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PRIMAVERA

P6 Professional R8.1 Standalone Installation and Configuration Guide

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Oracle Primavera P6 Professional R8.1 Standalone Installation and Configuration Guide
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Contents

Copyright	2
Preface	7
P6 Professional Documentation.....	7
Where to Get Documentation Updates.....	9
Where To Get Training	9
Where to Get Support	9
Overview	11
Required Downloads and Reference Documentation	11
Resources Needed for Installation.....	11
Component Descriptions	12
Client Operating System Requirements.....	13
New Installation Information	15
New Installation Overview.....	15
Installation	15
Upgrade Information	17
Upgrade Installation Overview.....	17
Part I - Backup Database SQL Server/MSDE Database	17
Part II – Upgrade Primavera v5.0, v6.0, or v6.1 to Oracle Primavera P6 v6.2.1.....	18
Part III - Upgrading to P6 Professional R8.1	19
Convert Methodologies to Projects	19
Set the industry type	20
Migrating Microsoft SQL Server Express to Oracle XE (Optional).....	21

Preface

The Security Guidance icon  helps you to quickly identify security-related content to consider during the installation and configuration process.

In This Chapter

P6 Professional Documentation.....	7
Where to Get Documentation Updates.....	9
Where To Get Training.....	9
Where to Get Support.....	9

P6 Professional Documentation

You can access reference manuals and administrator's guides from the P6 Professional Documentation Center, located in the \Documentation\<language> folder of the P6 Professional physical media or download. Most documentation assumes a standard setup of the product, with full access rights to all features and functions.

Media packs include all files necessary to install P6 Professional applications, all manuals and technical documents related to the installation, administration, and use of P6 Professional components, and the Quick Install Guide. For information on the contents of the P6 Professional Media Pack, see the *P6 Professional Quick Install Guide*.

The following table describes documentation publications and lists the recommended readers by role. P6 Professional roles are described in the *P6 Professional Administrator's Guide*.

Title	Description
<i>P6 Professional Administrator's Guide</i>	Explains how to set up the P6 Professional database, servers, and components; it also provides an overview of all the components in the P6 Professional solution. The guide describes the procedures required to administer P6 Professional, including setting up security and configuring global preferences.  The P6 Professional network administrator/database administrator should read this guide.
<i>Tested Configurations</i>	Lists the configurations that have been tested and verified to work with P6 Professional. The network

Title	Description
<i>P6 Professional Standalone Installation and Configuration Guide</i>	administrator/database administrator and P6 Professional administrator should read this document. Explains how to install and configure P6 Professional as a standalone application.
<i>P6 Professional Help</i>	Explains how to use P6 Professional to plan, set up, and manage projects in a multiuser environment. If you are new to P6 Professional, use this Help to learn how to use the software effectively to plan and manage projects. The P6 Professional administrator, program manager, project manager, resource/cost manager, and team leader should read this Help.
<i>P6 Professional User's Guide</i>	This guide explains how to plan, set up, and manage projects in a multiuser environment. If you are new to P6 Professional, start with this guide to learn how to use the software effectively to plan and manage projects. When you need more detail, refer to the P6 Professional Help. The program manager, project manager, resource/cost manager, and team leader should read this guide.
<i>Primavera Timescaled Logic Diagram Help</i>	Describes how to create, modify, and manage Timescaled Logic Diagrams. Timescaled Logic Diagrams condense the project schedule displayed in the Gantt Chart into a more readable, easier to understand format that provides a snapshot of the entire project plan and the chains of activities that drive the project schedule.
<i>P6 SDK Web-based documentation</i>	Describes how to use the P6 SDK to connect to the P6 Professional database. The tables, fields, and stored procedures that you can access through the P6 SDK are described. Examples are also provided to show how you can use the P6 SDK to perform several basic tasks, such as creating a new project or assigning a resource to a project activity. The P6 Professional network administrator/database administrator should read this documentation, which is available in <i>local drive\Program Files\Oracle\Primavera P6 Professional\PMSDK\Doc\</i> by default. Double-click the INDEX.HTML file to open the Table of Contents.

Title	Description
<i>P3 to P6 Professional Migration Guide</i>	This guide provides best practices for migrating your P3 data to P6 Professional, and details how P3 functionality maps to P6 Professional functionality.

Distributing Information to the Team

You can copy the online documentation to a network drive for access by project participants. Each team member can then view or print those portions that specifically relate to his or her role in the organization.

Throughout this documentation, the Security Guidance icon  helps you to quickly identify security-related content to consider during the installation and configuration process.

Where to Get Documentation Updates

For the latest updates to the P6 Professional Documentation library, go to http://download.oracle.com/docs/cd/E23006_01/index.htm.

Where To Get Training

To access comprehensive training for all Primavera products, go to:

<http://education.oracle.com>

Where to Get Support

If you have a question about using Oracle 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.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Overview

The purpose of this document is to provide a roadmap for installing and upgrading the standalone components of Oracle Primavera P6 Professional R8.1.

In This Section

Required Downloads and Reference Documentation.....	11
Resources Needed for Installation.....	11
Component Descriptions.....	12

Required Downloads and Reference Documentation

Media Pack Downloads: Compressed archive files for software and documentation downloads. Access

From within the media pack, download the following:

- ▶ P6 Professional Quick Install Guide
- ▶ P6 Professional R8.1
- ▶ P6 Professional Documentation

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

Reference Documentation:

- ▶ **Quick Install Guide:** General installation information.
- ▶ **Tested Configurations Document:** Contains tested environment configurations and version information for tested platforms, operating systems, and third-party software components for P6 Professional R8.1.

Location – P6 Professional Documentation download, Documentation
\

Resources Needed for Installation

Standalone 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 standalone 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 standalone installation without assistance when this documentation is utilized as part of the preparation.

Component Descriptions

System Architecture: Installing P6 Professional standalone 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 standalone 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 standalone Installation option:

- ▶ Database Server
- ▶ Database
- ▶ Desktop Client

Database server:

The standalone installation installs Oracle Database Express Edition (Oracle Database XE). This database server component of the standalone installation is required to store the project management databases on an individual computer.

There will be four default users for project management, the default users are ADMPRM\$PM, PRIVPRM\$PM, PUBPRM\$PM, and BGJOB\$PM.

Database:

A database is required to store the data, the project management database stores the project management data used by P6 Professional. It is a required database installed via the standalone installation.

The name of the default database alias shown on the login screen is PMDB.

Desktop client:

P6 Professional enables users to access the project management database to plan and control a large number of projects.

Client Operating System Requirements

- ▶ Microsoft Windows XP sp3
- ▶ Microsoft Windows Vista sp2
- ▶ Microsoft Windows 7

New Installation Information

Location in Media Pack

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

Client_Applications\setup.exe - choose Standalone as the setup type.

In This Section

New Installation Overview	15
Installation	15

New Installation Overview

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 P6 Professional as a standalone 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 **Choose Setup Type** dialog box, choose Standalone.
- 4) On the **Oracle Express Edition Install** dialog box, enter a password for your Oracle XE database. The password must contain 6-30 characters and begin with a letter. It must contain at least one number. Valid characters are letters (a-z and A-Z), numbers (0-9) and underscore.

Caution: You must remember this password because it will be used as the password for the Oracle XE system user, all default database users, and the application admin super user created during installation. The password will also be used for future installations and for contacting Oracle Support.

- 5) On the **Sample Data** dialog box, select **Include sample data** if you want to install sample projects.
- 6) Click **Next** to complete the installation.
- 7) During the installation, the setup program installs the database. Setup also installs and configures Oracle Database XE.
- 8) Click **Finish** to exit the Setup Wizard.
- 9) After the installation is complete, you must restart your computer before you can use the software.
- 10) Launch P6 Professional by clicking **Start, All Programs, Oracle – Primavera P6, P6 Professional R8.1** then select P6 **Professional R8.1**.

Note: You can login using the Login Name **admin** and the password you created using the Oracle Express Edition Install dialog box.

Upgrade Information

In This Section

Upgrade Installation Overview	17
Part I - Backup Database SQL Server/MSDE Database.....	17
Part II – Upgrade Primavera v5.0, v6.0, or v6.1 to Oracle Primavera P6 v6.2.1	18
Part III - Upgrading to P6 Professional R8.1	19
Migrating Microsoft SQL Server Express to Oracle XE (Optional)	21

Upgrade Installation Overview

Upgrade Version Considerations:

- ▶ To upgrade from Oracle Primavera P6 standalone v6.2, v6.2.1, v7.0, and v7.0 SP3 to P6 Professional R8.1 simply run standalone setup as described in **Installation** (on page 15).
- ▶ Versions of Oracle Primavera P6 standalone software prior to v5.0 are no longer supported and cannot be upgraded.
- ▶ To upgrade from P6 v6.2.1 or above follow Parts I and Part III below.
- ▶ Upgrading Oracle Primavera P6 standalone v5.0, v6.0, or v6.1 to v8.1 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 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 v5.0, v6.0, or v6.1 to Oracle Primavera P6 v6.2.1 (Required only for Primavera v5.0, v6.0, or v6.1)
- ▶ Part III – Upgrading P6 v6.2.1 or above to P6 Professional R8.1.
- ▶ (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 1> 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**:

Part II – Upgrade Primavera v5.0, v6.0, or v6.1 to Oracle Primavera P6 v6.2.1

- 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 Primavera v5.0), 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 standalone 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 **Finish** to exit the Install Shield Wizard.
- 15) Click **Exit** to end the installation.
- 16) Continue with Part III to complete upgrade.

Part III - Upgrading to P6 Professional R8.1

Note: Methodologies are not migrated when upgrading from any version to P6 Professional R8.1. **Convert Methodologies to Projects** (on page 19) in order to save methodology data as a project.

- 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 **Choose Setup Type** dialog box, choose **Standalone**.
- 4) Click **Next** to complete the installation.
- 5) Click **Finish** to exit the Setup Wizard.
- 6) After the installation is complete, you must restart your computer before you can use the software.

Launch P6 Professional by clicking **Start, All Programs, Oracle – Primavera P6, P6 Professional R8.1** then select **P6 Professional R8.1**. 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)*.

Convert Methodologies to Projects

To migrate Methodology Management version 7.0 or earlier data to P6 Professional R8.1 projects, 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 projects, contact Oracle Consulting to automate the process.

- 3) After you have converted all your Methodology Management data to projects, upgrade P6 Professional.

Set the industry type

The industry type that you choose determines the terminology and default settings that display in P6 Professional.

An upgrade or a new installation of P6 Professional database leaves the industry type field blank and requires the system administrator to set it. So immediately after the installation, the administrator must use the Admin Preferences, Industry tab in P6 Professional to select an appropriate industry type.

Use the following steps to select the industry type.

- 1) Choose Admin, Admin Preferences.
- 2) Click the Industry tab.
- 3) Select the option that most closely aligns with your industry.

Notes

- ▶ If you set the industry type and later change it, the change will not take effect for users who have logged in since it was last set until you clear their USERDATA; the new industry setting is immediately effective for new users.
- ▶ The following table lists each industry type and its corresponding terminology and default settings:

Industry Type	Industry Terminology Examples	Default project comparison tool
Engineering and Construction	Budgeted Units Budgeted Cost Original Duration	Claim Digger
Government, Aerospace, and Defense	Planned Units Planned Cost Planned Duration	Schedule Comparison
High-Technology, Manufacturing	Planned Units Planned Cost Planned Duration	Schedule Comparison
Utilities, Oil, and Gas	Budgeted Units Budgeted Cost Original Duration	Claim Digger
Other Industry	Planned Units Planned Cost Planned Duration	Schedule Comparison

Migrating Microsoft SQL Server Express to Oracle XE (Optional)

P6 Professional R8.1 still supports Microsoft SQL Server Express as your standalone database. If you would like to migrate your Microsoft SQL Server Express database to Oracle XE, you can follow the steps outlined below. After you install P6 Professional R8.1.

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 the 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 Client_Applications/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 the SQL database 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

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 standalone upgrades for future releases.

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

Privileged user name: **privprm\$pm** for PM database.

Public user name: **pubprm\$pm** for PM database.

Background job user name: **bgjob\$pm** for PM database.

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

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

Configuring Alias Connection for P6 Professional to Oracle XE

1) Launch P6 Professional.

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.

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
- 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.