



PRIMAVERA

**Manually Upgrading the P6 EPPM Database for SQL Server
Release 8.0**

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Overview of Manually Upgrading a P6 Database to P6 EPPM R8

To manually convert your P6 version 6.0 or higher database to P6 EPPM R8, follow the procedures described in this document. These procedures should be performed by an experienced database administrator. This document contains the following sections, which should be completed in the order specified:

- ▶ Back up the existing P6 database (also known as PMDB) and migrate all your methodologies. You cannot use Project Architect after you upgrade, so you will want to migrate your methodologies before you upgrade.
- ▶ Run the appropriate scripts to upgrade the P6 database structure to P6 EPPM R8.
- ▶ Perform required and recommended processes after the upgrade is complete.
- ▶ To configure the SQL database server for SSL, see instructions for configuring SQL Database Server SSL within Microsoft Documentation. Questions and Support for Installation / Configurations should be directed to the database vendor, Microsoft.

Database Upgrade Processes for P6 EPPM

You can upgrade your existing P6 EPPM database (version 6.0 and later) to P6 EPPM R8. You must upgrade your P6 EPPM database so it will work with the new version.

All risk data fields are migrated when upgrading; existing fields are mapped to new fields. See **Risks Migration** (on page 14) for more information.

Cautions:



- If you are a current Apache JackRabbit user and upgrade to P6 EPPM R8, JackRabbit documents data will not migrate automatically. Refer to My Oracle Support's Knowledge Articles for information on manually migrating JackRabbit documents to Oracle Universal Content Management. Oracle recommends that you migrate the data before upgrading to R8.
 - If you are a current jBPM user and upgrade to P6 EPPM R8, workflows and reviews data will not be available. You might want to close out all workflows and reviews that are in progress before upgrading to P6 EPPM R8.
-

The following list summarizes the procedures required to manually upgrade your database from P6 EPPM version 6.0 or later to P6 EPPM R8:


- ▶ Back up your P6 EPPM database before beginning the upgrade process to ensure you will not lose any data due to unexpected problems. You should back up your database before you perform any of the steps in this document since the upgrade is not reversible. If you are unsure how to back up your database, do not proceed with the upgrade. Contact your database administrator or database vendor for assistance with backing up your database before performing the database upgrade.
- ▶ For details on what information will not be upgraded, see **Data that is Not Migrated during the P6 EPPM Database Upgrade** (on page 12).
- ▶ Convert your Methodology Management data to projects BEFORE you upgrade to P6 EPPM R8. For instructions on this process, see **Migrating Methodology Management to P6 Project Templates** (on page 12).
- ▶ Manually run all scripts required to upgrade your existing P6 EPPM database. See **Run the SQL Server Database Upgrade Scripts for the P6 EPPM Database** (on page 17).
- ▶ Test the new database to ensure that the upgrade succeeded.

The following list summarizes the procedures required and recommended to perform **after** the upgrade to P6 EPPM R8:

- ▶ Oracle recommends that you make a backup of your newly upgraded database.
- ▶ Using the *P6 EPPM Administrator's Guide*:


- ▶ If you will be using a non-default port for SQL Server, see **P6 EPPM Database Connections Using a Non-Default SQL Server Port** for additional configuration instructions after the database upgrade.
- ▶  For security reasons, Oracle strongly recommends that you replace the default database users (privuser and pubuser) immediately after a manual database installation or an upgrade from P6 version 7.0 and earlier. Do not use special characters in the database name, privileged user, or public user name, for example: { } [] : ; < > , . ? ! @ # \$ % ^ & * () - _ | / \ ~ `  Oracle recommends the use of strong passwords. Strong passwords in P6 EPPM are defined as passwords containing between 8 and 20 characters and at least one numeric and one alpha character. To further strengthen the password, use a mixture of upper and lower case letters.

For instructions on how to replace the private database login, follow the instructions in **Modifying Private Database Logins for P6 EPPM**. For all other database user names and passwords, use the tools included with Microsoft SQL Server.

- ▶ Install the new P6 and P6 Progress Reporter servers, P6 Professional, and any additional components.
- ▶ Starting with P6 EPPM R8, all recurring job service functions are hosted by P6. Due to this change, after upgrading to P6 EPPM R8, you must configure Scheduled Services settings in the P6 Administrator application to use this functionality. See **Services Settings** for details. Also, you must RESUMMARIZE ALL PROJECTS to accurately reflect your summary data. See **Configuring a Separate Server for Job Services** for guidelines on setting up a dedicated server solely for job services.
- ▶  For security reasons, Oracle strongly recommends that you replace the default Admin Superuser (admin) immediately after a manual database installation or an upgrade from P6 version 7.0 and earlier. For guidelines on this process, see **The Default Admin Superuser**.
- ▶ Assign new or modified privileges to users, as needed. See **Defining Global Security Profiles in P6 EPPM** and **Defining Project Security Profiles in P6 EPPM**.
- ▶ All previously defined module access, security profiles, OBS access, and resource security settings will still apply to existing users after the database upgrade, with the exception of Team Member module access. For users whose module access assignments include Team Member and only P6 Professional, both assignments will remain intact during the database upgrade; however, once these user accounts are edited post-upgrade, Team Member module access will be removed to comply with functionality implemented in P6 EPPM R8. For users whose module access assignments include Team Member and additional module access assignments other than only P6 Professional, Team Member module access will be cleared during the database upgrade; all other assignments will remain selected. See **Configuring Users in P6 EPPM** for information on defining module access, security profiles, OBS access, and resource security.
- ▶ During the upgrade to P6 EPPM R8, some P6 Activity Views settings will be reset. After the upgrade, use the Customize Detail Windows feature to modify the settings that should appear for each view. See the *P6 Help* for information on how to edit Activity Views.

- ▶ Starting with P6 EPPM R8, filter definitions are saved globally. Filters are still applied to Activity Views, but all standard filter assignments will be reset during the upgrade. Due to this change, views that had Standard Filters applied will show all activities after the upgrade. Reapply filters, as needed, after the upgrade is complete. See the *P6 Help* for information on how to edit Activity Views.

Tips

- ▶ Summary-Only projects are not supported in P6 EPPM starting with R8. During the P6 EPPM database upgrade, existing Summary-Only projects are converted to standard projects, but will lose all summary data. You can import the summary project from Microsoft Project into the converted blank project, and then summarize the data. See the P6 Professional Help.
- ▶ P6 EPPM R8 includes a new encryption algorithm that provides enhanced security for private database logins; however, the new encryption algorithm is not automatically enforced when you manually configure or upgrade your database. If you manually configure or upgrade your database,  Oracle recommends that you use the new encryption algorithm. To do so, you must reset the private database login. See **Resetting Private Database Passwords to Use the New Encryption Algorithm** (on page 19) for instructions. If automatically installing or upgrading your database, no configuration is needed after the upgrade to use the encryption algorithm. User logins and passwords are not affected.
- ▶ Starting with P6 EPPM R8, all user security and administration is performed in P6. Due to this change, all Admin Superusers will be granted Projects module access during the upgrade.
- ▶ Starting with P6 EPPM R8, all new users will be required to create a password with at least one character, regardless of whether Password Policy is enabled. Existing users will be prompted to follow the new requirement if they reset their password and Password Policy is disabled.
- ▶ Due to the removal of recurring job services for P6 Professional, use the Windows command line interface to run batch reports and export projects as a service. To view P6 Professional reports in P6, select the "Store report in Work Products and Documents" option when creating report batches or printing reports. See the *P6 Professional Help* for more information.
- ▶ If you wish to prevent the appearance of duplicate values in P6 EPPM modules due to leading or trailing spaces, ensure that the ANSI_PADDING setting in SQL Server is set to OFF. For example, if one user enters "Equipment" and another user enters " Equipment" (with a leading space) for resource codes, the database will store both of these as valid values if ANSI_PADDING is set to ON. If ANSI_PADDING is set to OFF, the database will remove the leading space in the second entry and warn the user that a unique ID must be entered. See the documentation included with SQL Server for more information.
- ▶ To configure the SQL database server for SSL, instructions for configuring SQL Database Server SSL can be found within Microsoft Documentation. Questions and Support for Installation / Configurations should be directed to the database vendor, Microsoft.

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Data that is Not Migrated during the P6 EPPM Database Upgrade

When upgrading to P6 EPPM R8, the following data will not migrate from previous releases:

- ▶ Workflows Repository (supported configuration changed from jBPM to Oracle BPM).
- ▶ Content Repository (if previously an Apache JackRabbit user). Refer to My Oracle Support's Knowledge Articles for information on manually migrating JackRabbit documents to Oracle Universal Content Management.
- ▶ Top Down Estimation, including estimated weights (removed).
- ▶ Invited Users in the Project Workspace (removed).
- ▶ Issue Form Categories (removed).
- ▶ Summary Data (new summary tables incompatible with old summary tables). Refer to My Oracle Support's Knowledge Articles for information on manually migrating Scenarios data to the new summary tables.
- ▶ Methodology Management (replaced with Project Templates). See ***Migrating Methodology Management to P6 Project Templates*** (on page 12) for manual migration instructions.

Run the Validate Tool for a 7.0 or Earlier Microsoft SQL Server Database

Use the validate tool to ensure there are no missing objects in your database that could cause the database to fail to upgrade. You must perform the steps below before you download the 8.0 media pack. If you run the 8.0 validate tool against your current database, it will not work.

- 1) Double-click **validate.bat** (validate.sh for Linux) in your current Database folder of the P6 EPPM physical media or download to start the validate tool.

Note: Ensure you use the validate file from your current Database folder, not the 8.0 database folder.

- 2) Provide the following:
 - a. In the **Database host address** field, enter the server machine name or IP address where Microsoft SQL Server is installed.
 - b. In the **Database host port** field, enter the port number that Microsoft SQL Server is using. The default is 1433.
 - c. In the **Database name field**, enter the name of the existing database that you want to validate.
- 3) View the HTML page that the tool creates to ensure your database is not missing objects.
- 4) Go to the 'Client Application' media pack, then locate the \install\database\scripts\ folder to find the scripts you need to fix.

Migrating Methodology Management to P6 Project Templates

Follow the steps below to migrate Methodology Management data to P6 Project Templates.

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Converting Methodologies to Projects

To migrate Methodology Management version 7.0 or earlier data to P6 R8 Project Templates, you must first use Project Architect in the Project Management module (version 7.0 or earlier) to convert the data from a methodology to a project.

To convert Methodology Management data to a project:

- 1) Create a new EPS node in P6 Professional version 7.0 where you can store all your Methodology Management projects.
- 2) Use Project Architect in P6 Professional version 7.0 to create projects from Methodology Management data. For more information on using Project Architect, see version 7.0 of the *Oracle Primavera P6 Project Management Reference Manual*.




Note: You can create only one project at a time. If you want all of your Methodology Management data moved to P6 Project Templates, contact Oracle Consulting to automate the process.



- 3) After you have converted all your Methodology Management data to projects, upgrade P6 EPPM from 7.0 to 8.0 .
- 4) Launch P6.
- 5) Convert your upgraded projects (formerly methodologies) to project templates. (See **Creating a Project Template From Projects** (on page 13).)

Creating a Project Template From Projects

After you have converted your Methodology Management data to projects and upgraded your database to 8.0, you can create your project templates.

To create a project template:

- 1) Click  **Projects**.
- 2) On the **Projects** navigation bar, click  **EPS**.
- 3) On the **EPS** page, click the **Actions** ▼ menu and select **Add ► Add Project Template**.
- 4) In the **Add Project Template** dialog box, choose the **General** tab.
- 5) On the **General** tab:
 - a. In the **Template ID** field, type in a unique ID for the template.
 - b. In the **Template Name** field, type in a unique name for the template.
 - c. In the **EPS** field, click the corresponding  and choose the EPS where you want to store the template.

- d. In the **Responsible Manager** field, click the corresponding  and choose a responsible manager.
- e. In the **Copy from existing project or template field**, click the corresponding  and choose the methodology project you created in **Converting Methodologies to Projects** (on page 13).
- f. Click **Create**.

Risks Migration

The following table illustrates the risks data field mapping when upgrading from P6 EPPM database (version 6.0 and later) to P6 R8.

Risks Fields Migration Table

P6 EPPM database (version 6.0 and later) Risks Fields	P6 EPPM R8 Risks Field
Risk Id	id
risk_name	name
risk_descr	description
status_code	status
risk_type_id	category_id
risk_control	notes
table_name	table_name
wbs_id	cause, appended with 'Applies to WBS' <WBS name>
rsrc_id	cause, appended with 'Applies to Resource' <resource name>
obs_id	cause, appended with 'Responsible Manager' <OBS name>
priority_type	cause, appended with 'Priority' <priority type>
add_date	cause, appended with 'Date Identified' <add_date in mmm-dd-yyyy format >
impact_date	cause, appended with 'Date Identified' <add_date in mmm-dd-yyyy format >
prbly_pct	cause, appended with 'Probability' <prbly_pct>
impact_work_qty	cause, appended with 'Impact - Labor Units' <impact_work_qty> - 2 decimals

impact_equip_qty	cause, appended with 'Impact - Nonlabor Units' <impact_equip_qty> - 2 decimals
impact_mat_qty	cause, appended with 'Impact - Material Units' <impact_mat_qty> - 2 decimals
Impact_expense_cost	cause, appended with 'Impact - Expenses' <impact_expense_cost> - 2 decimals

Run the SQL Server Database Upgrade Scripts for the P6 EPPM Database

- 1) Copy the "scripts" folder to a local drive. The folder can be found in the **Database** directory of the P6 EPPM physical media or download.

Note: You need to execute all scripts against PMDB to upgrade.


- 2) Open SQL Server Management Studio and log in as the SA user or the appropriate administrative user.
- 3) Go to scripts\common and execute the **ss_disable_triggers.sql** script.
- 4) Go to \scripts\upgrade\PM_08_00_00 on your local drive. Execute one of the following scripts:
 - SSPM_50.sql**, if upgrading from P5
 - SSPM_50sp1.sql**, if upgrading from P5 service pack 1
 - SSPM_50sp2.sql**, if upgrading from P5 service pack 2
 - SSPM_50sp3.sql**, if upgrading from P5 service pack 3
 - SSPM_p6.sql**, if upgrading from P6 version 6.0
 - SSPM_p61.sql**, if upgrading from P6 version 6.1
 - SSPM_p62.sql**, if upgrading from P6 version 6.2 or 6.2.1
 - SSPM_p621sp1.sql**, if upgrading from P6 version 6.2.1 service pack 1
 - SSPM_p70.sql**, if upgrading from P6 version 7.0
 - SSPM_p70sp1.sql**, if upgrading from P6 version 7.0 service pack 1
- 5) If you're using version **SSPM_p70sp1.sql** or later, do not execute the **ss_update_usereng.sql** script.
If you're using a version before **SSPM_p70sp1.sql**, go to \scripts\common and execute the **ss_update_usereng.sql** script to grant all users with P6 Professional module access rights to the Projects section in P6.

Note: Prior to P6 version 7.0, users with Project Management module access also had rights to the Projects section in P6 Web Access. For security reasons, beginning with P6 version 7.0, P6 Professional module access only grants rights to log into the P6 Professional module.

- 6) Go to \scripts\common and execute the **ss_post_upgrade** script.
- 7) Go to \scripts\upgrade\PM_08_00_00 and execute the **sspm_grants.sql** and **sspm_synonyms.sql** scripts.
- 8) Go to \scripts\source\PM_08_00_00 and execute the **sspm_srcenc.sql** script.
- 9) Go to \scripts\install\PM_08_00_00 and execute the **sspm_database_version.sql** and **sspm_querylib.sql** scripts.
- 10) Run the **databaselogins.bat** to upgrade the encryption of privilege user passwords.

Private Database Logins for P6 EPPM

Private database logins are used primarily by administrators to gain direct access to a database. For example, the privileged user login that you use to access the P6 EPPM database is a private database login. You can add, modify, or delete existing logins using the Database Logins tool.

P6 EPPM R8 includes a new encryption algorithm that provides enhanced security for private database logins; however, the new encryption algorithm is not automatically enforced when you manually configure or upgrade your database. If you manually configure or upgrade your database,  Oracle recommends that you use the new encryption algorithm. To do so, you must reset the private database login. See **Resetting Private Database Passwords to Use the New Encryption Algorithm** (on page 19) for instructions. If automatically installing or upgrading your database, no configuration is needed after the upgrade to use the encryption algorithm. User logins and passwords are not affected.

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Resetting Private Database Passwords to Use the New Encryption Algorithm

To reset private database passwords to use the new encryption algorithm:

- 1) Run **databaselogins.bat** (databaselogins.sh for Linux) from the Database folder of the P6 EPPM physical media or download.
- 2) On the **Database Connection** dialog box:
 - a. Select the database, Microsoft SQL Server.
 - b. Type the user name and password of a privileged database user (for example, privuser). This login should have administrative rights on the database.
 - c. Enter the host address, host port, and database name specific to your Microsoft SQL Server installation. The Port field displays the default port for the database type you selected.
 - d. Click **Next**.
- 3) On the **Private Database Logins** dialog box:
 - a. Select the private database user name that you wish to reset.
 - b. Highlight the password, and change it (or simply re-enter the existing password).
 - c. Click the **Update Password** button.
 - d. To reverse a change, click **Undo**. Undo will reverse any changes made during the current session.
 - e. Click **Save**.
 - f. Click **OK** to exit the Database Logins tool.

Where to Get Support

If you have a question about using Oracle Primavera products that you or your network administrator cannot resolve with information in the documentation or help, go to:

<http://www.oracle.com/us/support/index.html>

This page provides the latest information on contacting Oracle Global Customer Support and the support renewals process.

Go to ***http://download.oracle.com/docs/cd/E17266_01/index.htm*** for the latest updates to the P6 EPPM 8.0 Documentation library.