



Strategies for Migrating to P6 8.3

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***2014 Technical
Webinar Series***

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- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.

Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Oracle perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- Our statements should not be construed as in conflict with any Oracle statement, as the Oracle statement is likely made based on more current knowledge than is available to us.



Abstract – Migrating to 8.3

- Migrating from P6 versions 6 or 7 to 8.3 involves a number of issues and decisions that not everyone seems to have a clear perspective on. In addition to migrating databases you may also need to migrate licenses. You'll need to make decisions about your use of P6 EPPM and P6 Pro that could have some long range impacts. Deciding to go one way could put you on a road with a dead end while deciding another way may force you to embrace technology that you don't feel you need or are ready for. We've found that there's quite a bit of misunderstanding about your options and the ramifications of your decisions. This presentation is intended to provide a clear perspective on your options and best path forward when migrating from 6/7 to 8.3.

- Oracle Primavera Software
- Oracle Primavera Certified Training & Implementation Specializations
- Project Support Services – administrators, schedulers, estimators



- Global, dedicated environment, hosting services
- Primavera OPPM, P6 EPPM, P6 Pro, Primavera Unifier, Contract Management, BI Publisher, UCM/Sharepoint, P6 Risk, AutoVue and Analytics
- Hard Dollar, HCSS, Acumen Fuse, Ecosys, Prism G2, US Cost, Microsoft...
- Global Data Centers in USA, London, Singapore and Brisbane



Agenda

Migrating to P6 R8.3.2

- Considerations
- Step 1 – Licensing
- Step 2 – Platform options
- Step 3 – Deployment options
- Step 4 – Plan your migration
- Step 5 – Get started
- Questions

Considerations

When upgrading from P6 v7 or earlier to P6 r8.3

- P6 EPPM (web) is now the primary component of P6 and does most of what the P6 client does in ver. 7 or earlier, plus many new features.
- P6 client is now referred to as P6 Professional and can be used with P6 EPPM (Web) or as a stand-alone, off-line or group model.
- You can log in remotely (“via the cloud”) to either P6 EPPM or P6 Pro.
 - This does not seem to be clear to a lot of P6 users, they think they need EPPM to have a centralized deployment. You do not. We currently host thousands of P6 Pro users.
- P6 Administration in Web ONLY if you deploy EPPM and Pro together.
- A P6 Pro only deployment includes it's own administration.

Considerations

When upgrading from P6 v7 or earlier to P6 r8.3

- Web content repository has changed, JackRabbit/Apache not supported.
- 8.3 supports Oracle WebCenter (UCM) or Sharepoint.
- Methodology Manager/Project Architect replaced by EPPM Templates.
- No integration API with P6 Pro but can still use SDK.
- Job Services run on-demand and in real-time.
- No more ProjectLink or MSP-managed (Summary) projects.
- P6 Team Member offers mobile and email statusing services.
- 8.3 has additional tables (P6 EPPM Extended Schema) for reporting.

Considerations

P6 r8.3 offers significant new features & enhancements

- New features – Line #'s, Visualizer, Import reviews, Schedule Checker, Risk Register, email updating, better security, Team member...
- Web Services for integration and customization only available in web.
- Latest release may resolve some issues from previous versions...
- R8.3 better supports large deployments.
- Integration with Unifier requires EPPM R8.3.2.
- Support for older versions has or will end.
- Support for latest hardware or software (64 bit) environments.

Considerations

P6 EPPM or P6 Pro? (or both?)

- It's NOT an either/or decision.
- If you select just Pro licenses, you can only use Pro software.
 - No migration path to EPPM, could end up with a “dead end” license.
- If you select EPPM licenses (costs \$250 more), you have choices.
 - Deploy just Pro for now and eventually switch to EPPM (no license “dead end”).
 - Deploy EPPM for Administration and use Pro for scheduling (best of both worlds).
 - As EPPM evolves you may evolve into a primary EPPM environment with just a few Pro users.
- P6 Professional is still the tool for Professional Schedulers.
 - Global Change, built-in report writer, better Layout printing, Visualizer...

Step 1 - Licensing

Perpetual, BPS, Term or SaaS?

- Oracle only supports Application users (Named)
 - Oracle Primavera has not supported Concurrent licensing since 2008.
- Concurrent (legacy) licenses need to be migrated to Named.
- Perpetual – you own the license forever (maintenance is optional).
- SaaS – Software as a Service – you pay per user/per month
 - Current Oracle Primavera P6 SaaS requires minimum of 200 users.
- BPS – Similar to SaaS, requires a services partnership with provider.
 - Minimum 20 users, 3 years, support from Authorized provider.
- DRM/MLM can provide SaaS-like model for less than 200 users.

Licensing Migrations

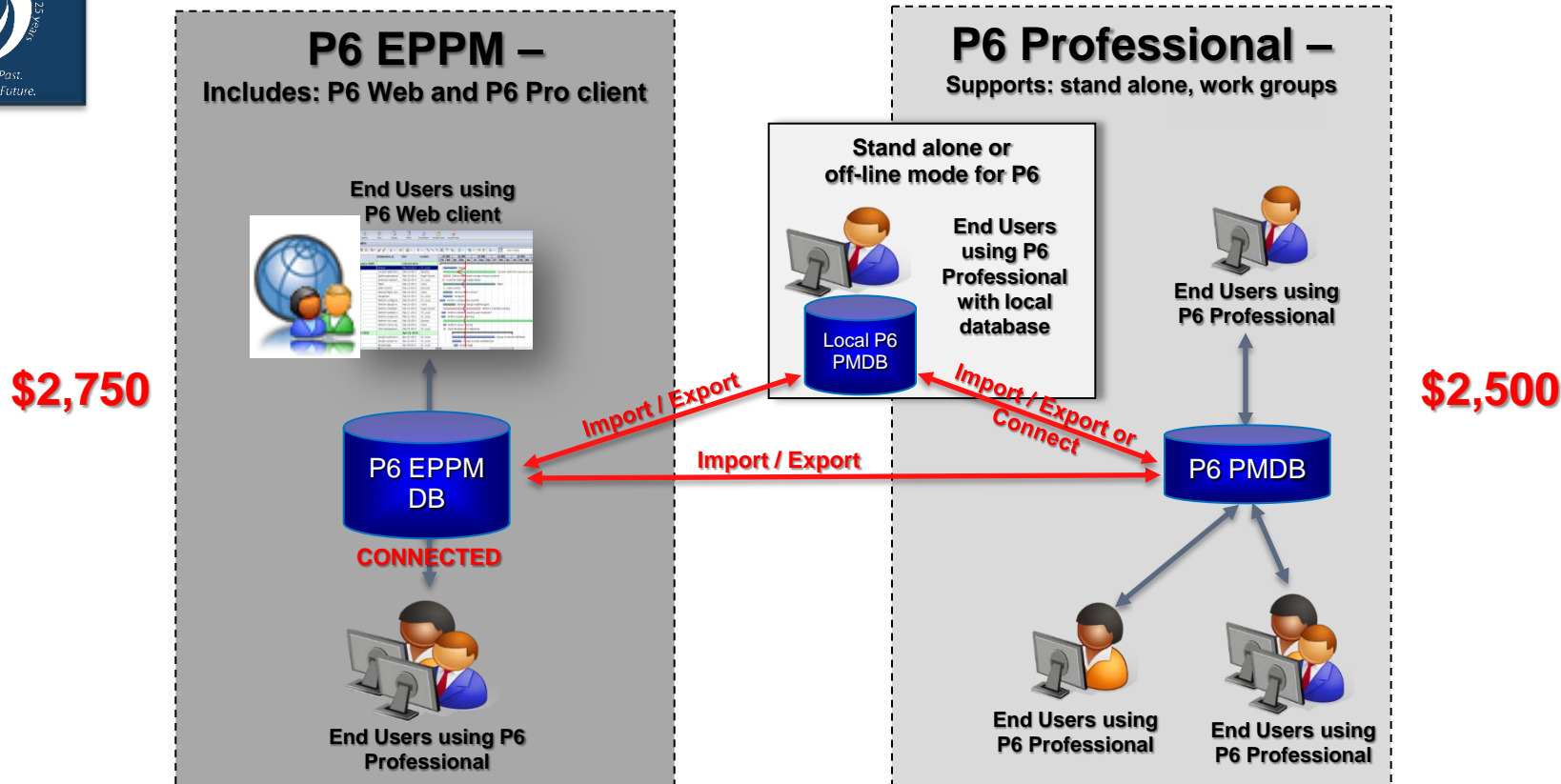
- Legacy licenses can migrate to Named user.
 - Each migration has to be submitted to Oracle for review and determination.
- Unpaid and/or first year maintenance included as part of migration cost.
- Migrations are done through Authorized Primavera Partners.
- Migrations are treated as new sales.
 - Can add additional licenses
 - Can add Web Services Licenses
- Maintenance costs remained the same after migration for the migrated licenses.

Step 2 – Platform Options

P6 EPPM or P6 Professional?

- P6 EPPM is web based, P6 Professional is Windows based.
 - P6 Pro can still be run remotely in a “cloud” environment.
- P6 Professional is the traditional scheduling tool for schedulers.
- P6 EPPM includes many add-ons
 - Team Member, Web Services, BI Publisher, Content Repository, Analytics, P6 Pro
- P6 EPPM or P6 Pro can be used in a multi-user environment.
- P6 Pro can also run offline on a desktop or laptop.
- P6 EPPM and P6 Pro databases have different schema's.
- Global Change and Visualizer are only available in P6 Professional.

P6 EPPM and P6 Professional R 8.3

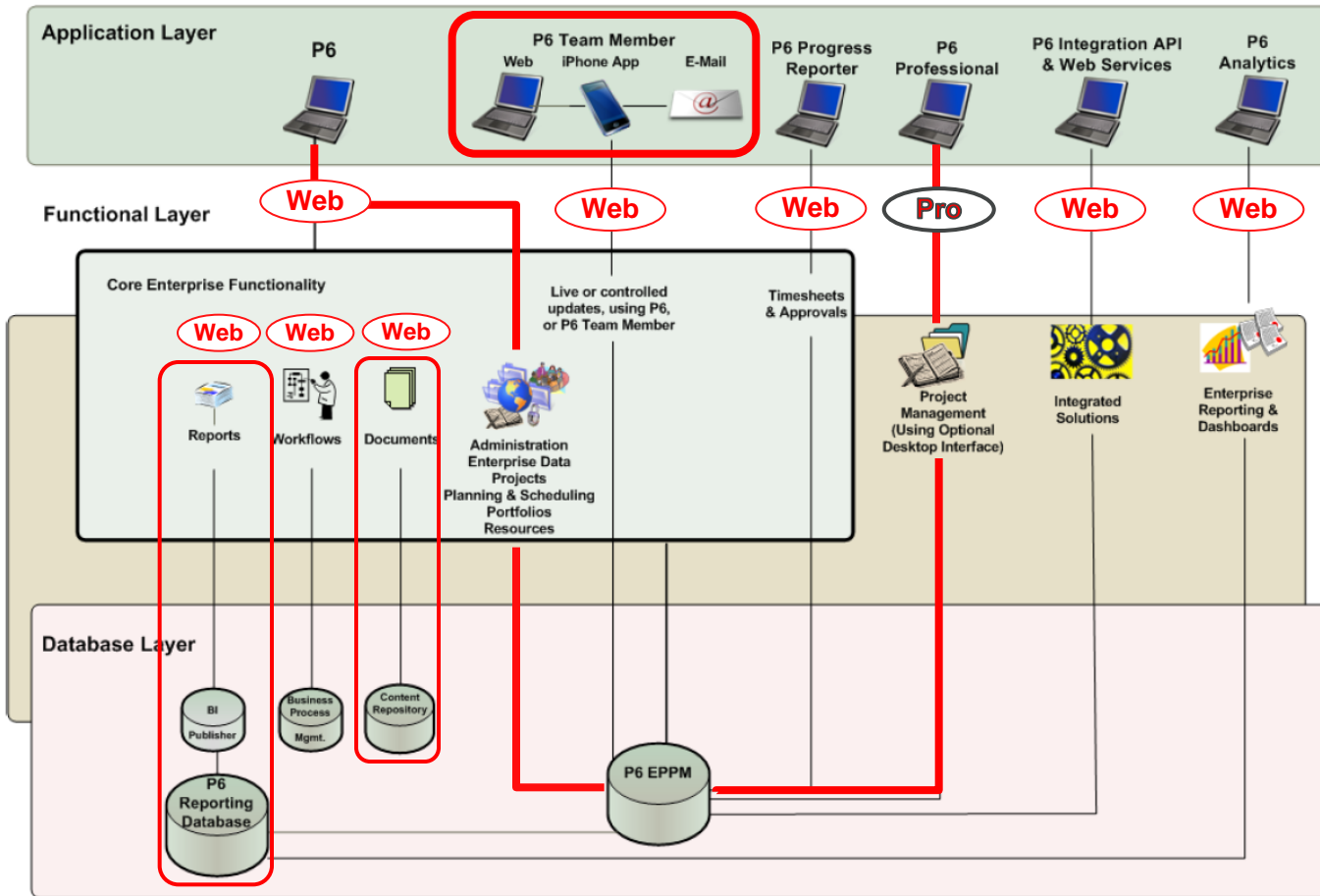


Step 3 – Deployment Options

P6 EPPM (Enterprise Project Portfolio Management) (P6 web)

- Requires a webserver (Oracle Weblogic).
- Connects to MS SQL or Oracle database.
- Allows P6 Pro (client) to connect but all administration is in web.
- Includes functionality not in P6 Pro
 - Team Member including mobile, web (BI) reporting, Schedule Checker, Schedule Preview, Approve Updates, Risk Register, Templates, Portfolio Views and Comparisons, Dashboards with KPI's, display PCM Project Workspace, display PCM portals for costs, enhanced resource functionality, capacity planning, content and document management, web services.
- Team Member requires a full license.

Deployment Graphic - P6 EPPM



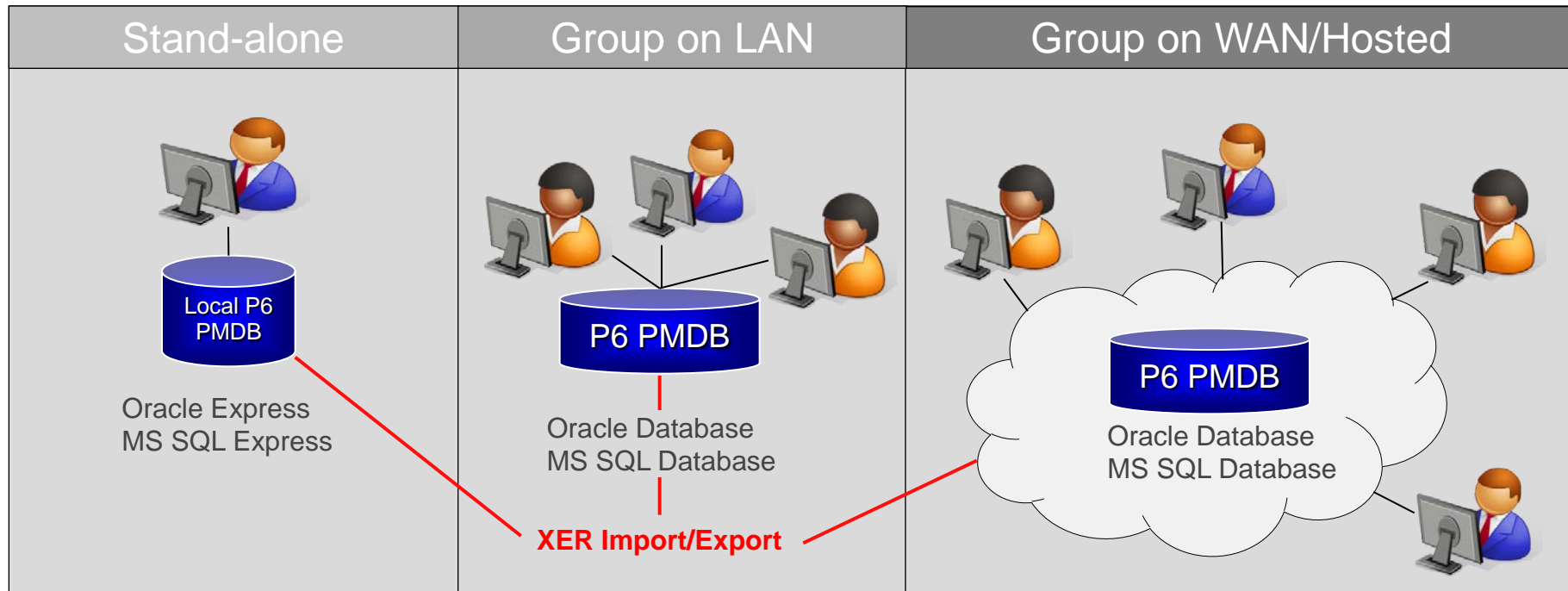
Step 3 – Deployment Options

P6 Professional (Windows client)

- Will run stand-alone or connected to a network (LAN or WAN).
- Can connect to Oracle Express or MS SQL Express (local) or MS-SQL or Oracle db's (server).
- When connected to P6 Pro db – all administration is local.
- If it's part of an EPPM license it can connect to EPPM database.
- When connected to EPPM db – all administration is through web.
- P6 Professional has functionality not in EPPM
 - Visualizer Time Scaled Logic diagrams, xer import/export, reflection projects, tabbed/tiled views, Line #'s, better Layout printing control, **global change**.

Deployment Graphic

P6 Professional

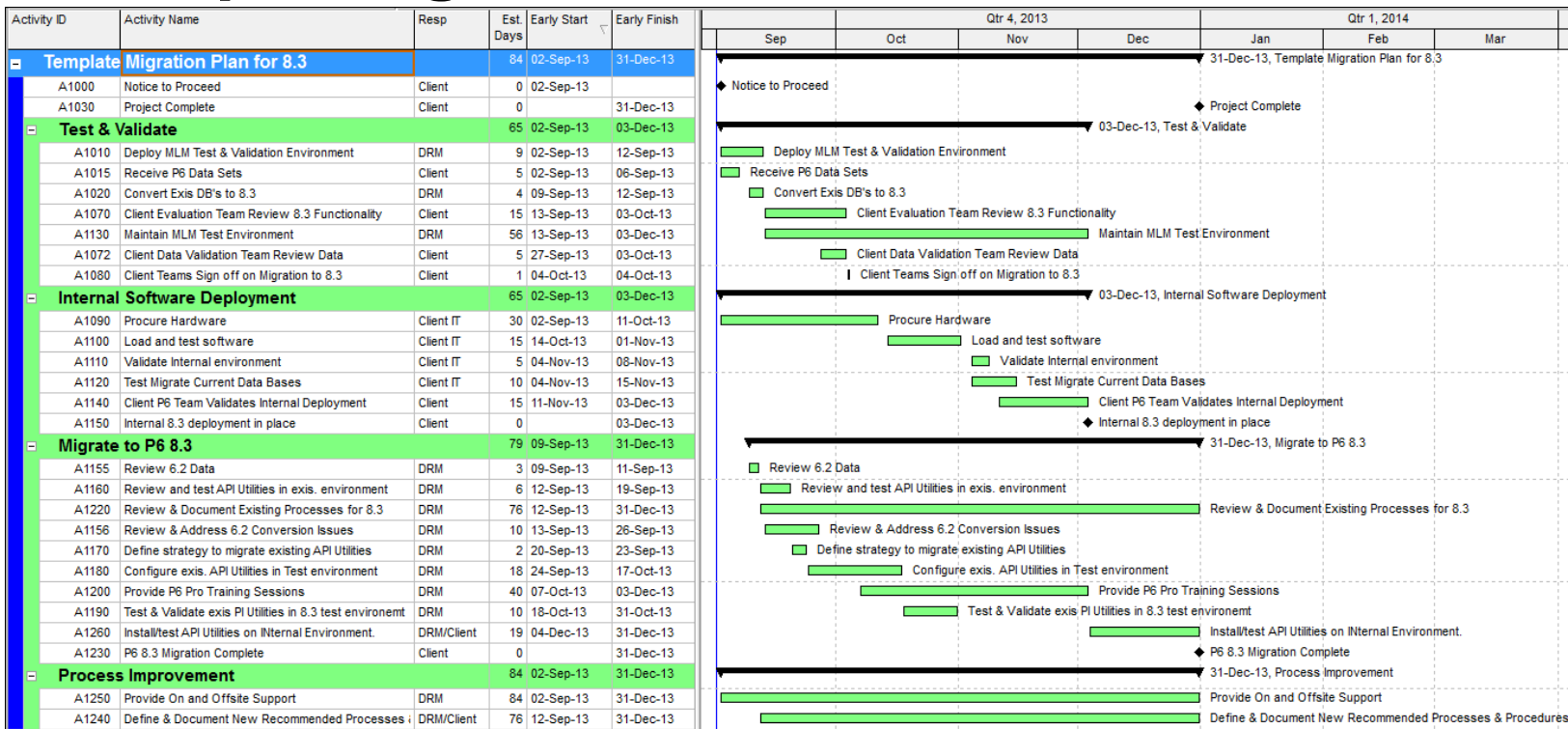


Step 4 – Plan Your Migration

Treat your migration as a project

- Take the time to understand licensing/migration requirements & costs.
- Understand the infrastructure & SME requirements.
- Use this as an opportunity to clean up and organize databases.
- Any migration requires data validation testing.
- Allow time for dealing with resistance to change – try to determine who the real “decision makers” are.
- Web training is usually role based, i.e. Administration.
- Significant new features warrant multiple days of training.
- Run parallel until data is validated and team is ready to switch.

Example Migration Plan



Hosted environment can cut this by as much as 2 months

Step 5 - Get Started

Decide what your strategy is

■ P6 Pro

- Do you want to run stand-alone, centralized or both?
- Have you been importing a lot of P3 files? (start with a fresh new database)

■ P6 EPPM

- Do you have the capability to self deploy. Is hosting, BPS or SaaS an option?
- Are you comfortable with centralized administration on the web?
- Do you understand the difference between the web & client?
- Be prepared to resolve data migration issues
- Do you have to migrate templates or documents?



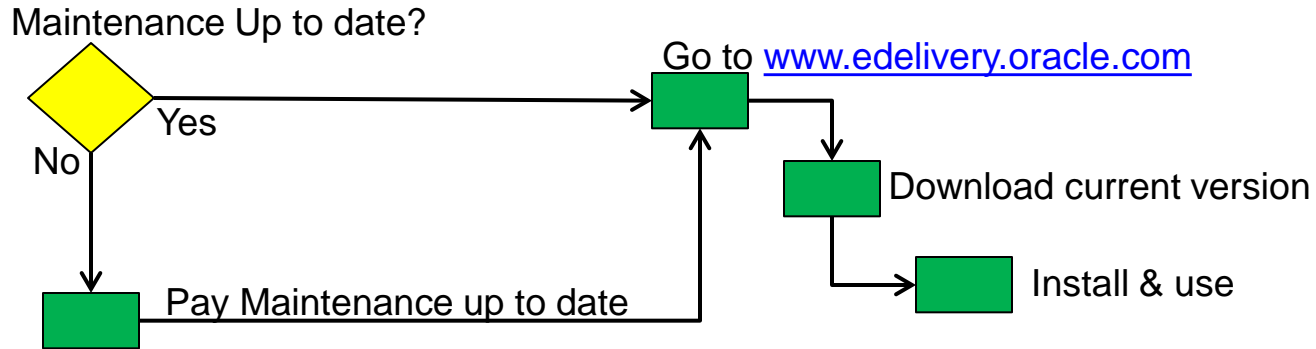
Execute Your Strategy

Keep your plan simple, always pilot and test before roll-out

- Upgrade or migrate licenses.
- Engage a Certified Primavera Consultant to support your team.
- Do a test migration of existing databases.
 - DRM provides test migration from a cloud environment as part of migration services.
- Design and build your 8.3 configuration pilot.
- Define how you will administrate your 8.3 deployment.
- Update or migrate data – test data integrity.
- Provide necessary team training.

Upgrade Process

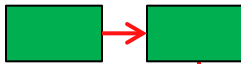
P6 v7 Full P6 Application User license with up to date maintenance



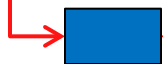
- Upgrades are simple – just download the software.
- Trial software is the same as full software.
- CD's (media kit) available with new orders only.
- Maintenance is direct with Oracle, not Oracle Partners.

Migration Process (legacy licenses)

Contact Oracle Partner



Provide necessary information to Partner



Partner submits to Oracle Manager



Oracle Manager researches & resolves issues

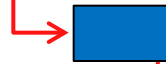


Oracle Manager submits to Migration Dept.

+/- 2 weeks



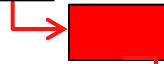
Migration Dept. provides price & expiration date



Partner provides complete pricing



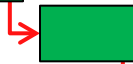
Customer Issues PO



Oracle issues OLSA to customer



Go to edelivery.oracle.com



Download current version



Install & use



Oracle



Oracle Partner



Customer



Information Needed for Migrations

Provide information to Oracle Partner

- Company name, contact(s), email and telephone information.
- Physical address including country.
- Serial or CSI Numbers.
- A clear understanding of what you currently have.
- A clear description of what you expect.

also..

- A clear understanding of your own procurement process because the migration quote has an expiration date.



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Things to Remember

Time spent planning saves time and money in execution

- Get professional, experienced help before you start.
- Try and take the infrastructure (hardware) out of the critical path so you can focus on the application deployment.
- Have a backup plan if some feature doesn't work exactly as you thought it would.
- Do not move until the new system has been "proofed".
- A "big bang" migration usually gives you a big bang!
- The real test of a good deployment is if it keeps working, day in and day out with low levels of user frustration.



Questions

All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.

- Answers are based on our own experiences using the various software products related to your questions.

Tech Tip – Upgrading to 8.3 (May 2013).

http://www.drmcnatty.com/wordpress/wp-content/uploads/2013/09/May_2013UpgradingtoP6ProR8_3.pdf

Thank you for participating

- Don McNatty – dmcnatty@drmcnatty.com



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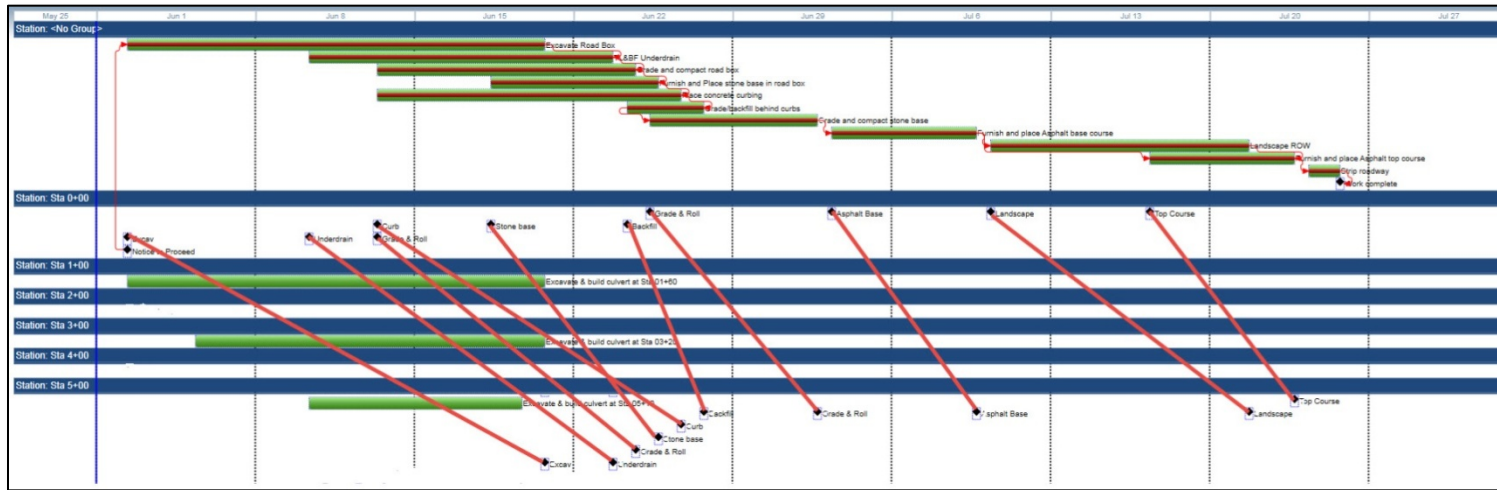
www.oracle.com/openworld

Hope to see you there!

Next Month

Linear Scheduling with P6 Professional 8.3 Visualizer

- Don presents an approach for developing Linear Schedule Graphics with P6 Visualizer
- Wednesday, May 21, 2014 at 10:00 AM (PDT)





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