Primavera P6 Enterprise Project Portfolio Management

Virtual Desktop User Guide

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Primary Author: Oracle Corporation

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About This Guide

Primavera Virtual Desktop enables you to run P6 Professional over a secure network connection.

Scope

This guide describes how to administer and use Primavera Virtual Desktop with P6 Professional.

Audience

P6 administrators and users working in Primavera Virtual Desktop should use this guide.

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Using Primavera Virtual Desktop for Cloud

This section contains information about how to access Primavera Virtual Desktop, how to export and import data, comparing schedules and printing in Primavera Virtual Desktop.

About Primavera Virtual Desktop

Primavera Virtual Desktop enables you to run P6 Professional over a secure network connection.

> **Note**
>
> - If the numeric lock status for your keyboard is not synchronized from your computer to Primavera Virtual Desktop, use the number keys at the top of your keyboard.
> - The selected database alias and file locations are not saved from the last time you logged into Primavera Virtual Desktop. Each time you log into Primavera Virtual Desktop, you will need to select the database alias and specify the locations to save files.

Prerequisites for Cloud

You must do the following before using Primavera Virtual Desktop:

1. Check the version of browser installed on your computer and upgrade if necessary. See *Client System Requirements*.
2. Add https://*.oraclecloud.com as a trusted site in your internet options. See Adding the Oracle Cloud URL to Trusted Sites.
3. Install Adobe Acrobat Reader on your local computer. Adobe Acrobat Reader can be downloaded from https://get.adobe.com/reader.
4. Install the Secure Global Desktop (SGD) client. See Accessing P6 Professional with Primavera Virtual Desktop for Cloud
5. Optionally configure access to your local drives from Primavera Virtual Desktop. See Accessing Local Drives.

In addition, some further prerequisites for use of Primavera Virtual Desktop must be carried out by a P6 administrator and system administrator. For further information see: Administering Primavera Virtual Desktop for Cloud.

Adding the Oracle Cloud URL to Trusted Sites

To add the Oracle Industry URL to the trusted sites list:

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1. Open the Windows Control Panel and select **Internet Options**.
2. In the Internet Options dialog box:
   a. Select the **Security** tab.
   b. Select **Trusted sites**.
   c. Select the **Sites** button.
3. In the Trusted sites dialog box:
   a. In the **Add this website to the zone:** field, type `https://*.oraclecloud.com`.
   b. Select **Add**.
   c. Select **Close**.
4. In the Internet Options dialog box, select **OK**.

Accessing Local Drives

Primavera Virtual Desktop automatically maps to all the local drives you have configured on your computer. This allows you to save documents to locations which you can access when you are not logged in to Primavera Virtual Desktop.

Prerequisites for Accessing P6 Professional with Primavera Virtual Desktop for Cloud

The first time you access P6 Professional you must install the Oracle Secure Global Desktop client.

To install the Oracle Secure Global Desktop client:

1. Uninstall any existing versions of the Secure Global Desktop client from your system.
2. Browse to the Primavera Portal page.
3. Click the **Primavera Virtual Desktop** link.

> **Note**
>
> If you receive a prompt to launch the application, click **Cancel**.

4. On the Secure Global Desktop loading page, click the **Client Options** link.
5. On the Secure Global Desktop welcome page, click **Install the Oracle Secure Global Desktop Client**.
6. In the installation wizard:
   a. Select the **Install Only For Me** option.

> **Note**
>
> You can select the Install For Everyone option if you have administrative privileges.

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b. Accept the default options on all further installation screens.

c. When you are prompted to select the devices you wish to share, select **Files**, **Clipboard**, and **Printers**.

7. Log in to the Primavera Portal.

a. Click the **Primavera Virtual Desktop** link.

b. Select the option to launch the application with Oracle Secure Global Desktop Client.

c. Select **Remember my choice for sgd** links.

d. Click **Open Link**.

> **Note**
>
> Launching Primavera Virtual Desktop in HTML5 mode is not supported for cloud.

> **Tip**
>
> Ten minutes after closing the browser or logging out of Primavera Virtual Desktop, the P6 Professional session times out. If you log back in within ten minutes, the session remains active.

Accessing P6 Professional with Primavera Virtual Desktop for Cloud

Primavera Virtual Desktop enables you to access P6 Professional using your browser via the Primavera Portal. After you enter your username and password and P6 Professional has authenticated your credentials, a virtual desktop for P6 Professional launches.

> **Note**
>
> P6 Professional requires the Oracle Secure Global Desktop Client. See Prerequisites for Accessing P6 Professional with Primavera Virtual Desktop for Cloud

To access P6 Professional with Primavera Virtual Desktop:

1. Log in to the Primavera Portal.
2. Click **Primavera Virtual Desktop for P6 Professional**.
3. In the login dialog box:

a. Enter your username in the **Login Name** field.

b. Enter your password in the **Password** field.

c. Click **OK**.

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Resizing the Primavera Virtual Desktop Window

You can resize the Primavera Virtual Desktop window. To resize the window, hold shift while dragging the corner of the window.

Dialog boxes which appear inside the Primavera Virtual Desktop window cannot be moved outside the window. To make dialog boxes larger, resize the entire Primavera Virtual Desktop window.

Exporting Project, Roles, and Resources for Cloud

When you attempt to export projects, roles, and resources with P6 Professional on Primavera Virtual Desktop, you must select a location on one of your network drives.

To export project, roles, or resources:

1. On the **File** menu, select **Export**.
2. On the Export Format screen:
   a. Select the **Primavera PM - (XER)** option.
   b. Optionally select a version number from the list.
   c. Click **Next**.
3. On the Export Type screen:
   - To export projects, select **Project**.
   - To export resources or roles, select either **Resource Only** or **Role Only**.
4. If you selected to export a project, on the Projects To Export screen, select the projects to export.
5. On the File Name screen:
   a. Click  **Browse**.
   b. In the Save File dialog box:
   c. Select a location on your local network.
   d. Enter a file name.
   e. Click Save.
6. Click **Finish**.

Importing Projects, Roles, and Resources for Cloud

When you attempt to import projects, roles, and resources to P6 Professional on Primavera Virtual Desktop, you must select a file from a location on one of your local network drives.

To import projects, roles, or resources:

1. From the File menu, select **Import**.
2. In the Import dialog box:

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a. On the Import Format screen, select the format of the file you want to import and click **Next**.

b. If you selected Primavera PM - (XER), on the Import Type screen select the type of data to import and click **Next**.

c. On the File Name or Files to Import screen:

- Click **Browse** and select the file to import.
- If you selected to import a Primavera P6 - (XML) file, choose whether to import all project level layouts.
- If you selected to import a Microsoft Project file, click Select and select the files to import.

Click **Next**.

d. Continue through the wizard selecting options as necessary and click **Next** on each screen.

e. Click **Finish**.

Configuring the Scheduling Log Location

When scheduling in P6 Professional, set the location for the log file to a folder on your local machine so that you can view the log when you are not logged into Primavera Virtual Desktop.

To set the location for the scheduling log file:

1. On the Tools menu, select **Schedule**.
2. In the Schedule dialog box:
   a. Select **Log to file**.
      - Select **Overwrite existing** to overwrite the existing schedule log file with a new file.
      - Select **Append to existing** to add to the existing schedule log file.
   b. Select **Browse**.
3. In the Specify Log File dialog box:
   a. Navigate to the location on your local drive where you want to save the scheduling log files.
   b. In the **File name:** field, enter a name for the file.
   c. Select **Open**.
4. In the Schedule dialog box, select **Schedule**.

Using Schedule Comparison for Cloud

Schedule Comparison is used to compare the current version of a project against its baseline so that you can access a report that displays the differences between added, deleted, or changed information between projects.

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When you use Schedule Comparison, you must designate a location to which your project comparison will be exported. You must export Schedule Comparison reports to your local network drive.

Printing Using Primavera Virtual Desktop for Cloud

Primavera Virtual Desktop offers several ways to print from P6 Professional:

- **Amyuni PDF Converter** enables you to open a PDF of your schedule and print a hard copy.
- **Print to PDF** enables you to create a PDF of your schedule in a location you specify. You must specify a destination for the file each time you print.

> **Note**
>
> – Oracle recommends using the Print to PDF option unless you are printing a hard copy to your default printer.
>
> – If Amyuni PDF Converter is not enabled, submit a Service Request in My Oracle Support. The necessary configuration change applies to all users.

Printing From The File Menu

> **Note**
>
> At each step there might be a delay. The length of the delay depends on several factors, including the bandwidth of your connection, network latency, and the number of pages in the report. You must wait for each of these steps to be completed before continuing to work in Primavera Virtual Desktop.

To print from the file menu:

1. On the File menu, select **Print**.
2. In the Print Options dialog box:
   - In the **Name** list:
     - Select **Print to PDF** to print a copy of your P6 Professional screen to a PDF file in a location you specify.
     - Select **Universal PDF Printer** to print your P6 Professional screen using your default printer.
3. Optionally if you selected the Print to PDF option, select **Properties**.
   a. In the Print To PDF Properties dialog box:
      - Select the **File System** option.
      - Optionally, select **Options** and configure any further output settings.
      - Click **OK**.

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b. In the save dialog box:

- If you see a Network icon, double click **Network** and then double click **tsclient** to list your local drives. Browse to your desired location and provide a file name for the PDF, then select **OK**.
- If you do not see a Network icon, select the desired folder location from the list and provide a file name.

> **Note**
>
> To save files more efficiently, you can enter the full path and file name. The path must begin with "`\\tsclient\D (rw)\`" and the file name must include the extension "`.pdf`" at the end. For example: `\\tsclient\D (rw)\myfiles\myprint.pdf`

4. In the Report Printed dialog box, select **OK**.

Printing From Page Setup or Print Preview

> **Note**
>
> At each step there might be a delay. The length of the delay depends on several factors, including the bandwidth of your connection, network latency, and the number of pages in the report. You must wait for each of these steps to be completed before continuing to work in Primavera Virtual Desktop.

To print from Page Setup or Print Preview in P6 Professional:

1. From the File menu, select **Print Setup**.
2. In the Print Setup dialog box:
   a. On the Name list, select **Print to PDF**.
   b. In the Size section, select the paper size you want to use for the PDF file.
   c. Optionally select **Properties** to configure final PDF output settings.
   d. Click **OK**.
3. From the File menu, select **Page Setup** or **Print Preview** and select the option to print using **Print to PDF**.

Viewing the Primavera Virtual Desktop Print Queue

To view the print queue for Primavera Virtual Desktop:

1. Browse to the Primavera Portal page.
2. Click the **Primavera Virtual Desktop** link.
3. In the Navigation pane, select the **List All Jobs** button.

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Changing The Default Overwrite Setting For Print To PDF

When you use the Print to PDF option, by default any existing file will be overwritten with the new file.

To change the default overwrite setting:

1. From the File menu, select **Print Setup**.
2. In the Print Setup dialog box:
   a. On the Name list, select **Print to PDF**.
   b. Click **Properties**.
   c. Select **Destination>**.
   d. In the Print to PDF Properties screen, select **File system** and click **Options**.
   e. Click **Overwrite without asking** and select a different action from the list.
   f. Click **OK**.

Troubleshooting

Secure Global Desktop Is Blocked By Virus Scanning Software

If the virus protection software installed on your computer incorrectly identifies components of Cloud Services as suspicious, contact your IT team.

Network Level Authentication Failure

If you receive an message about network level authentication having failed, see: *Secure Global Desktop Error "Session Failed: Network Level Authentication Failed" When Attempting to Launch P6 Professional via Primavera Virtual Desktop (*KB469986 at https://support.oracle.com/support/?kmExternalId=KB469986

P6 Professional Does Not Allow You to Select a File Destination

When you are printing in Primavera Virtual Desktop, if you receive a message that a report has been printed, but you are not able to select a destination for the report output:

1. In the Print dialog box, select **Properties**.
2. In the Print to PDF Properties dialog box, select a file location for the report.

Network Connectivity Loss

If Primavera Virtual Desktop crashes because of a loss of network connectivity, ensure that you have a reliable internet connection with your provider before logging back into Primavera Virtual Desktop.

Local Drives Are Not Available

If the local drives configured for your computer are not available inside Primavera Virtual Desktop, log out of P6 Professional and then log out of Primavera Virtual Desktop. Log in to Primavera Virtual Desktop.

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Administering Primavera Virtual Desktop for Cloud

This section contains information about configuring P6 Professional users and Windows users for using Primavera Virtual Desktop.

Administration Prerequisites

Before users can log into P6 Professional using Primavera Virtual Desktop, you must:

1. Assign users P6 Professional module access rights and project privilege rights in P6.
2. Assign users the Primavera Virtual Desktop role in Primavera Administration. See the *Primavera Administration Identity Management Guide* for details.

> **Note**
>
> After you assign the role assignment, users must wait approximately 10 minutes for the assignment to take effect.

3. Ensure that all usernames in Primavera Administration meet the following requirements.
   - User names must be unique on the computer that is being administered. User names must not be the same as any group names on the computer that is being administered.
   - The user name can be up to 20 alphanumeric characters and symbols and is not case sensitive.
   - The user name cannot contain the following characters: " / \ [ ] : ; | = , + * ? < > @
   - The user name cannot consist solely of periods (.) or spaces.

> **Note**
>
> Password can contain up to 127 characters.

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