

XER EVM Code Organizer Pro

EVM CONTROLS CONSULTING LLC

User Quick Guide

Every workflow on one page – the clicks, the screen, and what you should see.

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Install, trial, license

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GET STARTED

1 Install, start the trial, add a key

Excel for Windows
Desktop Excel, Microsoft 365 recommended. Not Mac, Excel Online or mobile.

An XER from P6
Export it in Primavera P6. After that, P6 is not needed.

Macros allowed
The installer puts the add-in in a trusted folder. If your company blocks macros by policy, IT may need to approve it.

Install in four steps

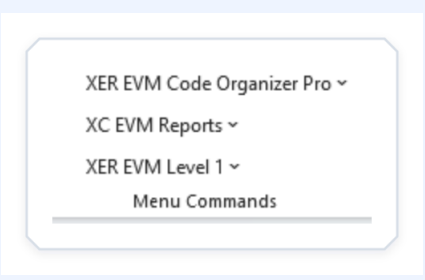
1. **Download** `XerEvmCodeOrganizerPro-Setup-1.0.exe` from evmcs.com/xer_evm_pro_l1.
2. **Run it.** If Windows shows "Windows protected your PC", click **More info > Run anyway**.
3. **Accept** the License Agreement and click **Install**. Close Excel if asked.
4. **Open Excel** with a blank workbook. The menus are on the **Add-ins** tab. There is nothing else to open: the add-in loads by itself every time Excel starts.

Trial and license

1. The **14-day trial** starts the first time the add-in runs on a computer. Every feature works.
2. To buy, open **Code Organizer Pro > License** and note the **Machine ID**. Click **Buy a license** at evmcs.com/xer_evm_pro_l1 and enter the Machine ID at checkout. Your key is emailed to you.
3. When the key arrives, open **License** again and enter your email and the key exactly as sent.
4. A key works for **one year on one computer**. No automatic renewal. A new computer needs a new key.

Good to know When the trial or key ends, the menus stop until a key is entered; existing workbooks still open. To uninstall: **Start menu > XER EVM Code Organizer Pro > Uninstall** (your license is kept if you reinstall).

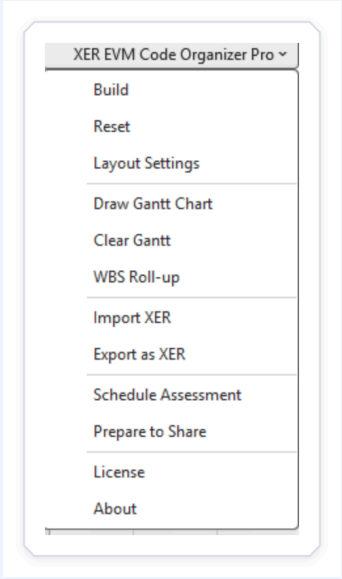
Where to find it



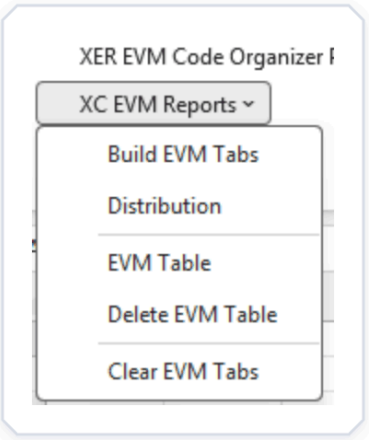
After installing, open Excel and click the **Add-ins** tab. The three menus sit under **Menu Commands**: **XER EVM Code Organizer Pro**, **XC EVM Reports** and **XER EVM Level 1**. The next page lists every command.

MENU CHEAT SHEET

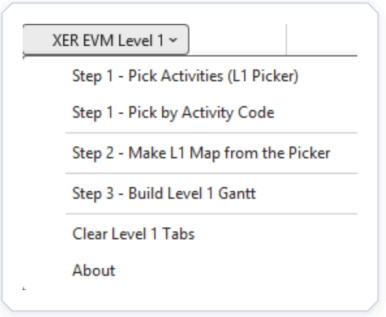
2 Three menus on the Add-ins tab



XER EVM Code Organizer Pro



XC EVM Reports



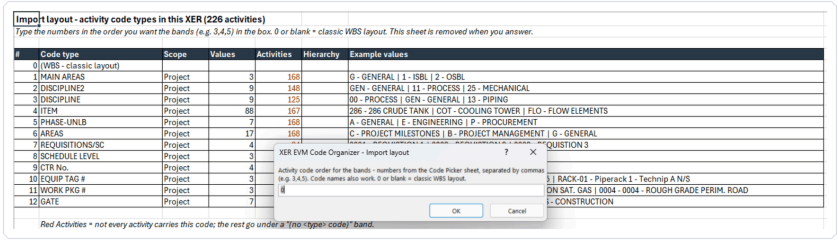
XER EVM Level 1

Command	What it does
Import XER	Reads an XER and builds the Schedule sheet, grouped by WBS or activity codes
Build / Reset	Rebuilds, or removes, the outline and roll-ups on the schedule sheet
Layout Settings	Opens XC Settings: colors, columns, copyright line and more
Draw / Clear Gantt	Draws or removes the Gantt bars
WBS Roll-up	Rolls activities up to summary rows
Schedule Assessment	Runs the DCMA 14-point checks
Export as XER · Prepare to Share	Writes an XER for P6 · saves a clean .xlsx with no add-in code
Build EVM Tabs	EVM in hours and dollars, Progress, Activity Detail, Cost Curve, Relationships
Distribution	Time-phased labor hours by period
EVM Table	Builds (or deletes) the nested EVM Summary Report
Level 1 Steps 1–3	Pick activities or a code → make the L1 Map → build the Level 1 Gantt

IMPORT

3 Import an XER and build the schedule

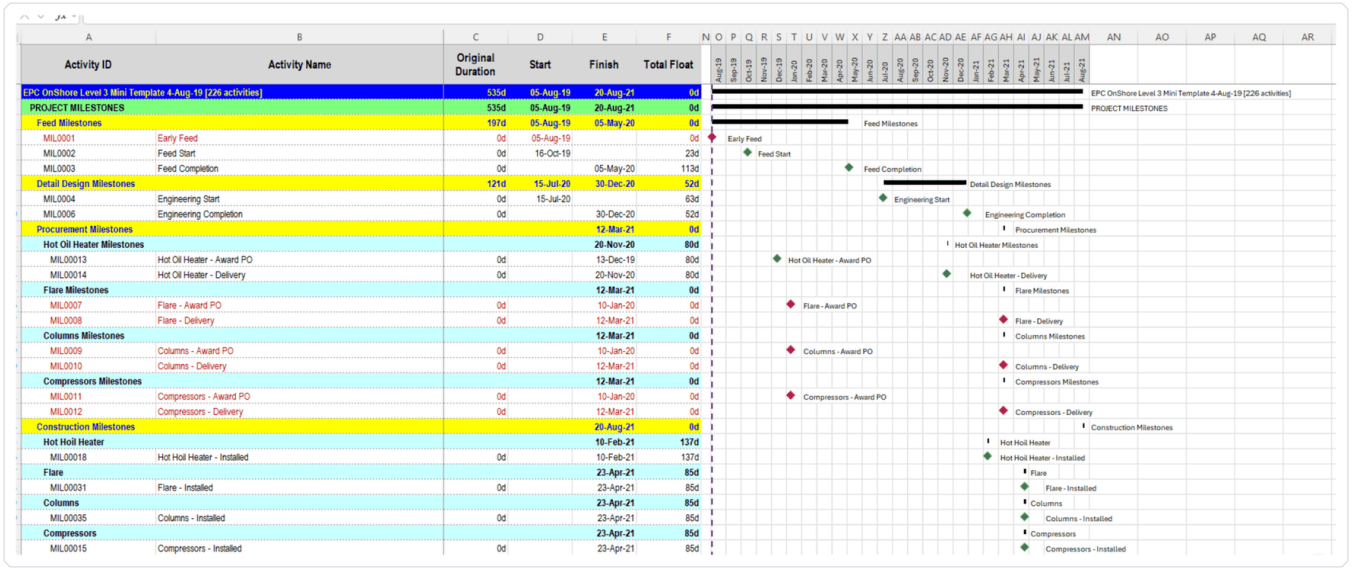
1. Open a blank workbook.
2. Choose **Code Organizer Pro > Import XER** and pick the XER.
3. On the Code Picker type **0** for the WBS layout, or code numbers in band order (e.g. **3,4,5**).
4. Use the 1–6 outline buttons to collapse or expand; **Draw Gantt Chart** adds bars.



Import layout – choose WBS or activity codes

You'll see the Schedule sheet with colored summary bands, roll-up dates, float and a Gantt.

Tip Red counts on the Code Picker mean not every activity carries that code.



Schedule sheet with outline levels and Gantt

ASSESS

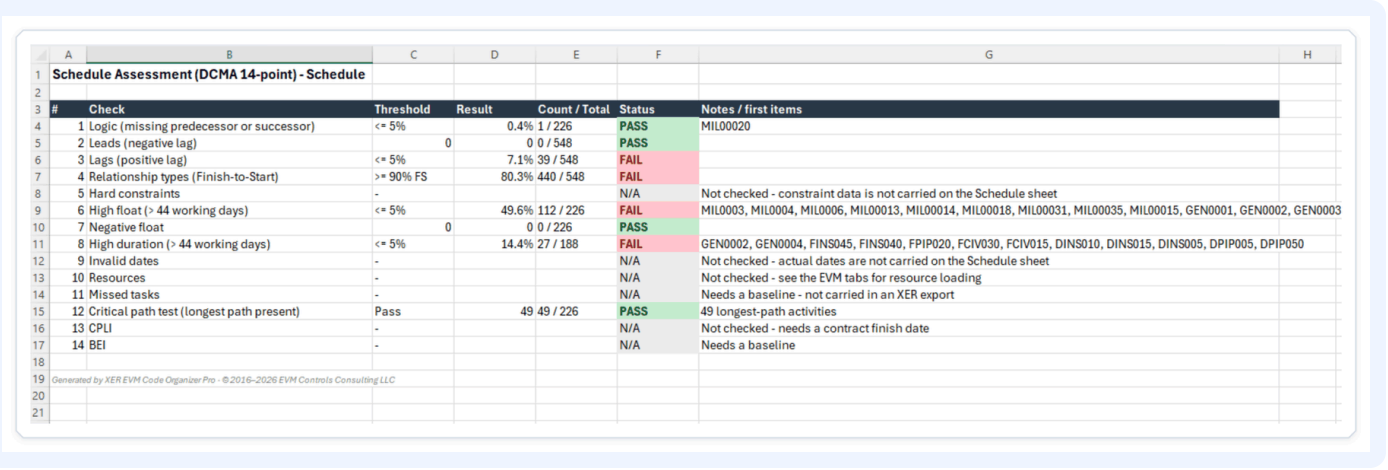
4 Schedule Assessment

1. Choose **Code Organizer Pro > Schedule Assessment**.
2. Read the threshold, result and count for each check.
3. Use **Notes / first items** to find the activities to fix.

You'll see the DCMA 14-point checks marked PASS, FAIL or N/A. N/A rows say why they were not checked.

Check group	Checks
Logic	Missing logic, leads, lags, relationship types
Float	High float, negative float
Duration & dates	High duration, invalid dates, hard constraints
Path & baseline	Critical path test, CPLI, missed tasks, BEI

Note Missed tasks and BEI need a baseline, which an XER export does not carry.



Schedule Assessment (DCMA 14-point) - Schedule

#	Check	Threshold	Result	Count / Total	Status	Notes / first items
1	Logic (missing predecessor or successor)	<= 5%	0.4%	1 / 226	PASS	MIL00020
2	Leads (negative lag)	0	0	0 / 548	PASS	
3	Lags (positive lag)	<= 5%	7.1%	39 / 548	FAIL	
4	Relationship types (Finish-to-Start)	>= 90% FS	80.3%	440 / 548	FAIL	
5	Hard constraints	-			N/A	Not checked - constraint data is not carried on the Schedule sheet
6	High float (> 44 working days)	<= 5%	49.6%	112 / 226	FAIL	MIL0003, MIL0004, MIL0006, MIL00013, MIL00014, MIL00018, MIL00031, MIL00035, MIL00015, GEN0001, GEN0002, GEN0003
7	Negative float	0	0	0 / 226	PASS	
8	High duration (> 44 working days)	<= 5%	14.4%	27 / 188	FAIL	GEN0002, GEN0004, FINS045, FINS040, FPIP020, FCIV030, FCIV015, DINS010, DINS015, DINS005, DPIP005, DPIP050
9	Invalid dates	-			N/A	Not checked - actual dates are not carried on the Schedule sheet
10	Resources	-			N/A	Not checked - see the EVM tabs for resource loading
11	Missed tasks	-			N/A	Needs a baseline - not carried in an XER export
12	Critical path test (longest path present)	Pass	49	49 / 226	PASS	49 longest-path activities
13	CPLI	-			N/A	Not checked - needs a contract finish date
14	BEI	-			N/A	Needs a baseline

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Schedule Assessment (DCMA 14-point)

PASS

The result is inside the DCMA threshold shown in the Threshold column.

FAIL

Outside the threshold. Notes / first items lists the activities to review first.

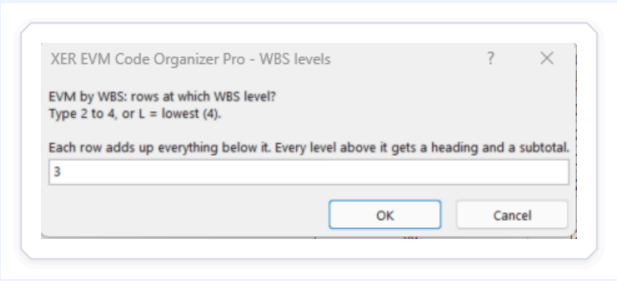
N/A

Not checked from this XER. The note says why – for example, a baseline is needed.

EARNED VALUE

5 Build the EVM tabs

1. Choose **XC EVM Reports > Build EVM Tabs**.
2. Type **0** for the P6 WBS, or code numbers in order.
3. For WBS, pick the row level (e.g. **3**). Every level above gets a heading and subtotal.



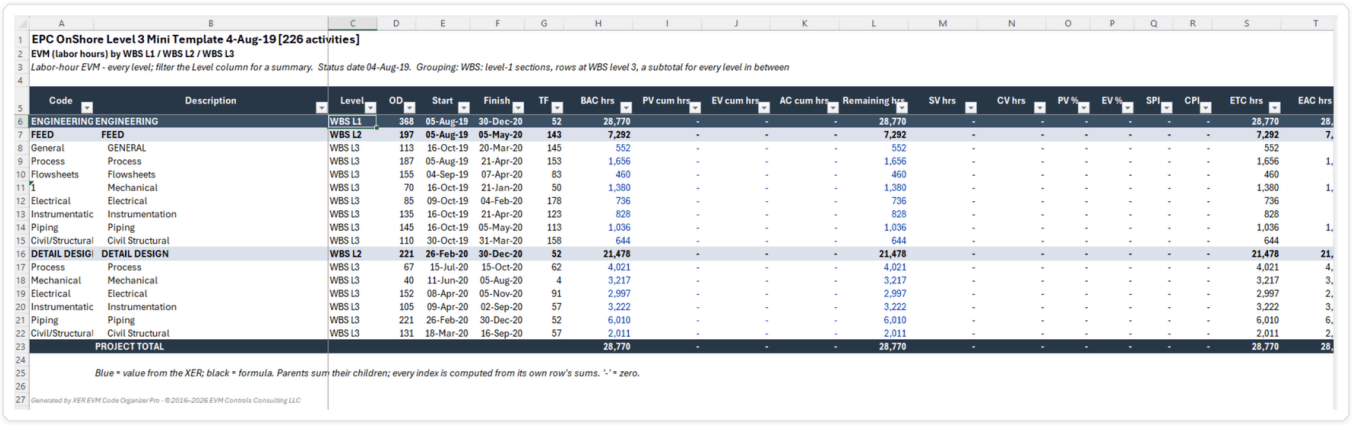
Rows at which WBS level?

You'll see EVM Hrs and $, Progress Hrs and $, Cost Curve, Activity Detail and EVM Notes tabs.

Read it SPI = EV/PV · CPI = EV/AC · EAC1 = (BAC−EV)/CPI + AC · VAC = BAC − EAC (negative = overrun). Blue = from the XER, black = formula.



Cost Curve – monthly cost and cumulative %



EPC OnShore Level 3 Mini Template 4-Aug-19 [226 activities]
EVM (labor hours) by WBS L1 / WBS L2 / WBS L3
Labor-hour EVM - every level; filter the Level column for a summary. Status date 04-Aug-19. Grouping: WBS: level-1 sections, rows at WBS level 3, a subtotal for every level in between

Code	Description	Level	OD	Start	Finish	TF	BAC hrs	PV cum hrs	EV cum hrs	AC cum hrs	Remaining hrs	SV hrs	CV hrs	PV %	EV %	SPI	CPI	ETC hrs	EAC hrs
ENGINEERING	ENGINEERING	WBS L1	368	05-Aug-19	30-Dec-20	52	28,770	-	-	-	28,770	-	-	-	-	-	-	28,770	28,
FEED	FEED	WBS L2	197	05-Aug-19	05-May-20	143	7,292	-	-	-	7,292	-	-	-	-	-	-	7,292	7,
General	GENERAL	WBS L3	113	16-Oct-19	20-Mar-20	145	552	-	-	-	552	-	-	-	-	-	-	552	
Process	Process	WBS L3	187	05-Aug-19	21-Apr-20	153	1,656	-	-	-	1,656	-	-	-	-	-	-	1,656	1,
Flowsheets	Flowsheets	WBS L3	155	04-Sep-19	07-Apr-20	83	460	-	-	-	460	-	-	-	-	-	-	460	
1	Mechanical	WBS L3	70	16-Oct-19	21-Jan-20	50	1,380	-	-	-	1,380	-	-	-	-	-	-	1,380	1,
Electrical	Electrical	WBS L3	85	09-Oct-19	04-Feb-20	178	736	-	-	-	736	-	-	-	-	-	-	736	
Instrumentatic	Instrumentation	WBS L3	135	16-Oct-19	21-Apr-20	123	828	-	-	-	828	-	-	-	-	-	-	828	
Piping	Piping	WBS L3	145	16-Oct-19	05-May-20	113	1,036	-	-	-	1,036	-	-	-	-	-	-	1,036	1,
Civil/Structural	Civil Structural	WBS L3	110	30-Oct-19	31-Mar-20	158	644	-	-	-	644	-	-	-	-	-	-	644	
DETAIL DESIGI	DETAIL DESIGN	WBS L2	221	26-Feb-20	30-Dec-20	52	21,478	-	-	-	21,478	-	-	-	-	-	-	21,478	21,
Process	Process	WBS L3	67	15-Jul-20	15-Oct-20	62	4,021	-	-	-	4,021	-	-	-	-	-	-	4,021	4,
Mechanical	Mechanical	WBS L3	40	11-Jun-20	05-Aug-20	4	3,217	-	-	-	3,217	-	-	-	-	-	-	3,217	3,
Electrical	Electrical	WBS L3	152	08-Apr-20	05-Nov-20	91	2,997	-	-	-	2,997	-	-	-	-	-	-	2,997	2,
Instrumentatic	Instrumentation	WBS L3	105	09-Apr-20	02-Sep-20	57	3,222	-	-	-	3,222	-	-	-	-	-	-	3,222	3,
Piping	Piping	WBS L3	221	26-Feb-20	30-Dec-20	52	6,010	-	-	-	6,010	-	-	-	-	-	-	6,010	6,
Civil/Structural	Civil Structural	WBS L3	131	18-Mar-20	16-Sep-20	57	2,011	-	-	-	2,011	-	-	-	-	-	-	2,011	2,
PROJECT TOTAL							28,770	-	-	-	28,770	-	-	-	-	-	-	28,770	28,

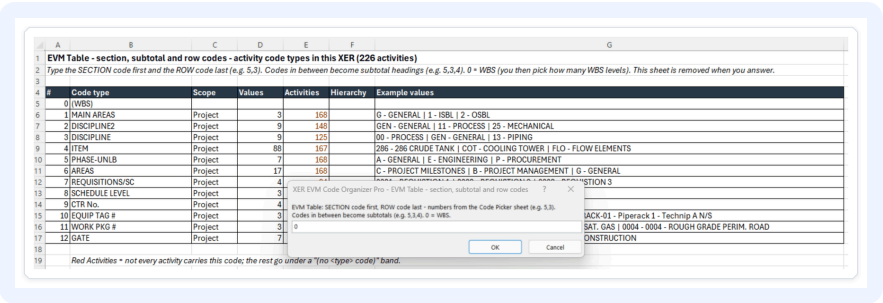
Blue = value from the XER; black = formula. Parents sum their children; every index is computed from its own row's sums. '-' = zero.

EVM by WBS – labor hours (EVM $ by WBS has the same layout)

EARNED VALUE

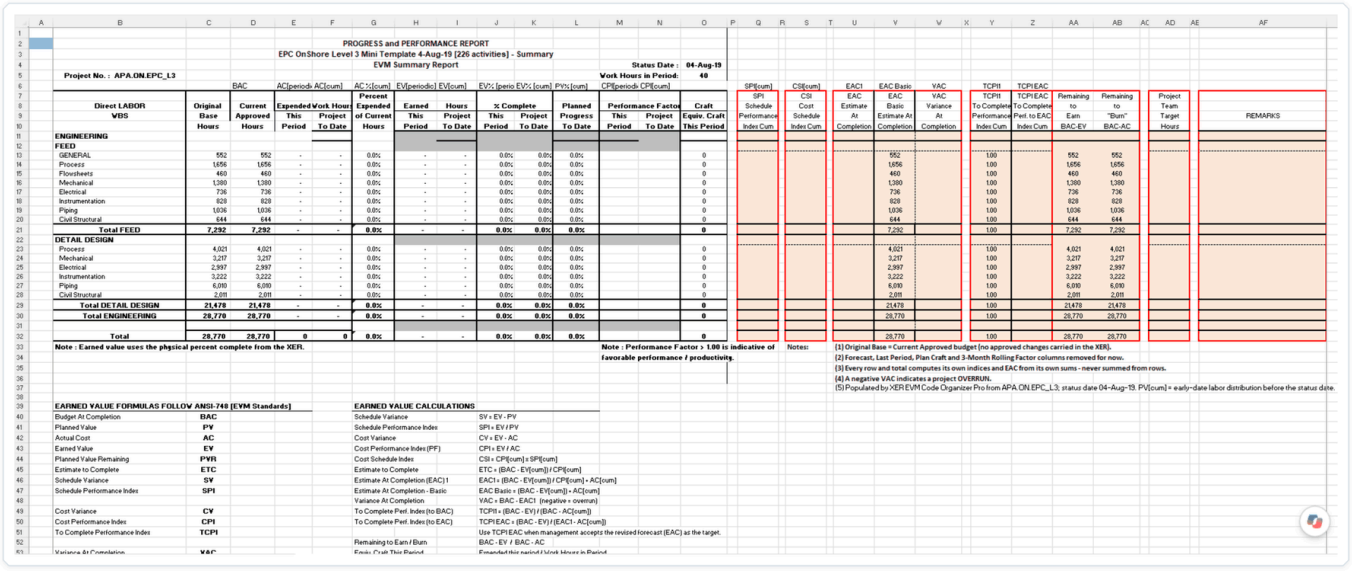
6 The EVM Summary Report

1. Choose **XC EVM Reports > EVM Table**.
2. Type the SECTION code first and the ROW code last (e.g. **5,3**). Codes in between become subtotals. **0** = WBS.
3. For WBS, pick the row level (e.g. **3**).



Section, subtotal and row codes

You'll see the PROGRESS and PERFORMANCE REPORT, set up to print, with the ANSI-748 formula key below.



EVM Summary Report

LEVEL 1

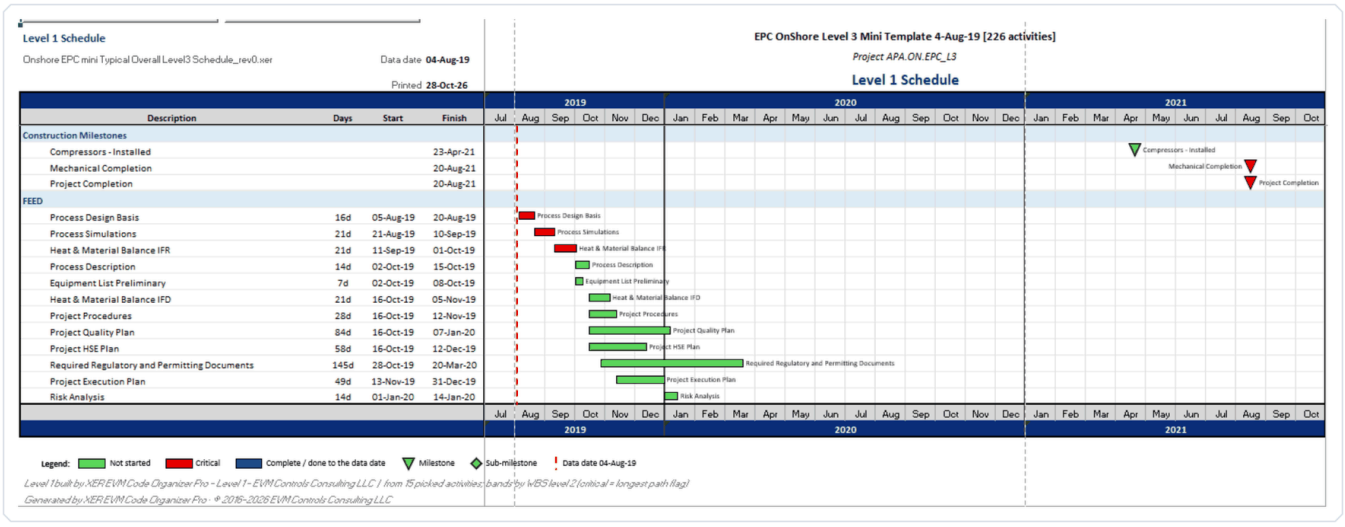
7 A one-page Level 1, three ways

A · Pick activities
Step 1 – Pick Activities, type Y, use filters and Tick visible rows, then **Step 2 – Make L1 Map**.

B · Roll up a code
Step 1 – Pick by Activity Code, answer **1**: one line per code value.

C · Filter by a code
Step 1 – Pick by Activity Code, answer **2**, pick values (OK = all).

1. Choose the band: **W1** / **W2** = WBS level 1 / 2, a code number, or **0** for one project band.
2. Check the **L1 Map**: titles, timescale, paper size; rename, reorder, switch off or recolor lines.
3. Click **Step 3 – Build Level 1 Gantt**. Green = not started, red = critical, blue = complete.



Level 1 Gantt

Quick fixes

If you see...	Do this
Menus don't show	Look on the Add-ins tab. If missing, run the installer again, or tick the add-in in File > Options > Add-ins
"No Schedule sheet"	Run Import XER first, or select the schedule sheet
"Waiting for printer"	Windows is reaching the default printer; wait, or set a local default printer
Trial ended · new computer	Enter a key under License · email info@evmcs.com with the new Machine ID

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