

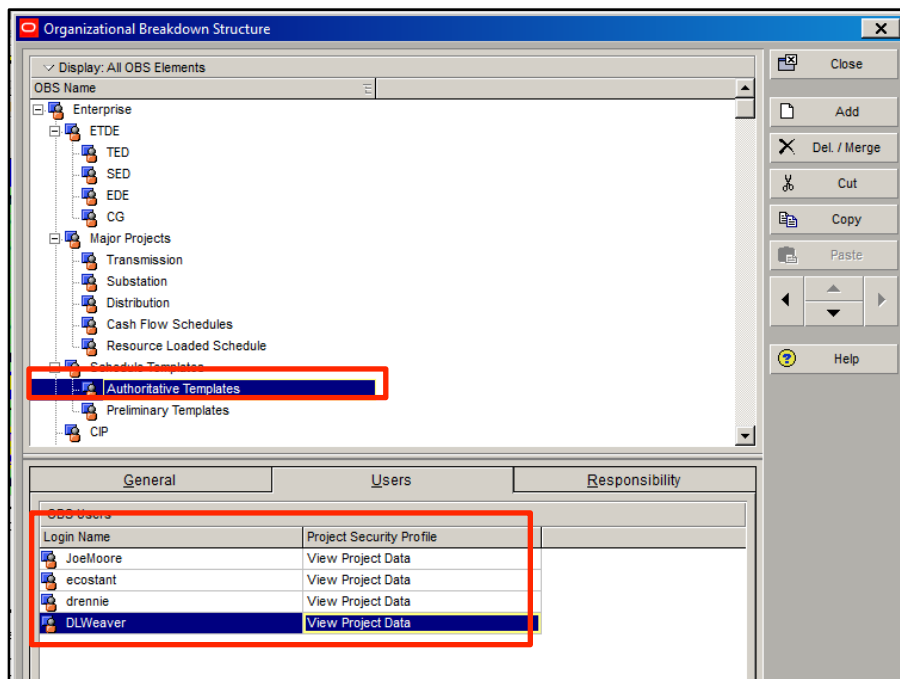
# TECH TIP

## MAINTAINING AND SECURITY FOR P6 TEMPLATES ORACLE PRIMAVERA P6

Using a Template is a very common way to reduce the time it takes to build a project schedule inside Primavera P6. Managing these templates can be cumbersome when a user inadvertently changes data while copying it to their blank project shell. Templates may also contain sensitive data that the organization may want to keep hidden from various users. This document provides a quick way to meet these requirements for managing templates and securities within Primavera P6.

### Step 1—View Only Access to Template Node

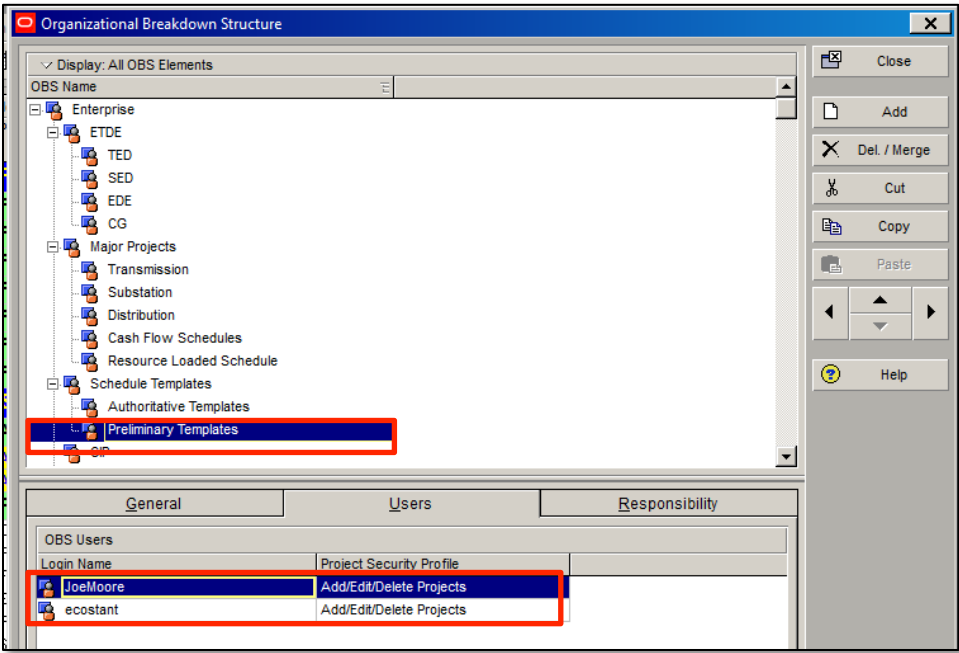
Build the OBS and assign all schedulers as “View Only” to the newly created “Authoritative Templates” node. This will ensure the users (Not including Admin) cannot edit or change released versions of the templates.



# MAINTAINING AND SECURITY FOR P6 TEMPLATES

## Step 2—Edit Access for Users Modifying Templates

Assign the designated individuals who will be responsible for maintaining the system templates to the "Preliminary Templates" node. A special project security profile has been created for the user assignments.



## Step 3—EPS Responsible Manager Assigned to Match OBS

Assign the matching EPS with the Responsible Manager correlating with the new OBS.

Project ID	Project Name	Responsible Manager
SCH TEMP	Schedule Templates	Schedule Templates
Auth_Temp	Authoritative Templates	Authoritative Templates
Proj Temp	Authoritative Project Templates	Authoritative Templates
TMPLT_002	Transmission (Sample Project Template)	Authoritative Templates
TMPLT_001	Substation (Sample Project Template)	Authoritative Templates
FIRM (BASIC)	FIRM Program Template (Basic)	Authoritative Templates
FIRM (BASIC) CONT-1	FIRM Program Template (Basic) Contractor	Authoritative Templates
FIRM (FULL UG)	FIRM Program Template (Full UG)	Authoritative Templates
FIRM (FULL OH)	FIRM Program Template (Full OH)	Authoritative Templates
FIRM (FULL OG) CONT-1	FIRM Program Template (Full UG) Contractor	Authoritative Templates
FIRM (FULL OH) CONT-1	FIRM Program Template (Full OH) Contractor	Authoritative Templates
WorkPkg Temp	Authoritative Work Package Templates	Authoritative Templates
Pre_Temp	Preliminary Templates (Templates Being Edited)	Preliminary Templates
CS Template	Civil/ Structural Template (Standard Structures)	Preliminary Templates
Pre-Con CL TEMP	Pre-Construction Job Package Checklist Template	Preliminary Templates
FIBER TEMP	Fiber Template	Preliminary Templates
ENV PMT	Environmental Permits	Preliminary Templates
PCO TEMP 2	Project Close Out Template 2	Preliminary Templates
Sample WBS	Sample WBS for Estimating	Preliminary Templates
Temp - New Sub	Template - New 230kV Substation	Preliminary Templates
Temp - Sub Rebuild	Template - 69kV Substation Rebuild	Preliminary Templates
WBS Template	WBS Template - No Activities	Preliminary Templates
CG - WDAT TEMP	Customer Generation WDAY Template	Preliminary Templates

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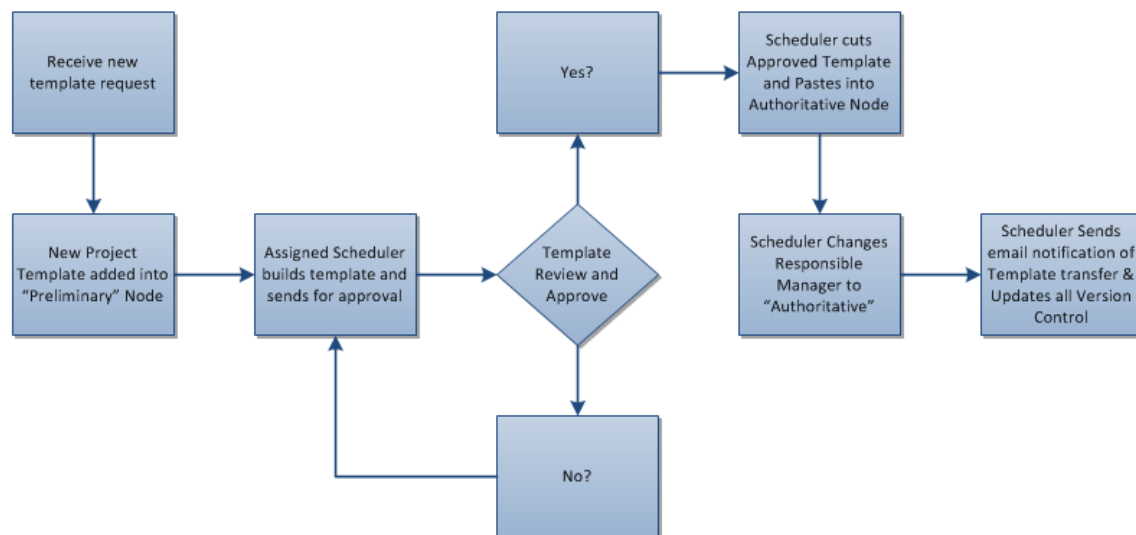
## Summary

In this manner, general P6 Schedulers will have access to USE but not MODIFY the templates in the "Authoritative Templates" node. This protects these templates from being modified when new projects are being created.

Those users responsible for creating, modifying and updating templates will have access to the "Preliminary Templates" node, and can therefore do any updates and testing of the changes and obtain approvals PRIOR to these templates being placed in the "Authoritative Templates" node.

## Sample Process Workflow

The approval process requires the individuals in charge of maintaining the templates to properly place the project into the proper area and change the responsible manager accordingly. See the flowchart for a sample process, from the request of a new template/change to the point the template is approved and populated and schedulers are notified.



If implementing this protocol for maintaining templates within a P6 environment, further administration will be required to maintain the integrity of the data. These items include, but are not limited to:

- Checking the WBS inside the project when changing the responsible manager.
- Verifying user securities are appropriately set.
- Maintaining the OBS when users change positions.