Touchplan

Master Schedule
Synchronization Best Practices

Introduction

This document is designed to set up best practices for teams managing their Master Schedule and Touchplan to ensure alignment between the schedule and the work plan the team is executing. This document will walk through the setup steps and the process needed to ensure alignment.

The below image highlights how each phase of the planning process and how each phase leads to the next and the lessons learned from each phase of planning needs to inform the previous and the next steps.
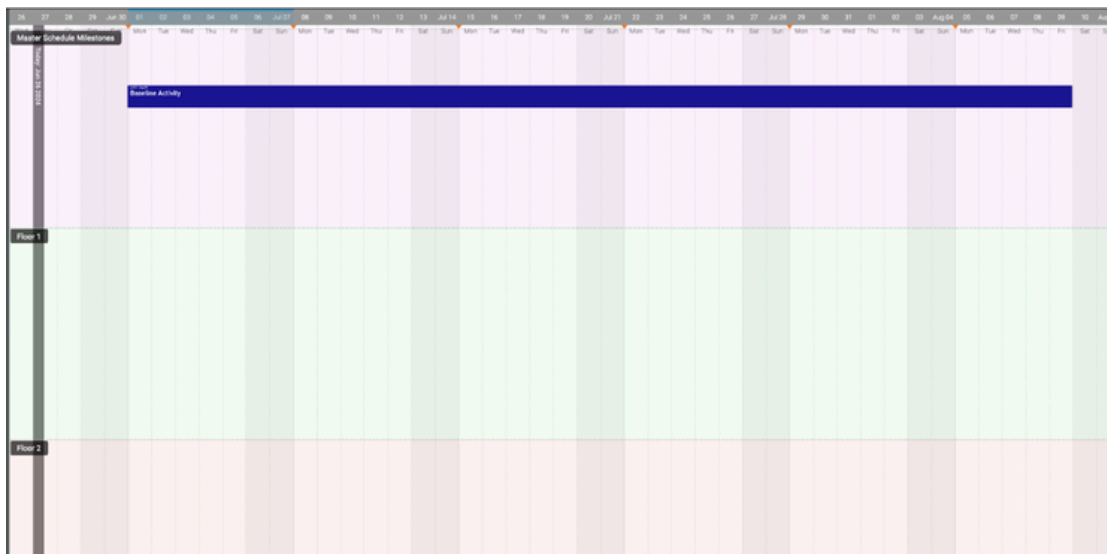

Master Planning

For the Master Planning stage the team will set up their schedule in a CPM platform. Once the CPM schedule is set up there are some best practices related to a workflow for managing your Master Schedule and your work plans (Touchplan).

- Master schedule is built and managed in a CPM platform and detailed no farther than Level 3.
- Pull Planning, Make Ready Planning, and Look Ahead plans are managed in Touchplan (Level 4 planning and beyond)
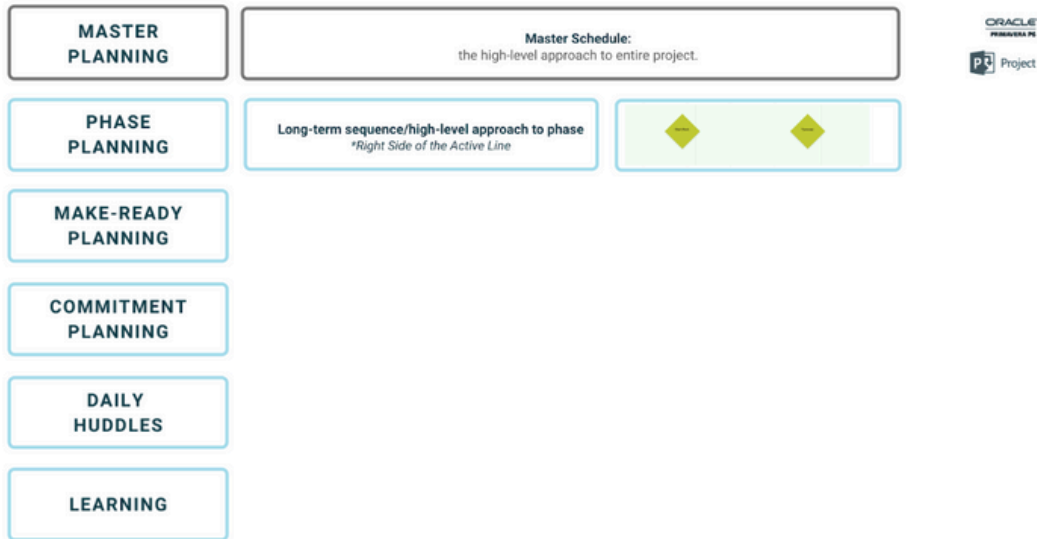- On a regular basis, to update the master schedule with actual progress, the team uses information in Touchplan.

To get started the team will identify the level of detail they want to have a one-to-one relationship between the two systems. This determination may be made based on a WBS level or pulling out key milestones. Once the team has determined the level of detail they will export P6 schedule into an Excel file (File format).

Upon import, the team will assign these Master Schedule tickets to a Baseline or Master Schedule Role. This will ensure that the key master schedule information is easily displayed and filtered in and out of reports. When the master schedule is in Touchplan the team will use this as a framework for their first series of Pull plans. The information from the master schedule will hold the key contractual target dates and the pull plan will determine how the team will reach those milestones. While the master schedule tickets will provide insights and boundaries the team will ultimately determine the execution plan.
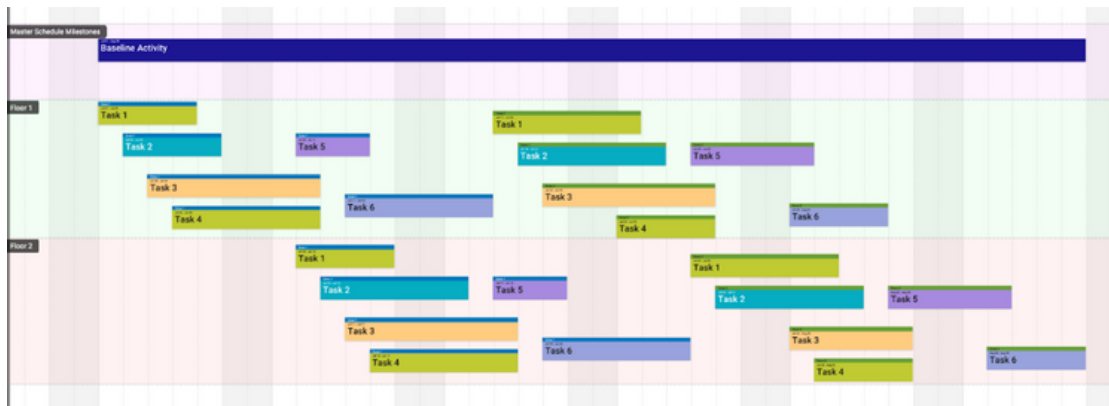
Phase Planning

TOUCHPLAN BEST PRACTICES

MASTER PLANNING	Master Schedule: the high-level approach to entire project.
PHASE PLANNING	Long-term sequence/high-level approach to phase *Right Side of the Active Line
MAKE-READY PLANNING	
COMMITMENT PLANNING	
DAILY HUDDLES	
LEARNING	

For the Phase planning step in Touchplan the team will create the first plan, ensure their default crew size is set to zero, and then use the import feature to pull in the Master Schedule file. This Master Schedule will include the level of detail from the CPM schedule that the team decided on in the Master Planning Phase. This will create all of the baseline tickets in the plan that can be used as a framework that the team will use to build out the more detailed plan.

How to use the Master Schedule as a framework:

- **Option 1**: Keep a Master Schedule Plan in Touchplan that is maintained by the admin team. Copy sections of the master Schedule plan into working phase plans and build out the plan beneath the master schedule tickets. Treating them like an umbrella activity. Link the first and last ticket in the plan to the corresponding master schedule ticket.
- **Option 2**: Split up the master schedule into separate plans and build out the plan beneath the master schedule tickets. Treating them like an umbrella activity. Link the first and last ticket in the plan to the corresponding master schedule ticket.

Executing Work
Make Ready Planning, Commitment Planning, and Daily Huddles
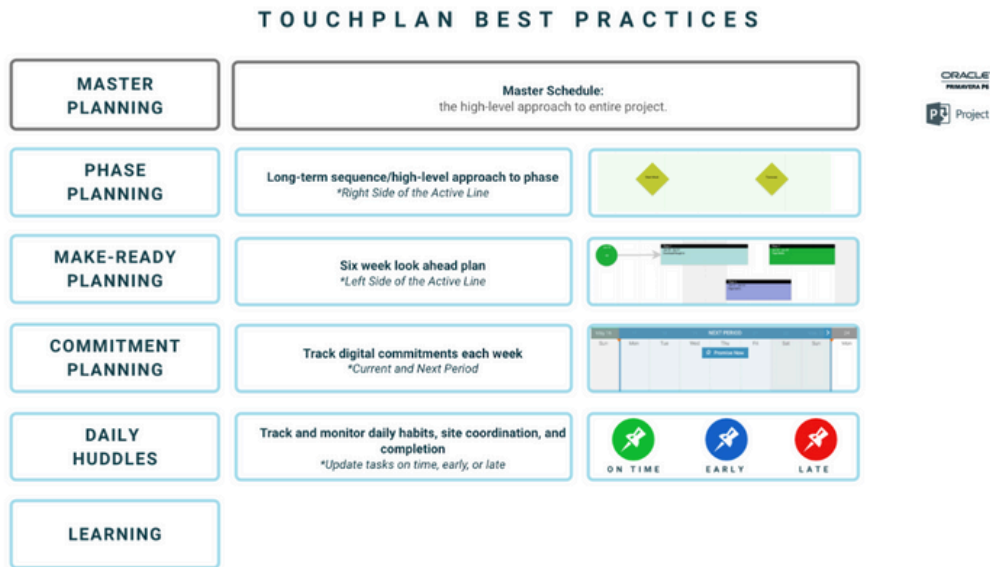
Once the plan is built the team will begin using it during their weekly meetings. This is where they begin the Make Ready Planning, Commitment Planning, and Daily Huddle Phases.

During these planning phases, the team will be living in Touchplan. They will be updating and revising the plan based on what is happening on the project. As the work plan is updated the team can update the corresponding master schedule tickets to ensure they are also reflecting what happened.
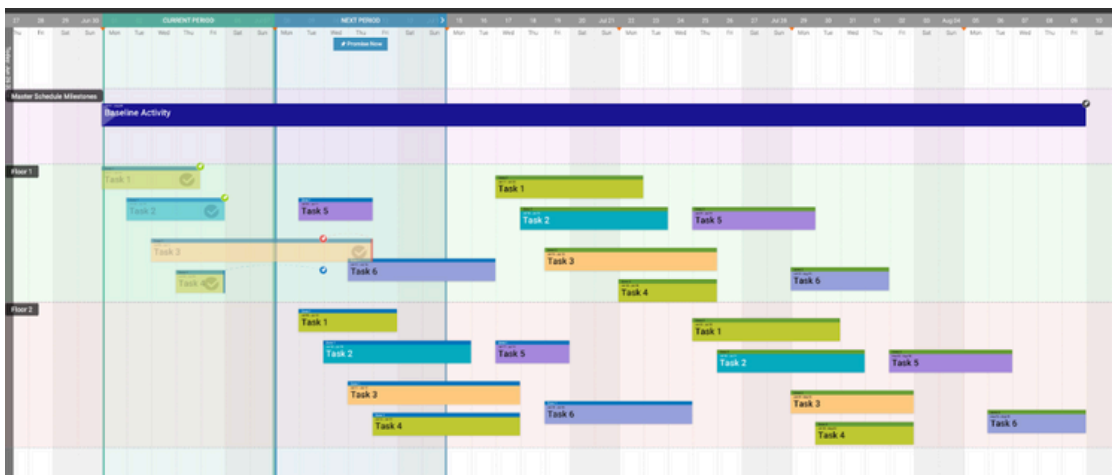
Learning

Keeping information synchronized between Touchplan and the Master Schedule

TOUCHPLAN BEST PRACTICES

In the Learning phase, the team is ensuring that the lessons learned from each of the previous planning phases are informing each of the other planning steps. This is where the team ensures there is alignment between the Work Plan (Touchplan) and the Master Schedule.

Regularly when it is time to update the master Schedule the team will pull an export of Touchplan using the P6 export feature. The team can determine the level of detail they want to pull back to the master schedule. Typically that will just be the tickets in the baseline or Master schedule role that have been updated based on the work plan. They will then reimport the file into P6 and check for the updates made and how that impacts their schedule.

When the Master Schedule is updated the team will want to ensure that those updates are passed back to Touchplan. The team will export the Excel file from their master schedule with the most up-to-date information. When they use the import feature they will use the Update and Create option to ensure any existing tickets are updated with the new information and any new tickets are successfully added to the plan. When the team performs this update they will then need to check the work plan to make sure that they account for any changes.

This cycle continues ensuring that the team is executing the plan in alignment with the master schedule.

Reports   ✕

Report type *
Export Tickets   ▾

Export Format *
P6 Primavera Excel   ▾

Schedule Template
P6_resource_example.xlsx   **CHOOSE TEMPLATE**

Filters   ⌃

Start date *   End date *
11/1/2023   📅   5/31/2024   📅

All Plans   ▾

All Locations   ▾

All Swimlanes   ▾

Roles
Baseline / Master Schedule   ▾

External Linkage *
All tickets   ▾

⬤ Include pull tickets
⬤ Filter by custom fields

CLEAR SETTINGS   **RUN REPORT**

                                                  ✕

① ─── ② ─── ③ ─── ④ ─── ⑤ ─── ⑥
Import Tickets Validate Insertion Point Resolve matching tickets Variance Reasons Results

Destination Plan
Carly   ▾

Data source *   Create a data source for each system you import
P6   ▾   tickets from   Learn more

                                                  Upload tickets data file in the selected format.
V2 Import demo.xlsx   **SELECT FILE**   To create a new data file in the Touchplan format,
                                                  DOWNLOAD BLANK SAMPLE

Import Scope   Specify what should be included in this import.
(2) Tickets, Predecessors   ▾

Default Role *   Any row in the data file without a role will be
Master Schedule/ Baseline   ▾   assigned the Default role

                                                  Specify the import behavior   Learn more
Import Type *
Create and update   ⬅━━━━━━━━━

Swimlane Placement   Tickets are placed in swimlanes on the plan. If no
WBS   ▾   matching swimlane exists on the plan, one will be
                                                  created. If an update mode is selected, updated
WBS Swimlane Level *   tickets will be moved to a matching swimlane.
4   ▾   Learn more

CANCEL   **NEXT**