P2 Explorer Dashboard Sets 1.0

Installation Guide

P2 Explorer Dashboard Sets

Installation Guide

First Edition (September 2014)

This edition applies to Version 1.0 of P2 Explorer Dashboard Sets and to all subsequent releases and modifications until otherwise indicated in new editions.

Description: C:\Users\trish.haynes\Desktop\Cover pages\Cover art\Logos\ISS Group RGB.wmfDescription: C:\Users\trish.haynes\Desktop\Cover pages\Cover art\Logos\ISS Group RGB.wmf

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# Preface

This installation guide is provided to assist with the installation of P2 Explorer Dashboard Sets.

P2 Explorer Dashboard Sets is a web-based application which allows users to view production, operational, and financial information relevant to a facility.

This document outlines:

How to install the P2 Explorer Dashboard Sets components.

How to configure P2 Explorer Dashboard Sets for use.

## Who Should Read This Guide

This guide is intended for anyone who is installing P2 Explorer Dashboard Sets into an existing enterprise system. It assumes working knowledge of:

Microsoft® Internet Explorer®

Microsoft® Windows® operating system

HTML

## Related Documentation

Documents in the P2 Explorer Dashboard Sets documentation suite are:

|  |  |
| --- | --- |
| Title | Description |
| P2 Explorer Dashboard Sets Release Notes | Release notes for the latest version of P2 Explorer Dashboard Sets. |
| P2 Explorer Dashboard SetsInstallation Guide | How to install P2 Explorer Dashboard Sets. |

You may also find the following documents useful:

P2 Server Installation Guide

P2 Explorer Installation Guide

P2 Security Installation Guide

P2 Security User’s Guide

These documents are available from P2 Customer Support.

## Help and Support

P2 Customer Support provides a central point of contact for software assistance and the resolution of software issues. As part of this, P2 offers a variety of professional services, online resources, and access to experienced product specialists who are able to assist with your service requests. For support and information regarding our products, the following resources are provided:

Free Documentation Resources

PDF documentation supplied in the installation directory.

Online help provided with the product (if supplied).

Online Support Portal

The P2 Support Portal (<http://p2energysolutions.com/support>) provides access to online support, where you can raise service requests for P2 software, track defects, get product information, and communicate with P2 Customer Support.

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P2 offers a variety of standard and customised training courses (ranging from introductory courses through to administrator courses) to help you learn how to use P2 products.

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P2 offers a series of system checks to make sure your P2 systems are running as efficiently as possible.

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Contact Details

You can contact P2 Customer Support via phone or email for technical support on any aspect of P2’s products. Please also contact P2 Customer Support for further information on the Customer Communities, access to the online support portal, Performance Tuning services, and information on available training courses. Feedback on our products or user guides can also be sent to P2 Customer Support.

|  |  |
| --- | --- |
| **Phone:** | 1300 739 969 (Australia only)  +61 8 9241 0314 (outside Australia) |
| **Email:** | [support@issgroup.com.au](mailto:support@issgroup.com.au) or [iss.support@p2energysolutions.com](mailto:iss.support@p2energysolutions.com) |

# About P2 Explorer Dashboard Sets

Large organizations have an abundance of data and reference material relating to their operating assets. The challenge for operating personnel is knowing where to find the data, viewing it in context, and using it for analysis & diagnostics in a single collaborative environment.

Production, operational, and financial data from various data sources all contain relevant information for production management, and are essential in supporting informed decision-making.

P2 Explorer Dashboard Sets is an integrated data management and dashboard solution, which brings together data from a multitude of systems in an easy and timely manner.

It provides the ability to verify that data and to show a single, unified view of operations for analysis and diagnostics.

Using P2 Explorer Dashboard Sets, you can quickly resolve the types of issues that can cause increased downtime, missed production targets, and lower overall sales.

## Component Overview

P2 Explorer Dashboard Sets consists of a set of pages built within P2 Explorer. It displays data via a connection with P2 Server.

**P2 Explorer**

**P2 Server**

**Explorer Dashboards**

# Quick Start Cheat Sheet

Here is a rundown of the installation process for those who wish to view a summary of the main instructions.

Note: If you encounter any issues during installation, refer to the complete linked instructions.

* **Collect your** [**database connection information**](#_Database_Information)**.**
* **Collect** [**URLs**](#_URLs) **for P2 Server Web API, P2 Server Connection Hub, and P2 Security.**
* **Ensure** [**IIS**](#_Appendix_B._How) **is correctly configured.**
* [**Review**](#_Step_1._Review) **and** [**install**](#_Step_2._Install) **the prerequisites.**
* **Install** [**P2 Explorer Dashboard Sets**](#_Step_3._Install)**.**
* [**Reconfigure**](#_Step_3._Reconfigure) **the Explorer Hierarchy.**
* **Configure** [**P2 Security**](#_Step_5._Configure)**.**

# Planning the Installation

This section describes the requirements for installing and configuring P2 Explorer Dashboard Sets. Before you start the installation, make sure your system will support P2 Explorer Dashboard Sets.

## Required Information

You need the following information to correctly install and configure P2 Explorer Dashboard Sets.

### URLs

|  |  |  |
| --- | --- | --- |
| URL Required | Description | Used In |
| **Web API Server** | The URL used to connect to P2 Server. E.g.  http://[servername]/P2.Server.API/api | Connecting P2 Explorer to P2 Server |
| **Connection Hub** | The URL used to connect to the P2 Server Data Broker. E.g.  http://[servername]:8080/databrokerasync | Connecting P2 Explorer to P2 Server |
| **P2 Security** | The URL used to open the P2 Security web interface. E.g.  http://[servername]/P2.Security.Connect | P2 Security settings ([Step 5](#_Step_5._Configure)) |

### Database Information

P2 Explorer Database

Use the following information to connect to the P2 Explorer database.

|  |  |  |
| --- | --- | --- |
| Placeholder | Description | Example |
| [INSTANCE NAME] | The name of the P2 Explorer database instance. | P2.EXPLORER |
| [SERVER] | The name of the database server hosting the P2 Explorer database. | Perdev01 |
| [DBA USER] | User name for the database administrator | sa |
| [DBA PWD] | Password for the database administrator |  |

P2 Server Database

Use the following information to connect to the P2 Server database.

|  |  |  |
| --- | --- | --- |
| Placeholder | Description | Example |
| [INSTANCE NAME] | The name of the P2 Server database instance. | P2.SERVER |
| [SERVER] | The name of the database server hosting the P2 Server database. | Perdev01 |
| [DBA USER] | User name for the database administrator | sa |
| [DBA PWD] | Password for the database administrator |  |

## Hardware Requirements

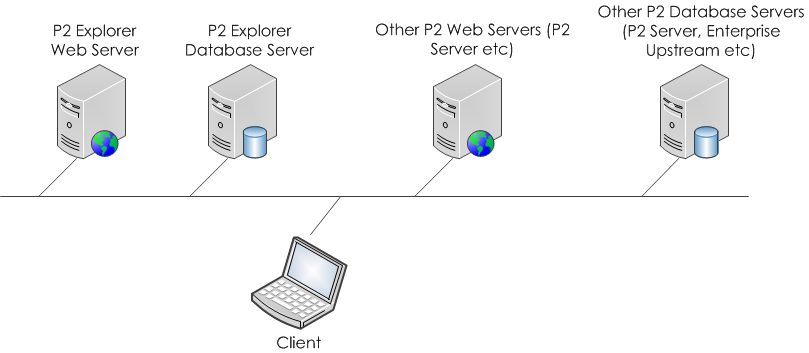
This section identifies the recommended hardware requirements for each machine. Note that this is the same specification as the P2 Server and P2 Explorer hardware.

All server class machines should have the following recommended requirements.

|  |  |
| --- | --- |
| Component | Recommended |
| **CPU** | 2 x Intel® Xeon® class E or L5000/7000 series or better |
| **RAM** | 16 GB+ |
| **Disk** | 4x 146GB 15000 rpm SAS, configured in RAID 5,10 |
| **NIC** | 1000 MBit/sec + |

## Network and Hardware Setup

The following diagram illustrates the recommended server configuration.



The servers as shown in the diagram are:

P2 Explorer Web Server

This is the machine on which P2 Explorer Dashboard Sets is installed. This may be located on the same machine as the P2 Explorer Database Server or another machine, depending on the site configuration.

P2 Explorer Database Server

This is the machine on which the P2 Explorer database is configured. This machine must have access to the P2 Server database and to the other servers configured in the corporate server. SQL Server must be installed on this machine prior to installing P2 Explorer.

Other P2 Web Servers

There may be one or more additional servers that host instances of other P2 applications, such as P2 Server, P2 Security, and Enterprise Upstream.

Other P2 Database Servers

There may be one or more additional servers that host instances of other P2 databases, such as P2 Server, P2 Security, and Enterprise Upstream. Data sourced from here is displayed on the dashboards.

Clients

The P2 Explorer clients are workstations or servers which have a browser that can access the P2 Explorer web site. The dashboards are accessed from here.

## Supported Technologies

The following list displays the technologies currently supported in P2 Explorer Dashboard Sets. We recommend that all customers keep their databases and operating systems current with patches and security fixes for the supported versions.

KEY:

 P2 does not warrant or support these platforms, this usually includes the very new and the very old.

 P2 does formal testing on these platforms and warrants and fully supports these installations.

 P2 generally supports these platforms/technologies outside of product maintenance; however no exhaustive testing is performed by P2 and if any major issues arise then it is recommended that only supported technologies are used.

clients

|  |  |
| --- | --- |
| Technology / Version | 1.0 |
| Windows 7 |  |
| Windows 8 |  |
| Internet Explorer 8.0 (32-bit) |  |
| Internet Explorer 9.0 (32-bit) |  |
| Internet Explorer 10.0 (32-bit) |  |
| Internet Explorer 11.0 (32-bit) |  |
| Google Chrome 36 and later |  |

servers

|  |  |
| --- | --- |
| Technology / Version | 1.0 |
| Windows 2008 Server R2 |  |
| Windows Server 2012 R2 |  |
| SQL Server 2008 R2 |  |
| SQL Server 2012 |  |
| Oracle 10 |  |
| Oracle 11 R2 |  |
| IIS 7.0 |  |
| IIS 7.5 |  |
| IIS 8.5 |  |

## Software Prerequisites

Software prerequisites are as follows:

Web Server Machine

* Microsoft Windows Server 2012 R2
* IIS 8.5
* P2 Explorer 4.0
* P2 Server 4.0
* P2 Security 4.0

Database Server Machine

* Microsoft SQL Server 2012  
  (Space required for schema: 500MB)

Client Machines

* Microsoft Internet Explorer 11 or  
  Google Chrome 36 or later

Note: We recommend that the latest version updates of any software is installed where possible to take advantage of improved functionality. Check the software’s release notes for any compatibility issues.

## Supplied Software

With this installation, the following items are present on the installation package. No other software is required from third party vendors.

Documents

P2 Explorer Dashboard Sets Installation Guide

Binaries

P2 Explorer Dashboard Sets installer (Setup – P2ExplorerPacks1.0.exe)

# Installation

This section describes the procedure for installing P2 Explorer Dashboard Sets.

## Fresh Installation

Installing P2 Explorer Dashboard Sets consists of the following steps:

1. [Review the installation requirements.](#_Step_1._Review)
2. [Install the prerequisites.](#_Step_2._Install)
3. [Install P2 Explorer Dashboard Sets.](#_Step_3._Install)
4. [Reconfigure the Explorer Hierarchy where applicable.](#_Step_4._Reconfigure)
5. [Configure P2 Security.](#_Step_5._Configure)

These steps are described in the following sections.

### Step 1. Review Installation Requirements

1. Gather the required [Database Information](#_Database_Information) and [URLs](#_URLs).
2. Review the [software prerequisites](#_Software_Prerequisites_1).

### Step 2. Install Prerequisites

The following software is included in the P2 Explorer Dashboard Sets installation package and must be installed on the web server before installing P2 Explorer Dashboard Sets.

Install the following software:

1. P2 Server 4.0

Note: Refer to the P2 Server Installation Guide for further information. You will only need to install this if it is not already installed on the network or you cannot access it. If already installed and you do have access, you will need to know the connection URL so you can properly configure P2 Explorer.

1. P2 Explorer 4.0

Note: Refer to the P2 Explorer Installation Guide for further information. You will only need to install this if it is not already installed on the network or you cannot access it. If already installed and you do have access, you will need to know the connection URL so you can use P2 Explorer Dashboard Sets.

1. P2 Security 4.0

Note: Refer to the P2 Security Installation Guide for further information. You will only need to install this if it is not already installed on the network or you cannot access it. If already installed and you do have access, you will need to know the connection URL so you can correctly configure security in [Step 5](#_Step_5._Configure).

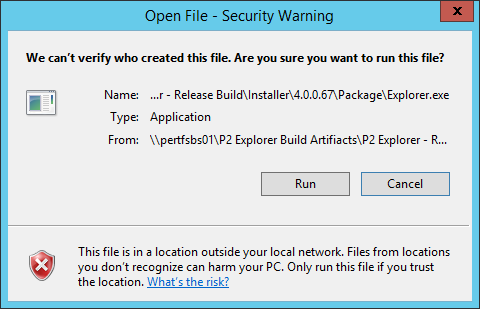
### Step 3. Install P2 Explorer Dashboard Sets

The P2 Explorer Dashboard Sets installer installs the selected Explorer dashboards and connects to the P2 Server and P2 Explorer databases. **P2 Explorer Dashboard Sets** **must be installed onto the same machine as P2 Explorer**.

Note: You can install multiple instances of P2 Explorer Dashboard Sets on the one machine using the same installer.

To run the installer:

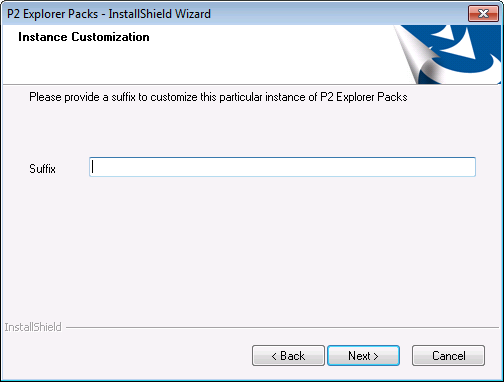
1. Double-click **Setup – P2ExplorerPacks1.0.exe**.
2. At the Security Warning, click **Run**.



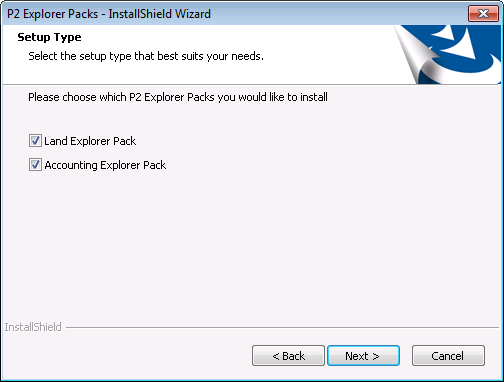
The InstallShield Wizard prepares the setup, and then displays the **Installation** page.

1. Click **Next**.
2. In the **Instance Customization** screen, type a unique name for that instance of P2 Explorer Dashboard Sets.

This is the name of the directory that will be created in the destination folder when P2 Explorer Dashboard Sets is installed. This allows you to install P2 Explorer Dashboard Sets for multiple databases. E.g. P2.Explorer.Sets1.

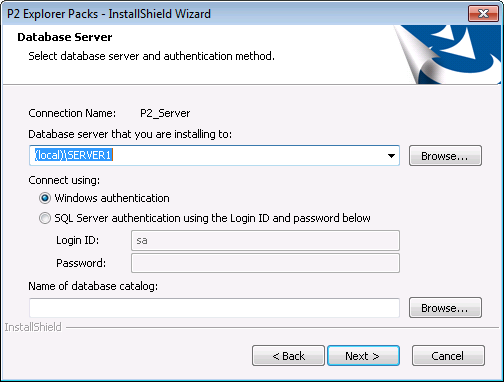


1. Click **Next**.
2. In the **Setup Type** screen, select the check box of each P2 Explorer dashboard that you would like to install.



1. Click **Next**.

The **Database Server** screen for P2 Server appears.



1. Specify the following for your P2 Server database:

**Database server you are installing to**:

Type in the name of the P2 Server database; or

Select the name from the drop-down list; or

Click **Browse** to select the database.

**Connect Using**:

This is the authentication method used to log in to the database.

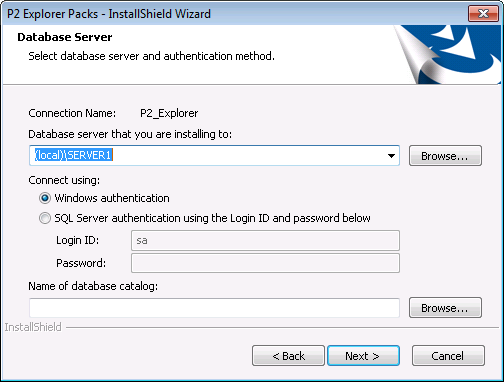
* + Windows authentication; or
  + SQL Server authentication. If this is selected, provide the user name and password.

**Name of database catalog**:

Select the database catalog (Database Instance Name) for P2 Server.

1. Click **Next**.

The **Database Server** screen for P2 Explorer appears.



1. Specify the following for your P2 Explorer database:

**Database server you are installing to**:

Type in the name of the P2 Explorer database; or

Select the name from the drop-down list; or

Click **Browse** to select the database.

**Connect Using**:

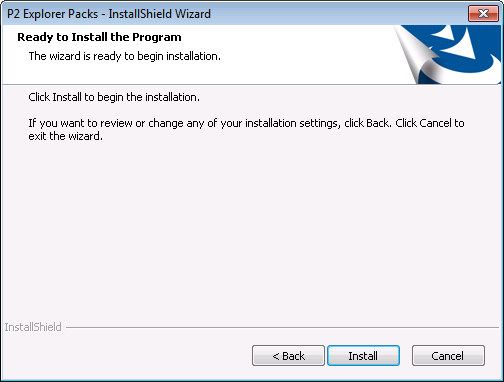
This is the authentication method used to log in to the database.

* + Windows authentication; or
  + SQL Server authentication. If this is selected, provide the user name and password.

**Name of database catalog**:

Select the database catalog (Database Instance Name) for P2 Explorer.

1. Click **Next**.



1. Click **Install**.

P2 Explorer Dashboard Sets installs. The installation will usually only take a minute.

1. When the installer has finished, click **Finish**.

File Directory Structure

When you install P2 Explorer Dashboard Sets, the following default file directory structure is created on your computer:

..P2

| wwwrootssl

| P2.Explorer.Sets1 //the instance name of this installation

### Step 4. Reconfigure the Explorer Hierarchy

The Explorer Hierarchy will be different for each implementation. You will therefore need to re-configure each P2 Explorer dashboard to work with a different hierarchy structure.

Note: If the required deployment hierarchy is the same as the default hierarchy, **you can skip this section**.

To open P2 Explorer:

1. Open a browser and type the URL into the address bar.

The URL will be something like:

http://[servername]/P2.Explorer

1. At the Windows Security prompt, type your user name and password.

P2 Explorer opens. The following steps describe how to reconfigure the hierarchy for each P2 Explorer dashboard.

#### 4.1 Turn On Edit Mode

You will need to turn on edit mode for P2 Explorer, in order to make the required modifications to each of the dashboards.

1. In the root directory of the installation (e.g. C:\P2\wwwrootssl\P2.Explorer.Sets1), use a text editor to open the **web.config** file.
2. Add ‘**Edit**’ to the list of enabled features, as follows:

<explorerFeatures>

<enabledFeatures>

<add name="Edit" />

</enabledFeatures>

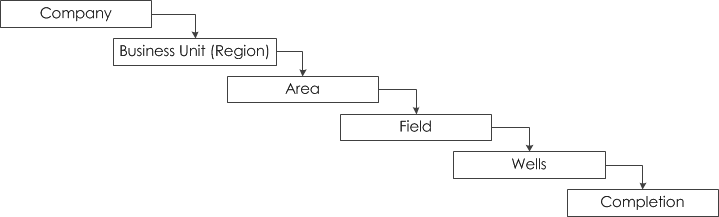
</explorerFeatures>

1. Save and close the web.config file.

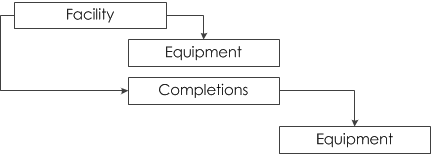
#### 4.2 Production

The dashboard summary screens are configured to work with the hierarchy structures defined below.

Corporate Hierarchy Structure



Facility Hierarchy Structure



The corporate hierarchy shown below provides an example of a different hierarchy structure, and we will use this as an example of how to re-configure the existing pages or to add new pages for the new levels.



The new levels are:

Prospect

Land Lease

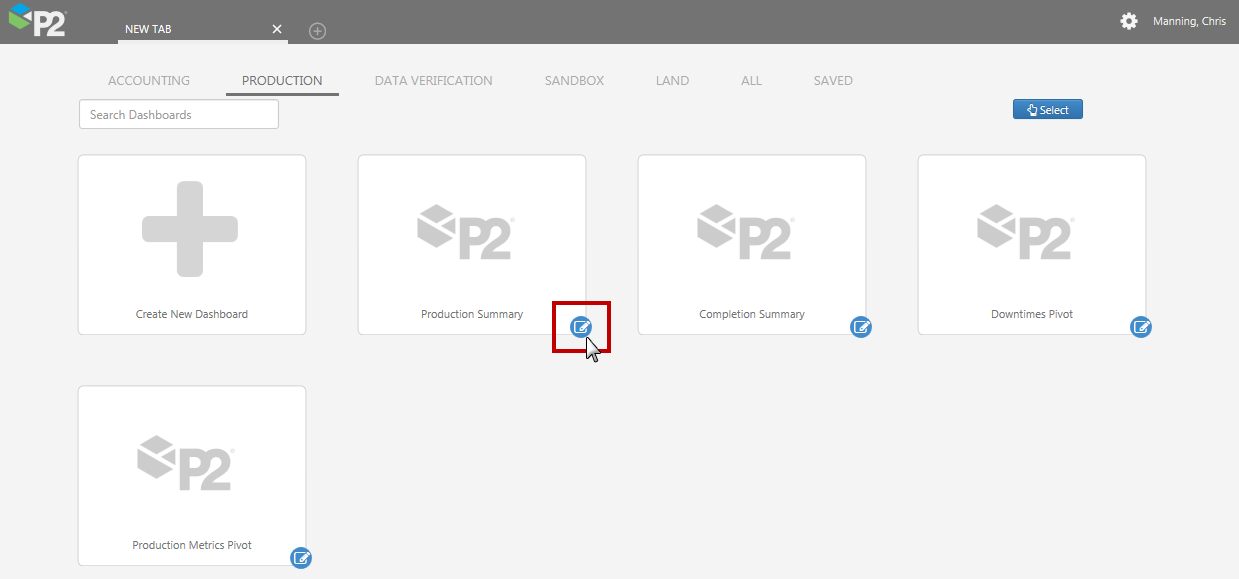
Land Tract

Land Depth

You will need to reconfigure the hierarchy on each dashboard page.

To reconfigure the hierarchy:

1. Open the **Production Summary** page in Edit  mode.



The HTML code of the **Production Summary** page is displayed.

1. Scroll down until you reach the <ex-defaults> node.

<ex-defaults>

<ex-default name="readingTypeOptions" type="csv">Monthly,Daily</ex-default>

<ex-default name="selectedReadingType" type="csv">Monthly</ex-default>

<ex-default name="startTime" type="time">July 2013</ex-default>

<ex-default name="hierarchyName" type="string">Corporate</ex-default>

<ex-default name="selectedEntity">Company Name</ex-default>

<ex-default name="trendDuration">1 year</ex-default>

<ex-default name="longAverageDuration">1 year</ex-default>

<ex-default name="shortAverageDuration">6 months</ex-default>

</ex-defaults>

1. Make the required changes to the following elements:

hierarchyName

selectedEntity

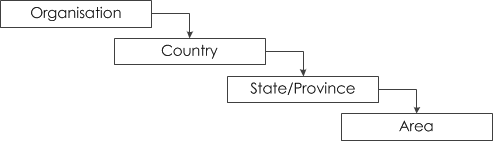
1. Make any other required changes to the defaults, and then click the **Save** button at the bottom of the page.
2. Close the **Production Summary** tab.
3. Repeat the above steps for the remaining dashboards:
   1. Completion Summary
   2. Downtimes Pivot
   3. Production Metrics Pivot

#### 4.3 Accounting

If you have installed the Accounting Explorer Pack, there are two changes to make.

##### 4.2.1 Update Hierarchy Levels

The dashboard summary screens are configured to work with the reporting levels defined below.



If the organisation uses a different reporting hierarchy, you will need to reconfigure the hierarchy on each dashboard page.

To reconfigure the hierarchy:

1. Open the **Key Performance Indicators** page in Edit  mode.

The HTML code of the **Key Performance Indicators** page is displayed.

1. Scroll down until you reach the <ex-defaults> node.

<ex-defaults>

<ex-default name="currencyOptions" type="csv">USD,CAD,NOK</ex-default>

<ex-default name="selectedCurrency">CAD</ex-default>

<ex-default name="amountTypeOptions" type="csv">Gross,Net</ex-default>

<ex-default name="selectedAmountType">Net</ex-default>

<ex-default name="measureOptions" type="csv">IMPERIAL,METRIC</ex-default>

<ex-default name="selectedMeasureType">IMPERIAL</ex-default>

<ex-default name="periodTypeOptions" type="csv">Accounting,Production</ex-default>

<ex-default name="selectedPeriodType">Accounting</ex-default>

<ex-default name="reportingLevelOptions" type="csv">ORG,COUNTRY,STATEPROV,AREA</ex-default>

<ex-default name="selectedReportingLevel">AREA</ex-default>

<ex-default name="hierarchyName">Accounting</ex-default>

<ex-default name="selectedHierarchyId">All</ex-default>

<ex-default name="startTime" type="time">First day of last month</ex-default>

<ex-default name="endTime" type="time">First day of this month</ex-default>

<ex-default name="entitySelectedFlag">Y</ex-default>

<ex-default name="disableSelection">false</ex-default>

<ex-default name="autoSelectEntities">true</ex-default>

</ex-defaults>

1. Make the required changes to the following elements:

selectedCurrency

selectedMeasureType

reportingLevelOptions

selectedReportingLevel

hierarchyName

selectedHierarchyId

1. Make any other required changes to the defaults, and then click the **Save** button at the bottom of the page.
2. Close the **Key Performance Indicators** tab.
3. Repeat the above steps for the remaining dashboards:
   1. Operating Income
   2. Sales
   3. Royalties
   4. Operating Expenses
   5. Capital Expenditures
   6. AFE Variances
   7. Gas – Sales
   8. Oil – Sales
   9. NGL – Sales
   10. Capital Budget by Area and AFE Types
   11. Capital Budget – Development, Exploration and Facilities

##### 4.2.2 Update the Optix Links

On each of the Sales, Royalties, Operating income, and Operating Expenses dashboards, you will need to update the hardcoded hierarchy ID in the optix link.

1. Open the **Sales** page in Edit  mode.

The HTML code of the **Sales** page is displayed.

In the <ex-dashboard> node, immediately after the <style> node, you will see a <script> node.

1. In the <script> node, locate the optixLink URL.

<script>

function AccountingController($scope) {

$scope.openURL = function(entityName) {

var optixDisplayDate = moment($scope.state.endTime).subtract(11, 'months');

var optixLink = "<http://brahma.qbyte.com:7003/JiveWebClient/service/getReportOpenUrl/FM/CostCentreRequest/>"

…

1. Update the URL and port number as required for the organization.
2. Scroll down until you reach the <ex-defaults> node.

<ex-defaults>

<ex-default name="currencyOptions" type="csv">USD,CAD,NOK</ex-default>

<ex-default name="selectedCurrency">CAD</ex-default>

<ex-default name="amountTypeOptions" type="csv">Gross,Net</ex-default>

<ex-default name="selectedAmountType">Net</ex-default>

<ex-default name="measureOptions" type="csv">IMPERIAL,METRIC</ex-default>

<ex-default name="selectedMeasureType">IMPERIAL</ex-default>

<ex-default name="periodTypeOptions" type="csv">Accounting,Production</ex-default>

<ex-default name="selectedPeriodType">Accounting</ex-default>

<ex-default name="reportingLevelOptions" type="csv">ORG,COUNTRY,STATEPROV,AREA</ex-default>

<ex-default name="selectedReportingLevel">AREA</ex-default>

<ex-default name="hierarchyName">Accounting</ex-default>

<ex-default name="selectedHierarchyId">All</ex-default>

<ex-default name="startTime" type="time">First day of last month</ex-default>

<ex-default name="endTime" type="time">First day of this month</ex-default>

<ex-default name="entitySelectedFlag">Y</ex-default>

<ex-default name="defaultDecimalPointForPricePerc">2</ex-default>

<ex-default name="defaultDecimalPoint">0</ex-default>

<ex-default name="defaultChartGridLines">9</ex-default>

<ex-default name="defaultOptixHierarchyId">1022</ex-default>

<ex-default name="defaultOptixFinancialVolumes">I</ex-default>

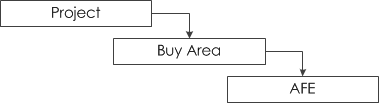
<ex-default name="defaultOptixReportGraphContent">N</ex-default>

</ex-defaults>

1. Change the **defaultOptixHierarchyId** so that it reflects your organization number.
2. Click the **Save** button at the bottom of the page.
3. Close the **Sales** tab.
4. Repeat the above steps for the following dashboards:
   1. Operating Income
   2. Royalties
   3. Operating Expenses

#### 4.4 Land

The dashboard summary screens are configured to work with the reporting levels defined below.



If the organisation uses a different reporting hierarchy, you will need to reconfigure the hierarchy on each dashboard page.

To reconfigure the hierarchy:

1. Open the **Land Acquisition Budget** page in Edit  mode.

The HTML code of the **Land Acquisition Budget** page is displayed.

1. Scroll down until you reach the <ex-defaults> node.

<ex-defaults>

<ex-default name="currencyOptions" type="csv">USD,CAD,NOK</ex-default>

<ex-default name="selectedCurrency">CAD</ex-default>

<ex-default name="amountTypeOptions" type="csv">Gross,Net</ex-default>

<ex-default name="selectedAmountType">Net</ex-default>

<ex-default name="reportingLevelOptions" type="csv">Project,Buy Area,AFE</ex-default>

<ex-default name="selectedReportingLevel">Buy Area</ex-default>

<ex-default name="hierarchyName">Accounting</ex-default>

<ex-default name="fromStartTime" type="time">first day of last month</ex-default>

<ex-default name="fromEndTime" type="time">first day of this month</ex-default>

<ex-default name="toStartTime" type="time">first day of this month</ex-default>

<ex-default name="toEndTime" type="time">first day of next month</ex-default>

<ex-default name="timePeriodOptions" type="csv">Current Month,Current Year,IDT - Inception to Date,Select Range</ex-default>

<ex-default name="selectedTimePeriod" type="string">Current Month</ex-default>

<ex-default name="currentMonthEndDate" type="time">last day of this month</ex-default>

<ex-default name="currentMonthStartDate" type="time">first day of this month</ex-default>

<ex-default name="currentYearEndDate" type="time">december of this year</ex-default>

<ex-default name="currentYearStartDate" type="time">january of this year</ex-default>

<ex-default name="minimumEndDate" type="time">today</ex-default>

<ex-default name="minimumStartDate" type="time">1970-01-01</ex-default>

</ex-defaults>

1. Make the required changes to the following elements:

selectedCurrency

reportingLevelOptions

selectedReportingLevel

hierarchyName

1. Make any other required changes to the defaults, and then click the **Save** button at the bottom of the page.
2. Close the **Land Acquisition Budget** tab.
3. Repeat the above steps for the remaining dashboards:
   1. Operating Income
   2. Sales
   3. Royalties
   4. Operating Expenses
   5. Capital Expenditures
   6. AFE Variances
   7. Gas – Sales
   8. Oil – Sales
   9. NGL – Sales
   10. Capital Budget by Area and AFE Types
   11. Capital Budget – Development, Exploration and Facilities

#### 4.5 Turn Off Edit Mode

You will need to turn off edit mode for P2 Explorer, so no more modifications can be made to the dashboards.

1. In the root directory of the installation (e.g. C:\P2\wwwrootssl\P2.Explorer.Sets1), use a text editor to open the **web.config** file.
2. Remove ‘**Edit**’ from the list of enabled features.

<explorerFeatures>

<enabledFeatures>

<add name="Edit" />

</enabledFeatures>

</explorerFeatures>

1. Save and close the web.config file.

### Step 5. Configure P2 Security

You will need to configure the appropriate security settings for objects in P2 Explorer Dashboard Sets. This is done using **P2 Security**. You can find detailed information on how to use P2 Security in the P2 Security User’s Guide.

1. Open P2 Security.

The URL will look something like this:

http://[servername]/P2.Security.Connect

1. Configure P2 Explorer Dashboard Sets to use P2 Security.
   1. Add the application to P2 Security.

For instructions, refer to “Adding an Application” in the P2 Security User’s Guide.

* 1. Configure and map the required global roles.

This allows groups and users with those global roles to have the access privileges associated with the application roles.

For instructions, refer to “Managing Global Roles” in the P2 Security User’s Guide.

* 1. Configure object security for the application.

For instructions, refer to “Editing Object Privileges” in the P2 Security User’s Guide.

1. Configure user access.
   1. If required, add users to P2 Security.

For instructions, refer to “Adding, Editing, and Deleting a User” in the P2 Security User’s Guide.

* 1. Assign users to groups.

This allows the user to inherit the privileges assigned to the group.

For instructions, refer to “Assigning Users to Groups” in the P2 Security User’s Guide.

* 1. Assign users to global roles or assign groups to global roles.

This grants the user the privileges associated with the application (through the mapping of the global role to the application role). If the user has been assigned to a group, and the group has been assigned to a global role, you do not need to assign the user to a global role.

For instructions, refer to “Assigning Users to Global Roles” or “Assigning Groups to Global Roles” in the P2 Security User’s Guide.

P2 Explorer Dashboard Sets should now be correctly configured with appropriate security settings.

## Upgrading

* Before upgrading, make sure you first back up your existing databases, web directories, and other customisations.

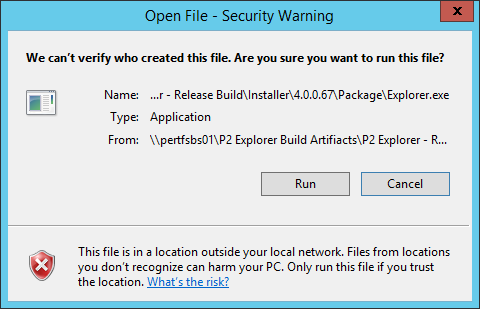
### Upgrade Procedure

Upgrading P2 Explorer Dashboard Sets consists of the following steps:

1. Back up the database and any modified configuration files found in the installation directory.
2. Uninstall the previous version of P2 Explorer Dashboard Sets, if required.

Note: You can install multiple instances of P2 Explorer Dashboard Sets on the one machine using the same installer.

1. Double-click **Setup – P2ExplorerPacks1.0.exe**.
2. At the Security Warning, click **Run**.

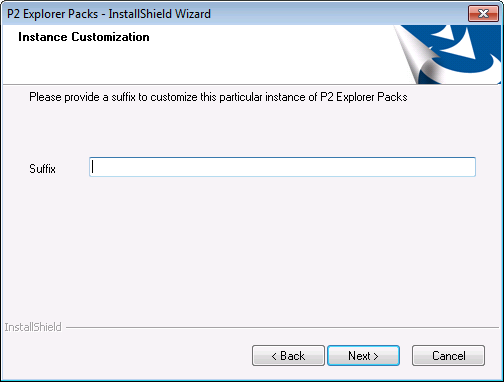


The InstallShield Wizard prepares the setup, and then displays the **Installation** page.

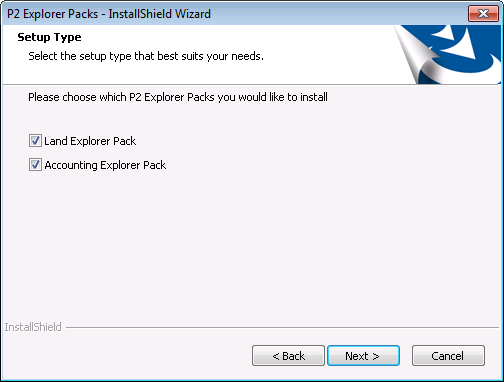
1. Click **Next**.
2. In the **Instance Customization** screen, type a unique name for that instance of P2 Explorer Dashboard Sets.

This is the name of the directory that will be created in the destination folder when P2 Explorer Dashboard Sets is installed. This allows you to install P2 Explorer Dashboard Sets for multiple databases. E.g. P2.Explorer.Sets1.

You can overwrite an existing instance by typing the same name into this field.

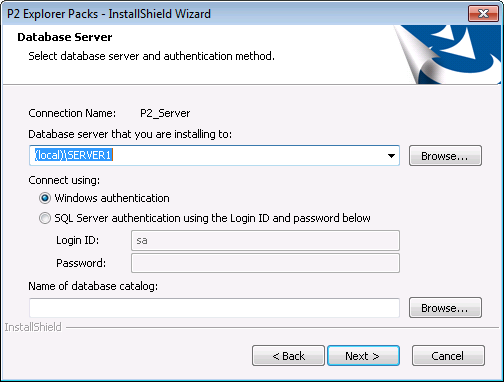


1. Click **Next**.
2. In the **Setup Type** screen, select the check box of each P2 Explorer dashboard that you would like to install.



1. Click **Next**.

The **Database Server** screen for P2 Server appears.



1. Specify the following for your P2 Server database:

**Database server you are installing to**:

Type in the name of the P2 Server database; or

Select the name from the drop-down list; or

Click **Browse** to select the database.

**Connect Using**:

This is the authentication method used to log in to the database.

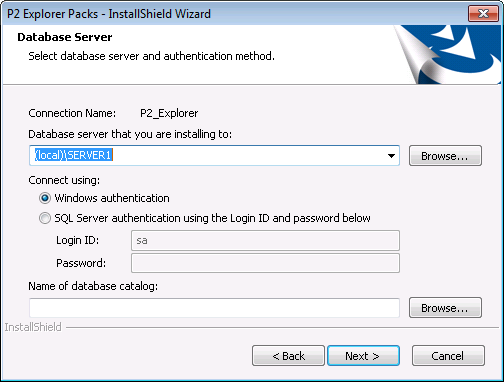
* + Windows authentication; or
  + SQL Server authentication. If this is selected, provide the user name and password.

**Name of database catalog**:

Select the database catalog (Database Instance Name) for P2 Server.

1. Click **Next**.

The **Database Server** screen for P2 Explorer appears.



1. Specify the following for your P2 Explorer database:

**Database server you are installing to**:

Type in the name of the P2 Explorer database; or

Select the name from the drop-down list; or

Click **Browse** to select the database.

**Connect Using**:

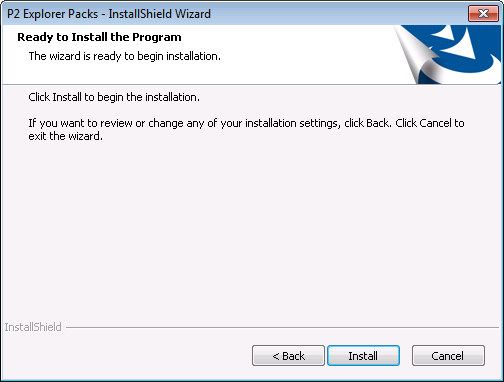
This is the authentication method used to log in to the database.

* + Windows authentication; or
  + SQL Server authentication. If this is selected, provide the user name and password.

**Name of database catalog**:

Select the database catalog (Database Instance Name) for P2 Explorer.

1. Click **Next**.



1. Click **Install**.

P2 Explorer Dashboard Sets installs. The installation will usually only take a minute.

1. When the installer has finished, click **Finish**.
2. Check your settings for [P2 Security](#_Step_5._Configure).

You should not need to change anything, but be aware of any new objects that may appear.

1. If you have installed a new dashboard, refer to [Step 4](#_Step_3._Reconfigure) for instructions on how to reconfigure the Explorer Hierarchy.

### Rollback Procedure

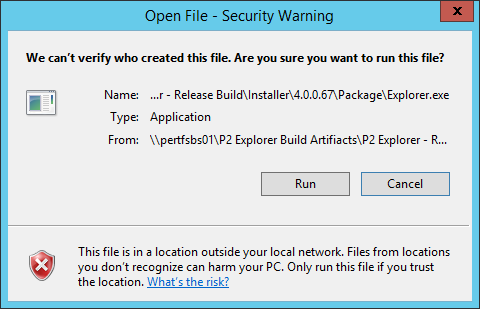
1. [Uninstall](#_Uninstall) P2 Explorer Dashboard Sets.
2. [Install](#_Step_3._Install) the previous version of P2 Explorer Dashboard Sets.
3. Restore the P2 Explorer Dashboard Sets database from backup.
4. Restore the P2 Explorer Dashboard Sets configuration files from backup.

## Uninstall

After you have run the **Setup – P2ExplorerPacks1.0.exe** installer, running this again offers you the options of changing your installation, repairing your installation, and removing your installation.

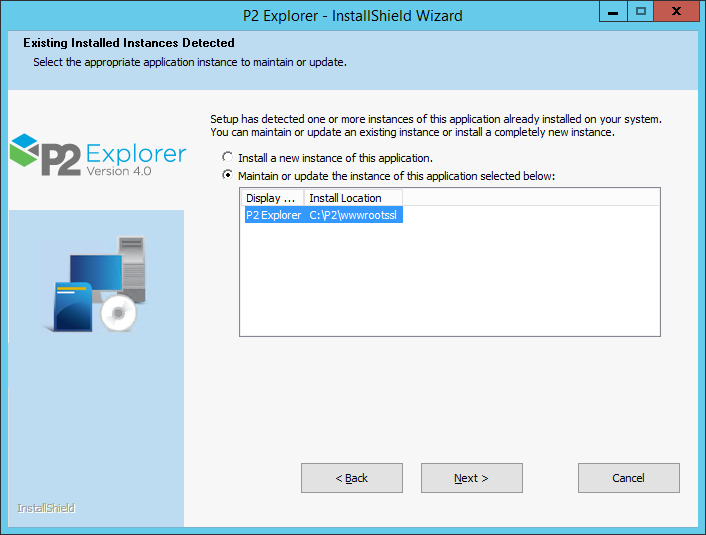
To run the installer:

1. Double-click **Setup – P2ExplorerPacks1.0.exe**.
2. At the Security Warning, click **Run**.



The InstallShield Wizard prepares the setup, and then displays the **Existing Installed Instances Detected** screen.

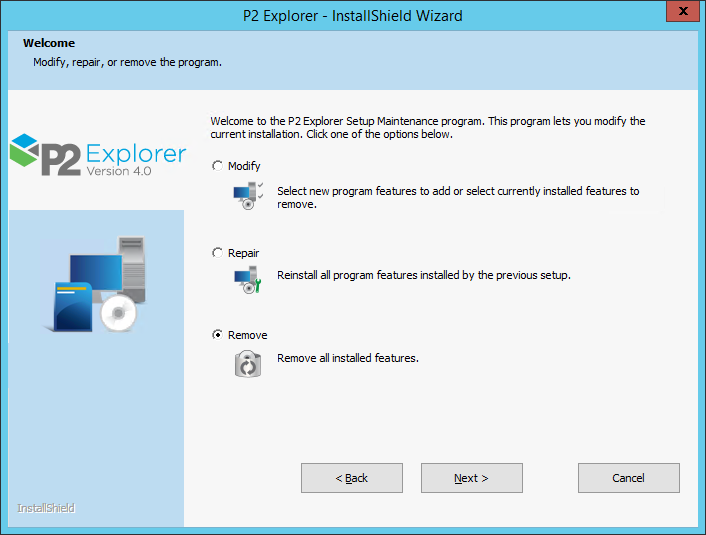
Note: You can bypass the InstallShield wizard through the **Program Features** utility (Start > Control Panel > Programs and Features). Double-click **P2 Explorer** in the list of installed programs to completely remove the application.



1. Select the “**Maintain or update**” option, and then select the instance that you want to uninstall.
2. Click **Next**.

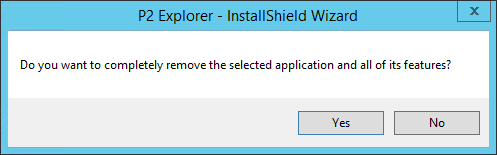
InstallShield prepares the setup and displays a welcome screen.

The following options appear:



* + **Modify**: The Modify option allows you to change the installed components. Since the Explorer installation requires a complete installation of all components, this option is not applicable.
  + **Repair**: Repair allows you to fix any errors that may have occurred in the most recent installation. It fixes missing and corrupt files, shortcuts, and registry entries.
  + **Remove**: Remove allows you to remove P2 Explorer Dashboard Sets and all associated files and features from your computer. You should not do this until you have spoken to P2 Customer Support.

1. To uninstall P2 Explorer Dashboard Sets, select **Remove** and then click **Next**.



1. At the confirmation prompt, click **Yes**.

The InstallShield wizard removes P2 Explorer Dashboard Sets.

1. When the uninstall has been completed, click **Finish**.

Note: The installer will not remove the P2 Explorer Dashboard Sets database. If you want to remove the database, you must do this manually using the appropriate database tool. Please contact P2 Customer Support before doing so.

# Appendix A. Troubleshooting

This section describes some problems that may occur during installation, and how to resolve them.

You should also refer to the troubleshooting sections in the P2 Explorer Installation Guide and P2 Server Installation Guide.