Portfolio Management Upgrade Guide
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Overview

An upgrade of Primavera Portfolio Management refers to installing the current version of Primavera Portfolio Management over an existing installation of *Primavera Portfolio Management* 5.0 and later, including service packs.

To upgrade Primavera Portfolio Management:

1) Verify the prerequisites. For more details, see the *Primavera Portfolio Management Installation and Configuration Guide*.
2) Sign in to the Primavera Portfolio Management server with administrative privileges.
3) Install Primavera Portfolio Management without uninstalling the older version of Primavera Portfolio Management. For more details, see ***Upgrading Primavera Portfolio Management*** (on page 7).

   Note: The database will also be automatically upgraded.

4) (Optional) Configure the SMTP Server Smart Host. For more details, see ***Configuring the SMTP Mail Server for Primavera Portfolio Management*** (on page 9).
5) After upgrading, verify the installation. For more details, see ***Verifying the Installation*** (on page 11).

Upgrading Primavera Portfolio Management

To upgrade Primavera Portfolio Management:

1) Download Primavera Portfolio Management from the Oracle edelivery website.
2) Unzip the downloaded Primavera Portfolio Management file.
3) Double-click **setup.exe** to begin installation.
4) In the **Choose Setup Language** dialog box, select the language in which the installation screens are to be displayed, and select **OK**.

   Note: This does not influence the language in which the user interface of Primavera Portfolio Management will be displayed.

5) On the **Welcome** screen, select **Next**.

   Note: Select **Next** on each screen to advance to the next step of the installation.

6) On the **Customer Information** screen confirm the pre-populated **User Name** and **Organization**. Otherwise enter correct values.
7) On the **Destination Folder** screen, select **Change** and browse to the previously installed PPM folder that is to be upgraded.
8) On the **Select Default User Interface Language** screen, select the default language of the user interface.

   Note: Each user can later change this default language selection.

9) On the **Feature Selection** screen, for each instance of Primavera Portfolio Management, select only one installation of the **Portfolio Management Primary Back-End**, and at least one installation of the **Portfolio Management Front-End**. These can be installed on separate or same physical servers.

   For the *simplest* installation of all required features installed on one server, select

   - **Portfolio Management Primary Back-End**
   - **Portfolio Management Front-End**

   Additionally, select any of the following optional features:

   - **SOAP RPC interface**
   - **Web Services interface**
   - **Propose**

     For more details on how to configure Propose, see the, *Configuring Propose* section in the *Primavera Portfolio Management Installation and Configuration Guide*.
   - **Bridge for Primavera P6 and Microsoft Project Server**

Configure the Front-End for Publish and Update, and configure the Back-End for Sync. For more details on how to configure the Bridge on both the servers, see *Configuring the Bridge for Project Management Systems* section in the *Primavera Portfolio Management Installation and Configuration Guide*.

- **Note**: To install Primavera Portfolio Management in a scaled-out environment, see *Installing Primavera Portfolio Management in a Distributed Setup* in the *Primavera Portfolio Management Installation and Configuration Guide*.

10) On the **Internet Information Server (IIS) Properties** screen, select any of the following options:
   - If you have been created a web site for Primavera Portfolio Management on the Internet Information Server Manager, select that web site from the **Install in** list.
   - Select **Redirect Web Site to Primavera Portfolio Management** if you want to redirect the website to a virtual directory created by Primavera Portfolio Management.
   - Select **Use https on all screens** to ensure information is secured by SSL.

   The Primavera Portfolio Management install automatically detects if a SSL certificate is already installed on your server. If no certificate is found, it will generate a self-signed SSL certificate for you, so that you will be able to use https (http protocol secured by SSL).
11) On the **Internet Information Server (IIS) Properties** screen, enter the corresponding URLs if they are different from the defaults for the following fields:
   - **How will Primavera Portfolio Management 19 (64-bit) be accessed on the intranet of your organization?**
   - **How will Primavera Portfolio Management 19 (64-bit) be accessed from outside your organization?**

   Note: If the URLs are different from the defaults, you will also need to synchronize the random number value for *all* non-default websites in which Primavera Portfolio Management is installed. For detailed instructions, see *Synchronizing all Non-default Websites Installed* with Primavera Portfolio Management in the *Primavera Portfolio Management Installation and Configuration Guide*.

12) On the **Ready to Install** screen, select **Install**.

   A message displays indicating that the database currently connected to Primavera Portfolio Management will also be upgraded.
13) On the **InstallShield Wizard Completed** screen, select **Finish**.

   Primavera Portfolio Management is installed successfully.

Configuring the SMTP Mail Server for Primavera Portfolio Management

To use the Send Mail feature of Primavera Portfolio Management, the SMTP service must be configured properly. This requires that the SMTP mail server is specified as your smart host. This will ensure the IIS SMTP Service automatically routes any SMTP e-mail sent to your local server onto your SMTP mail server for delivery.

A *smart host* allows you to route all outgoing messages for remote domains instead of sending them directly to the domain. This allows you to route messages over a connection that may be more direct or less costly than other routes. A smart host is similar to the route domain option for remote domains. The difference being, with a smart host, all outgoing messages are routed to that server, whereas with a route domain, only messages for the remote domain are routed to a specific server.

In a *distributed setup*, the SMTP Mail Server must be setup on the Primary Back-End, and the Front-End servers.

To set up the SMTP mail server on the Primavera Portfolio Management server:

1) From the **Start** menu, select **Administrative Tools**, **Internet Information Services (IIS) 10.X Manager**.
2) In the left navigation pane, select **SMTP Virtual Server**, right-click, and then select **Properties**.
3) In the **SMTP Virtual Server Properties** dialog box, select the **Delivery** tab.
4) Select **Advanced...**.
5) In the **Smart host** field, enter the name or IP Address of the SMTP mail server.

   If you do not know the name or IP Address of the SMTP mail server, contact your mail administrator.
6) Select **OK** to close the **Advanced Delivery** dialog box.
7) Select **OK** to close the **SMTP Virtual Server Properties** dialog box.
8) Close the IIS 10.X Manager screen.

- **Notes**:
- Since the SMTP service is a part of the IIS Admin Service, ensure that the Simple Mail Transfer Protocol (SMTP) service, as well as the IIS Admin service are running.
- If you set up a smart host, you can still designate a different route for a remote domain. Then the route domain setting overrides the smart host setting.
- Enter a Fully Qualified Domain Name (FQDN) or an IP address to identify the smart host. If you use an IP address, enclose it in square brackets [ ] (for example: [123.123.123.123]) to increase system performance. Microsoft SMTP Service checks first for a name, then an IP address. The brackets identify the value as an IP address, so the DNS lookup is bypassed.

For more details, see the *Configuring SMTP* topic in the *Primavera Portfolio Management System Administration Guide.*

Verifying the Installation

Verify that Primavera Portfolio Management has been installed correctly as follows:

1) On the Primavera Portfolio Management server, or a client workstation with network access to that server, open a compatible browser.
2) Enter the URL in the format specified during the installation of Primavera Portfolio Management. For example, *https://<server>/prosight*.
3) In the **User Name** field, enter the name of the Primavera Portfolio Management user.
4) In the **Password** field, enter the password of the user.

   The main page of Primavera Portfolio Management displays.

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Oracle Primavera Portfolio Management Upgrade Guide

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