection screen for the PMDB database.
- 13) Click **Finish** at the Connection Successful screen for the PMDB database.
- 14) Click **Next** at the Validate Database Connection screen for the MMDB database.
- 15) Click **Finish** at the Connection Successful screen for the MMDB database.
- 16) Click **Finish** to exit the Install Shield Wizard.
- 17) Click **Exit** to end the installation.
- 18) Continue with Part III to complete upgrade.

PART III - UPGRADING P6 V6.0 OR ABOVE TO ORACLE PRIMAVERA P6 V7.0

- 1) In the P6 v7.0 Client_Applications folder, double-click on the file **setup.exe**.
- 2) Click **OK** to following message: A previous version of Primavera has been detected. Continuing the setup will upgrade it.
- 3) On the Welcome screen, click **Next**.
Click **Next** on each wizard dialog box to advance to the next step.
Click **Cancel** at any time to exit the wizard.
- 4) Select the Industry to determine terminology and default settings for calculation.
- 5) On the Select Type dialog box, choose the second option, **Primavera Stand-alone**.
- 6) On the Choose Destination Location dialog box, enter or select the **destination folder** for the client modules.
- 7) On the Choose Destination Location (Common) dialog box, enter or select the **destination folder for Primavera common files**.
- 8) By default, common files are installed in the Primavera Common folder created during installation. You can choose a different folder.
- 9) Select the program folder name in which the Primavera icons will be stored on the Start menu. If you make no changes, these icons are stored under **Programs, Oracle-Primavera P6**.
- 10) Click **Install** to begin the installation.
- 11) During the installation, the setup program installs/upgrades the project management and methodology management databases.
- 12) On the **InstallShield Wizard Complete** dialog box, choose whether to restart your computer now or later, and then click **Finish**. After the installation is complete, you must restart your computer before you can use the software.
- 13) Launch a module by clicking **Start, Programs, Oracle – Primavera P6**, then select the module of your choice.

You have completed the upgrade to P6 v7.0. If you would like to migrate your database from Microsoft SQL Server Express to Oracle XE, you can follow the steps in Migrating Microsoft SQL Server Express to Oracle XE (Optional).

MIGRATING MICROSOFT SQL SERVER EXPRESS TO ORACLE XE (OPTIONAL)

Oracle Primavera P6 v7.0 still supports Microsoft SQL Server Express as your stand-alone database. If you would like to migrate your Microsoft SQL Server Express database to Oracle XE, you can follow the steps outlined below.

Considerations:

Oracle Database XE has the following limitations:

- ▶ Supports up to **4GB of user data maximum** (in addition to Oracle system data).
- ▶ Single instance only of Oracle Database XE on any server.
- ▶ May be installed on a multiple CPU server, but only executes on one processor in any server.
- ▶ May be installed on a server with any amount of memory, but will only use up to 1GB RAM of available memory.

Process:

- ▶ Install Oracle XE
- ▶ Migrate Microsoft SQL Server Express to Oracle XE
- ▶ Configure Alias Connection to point to Oracle XE

Install Oracle XE

Oracle XE can be found in Primavera P6 v7.0 Client Application's media download (Client_Applications\Oracle XE\OracleXEUniv.exe).

- 1) Launch the OracleXEUniv.exe. The installer will begin extracting the files.
- 2) On the Welcome screen select **Next**.
- 3) Accept the Licensing Agreement.
- 4) Select the location for the install.
- 5) Enter the password that will be used for SYS and SYSTEM database accounts.
- 6) The Summary displays what will be installed. Click **Install** to begin.
- 7) When the installation is complete, click **Finish** to launch the Database homepage.

Migrating Microsoft SQL Server database to Oracle XE

Run migrate.bat at 70_Client_Applications/install/database folder:

- 1) Select Microsoft Sql Server option on Select Source screen.
- 2) Select **Project Management database** option on the next screen P6 Database Selection.
- 3) Provide Source Connection information in the next screen:

Administrative user name: **sa**

Administrative password: **Prima123Vera** (default). If the default password is changed, type the correct password.

Database host address: Machine name where P6 v6.2.1 is installed.

Database host port: Default is 1433

To get this port information from the registry, go to

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Microsoft SQL
Server\PRIMAVERA\MSSQLServer\SuperSocketNetLib\Tcp

Database name:

pmdb\$primavera for PM Database

mmdb\$primavera for MM Database

4) Select Oracle/Oracle XE option on Next Select Target screen.

5) Provide Oracle XE connection information on next screen.

DBA user name: **system**

DBA password: Type the system password that was used for creating XE.

Database host address: Machine name

Database host port: **1521**

Database name (SID): **XE**

6) Keep the default tablespace names and click **Next**.

7) Keep the default tablespace locations and select **Next**.

8) On the Create Oracle Users screen type the following user names and select **Create**.

Notes:

- ▶ It is extremely important that these names be typed exactly as shown here.
- ▶ If you use a different user name, you will not be able to do automatic stand-alone upgrades for future releases.
- ▶ The passwords for each of these users are the same as the user name.

Administrative user name: **admprm\$pm** for the PM database, **admprm\$mm** for the MM database.

Privileged user name: **privprm\$pm** for PM database, **privprm\$mm** for the MM database.

Public user name: **pubprm\$pm** for PM database, **pubprm\$mm** for the MM database.

9) Keep the default and click **Next** on the Migrate Options screen.

10) Click **Next** on Migrate Options screen and complete the migration.

11) Run the migrate.bat again for the MM database migration, repeating steps 2 –10. In step 2, choose the Methodology Management database option.

Configuring Alias Connection for Project Management and Methodology Management to Oracle XE

1) Launch Project Management or Methodology Management.

2) In the Database field, click on the Ellipse (...) button.

- 3) Click **Add**. (To update or reconfigure an existing alias, highlight the Alias and select Configure.)
- 4) Enter an Alias name in the Database Alias field and select the database type in the Driver Type field.
Alias names can be almost any name, for example PMDB_XE or MMDB_XE.
Driver Type is **Oracle**
- 5) For the Oracle connect string enter **XE** and click **Next**.
- 6) Enter the Username and Password for the Public logon information:
pubprm\$pm (for PM)
pubprm\$mm (for MM)
- 7) Click **Next**, then **Next** again to test the connection. Click **Finish** to complete the wizard. Then click **Select** to choose the new database connection and then login to the database.