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**PRIMAVERA**

**P6 Professional Standalone Installation and Configuration Guide  
8.3**

January 2014



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# Overview

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The P6 Professional Standalone Installation and Configuration Guide provides a roadmap for installing and upgrading the standalone components of Oracle Primavera P6 Professional R8.3.

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

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## Required Downloads and Reference Documentation

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

From within the media pack, download the following:

- ▶ P6 Professional Readme
- ▶ P6 Professional R8.3
- ▶ P6 Professional Documentation

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**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.

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### Reference Documentation:

- ▶ **Tested Configurations Document:** Contains tested environment configurations and version information for tested platforms, operating systems, and third-party software components for P6 Professional R8.3.

Location – P6 Professional Documentation download, Documentation \<language>\Tested Configurations\Tested Configurations.zip

- ▶ Also review the following knowledge base article:  
P6 Client and Professional (Standalone) Installation Prerequisites and Considerations for Windows Vista and Windows 7 Operating Systems ID 911105.1

## 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.

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

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. The P6 standalone Installation option installs the following:

- ▶ Database Server

The standalone installation installs Oracle Database Express Edition 10g (Oracle Database XE). This database server component of the standalone installation is required to store the project management databases on an individual computer.

**Note:** If Oracle Database Express Edition 11g is already installed on the client computer, the installation creates the P6Professional database there.

Four default users will be created for project management: ADMPRM\$PM, PRIVPRM\$PM, PUBPRM\$PM, and BGJOB\$PM.

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.

- ▶ Database

The project management database stores the project management data used by P6 Professional. The database is installed during 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 sp1

See the *Tested Configurations* document for the most recent information.





# New Installation Information

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## Location in Media Pack

Extract the contents of the media pack to a folder on the computer where you are installing P6 Professional. The installation wizard utility may be run from the following location:

Client\_Applications\setup.exe - choose Standalone as the setup type.

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## Installation Overview

The P6 Professional standalone installation wizard performs the following:

- ▶ installs the database server component along with the databases
- ▶ installs the client application software
- ▶ configures the connectivity between the client software and the databases

To complete the installation you must have full administrative rights to the machine on which you are installing the software.

## Before You Begin

Before beginning the standalone installation and creating a project management database check for the following as they may impact a successful installation:

- ▶ You must have full administrative rights to the machine on which you are installing the software.
- ▶ Download and extract (unzip) the software to a folder on the local hard drive, such as C:\Temp.
- ▶ Avoid downloading the software too deep within the windows folder structure. It can limit the file name to 256 characters.
- ▶ 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.

- ▶ Ensure the DEP (Data Execution Prevention) setting, **Turn on DEP for all programs and services except those I select** is not enabled, as it can block the creation of the database.
- ▶ Ensure anti-virus, anti-spyware, security software and/or firewall is not enabled as it may block programs, protocols, or ports necessary for database creation.
- ▶ Ensure the UAC (User access control) is not enabled as it may block the installation and creation of Oracle database.

### Installation

- 1) Download and extract the media zip file locally to the client.
- 2) Double-click **setup.exe** in the **Client\_Applications** folder of the P6 physical media or download to launch the installation wizard.

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**Note:** Click **Next** on each wizard dialog box to advance to the next step. Click **Cancel** at any time to exit the wizard.

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- 3) On the **Welcome** screen, click **Next**.
- 4) On the **Choose Setup Type** dialog box, choose **Standalone**.
- 5) Microsoft .NET Framework, Windows Installer, and the Java Runtime Environment are required to run P6 Professional. If they are not installed, follow the prompts to install them and then restart your computer when prompted. Allow setup.exe to run when your computer restarts and follow the prompts to complete installation of the required components.

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**Note:** Microsoft Windows Imaging Component is required for .NET 4.0 installation on 64-bit Windows XP SP2 systems. This component can be downloaded from Microsoft at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=F64654AC-6E26-41D9-A90A-0E7783B864EE>

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- 6) 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.

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**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.

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- 7) On the **Sample Data** dialog box, select **Include sample data** if you want to install sample projects.
- 8) Click **Install** to complete the installation.

- 9) During the installation, the setup program installs the database. Setup also installs and configures Oracle Database XE.
- 10) Click **Finish** to exit the Setup Wizard.
- 11) After the installation is complete, you must restart your computer before you can use the software.
- 12) Launch P6 Professional by clicking the version-specific menu option, **Start, All Programs, Oracle – Primavera P6, P6 Professional**, then select **P6 Professional**.

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

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# Upgrade Information

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## Upgrade Installation Overview

### Upgrade Version Considerations:

- ▶ 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, backup your database, then follow the instructions in *Upgrading P6 v6.2.1 or above to P6 Professional R8.3*
- ▶ Upgrading Oracle Primavera P6 standalone v5.0, v6.0, or v6.1 to v8.3 is a process that requires an intermediate installation of version 6.2.1. Backup your SQL Server/MSDE database then follow the instructions in *Upgrade Primavera v5.0, v6.0, or v6.1 to Oracle Primavera P6 v6.2.1*.
- ▶ Upgrades of versions prior to v7.0 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:

- ▶ Prerequisite - Backup Database SQL Server/MSDE database
- ▶ 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)
- ▶ Upgrading P6 v6.2.1 or above to P6 Professional R8.3.
- ▶ (Optional) Migrating Microsoft SQL Server Express to Oracle XE

## 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**:

### 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) Repeat Steps 12 and 13 for the MMDB database.
- 15) Click **Finish** to exit the Install Shield Wizard.
- 16) Continue with Upgrading to P6 Professional R8.3 to complete upgrade.

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## Upgrading to P6 Professional R8.3

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**Note:** Methodologies are not migrated when upgrading from v7.0 or earlier to P6 Professional R8.3. See **Convert Methodologies to Projects** (on page 15) in order to save methodology data as projects before you upgrade.

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- 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.

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- 2) On the **Welcome** screen, click **Next**.
- 3) On the **Choose Setup Type** dialog box, choose **Standalone**.
- 4) Microsoft .NET Framework, Windows Installer, and JRE are required to run P6 Professional. If they are not installed, follow the prompts to install them and then restart your computer when prompted. Allow setup.exe to run when your computer restarts and follow the prompts to complete installation of the required components. Check the tested configurations document to see the required versions.

**Note** Microsoft Windows Imaging Component is required for .NET 4.0 installation on 64-bit Windows XP SP2 systems. This component can be downloaded from Microsoft at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=F64654AC-6E26-41D9-A90A-0E7783B864EE>

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- 5) Click **Install** to complete the installation.
- 6) Click **Finish** to exit the Setup Wizard.
- 7) 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 R8.3** then select **P6 Professional R8.3**. 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).

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### Convert Methodologies to Projects

To migrate Methodology Management version 7.0 or earlier data to P6 Professional R8.3 projects, use Project Architect in the Project Management module (version 7.0 or earlier) to convert the data from a methodology to a project.

**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.

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To convert Methodology Management data to a project:

- 1) Create a new EPS node in Project Management where you can store all your Methodology Management projects.
- 2) Use Project Architect in Project Management 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*.
- 3) After you have converted all your Methodology Management data to projects, upgrade P6 Professional.

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### Set the Industry Type (P6 Professional Only)

The industry type that you choose determines the terminology and default calculation 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.

**Note:** If you set the industry type and later change it, the new industry setting is immediately effective for new users. However, the change will not take effect for users who have logged in since it was last set. For information on how to make it effective for existing users, refer to My Oracle Support's Knowledge article [How To Change The P6 Industry Type In P6 PPM \(Professional\) and P6 EPPM R8.3 \(Doc ID 1386047.1\)](#)

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	Schedule Comparison



	Planned Duration	
High-Technology, Manufacturing	Planned Units Planned Cost Planned Duration	Schedule Comparison
Utilities, Oil, and Gas	Budgeted Units Budgeted Cost Original Duration	Claim Digger

### Migrating Microsoft SQL Server Express to Oracle XE (Optional)

P6 Professional R8.3 still supports Microsoft SQL Server Express as your standalone database when upgrading from v7.0 and earlier. 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 R8.3.

#### 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: !433 (default). If a different port was used, type the correct port  
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 Standalone 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 when you installed 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**.  
**Administrative user name: admprm\$pm**  
**Privileged user name: privprm\$pm**  
**Public user name: pubprm\$pm**  
**Background job user name: bgjob\$pm**  
**Caution:**
  - ▶ It is extremely important that these names be typed exactly as shown here; when the standalone installation creates the database users are created as follows:  
'admuser' is 'admprm\$pm'  
'privuser' is 'privprm\$pm'  
'pubuser' is 'pubprm\$pm'
  - ▶ The password is the one created during Oracle XE installation.
  - ▶ If you use different user names, you will not be able to do automatic standalone upgrades for future releases.

- 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, <system password>**
- 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.

## For More Information

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### Where to Get Documentation

For the most up-to-date versions of all manuals and technical documents related to installing, administering, and using P6 Professional, go to:

[http://download.oracle.com/docs/cd/E35157\\_01/index.htm](http://download.oracle.com/docs/cd/E35157_01/index.htm).

You can also access the versions of the product manuals and technical documents that were available at the time of the release from the Documentation Library by clicking [index.htm](#) in the Documentation folder of the physical media or download.

The following table lists the core documents available for the release, and identifies recommended readers by role. P6 Professional roles are described in the *P6 Professional Administrator's Guide*. Other, more technical documents are available on the media pack and OTN site, but are not listed below.

Title	Description
<i>What's New in P6 Professional</i>	<p>Highlights the new and enhanced features included in this release.</p> <p>You can also use the <i>P6 Professional Cumulative Feature Overview Tool</i> to identify the features that have been added since a specific release level.</p> <p>All users should read this guide.</p>
<i>P6 Professional Administrator's Guide</i>	<p> 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.</p> <p>The P6 Professional network administrator/database administrator should read this guide.</p>
<i>Tested Configurations</i>	<p>Lists the configurations that have been tested and verified to work with P6 Professional. The network administrator/database administrator and P6 Professional administrator should read this document.</p>
<i>P6 Professional Standalone Installation and Configuration Guide</i>	<p>Explains how to install and configure P6 Professional as a standalone application.</p> <p>All administrators should read this guide.</p>
<i>P6 Professional Help</i>	<p>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.</p> <p>The P6 Professional administrator, program manager, project manager, resource/cost manager, and team leader should read this Help.</p>
<i>P6 Professional User's Guide</i>	<p>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.</p> <p>The program manager, project manager, resource/cost manager, and team leader should read this guide.</p>
<i>P6 Visualizer Help</i>	<p>Describes how to create, modify, and manage Timescaled Logic Diagrams and Gantt charts.</p> <p>All users should read this Help.</p>

<i>P6 Professional SDK Help</i>	Explains how to use the P6 Professional SDK to connect to the P6 Professional database. Describes the tables, fields, and stored procedures that you can access through the P6 Professional SDK. Provides examples that show how you can use the P6 Professional SDK to perform several basic tasks, such as creating a new project or assigning a resource to a project activity. To open the help file, double-click the p6_pro_sdk.chm file, which is available in <i>local drive</i> \Program Files\Oracle\Primavera P6 Professional\PM SDK\Doc\ by default. The P6 Professional network administrator/database administrator should read this documentation.
<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. All administrators should read this guide if your organization is moving from P3 to P6.

### 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 Training

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

<http://education.oracle.com>

### Oracle Learning Library

The Oracle Learning Library (OLL) provides online learning content covering Primavera products. Content includes videos, tutorials, articles, demos, step-by-step instructions to accomplish specific tasks, and self-paced interactive learning modules.

To access the learning library's Primavera content, go to:

<http://www.oracle.com/goto/oll>

## 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, click <http://support.oracle.com/>. This page provides the latest information on contacting Oracle Global Customer Support, knowledge articles, and the support renewals process. For more information about working with Support, visit <https://support.oracle.com/epmos/faces/DocumentDisplay?id=888813.2> to view **Support Tools & Tips**.

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/us/support/contact-068555.html> or visit <http://www.oracle.com/us/corporate/accessibility/support/index.html> if you are hearing impaired.

### Using Primavera's Support Resource Centers

Primavera's Support Resource Center provides links to important support and product information. Primavera's Product Information Centers (PICs) organize documents found on My Oracle Support (MOS), providing quick access to product and version specific information such as important knowledge documents, Release Value Propositions, and Oracle University training. PICs also offer documentation on Lifetime Management, from planning to installs, upgrades, and maintenance.

Visit <https://support.oracle.com/epmos/faces/DocumentDisplay?id=1486951.1> to access links to all of the current PICs.

PICs also provide access to:

- ▶ **Communities** which are moderated by Oracle providing a place for collaboration among industry peers to share best practices.
- ▶ **News** from our development and strategy groups.
- ▶ **Education** via a list of available Primavera product trainings through Oracle University. The Oracle Advisor Webcast program brings interactive expertise straight to the desktop using Oracle Web Conferencing technology. This capability brings you and Oracle experts together to access information about support services, products, technologies, best practices, and more.

# Legal Notices

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