Migration from Sybase Installation Instructions

Sybase Adaptive Server Anywhere is not supported in this version. By default, customers using Sybase will be automatically migrated to Oracle XE during the upgrade process. This includes migration of your reports and forms. There are database storage capacity limitations that may impact your ability to migrate to Oracle XE. In this case, you will be required to manually migrate your Sybase installation to Oracle or Microsoft SQL Server using the documentation provided.

This document contains the detailed instructions for completing this migration process and enabling you to upgrade to Primavera Contract Management 13. It is intended for installations that cannot automatically be migrated during the upgrade process, or for customers wishing to migrate their system manually.

Reports and Forms

In order to use your existing reports and forms, you need to manually convert them using the instructions provided in the Reports Migration Utility Instructions.pdf, available on the release media or download. Alternately, you can load the stock reports and forms provided with the Contract Management 13.0 download that correspond with your new database platform. If you decide to load the stock reports and forms, refer to step #6 (Load Contract Management stock reports and forms) in this document for instructions.

Migration Process Summary

1. Install and configure your new database server
2. Migrate your Sybase database(s) to one of the supported platforms
3. Configure Contract Manager to connect with the newly migrated databases
4. Upgrade your newly migrated databases
5. Upgrade to Contract Management
6. Load Contract Management stock reports and forms

1. Install and configure your new database server

Before beginning the migration process you will need to install and configure your new database server.

The supported database platforms are:

- Oracle 11g
- Oracle 10g Express Edition (Oracle XE)
- Microsoft SQL Server 2008
- Microsoft SQL Server 2005

Oracle Express Edition is provided with Primavera Contract Management, and can be installed from the Install Other Applications menu. Oracle XE is an entry-level database with storage capacity of 4GB, can use up to 1GB of memory, and will use one CPU on the host machine.

2. Migrate your Sybase database(s) to one of the supported platforms

Now that you have installed and configured your database server, you can begin the migration process. This process will extract the data from your Sybase database, and load it into your new database.
The following are the detailed steps for completing the data migration process.

1. Stop the Contract Manager service.
   - From the Start menu, select Programs/Primavera/Contract Manager Utilities/Stop Contract Management Service.
   - This will shut down both the Contract Management service and the Sybase database server.

2. From the Contract Management physical media or download, run setup.exe.

3. Choose **Configure Primavera Contract Management Databases**.

4. Choose **Sybase Migration Utility**.
   
   **NOTE:** The Sybase Migration Utility contains options for creating, upgrading, and migrating databases. For this migration process, you will be choosing the option to convert. The other options should not be used when launching this utility.

5. Click **Convert an existing Contract Management Database**, and click the **Next** button.

6. Specify the Source Database Connection Information.
   a. Choose **Sybase** as the Source Database.
   b. Enter the Schema Owner User Name (the default is **exp**). This is the database owner name.
   c. Enter the Schema Owner Password (the default is **sql**). This is the database owner password.
   d. If the Sybase databases are not located in the folder specified in the Database Folder field, click the folder icon to the right of the field, and browse to the correct folder.
   e. Choose the name of the database you want to convert.
      
      **NOTE:** It is recommended that you convert the EXPADMIN database first.
   f. Click **Next**.
      
      **NOTE:** Before displaying the next screen, the migration utility will connect to the specified Sybase database to ensure that the database is a valid Contract Management database.

7. Steps for **migrating to an Oracle database**:
   a. Select **Oracle** as the target database.
   b. Enter the System username and password.
   c. Enter the Oracle connection string (SID), and click **Next**.
   d. Specify Oracle tablespace information, and click **Next**.
   e. Review the tablespace name information, and click **Next**.
   f. Specify the database user information, and click **Next**.
   g. Choose **Yes** to begin the migration process.
   h. Repeat Steps 6 and 7 for each Sybase database that you wish to migrate.

8. Steps for **migrating to a Microsoft SQL Server database**:
a. Select **MS SQL** Server as the target database.
b. Enter the SQL Server Instance name.
c. Enter the Database name, and click **Next**.
d. Specify the database user information, and click **Next**.
e. Choose **Yes** to begin the migration process.
f. Repeat Steps 6 and 8 for each Sybase database that you wish to migrate.

### 3. Configure Contract Manager to connect to the newly migrated databases

The next step is to reconfigure Contract Manager to connect to the newly migrated databases. Without doing this step, Contract Manager will still be configured for Sybase, and the Upgrade Installation will be aborted.

The Server Config utility is used to reconfigure your Contract Manager settings. This is a wizard based utility. The wizard screens will default to your current settings. For the migration process, the only changes that need to be made are to the screens which specify the database connection information.

The following are the detailed steps for running the Server Config utility.

1. Choose Start/Programs/Primavera/Contract Manager Utilities/Server Config.
2. Click **Next** on the Welcome to the Contract Manager Server Configuration utility screen.
3. Click **Next** on the Enter your SMTP Server screen.
4. Click **Next** on the Enter the Port Number to use for Contract Management screen.
5. Click **Next** on the Contract Management Web Server Memory Allocation screen.
6. The next screen contains the options for the Contract Management Database.
7. Change the radio button to match your new database platform, and press Next.
8. For **migrations to Oracle**, do the following:
   a. On the first screen specify the database instance, host and port information.
      - **Server name (SID)** – This is the name of the Oracle database to which you are connecting.
      - **Computer Name** – This is the name of the host on which the database resides. This can be the alphanumeric name or the IP address.
      - **Port** – This the number of the port on the database host to which you are connecting. The default is **1521**.
   b. On the next screen, specify the Administration user name and password information.
      - **Expadmin User Name** – The default is **EXPADMIN**.
      - **Expadmin Password** – This is the password that you supplied when migrating the EXPADMIN database.
   c. On the next screen, specify the Group user name and password information.
      - **Group User Name** – The default is **exp**.
• **Group Password** – This is the password that you supplied when migrating the group database.

9. For migrations to Microsoft SQL Server, do the following:
   a. On the first screen specify the database instance, host and port information.
      • **Server name (SID)** – This is the name of the Oracle database to which you are connecting.
      • **Computer Name** – This is the name of the host on which the database resides. This can be the alphanumeric name or the IP address.
      • **Port** – This the number of the port on the database host to which you are connecting.
   b. On the next screen, specify the Administration user name and password information. The default is 1433.
      • **Expadmin User Name** – The default is EXPADMIN.
      • **Expadmin Password** – This is the password that you supplied when migrating the EXPADMIN database.
   c. On the next screen, specify the Group user name and password information.
      • **Group User Name** – The default is exp.
      • **Group Password** – This is the password that you supplied when migrating the group database.

10. Click **Next** on the Primavera schedule database type screen
    
    **Note:** If your current installation is configured to connect to a Primavera schedule, you will be prompted for additional screens. If you have not made any changes to the Primavera schedule connections, you can press **Next** through these screens as well.

11. Review the Start installing the revised Server Configurations screen. If any changes are required, click **Back** to return to the appropriate screen, otherwise click **Next**.

12. On the Contract Management Server Configuration Complete screen, make sure to check both checkboxes, and then click **Finish**.

At this point, your database connections and server settings have been reconfigured, and the Contract Management service is restarting. Once the service has fully started, you can login and view your project data within the migrated databases.

**NOTE:** The Server Config Utility allows for connecting to one group database. If you migrated multiple group databases, you can login to the Primavera Administrator utility at this time, and specify the remaining group databases that were migrated.

4. **Upgrade your newly migrated databases**

Now that you have successfully configured Contract Manager to connect to the migrated databases, you can upgrade your database.

Before upgrading your database, you will need to shut down the Contract Manager service, and backup your databases.

Primavera Contract Management contains separate installation guides for Oracle and Microsoft SQL Server. For detailed instructions on performing the database upgrade, see “Upgrading Your Databases” in the “Preparing for Installation” chapter of the appropriate installation guide.
5. Upgrade Contract Management

The final step in the migration process is to upgrade to Primavera Contract Management 13. In order to upgrade to Primavera Contract Management 13, you will need to setup and configure your application server. Primavera Contract Management supports two application servers (JBoss 5.0.1 and WebLogic 10gR3 Enterprise).

For JBoss application server setup instructions, see “Configuring a JBoss Application Server” in the “Preparing for Installation” chapter of the appropriate installation guide.

For WebLogic application server setup instructions, see “Configuring a WebLogic Application Server” in the “Preparing for Installation” chapter of the appropriate installation guide.

Once the application server has been configured, you can now run the Primavera Contract Management Upgrade Installation. For information on performing the upgrade installation, see the “Upgrading to Contract Management 13.0 from a Previous Version” chapter in the appropriate installation guide.

6. Load Contract Management 13 stock reports and forms

Use the following instructions to load the stock reports and forms that are included in the Contract Management 13 media pack.

1. Back up your existing reports and forms:
   a. Browse to the location where your current reports and forms are stored.
   b. Make a backup copy of both the reports and forms folders.
   c. The backup copy should not be located in the same folder as the existing reports and forms.

2. Locate the reports and forms to be copied from the media pack:
   a. The location of the stock reports and forms depends upon the database type to which you migrated.
      • For Oracle, the download locations are `<download_folder>\exponline\libs\oracle\reports`, and `<download_folder>\exponline\libs\oracle\forms`.
      • For Microsoft SQL Server, the download locations are `<download_folder>\exponline\libs\sql\reports`, and `<download_folder>\exponline\libs\sql\forms`.
   b. Copy the appropriate reports folder, and replace your existing reports folder with the copy.
   c. Copy the appropriate forms folder, and replace your existing forms folder with the copy.

3. Load the reports and forms:
   a. Login to the Primavera Contract Management Administration application.
   b. Click the Server Configuration link.
   c. Press the Import Reports and Forms button to import the reports and forms. For more information, see the online help (click the Help link at the top right of the window).