



Primavera P6 – USACE Mandatory Requirements

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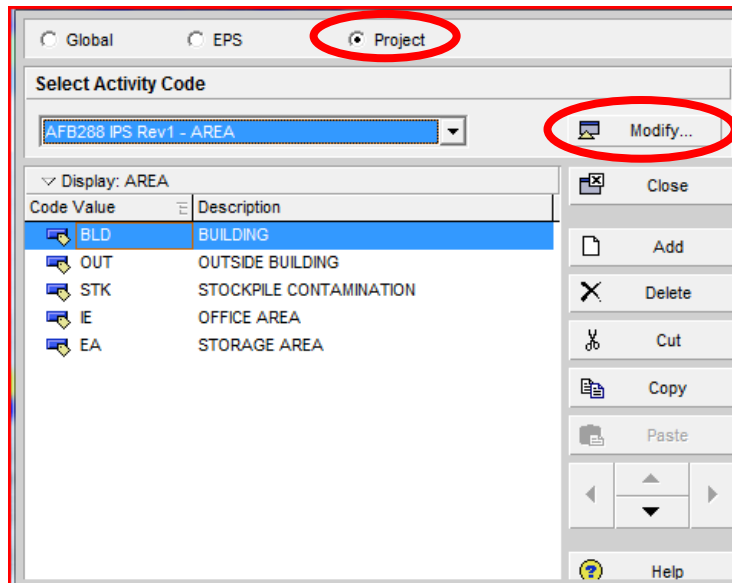
Primavera P6 – USACE Mandatory Requirements

#1 Activity Codes are Project Level

Projects should only contain Project Level Activity Codes and not Global Level or EPS Level.

Steps:

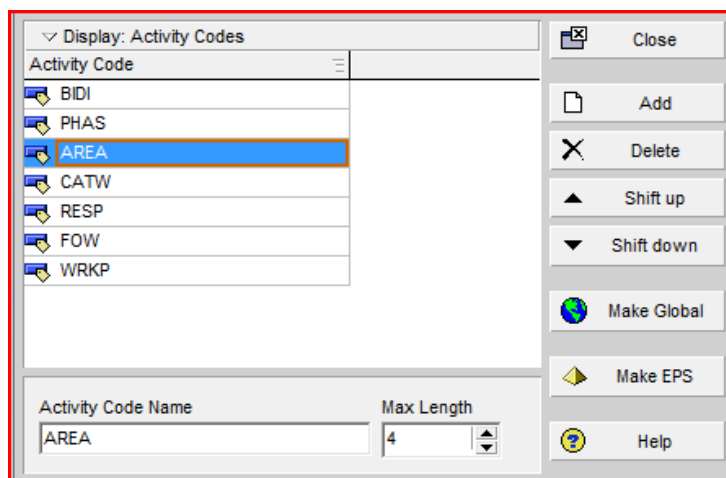
1. Open the Project.
2. From the Menu bar, click *Enterprise*.
3. Click *Activity Codes*.
4. Click on the *Project* radial button at the top.



Why the Requirement?

Global activity codes can overwrite each other, thus corrupting other projects in the database.

5. Click *Modify* to view the created Project Level Activity Codes.



Note:

Activity Code Names and Lengths may be verified in this view that they match the Standard Activity Coding Dictionary (SDEF) as required by contract. The structure is mandatory and defined in ER 1-1-11, Appendix A

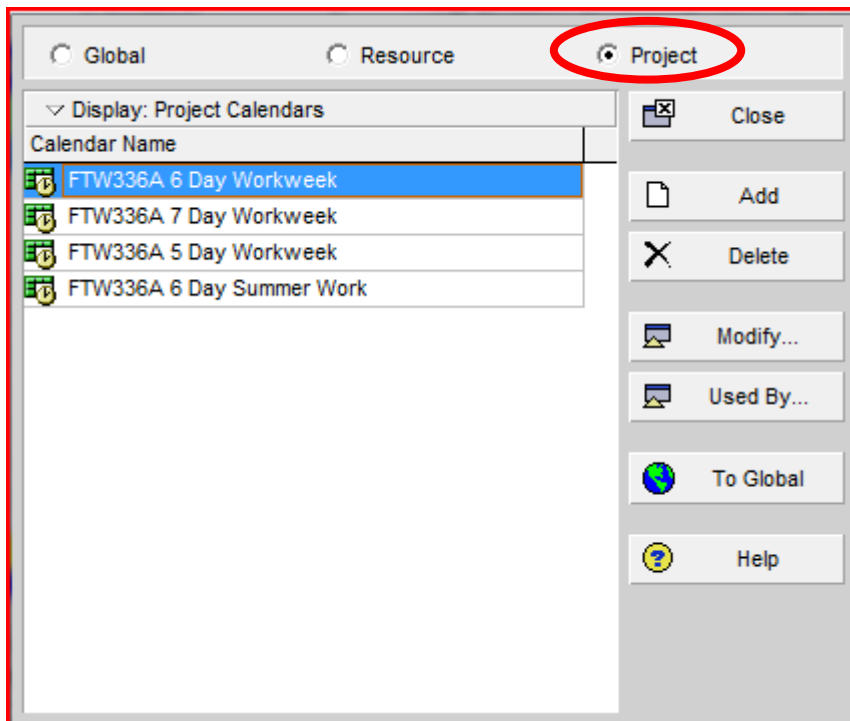
6. Confirm all required activity codes are created.

#2 Calendars are Project Level

Only Project Level Calendars should be used on Projects. No Activity should be assigned to a Global Level Calendar.

Steps:

1. Open the Project.
2. From the Menu bar click, *Enterprise*.
3. Click *Calendars*.
4. Click the *Project* radial button at the top.



Why the Requirement?

Global Calendars with the same Name can overwrite other Project Calendars thus corrupting other projects in the database.

5. Confirm Project Level Calendars have been created.

#2 Calendars are Project Level (continued)

An alternative approach is to create a report that identifies any Global Level Calendars assigned to the project.

General Steps:

1. Go to the *Reports* window.
2. Add a new report.
3. Choose the subject area *Calendars*.
4. Add the following filter:

The screenshot shows the 'Display: Filter' dialog box in Primavera P6. The dialog has a table with columns: 'Display all rows', 'Parameter', 'Is', 'Value', and 'High Value'. The table contains two rows: 'Where Calendar Type equals Global Calendar' and 'And Project equals'. The 'And' row is highlighted in blue. A red circle highlights the 'Value' cell in the 'And' row, which is currently blank. Two red callout boxes provide instructions: one points to the 'And' row with the text 'Change the Filter to an “And” statement by selecting (All of the following).', and the other points to the blank 'Value' cell with the text 'Enter the Project ID in the blank cell.' The right side of the dialog contains buttons: OK, Cancel, Apply, Add, Delete, Cut, Copy, Paste, and Help.

Display all rows	Parameter	Is	Value	High Value
☐	(All of the following)			
	Where Calendar Type	equals	Global Calendar	
	And Project	equals		

Change the Filter to an “And” statement by selecting (All of the following).

Enter the Project ID in the blank cell.

The report will only display Global Level Calendars that are assigned to the Project identified in the filter. If the report appears empty, the project does not contain Global Level Calendars, and is acceptable.

#3 Duration Types set to “Fixed Duration & Units”

Each Activity can have a different Duration Type within a Project. Verify the Default Duration Type for the project is “Fixed Duration and Units” and all activities within the Project are “Fixed Duration & Units”.

Steps (Project Level):

1. Navigate to the *Projects* window.
2. Highlight the project.
3. Click on the *Defaults* tab.
4. Verify the Duration Type is “Fixed Duration & Units”.

The screenshot shows the 'Defaults' tab in the Primavera P6 software interface. The 'Defaults for New Activities' section is visible, with the 'Duration Type' dropdown menu set to 'Fixed Duration & Units'. The 'Percent Complete Type' is set to 'Physical' and the 'Activity Type' is set to 'Task Dependent'. The 'Auto-numbering Defaults' section shows the 'Activity ID Prefix' as 'A', the 'Activity ID Suffix' as '1000', and the 'Increment' field is empty. The checkbox 'Increment Activity ID based on selected activity' is checked.

General	Dates	Notebook	Codes	Defaults	Resources	Settings	Calculations
Defaults for New Activities							
Duration Type		Fixed Duration & Units					
Percent Complete Type		Physical					
Activity Type		Task Dependent					
Auto-numbering Defaults							
Activity ID Prefix		Activity ID Suffix		Increment			
A		1000					
☒ Increment Activity ID based on selected activity							

#3 Duration Types set to “Fixed Duration & Units” (continued)

Steps (Activity Level):

1. Navigate to the Activities window.
2. Add the column *Duration Type* to the Activity Table.
3. Verify every Activity is set to “Fixed Duration & Units”

Activities		
Layout: Classic WBS Layout Filter: All Activities		
Activity ID	Activity Name	Duration Type
1010	Create Preliminary Project Schedule	Fixed Duration & Units
1020	Create Submittal Register	Fixed Duration & Units
1030	Precon & Mutual Understanding Meeting	Fixed Duration & Units
1060	Demo Pavement and Concrete, Concrete and	Fixed Duration & Units
1070	Clear and Excavate Building Site	Fixed Duration & Units
1080	New fill to Bottom of Footings	Fixed Duration & Units
1300	Submit NOI	Fixed Duration & Units
1310	Install S/WPPP Materials	Fixed Duration & Units
1315	Maintain S/WPPP Materials	Fixed Duration & Units
1330	Secure Excavation Clearance Request	Fixed Duration & Units
1470	Detail/Submit Structural Steel	Fixed Duration & Units
1480	Detail/Submit HVAC Units	Fixed Duration & Units
1490	COE Approve Structural Steel Shop Dwgs	Fixed Duration & Units
1500	COE Approve Reinforcing Steel Shop Dwgs	Fixed Duration & Units
1510	COE Approve Roof Truss Shop Dwgs	Fixed Duration & Units
1520	COE Approve Blast and Alum Window Material	Fixed Duration & Units
1530	COE Approve Mech & Elec UG Materials	Fixed Duration & Units
1540	Order/Receive Structural Steel	Fixed Duration & Units

Why the Requirement?

Duration Types can alter the duration of activities when Resource assignments are changed. “Fixed Duration & Units” will maintain the duration of the Activity.

#4 Percent Complete Types set to “Physical”

Verify the Default Percent Complete Type for the Project is “Physical” and all activities within the Project are “Physical”. The software allows the option for each Activity can have a different Percent Complete Type within a project; however, only one option meets contract requirements.

Steps (Project Level):

1. Navigate to the *Projects* window.
2. Highlight the Project.
3. Click on the *Defaults* tab.
4. Verify the Percent Complete Type is “Physical”.

The screenshot shows the 'Defaults' tab in the Primavera P6 software interface. The 'Defaults for New Activities' section contains three dropdown menus: 'Duration Type' set to 'Fixed Duration & Units', 'Percent Complete Type' set to 'Physical', and 'Activity Type' set to 'Task Dependent'. The 'Percent Complete Type' dropdown is circled in red. Below this, the 'Auto-numbering Defaults' section includes text boxes for 'Activity ID Prefix' (containing 'A') and 'Activity ID Suffix' (containing '1000'), and a checkbox labeled 'Increment Activity ID based on selected activity' which is checked.

#4 Percent Complete Types set to “Physical” (continued)

Steps (Activity Level):

1. Navigate to the Activities window.
2. Add the column *Percent Complete Type* to the Activity Table.
3. Verify every Activity is set to “Physical”.

Activities		
Layout: Classic WBS Layout Filter: All Activities		
Activity ID	Activity Name	Percent Complete Type
1010	Create Preliminary Project Schedule	Physical
1020	Create Submittal Register	Physical
1030	Precon & Mutual Understanding Meeting	Physical
1060	Demo Pavement and Concrete, Concrete and	Physical
1070	Clear and Excavate Building Site	Physical
1080	New fill to Bottom of Footings	Physical
1300	Submit NOI	Physical
1310	Install S/WPPP Materials	Physical
1315	Maintain S/WPPP Materials	Physical
1330	Secure Excavation Clearance Request	Physical
1470	Detail/Submit Structural Steel	Physical
1480	Detail/Submit HVAC Units	Physical
1490	COE Approve Structural Steel Shop Dwgs	Physical
1500	COE Approve Reinforcing Steel Shop Dwgs	Physical
1510	COE Approve Roof Truss Shop Dwgs	Physical
1520	COE Approve Blast and Alum Window Materi	Physical
1530	COE Approve Mech & Elec UG Materials	Physical
1540	Order/Receive Structural Steel	Physical

Why the Requirement?

The “Physical” Percent Complete Type allows the contractor to update the Remaining Duration and the Percent Complete of an Activity independently as required by contract.

#5 Time Period Preferences are set to Primavera's Default

(8.0 Hrs/Day, 40.0 Hrs/Week, 172.0 Hrs/Month, and 2000.0 Hrs/Year)

The contractor will need to have their Time Period Preferences set to USACE standards to ensure quality of schedule. This cannot be confirmed by looking at the Project. The reviewer will need to verify with the contractor, that the contractor's settings are correct.

Steps:

1. Have the contractor open Primavera and perform the steps.
2. Click on *Admin* from the Menu bar.
3. Click *Admin Preferences*.
4. Click on the *Time Periods* tab.
5. Verify the correct settings of: 8 Hrs/Day, 40 Hrs/Week, 172 Hrs/Week, 2000 Hrs/Year

The screenshot shows the 'Admin Preferences' dialog box with the 'Time Periods' tab selected. The 'Hours per Time Period' section is highlighted with a red oval, showing the following values:

Hours/Day	Hours/Week	Hours/Month	Hours/Year
8.0	40.0	172.0	2000.0

Below this, the 'Time Period Abbreviations' section shows the following abbreviations:

Minutes	Hours	Days
n	h	d

Weeks	Months	Years
w	m	y

The checkbox 'Use assigned calendar to specify the number of work hours for each time period' is checked. The dialog box also includes a 'General' tab and a 'Time Periods' tab. The 'Time Periods' tab is currently selected.

Why the Requirement?

The Time Period Preferences are user specific and do not transfer with the schedule files. If the contractor and Government use different settings - Dates, Durations and Total Float are likely to be different. While the contractor may work different hours/day etc. the Durations should reflect this and

Note: The required settings are Primavera's Default settings.

Additional Checks & Troubleshooting:

1. Check Calendars Work Hours/Day are set to 8.0 Hour days.
2. Edit, User Preferences Time Units Hours per Time Period (P6.1): check Hours as listed above.
3. Troubleshoot: Show decimals in Durations, Show hours in Time – to resolve date anomalies.

#6 Critical Activities defined as “Longest Path”

Verify that the critical activities are defined as “Longest Path”. This can be reviewed in two places, either in the Projects window under the Settings tab, or in the Schedule Options. Below are the steps to verify via the Schedule Options.

Steps:

1. From the Menu bar, click *Tools*.
2. Click *Schedule*.
3. Click *Options*.
4. Verify critical activities are defined by “*Longest Path*”.

Why the Requirement?

Critical (red) activities will show as the activities driving the finish date of the project.

The screenshot shows the 'Schedule Options' dialog box with the 'Advanced' tab selected. The 'Define critical activities as' section has the 'Longest Path' radio button selected and circled in red. Other options include 'Total Float less than or equal to' (with a text input field) and 'Retained Logic' (selected) for scheduling progressed activities. The 'Calculate float based on finish date of' section has 'Each project' selected. The 'Compute Total Float as' dropdown is set to 'Finish Float = Late Finish - Early Finish'. The 'Calendar for scheduling Relationship Lag' dropdown is set to 'Predecessor Activity Calendar'. The dialog box has 'Close', 'Cancel', 'Default', and 'Help' buttons on the right.

#7 Schedule Option is set to Retained Logic

The only acceptable scheduling option for “scheduling progressed activities” is *Retained Logic*. This is the Primavera default setting.

Steps:

1. From the Menu bar, click *Tools*.
2. Click *Schedule*.
3. Click *Options*.
4. Verify *Retained Logic* is selected.

Why the Requirement? The contract requires that the schedule calculations retain the logic between predecessors and successors even if the successor activity starts and the successor has not finished. “Progress Override” is not allowed.

The screenshot shows the 'Options' dialog box in Primavera P6, with the 'Advanced' tab selected. The 'When scheduling progressed activities use' section has three radio buttons: 'Retained Logic' (selected and circled in red), 'Progress Override', and 'Actual Dates'. Other settings include 'Use Expected Finish Dates' checked, 'Calculate start-to-start lag from' set to 'Early Start', 'Define critical activities as' set to 'Longest Path', 'Calculate float based on finish date of' set to 'Each project', and 'Compute Total Float as' set to 'Finish Float = Late Finish - Early Finish'. The 'Calendar for scheduling Relationship Lag' is set to 'Predecessor Activity Calendar'. The dialog box has a 'Close' button and a 'Cancel' button in the top right corner.

#8 Schedule Cost Loaded using Lump Sum Labor Resource

Cost will be tracked using a single lump sum resource. The resource will need to have a price/unit of \$1/hr, have the setting “Calculate Cost from Units” checked, and a default units/time of 8hrs/day.

Steps:

1. Navigate to the *Resources* window.
2. Run the filter, *Current Project’s Resources*:
View > Filter By > Current Project’s Resources
3. Highlight the lump sum resource, click on the *Details* tab.
4. Verify the resource is *Labor*, *Default units/time* = 8h/d, and *Calculate costs from units* is checked.

The screenshot shows the 'Resource Details' window for a 'Labor' resource. The 'Resource Type' section has 'Labor' selected. The 'Profile' section shows 'Calendar' set to 'LUMPSUM - Cal-9', 'Default Units / Time' set to '8h/d', and both 'Auto Compute Actuals' and 'Calculate costs from units' checked. The 'Currency and Overtime' section shows 'Currency' set to 'Dollar' and 'Overtime Allowed' unchecked.

5. Click on the *Units & Prices* tab.
6. Verify the *Price/Unit* is \$1/h.
7. Click on *Units & Prices* tab.
8. Ensure the *Auto Compute Actuals* and *Calculate Costs from Units* are both checked.

Effective Date	Max Units / Time	Price / Unit
01-Jan-04	0h/d	\$1.00/h

Why the Requirement?

The lump sum resource allows the contractor to cost load activities as required by contract and successfully import into QCS/RMS.

#9 Activity ID values do not exceed 10 characters

Activity IDs may not exceed 10 characters. If the Activity IDs exceed 10 characters, the SDEF converter will truncate the first 10 characters.

Steps:

1. Open the project.
2. Navigate to the *Activities* window.
3. Confirm the Activity ID column is visible.
4. Confirm all Activity IDs do not exceed 10 characters.

Layout: Classic WBS Layout Filter: All Activities					
Activity ID	Activity Name	Original Duration	Remaining Duration	Schedule % Complete	
1010	Create Preliminary Project Schedule	11d	11d	0%	
1020	Create Submittal Register	12d	12d	0%	
10300010125	Pre-con & Mutual Understanding Meeting	1d	1d	0%	
1060	Demo Pavement and Concrete, Concrete ar	5d	5d	0%	
1070	Clear and Excavate Building Site	6d	6d	0%	
1080	New fill to Bottom of Footings	6d	6d	0%	
1300	Submit NOI	1d	1d	0%	
1310	Install SWPPP Materials	2d	2d	0%	
13154564566	Maintain SWPPP Materials	2d	2d	0%	
1330	Secure Excavation Clearance Request	4d	4d	0%	
1470	Detail/Submit Structural Steel	48d	48d	0%	
1480	Detail/Submit HVAC Units	111d	111d	0%	
1490	COE Approve Structural Steel Shop Dwgs	30d	30d	0%	
1500	COE Approve Reinforcing Steel Shop Dwgs	30d	30d	0%	
1510	COE Approve Roof Truss Shop Dwgs	30d	30d	0%	
1520	COE Approve Blast and Alum Window Materi	30d	30d	0%	
1530	COE Approve Mech & Elec UG Materials	30d	30d	0%	
1540	Order/Receive Structural Steel	30d	30d	0%	

Why the Requirement?

The SDEF conversion file cuts off Activity IDs after 10 characters. Duplicate Activity IDs may be created for the Project. RMS will not accept or import duplicate Activity IDs.

Note: Manually adjust the Activity ID column width to approximately 11 characters. This will help quickly identify the Activity IDs that contain too many characters.

#10 Activity Name values do not exceed 30 characters

Activity Names should not exceed 30 characters. If the Activity Names do exceed 30 characters, the SDEF converter will truncate after the first 30 characters. If the primary Activity description detail is contained in the first 30 characters, additional characters may be used for use in the Primavera software at the discretion of USACE.

Steps:

1. Open the Project.
2. Navigate to the *Activities* window.
3. Confirm the Activity Name column is visible.
4. Confirm all Activity Names do not exceed 30 characters.

Activity ID	Activity Name	Original Duration	Remaining Duration	Schedule % Complete
1010	Create Preliminary Project Schedule	11d	11d	0%
1020	Create Submittal Register	12d	12d	0%
1030	Precon & Mutual Understanding Meeting	1d	1d	0%
1060	Demo Pavement and Concrete, Concrete and	5d	5d	0%
1070	Clear and Excavate Building Site	6d	6d	0%
1080	New fill to Bottom of Footings	6d	6d	0%
1300	Submit NOI	1d	1d	0%
1310	Install S/WPPP Materials	2d	2d	0%
1315	Maintain S/WPPP Materials	2d	2d	0%
1330	Secure Excavation Clearance Request	4d	4d	0%
1470	Detail/Submit Structural Steel	48d	48d	0%
1480	Detail/Submit HVAC Units	111d	111d	0%
1490	COE Approve Structural Steel Shop Dwgs	30d	30d	0%
1500	COE Approve Reinforcing Steel Shop Dwgs	30d	30d	0%
1510	COE Approve Roof Truss Shop Dwgs	30d	30d	0%
1520	COE Approve Blast and Alum Window Matern	30d	30d	0%
1530	COE Approve Mech & Elec OG Materials	30d	30d	0%
1540	Order/Receive Structural Steel	30d	30d	0%
1550	Order/Receive Reinforcing Steel	30d	30d	0%

Why the Requirement?

The SDEF conversion file drops off Activity Names after 30 characters. During the import process to RMS “like” activities will be difficult or impossible to distinguish and may cause confusion especially during the pay estimate process.

Note: Manually adjust the Activity Name column width to approximately 31 characters. This will help quickly identify the Activity Names that contain too many characters.