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PRIMAVERA

**Connecting the Content Repository to P6
Release 8.3**

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Legal Notices

Oracle Primavera Connecting the Content Repository to P6

Contents

Preface

In This Section

Where to Get Documentation

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

http://download.oracle.com/docs/cd/E29618_01/index.htm

Most documentation assumes a standard setup of the product, with full access rights to all features and functions.

You can also access the versions of the product manuals and technical documents that were available at the time of the release from the P6 EPPM Documentation Center, located in the \Documentation\Documentation_library*language* folder of the P6 EPPM physical media or download.

The following table describes the core documents available for P6 EPPM and lists the recommended readers by role. P6 EPPM roles are described in the *Planning Your P6 EPPM Implementation* guide.

Title	Description
What's New in P6 EPPM	Highlights the new and enhanced features included in this release.
	You can also use the *P6 EPPM Cumulative Feature Overview Tool* to identify the features that have been added since a specific release level.
	All users should read this guide.
Planning Your P6 EPPM Implementation	This book provides information on planning your implementation. It provides an installation process overview, frequently asked questions, client and server requirements, and security information.
	The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.

Title	Description
P6 EPPM Installation and Configuration Guide	This documentation set explains how to install and configure the P6 EPPM using the P6 EPPM Installation and Configuration wizards. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.
P6 EPPM Installation and Manual Configuration Guide	This documentation set explains how to install and configure the P6 EPPM using the P6 EPPM Installation wizards, and how to manually configure individual components. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.
P6 EPPM Post Installation Administrator's Guide	Once you have installed and configured your P6 EPPM applications, this guide will tell you how to get started using them. You will want to complete most of the tasks in this guide before you let your users work with these applications. These tasks include information about configuring your users and security settings and privileges, setting your P6 Administrator application and P6 Progress Reporter Administrator settings, and finalizing your P6 Integration API and P6 EPPM Web Services settings. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.
Tested Configurations	Lists the configurations that have been tested and verified to work with P6 EPPM. The network administrator/database administrator and P6 EPPM administrator should read this document.
P6 User's Guide	This guide explains how to plan, set up, and manage projects in a multiuser environment. If you are new to *P6*, 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 Help. The program manager, project manager, resource/cost manager, and team leader should read this guide.
P6 Data Dictionary	This data dictionary defines fields used in P6. All P6 users should refer to this guide if you need a field

Title	Description
	definition.
P6 Team Member User's Guide	This guide explains how to status activities using P6 Team Member interfaces, which are P6 Team Member Web, P6 Team Member for iPhone, and E-mail Statusing Service. All users of the P6 Team Member interfaces should read this guide.
P6 Team Member Web Help	Describes how to use P6 Team Member Web to provide status on activities. P6 Team Member Web users should read this Help.
P6 Team Member for iPhone Help	Describes how to use the P6 Team Member for iPhone app to provide status on activities. P6 Team Member for iPhone app users should read this Help.
P6 Professional Help	Explains how to use P6 Professional for EPPM 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.
P6 Help	Describes how to create, manage, plan, and schedule projects, group projects into portfolios, administer all enterprise data, application settings, user accounts, and security profiles, maintain both the organizational breakdown structure (OBS) and enterprise project structure (EPS), manage resources and roles, track risks, issues, and notebooks, create and reuse templates, evaluate budgets, analyze performance and ROI for project portfolios, participate in workflows and document reviews, approve timesheets, and generate reports. The operations executive, P6 EPPM and P6 administrator, program manager, project manager, resource/cost manager, and team leader should read this Help.

Title	Description
P6 Progress Reporter Administrator Help	Describes how to enter database connection information for the P6 Progress Reporter server and modify P6 Progress Reporter server and application settings. The P6 EPPM network administrator/database administrator should read this Help.
P6 Progress Reporter Help	Describes how to use P6 Progress Reporter to enter and update time spent on assignments. Team members using P6 Progress Reporter should read this Help.
P6 Progress Reporter User's Guide	This guide explains how to report work time and provide status on assigned activities using P6 Progress Reporter. Team members using P6 Progress Reporter should read this guide.
Primavera P6 Visualizer Help	Describes how to create, modify, and manage Timescaled Logic Diagrams and Gantt charts. The Visualizer application can connect to a P6 Professional or EPPM database. Visualizer can only be installed via the P6 Professional setup. However, you can run Visualizer without P6 Professional installed. All users should read this Help.
P6 EPPM Web Services Programmer's Guide, and P6 EPPM Web Services Reference Manual	The *P6 EPPM Web Services Programmer's Guide*, available as an HTML help system, describes how to invoke, use, and troubleshoot the available services/operations within supported environments. The *P6 EPPM Web Services Reference Manual*, also available as an HTML help system, describes all services and operations available in P6 EPPM Web Services in a comprehensive manner. Anyone who wants to develop applications which interact with P6 should read this guide.
P3 to P6 EPPM Migration Guide	This guide provides best practices for migrating your P3 data to P6 EPPM, and details how P3 functionality maps to P6 EPPM functionality. All administrators should read this guide.

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

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.

P6 EPPM integrates with different Oracle applications; when you create a Service Request, be sure to open the request with the proper Support team. To ensure you reach the proper Support team, enter the correct product information when you create the Service Request. Each product has its own support line.

▸ Use the **Primavera P6 EPPM** support line when you are having installation, configuration, or connection issues related to P6 EPPM.
▸ Use one of the following support lines when you are having installation or configuration issues that do not relate to P6 EPPM.
  ▸ Oracle WebLogic Server
  ▸ Oracle Database Server
  ▸ BI Publisher
  ▸ BPM
  ▸ Oracle Webcenter Content Core Capabilities (formerly Universal Content Management)
  ▸ Oracle Enterprise Manager
  ▸ Oracle Access Manager
  ▸ Oracle AutoVue

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** are moderated by Oracle providing a place for collaboration among industry peers to share best practices.
- **News** from our development and strategy groups.
- **Education** contains 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.

For more information about working with Support, visit https://support.oracle.com/epmos/faces/DocumentDisplay?id=888813.2.

About Connecting the Content Repository

Having a content repository integrated with P6 can turn cluttered, unstructured content into organized assets by making it easier to catalog, access, search, and reuse documentation.

This guide will tell you how to:

‣ Configure Oracle Universal Content Management (UCM) 10g, Oracle Webcenter Content Core Capabilities (WCCC) 11g, Microsoft SharePoint, or any CMIS-compliant content repository when you install it.

> **Note**: WCCC was formerly UCM.

‣ Set your content repository settings in the P6 Administrator application to connect your content repository to P6.

About Content Repository Authentication Modes

P6 EPPM offers two content repository authentication modes. You can configure authentication for either single user authentication or multiple user authentication. In single user authentication mode, all P6 EPPM users access the repository using a single administrator user login that is set during repository configuration. In multiple user authentication mode, each P6 EPPM user is authenticated based on their individual login.

Single User authentication mode is useful when you want users to have full access to the content repository through P6 EPPM without having to maintain an equivalent list of users for both P6 EPPM and the repository. This allows a repository administrator to maintain one set of credentials for the repository without having to share those credentials with all users. Single user authentication is also useful for quickly setting up test repositories that testers can access with minimal fuss.

Multiple User authentication mode is the default mode. Multiple user authentication mode provides increased security by restricting content repository access on an individual user basis. Because it uses native auditing fields it also allows a clear audit of who has created and modified files.

> **Note:** When using multiple user authentication mode, you should disable for the Oracle content repository Guest Access. If you leave Guest Access enabled and the guest user is not part of the P6 EPPM security group, that user will not be able to access P6 repository functionality.

See the *P6 EPPM Post Installation Administrator's Guide* for more information about Single User and Multiple User settings.

Requirements for Using AutoVue

If you plan on using Autovue, you should consider the following:

▶ P6 R8.3 supports Oracle UCM 10g, Oracle WCCC 11g, Microsoft SharePoint 2010/2007, and CMIS-compliant repositories.

▶ If you are using SharePoint 2007 or UCM 10g and P6 R8.3, you should not upgrade to AutoVue 20.2.

▶ If you are using P6 R8.3 and AutoVue 20.2, you must upgrade to Oracle WCCC 11g. You will need to use the WCCC 11g Connector provided in the Tools folder of the Media Pack.

Configuring the Content Repository for P6

If you are installing P6 and the content repository for the first time, follow the steps in this section.

If you upgraded from a previous P6 version to R8.3 or from a previous content repository to WCCC 11.1.1.6, you need to follow the steps in **Upgrading the Content Repository** (on page 24).

Before you configure your content repository, you need to decide which authentication mode to use. Refer to the documentation included with the content repository application for detailed instructions on how to complete the guidelines in this section.

Configuring UCM 10g to Work with P6

> **Note**: These instructions contain information only on configuring Oracle Universal Content Management (UCM) to work with P6. They do not include information on installing UCM. For UCM's installation instructions, see the documentation included with Oracle UCM.

Except where noted, the guidelines below are recommendations. Depending on your organization, you can choose to use existing configurations or your own naming conventions. Refer to the documentation included with Oracle Universal Content Management for detailed instructions on how to complete the guidelines in this section.

To configure Oracle UCM:

1) *(required)* Establish a Trusted Connection to the P6 EPPM database by adding the P6 EPPM machine name or IP address as a trusted server in the UCM server's configuration file.

   a. For UCM 10g, go to UCM_Home\config\.

   b. Edit the **config.cfg** file.

   c. Find the **SocketHostAddressSecurityFilter** line and add the P6 EPPM machine name or IP address to the end of the line.

   d. Restart the UCM server.

2) *(required)* Create a P6 EPPM documents home folder on the UCM server by adding a unique path to Contribution Folders.

   a. Log into the UCM Content Server as an administrative user.

   b. Create a new **Contribution Folder** (see the UCM documentation for more information). A sample folder name would be:

   \\Contribution Folders\Production\Oracle Primavera\

3) Create a P6 EPPM Security Group in UCM and grant the appropriate rights for P6 EPPM users. Security considerations include the following:

   ▸ P6 EPPM user names must match the UCM user names, unless using "Single User" for the Authentication Mode.

   > **Note:** "Single User" Authentication Mode will log all P6 EPPM users into UCM via the administrative user created below and/or as specified in the Database/Instance/Content Repository setting in the P6 Administrator application.

   ▸ All P6 EPPM-related UCM user names must have appropriate assignments to UCM Roles and Users. For a quick setup, you can simply create one P6 EPPM-specific Role to map to, with full privileges (Read, Write, Delete, Admin).

   ▸ All P6 EPPM-related UCM user names must have access to the P6 EPPM Security Group, either directly or through a role.

4) *(required)* Create an administrative user in UCM and provide it with Read, Write, Delete, and Admin privileges to the P6 EPPM Security Group. A user account with administrative privileges is required for P6 EPPM document access when using "Single User" Authentication Mode, and for creating or changing P6 EPPM document organization when using "Single User" or "Multiple User" Authentication Mode.

> **Note:** When using "Single User" for Authentication Mode, users will have the ability to browse for documents outside of the P6 EPPM documents home folder, as long as the administrative user has access to all appropriate Security Groups, including the P6 EPPM Security Group.

5) If you enabled Security Accounts, create a P6 EPPM Security Account. For example, depending on your organization, you might need to set up a Security Account for performance and storage reasons. Security considerations, similar to those made for the Security Group above, include the following:

- P6 EPPM user names must match the UCM user names, unless using "Single User" for the Authentication Mode.
- All P6 EPPM-related UCM user names must have appropriate assignments to UCM Roles and Users. For a quick setup, you can simply create one P6 EPPM-specific Role to map to, with full privileges (Read, Write, Delete, Admin).
- All P6 EPPM-related UCM user names must have access to the P6 EPPM Security Account.

6) Create a Document Type for P6 EPPM documents in UCM.

   a. Log into the UCM Content Server as an administrative user.

   b. Use the **Configuration Manager** to create a new **Content Type** for P6 Documents (see the UCM documentation for more information).

   For example:

   Enter the Document Type as ADACCT.

> **Note:** These document types are the defaults in their repositories.

7) *(required)* Create the following metadata text fields, exactly as specified (including case), in UCM for P6 EPPM:

- PrmUserId
- PrmProjectId
- PrmWorkgroupId
- PrmWorkflowId
- PrmWorkflowStatus
- PrmWorkflowAction
- PrmSecurityPolicy
- PrmTemplate (clear the "Enabled" and "Searchable" attributes)

- ▸ PrmCheckedOutUserId
- ▸ PrmCheckedOutDate
- ▸ PrmLocalFilePath (make Type = Long Text)
- ▸ PrmAuthorId

Using "Prm" as a prefix is optional. You can use any prefix. If you don't use a prefix, ensure that none of the P6 EPPM metadata fields conflict with existing metadata fields.

8) *(required)* Configure the appropriate database instance settings for the P6 Administrator application either through the configuration wizard or in the P6 Administrator application depending on your installation process.

Configuring Oracle Universal Content Management 10g in the Database Instance Settings

To set your UCM settings:

> **Note**: Ensure the settings you entered in when you configured UCM 10g to Work with P6 match the settings you enter below.

1) Open the P6 Administrator application.
2) In the **Configurations** tab, expand your configuration.
3) Expand **Database/Instance[n]/Content Repository**.
4) In the **Type** field, choose **Oracle**.
5) Expand **Database/Instance[n]/Content Repository/Oracle Webcenter Content Core Capabilities**.
6) In the **Host** field, enter the machine name or IP address of the content repository server.
7) In the **Port** field, enter the IntradocServerPort number of the content repository server. By default, this is 4444.
   a. Go to *UCM_Home*\config\.
   b. Edit the **config.cfg** file.
   c. Find the IntradocServerPort line, which contains the port number.
8) In the **Oracle Home** field, enter the path to the P6 EPPM content repository files on the content repository server, as specified when you configured your content repository. This setting is required.
   Example:
   \\Contribution Folders\Production\Oracle Primavera\
9) In the **Oracle Security Group** field, enter the name of the Security Group for P6 EPPM documents, as specified when you configured the content repository.
10) In the **Oracle Security Account** field, enter the name of the Security Account for P6 EPPM documents, as specified when you configured the content repository.
   If you did not enable security accounts, leave this setting blank.

11) In the **Oracle Document Type** field, enter the document type for P6 EPPM documents, which can be either an existing document type or a new one, as specified when you configured the content repository. If you enabled Document Types, you must configure this setting.

Example:

Enter the Document Type as ADACCT.

12) In the **Metadata Prefix** field, enter the prefix added to P6 EPPM metadata fields, as specified when you configured the content repository.

13) In the **Admin User** field, enter the user name with administrative privileges, as specified when you configured the content repository. This setting is required.

14) In the **Authentication Mode** field, enter authentication mode used to access the content repository server. P6 EPPM users cannot access content repository functions if you do not configure this setting.

If you choose "Multiple User", all P6 EPPM content repository-related user names must match the equivalent content repository user name. For example, a P6 EPPM user named "Joe" must have an equivalent user named "Joe" in the content repository.If you choose "Single User", the administrative user specified in the setting above must have access to all appropriate Security Groups to browse to documents outside of the P6 EPPM home folder.

15) Expand **Database/Instance[n]/Content Repository/Oracle Webcenter Content Core Capabilities/Autovue**.

16) In the **VueLink URL** field, enter the URL of the server hosting AutoVue VueLink. The default is http://localhost/idc/jsp/autovue/csiApplet.jsp.

> **Note:** Refer to the *Tested Configurations* document for the AutoVue version P6 supports.

Example format:

http://*vuelinkpath*/csiApplet.jsp

17) In the **Enable** field, choose true to enable AutoVue or false to disable it.

Configuring WCCC 11.1.1.6 to Work with P6

> **Note**: These instructions contain information only on configuring Oracle Webcenter Content Core Capabilities (WCCC) to work with P6. They do not include information on installing WCCC. For WCCC's installation instructions, see the documentation included with Oracle WCCC.

Except where noted, the guidelines below are recommendations. Depending on your organization, you can choose to use existing configurations or your own naming conventions. Refer to the documentation included with Oracle Webcenter Content Core Capabilities for detailed instructions on how to complete the guidelines in this section.

To configure Oracle WCCC:

1) *(required)* Establish a Trusted Connection to the P6 EPPM database by adding the P6 EPPM machine name or IP address as a trusted server in the WCCC server's configuration file.

   a. Go to *WCCC_Home*`\ucm\cs\config\`.

   b. Edit the **config.cfg** file.

   c. Find the **SocketHostAddressSecurityFilter** line and add the P6 EPPM machine name or IP address to the end of the line.

   d. Restart the WCCC server.

2) *(required)* Create a P6 EPPM documents home folder on the WCCC server by adding a unique path to the root folder.

   a. Log into the WCCC Content Server as an administrative user.

   b. Create a new **Folder** (see the WCCC documentation for more information).

      For example:

      /Production/Oracle Primavera

      > **Note**: In WCCC 11.1.1.6, the Framework folder interface is not enabled by default. To enable it, see the WCCC documentation for more information.

3) Create a P6 EPPM Security Group in WCCC and grant the appropriate rights for P6 EPPM users. Security considerations include the following:

   ▸ P6 EPPM user names must match the WCCC user names, unless using "Single User" for the Authentication Mode.

      > **Note:** "Single User" Authentication Mode will log all P6 EPPM users into WCCC via the administrative user created below and/or as specified in the Database/Instance/Content Repository setting in the P6 Administrator application.

   ▸ All P6 EPPM-related WCCC user names must have appropriate assignments to WCCC Roles and Users. For a quick setup, you can simply create one P6 EPPM-specific Role to map to, with full privileges (Read, Write, Delete, Admin).

   ▸ All P6 EPPM-related WCCC user names must have access to the P6 EPPM Security Group, either directly or through a role.

4) *(required)* Create an administrative user in WCCC and provide it with Read, Write, Delete, and Admin privileges to the P6 EPPM Security Group. A user account with administrative privileges is required for P6 EPPM document access when using "Single User" Authentication Mode, and for creating or changing P6 EPPM document organization when using "Single User" or "Multiple User" Authentication Mode.

> **Note:** When using "Single User" for Authentication Mode, users will have the ability to browse for documents outside of the P6 EPPM documents home folder, as long as the administrative user has access to all appropriate Security Groups, including the P6 EPPM Security Group.

5) If you enabled Security Accounts, create a P6 EPPM Security Account. For example, depending on your organization, you might need to set up a Security Account for performance and storage reasons. Security considerations, similar to those made for the Security Group above, include the following:

▸ P6 EPPM user names must match the WCCC user names, unless using "Single User" for the Authentication Mode.

▸ All P6 EPPM-related WCCC user names must have appropriate assignments to WCCC Roles and Users. For a quick setup, you can simply create one P6 EPPM-specific Role to map to, with full privileges (Read, Write, Delete, Admin).

▸ All P6 EPPM-related WCCC user names must have access to the P6 EPPM Security Account.

6) Create a Document Type for P6 EPPM documents in WCCC.

   a. Log into the WCCC Content Server as an administrative user.

   b. Use the **Configuration Manager** to create a new **Content Type** for P6 Documents (see the WCCC documentation for more information).

   For example:

   Enter the Document Type as Document.

   > **Note:** These document types are the defaults in their repositories.

7) *(required)* Create the following metadata text fields, exactly as specified (including case), in WCCC for P6 EPPM:

▸ PrmUserId

▸ PrmProjectId

▸ PrmWorkgroupId

▸ PrmWorkflowId

▸ PrmWorkflowStatus

▸ PrmWorkflowAction

▸ PrmSecurityPolicy

▸ PrmTemplate (clear the "Enabled" and "Searchable" attributes)

> ▶ PrmCheckedOutUserId
>
> ▶ PrmCheckedOutDate
>
> ▶ PrmLocalFilePath (make Type = Long Text)
>
> ▶ PrmAuthorId

Using "Prm" as a prefix is optional. You can use any prefix. If you don't use a prefix, ensure that none of the P6 EPPM metadata fields conflict with existing metadata fields.

8) *(required)* Configure the appropriate settings for the P6 Administrator application. See **Configuring Oracle Webcenter Content Core Capabilities (WCCC) 11.1.1.6 in the Database Instance Settings** (on page 19).

Configuring Oracle Webcenter Content Core Capabilities (WCCC) 11.1.1.6 in the Database Instance Settings

To set your WCCC settings:

> **Note**: Ensure the settings you entered in when you configured the content repository match the settings you enter below.

1) Open the P6 Administrator application.
2) In the **Configurations** tab, expand your configuration.
3) Expand **Database/Instance[n]/Content Repository**.
4) In the **Type** field, choose **Oracle**.
5) Expand **Database/Instance[n]/Content Repository/Oracle Webcenter Content Core Capabilities**.
6) In the **Host** field, enter the machine name or IP address of the content repository server.
7) In the **Port** field, enter the IntradocServerPort number of the content repository server. By default, this is 4444.
   a. Go to *WCCC_Home*`\ucm\cs\config\`.
   b. Edit the **config.cfg** file.
   c. Find the IntradocServerPort line, which contains the port number.
8) In the **Oracle Home** field, enter the location of the framework folders.

   For example:

   /Production/Oracle Primavera
9) In the **Oracle Security Group** field, enter the name of the Security Group for P6 EPPM documents, as specified when you configured the content repository.
10) In the **Oracle Security Account** field, enter the name of the Security Account for P6 EPPM documents, as specified when you configured the content repository.

    If you did not enable security accounts, leave this setting blank.

11) In the **Oracle Document Type** field, enter the document type for P6 EPPM documents, which can be either an existing document type or a new one, as specified when you configured the content repository. If you enabled Document Types, you must configure this setting.

For example:

Enter the Document Type as Document.

12) In the **Metadata Prefix** field, enter the prefix added to P6 EPPM metadata fields, as specified when you configured the content repository.

13) In the **Admin User** field, enter the user name with administrative privileges, as specified when you configured the content repository. This setting is required.

14) In the **Authentication Mode** field, enter authentication mode used to access the content repository server. P6 EPPM users cannot access content repository functions if you do not configure this setting.

If you choose "Multiple User", all P6 EPPM content repository-related user names must match the equivalent content repository user name. For example, a P6 EPPM user named "Joe" must have an equivalent user named "Joe" in the content repository.If you choose "Single User", the administrative user specified in the setting above must have access to all appropriate Security Groups to browse to documents outside of the P6 EPPM home folder.

15) Expand **Database/Instance[n]/Content Repository/Oracle Webcenter Content Core Capabilities/Autovue**.

16) In the **VueLink URL** field, enter the URL of the server hosting AutoVue VueLink. The default is http://localhost/idc/jsp/autovue/csiApplet.jsp.

> **Note:** Refer to the *Tested Configurations* document for the AutoVue version P6 supports.

Example format:

http://*vuelinkpath*/csiApplet.jsp

Example format for Autovue 20.2:

http://*servername*/cs/idcplg?IdcService=VIEW_IN_AUTOVUE

17) In the **Enable** field, choose true to enable AutoVue or false to disable it.

Configuring Microsoft SharePoint for P6

Notes:

- These instructions contain information only on configuring Microsoft SharePoint to work with P6. They do not include information on installing Microsoft SharePoint. For Microsoft SharePoint's installation instructions, see the documentation included with Microsoft SharePoint.

- ▪ Oracle recommends that you install the P6 SharePoint Connector on the same Internet Information Server (IIS) where you installed SharePoint. However, if you want to install it on a different server, you must install the P6 SharePoint Connector on an IIS where it can continually connect to the SharePoint server and Web Access Server in the same Local Area Network.

Except where noted, the guidelines below are required. Depending on your organization, you can choose to use your own naming conventions. Refer to the documentation included with Microsoft SharePoint for detailed instructions on how to complete the guidelines in this section.

To configure Microsoft SharePoint:

1) Create a new site named "WS_FPRPC" (recommended name) on the Microsoft IIS using the IIS Admin.

2) If not already installed, install Microsoft .Net Framework 3.5 SP1. You can download it from this Web site: http://msdn.microsoft.com/en-us/netframework/cc378097.

3) From the **\Tools\SharePoint Connector** folder of the P6 EPPM physical media or download, launch **setup.exe** to install P6 EPPM Web Services on the "WS_FPRPC" site.

4) During the web service installation, retain the default virtual directory. For example, on the **Select Installation Address** dialog box, enter the following:

   Site = WSFPRPC
   Virtual Directory = WS_FPRPC
   Application Pool = DefaultAppPool

5) Once the installation finishes, test the installation by launching the following URL:

   http://*host*:*port*/*virtual_dir*/WS_FPRPC.asmx

   where *host* is the server machine name or IP address where you installed SharePoint, *port* is the port number that SharePoint is using (the default is 80), and *virtual dir* is the default virtual directory (for example, WS_FPRPC).

6) From the **\Tools\SharePoint Connector** folder of the P6 EPPM physical media or download, upload one of these templates to the SharePoint server:
   - ▸ For SharePoint 2007, **WebAccessLibraryTemplate.stp**.
   - ▸ For SharePoint 2010, **WebAccessLibraryTemplate2010.stp**.

7) Go to **Site Actions**, **Site Settings**, **List Templates** and create a SharePoint document library for P6 EPPM. Note what you call the document library.

8) Enter the appropriate settings in the P6 Administrator application. See *Configuring Microsoft SharePoint in the Database Instance Settings* (on page 21).

Configuring Microsoft SharePoint in the Database Instance Settings

To set your SharePoint settings:

> **Note**: Ensure the settings you entered in Configuring Microsoft SharePoint to Work with P6 match the settings you enter below.

1) Open the P6 Administrator application.
2) In the **Configurations** tab, expand your configuration.
3) Expand **Database/Instance[n]/Content Repository**.
4) In the **Type** field, choose **SharePoint**.
5) Expand **Database/Instance[n]/Content Repository/SharePoint**.
6) In the **Login Name** field, enter a SharePoint user name with administrative privileges.

> **Note**: You do not need to include your domain. You just need your user name.

7) In the **Password** field, enter the password for the SharePoint login name.
8) In the **Authentication Mode** field, select the mode used to connect to the SharePoint content repository database. P6 EPPM users cannot access content repository functions if you do not configure this setting.

    If you choose "Multiple User", all P6 EPPM content repository-related user names must match the equivalent SharePoint user name. For example, a P6 EPPM user named "Joe" must have an equivalent user named "Joe" in SharePoint.

    If you choose "Single User", the administrative user specified in the setting above must have access to all appropriate SharePoint libraries to browse to documents outside of the P6 EPPM home folder.
9) In the **Host Name** field, enter the machine name or IP address of the SharePoint server.
10) In the **Domain** field, enter the domain where the SharePoint server resides.
11) In the **Document Library URL** field, enter the URL of the P6 EPPM document library on SharePoint that you created when you configured SharePoint. The URL includes the machine name (or IP address) of the content repository server and the path to the content repository library.

    Example format:

    http://<hostname>:<port>/<domain>/<doclib>

> **Note**:
> - Do not put a / at the end of the URL.
> - Ensure there are no spaces in the URL.

12) In the **Web Service URL** field, enter the URL of the Web Service used to connect P6 EPPM to SharePoint, as specified when you configured SharePoint. The URL includes the machine name (or IP address) of the content repository server, port number of the server, and web service name.

    Example format:

http://*<hostname>:<port>*/WS_FPRPC

> **Note**: Do not put a / at the end of the URL.

13) In the **External Document Library URL** field, enter the URL of an external document library. If you need to connect to a non-P6 EPPM document library, you must configure this setting.

Example format:

http://*<hostname>:<port>/<extdoclib>*

> **Note**: Do not put a / at the end of the URL.

14) Expand **Database/Instance[n]/Content Repository/SharePoint/Autovue**.
15) In the **VueLink URL** field, enter the URL of the server hosting AutoVue VueLink. The default is http://localhost/site/_layouts/1033/vue.aspx.

> **Note:** Refer to the *Tested Configurations* document for the AutoVue version P6 supports.

Example format:

http://*vuelinkpath*/vue.aspx

16) In the **Enable** field, choose true to enable AutoVue or false to disable it.

Configuring CMIS-Compliant Content Repository for P6

Content Management Interoperability Services (CMIS) is a standard that content repositories have agreed to adhere to so that a single document connector can be used to connect to any CMIS-compliant repository.

You can connect any CMIS-compliant content repository to P6 and use it with UCM and Microsoft Sharepoint. The repository must be 100% CMIS-compliant to utilize all the features of P6 document functionality.

Configuring CMIS-Compliant Content Repository in the Database Instance Settings

To configure your CMIS-compliant content repository:

1) Open the P6 Administrator application.
2) In the **Configurations** tab, expand your configuration.
3) Expand **Database/Instance[n]/Content Repository**.
4) In the **Type** field, choose **CMIS**.
5) Expand **Database/Instance[n]/Content Repository/CMIS**.
6) In the **Login Name** field, enter the user name for your content repository.
7) In the **Password** field, enter the password for the user name you entered above.

8) In the **Authentication Mode** field, enter authentication mode used to access the content repository server. P6 EPPM users cannot access content repository functions if you do not configure this setting.

   If you choose "Multiple User", all P6 EPPM content repository-related user names must match the equivalent content repository user name. For example, a P6 EPPM user named "Joe" must have an equivalent user named "Joe" in the content repository.

   If you choose "Single User", the administrative user specified in the setting above must have access to all appropriate Security Groups to browse to documents outside of the P6 EPPM home folder.

9) In the **Repository Name** field, enter the name for your content repository.

10) In the **Document Home** field, enter the location of your documentation home where you want to store P6 documents.

11) In the **Web Service URL** field, enter the URL for your web services home.

12) Expand **Database/Instance[n]/Content Repository/CMIS/Autovue**.

13) In the **VueLink URL** field, enter the URL of the server hosting AutoVue VueLink.

> **Note:** Refer to the *Tested Configurations* document for the AutoVue version P6 supports.

Example format:

http://*vuelinkpath*/csiApplet.jsp

Example format for AutoVue 20.2:

http://*servername*/cs/idcplg?IdcService=VIEW_IN_AUTOVUE

14) In the **Enable** field, choose true to enable AutoVue or false to disable it.

Upgrading the Content Repository

If you upgraded to P6 or the content repository, you need to do one of the following:

▸ If you upgraded from a previous P6 version to R8.3, see **Migrating the Content Repository if Upgrading to P6 R8.3** (on page 25).

▸ If you upgraded UCM to 11.1.1.6, see **Upgrading from Previous UCM Version to WCCC 11.1.1.6** (on page 25).

> **Note**: If you used the content repository after upgrading to R8.3 without running the migration tool, please refer to the troubleshooting section in the *P6 EPPM Post Installation Administrator's Guide* for information on ensuring the content repository works.

Migrating the Content Repository if Upgrading to P6 R8.3

If you upgraded to P6 R8.3 from a previous version, you must:

> **Note**: These steps apply whether you are using Oracle UCM or Microsoft SharePoint.

1) Run the migration utility before connecting the upgraded environment back to the Content Repository. Running the migration utility will ensure all project folder names in the Content Repository change from Database IDs to their respective Project ID field (from P6).
   a. Go to the **P6EPPM_Home/p6** folder.
   b. Run **migrationtool.cmd** or **migrationtool.sh** (based on your operating system).
2) Configure the Oracle Universal Content Management or Microsoft SharePoint server with P6 EPPM.

> **Note**: If you run the migration utility in this section, you do not need to run it again if you are upgrading your UCM or Microsoft SharePoint content repository.

Upgrading from Previous UCM Version to WCCC 11.1.1.6

If you were using a previous version of UCM, you will notice many changes when you upgrade to WCCC 11.1.1.6. To maintain your documents from P6, you should ensure folder_g updates to a framework folder correctly. To do this, you should:

1) Shutdown all the P6 applications connecting to your current content repository.
2) Run the migration utility.
   a. Go to the **P6EPPM_Home/p6** folder.
   b. Run **migrationtool.cmd** or **migrationtool.sh** (based on your operating system).

> **Note**: **Users** is a restricted folder name for folders within the UCM 11.1.1.6 folder structure.

3) Note the folder database converts project IDs to project short names.
4) Upgrade UCM 11.1.1.5 to UCM 11.1.1.6 using the upgrade guide provided with the UCM media packs.
   a. Enable both folder_g and framework folders components in the upgraded UCM.

> **Note**: You should enable both these components only when you want to migrate data from folder_g to the Framework folders.

   b. In the **Migration** menu under **Administration** section, migrate folder_g to the Framework folders.
5) After the migration:

a. Locate the **migration_run****** folder that was created.

b. Move all the folders and documents under this folder to the Content repository home folder that you want to use.

c. Ensure you select **inhibit propagation** to ensure proper movement of documents and folders.

6) After the move completes, you can start using the documents with the correct content repository home.

Tips

‣ Have 4-6 GB open memory space.

‣ Don't propagate changes when given the option.

Troubleshooting

If you started using the document functionality of the P6 application without running migration utility provided with P6 on an upgraded environment, where you were using a content repository for managing documents (UCM or Sharepoint), you will be unable to use the documents that were earlier associated with any Projects or Users.