

Solution Note - Tracking Productivity

How to track productivity with your Touchplan production plan using Touchplan Custom Fields

Problem Statement

Maintaining the flow of work on a jobsite is a crucial task that can make or break the success of a project. Missing handoffs between trades can kill momentum and cause a ripple effect to downstream work leading to possible delays.

Solution

Create Custom Fields for planned and actual production rate. By creating custom fields for planned production rate, teams can plan around what is expected to keep pace and maintain flow. As the work is statused, having a field for actual production rate will let the team see how work is progressing compared to the plan. With this new information, teams can then analyze the data to see when things are slipping and backups are beginning to occur.

Related Materials

Object	Link	Description
Video	Intro Video	Introduction to Custom Fields
Video	Maintaining Flow Video	Using Custom Fields to Maintain Flow on Site
FAQ	Custom Fields Video	How to Use Custom Fields

Step-by-step instructions

1. Go to the Custom Fields dialog box to add new fields.
2. Create custom fields for “Planned Install Rate” and “Actual Install Rate” and assign them to the desired roles.
 - a. The specifics on these fields will vary depending on what is being installed. (Ex. Tracking footings - Planned # of Footings / Actual # of Footings, Tracking utility pipe install - Planned length of Pipe (LF) / Actual Length of pipe (LF), Tracking generic units - Planned # of Units / Actual # of Units)

Custom Fields

+ Custom Field All roles

Planned Rate - Piers
Text

Actual Rate - Piers
Text

CSI Code
Drop-down List

GWB Order
Number

Master Schedule ID
Text

Planned LF of Pipe

Info Roles

Field Label
Planned Rate - Piers

Type
Text
Cannot change type after creation

Ticket Types

Tasks

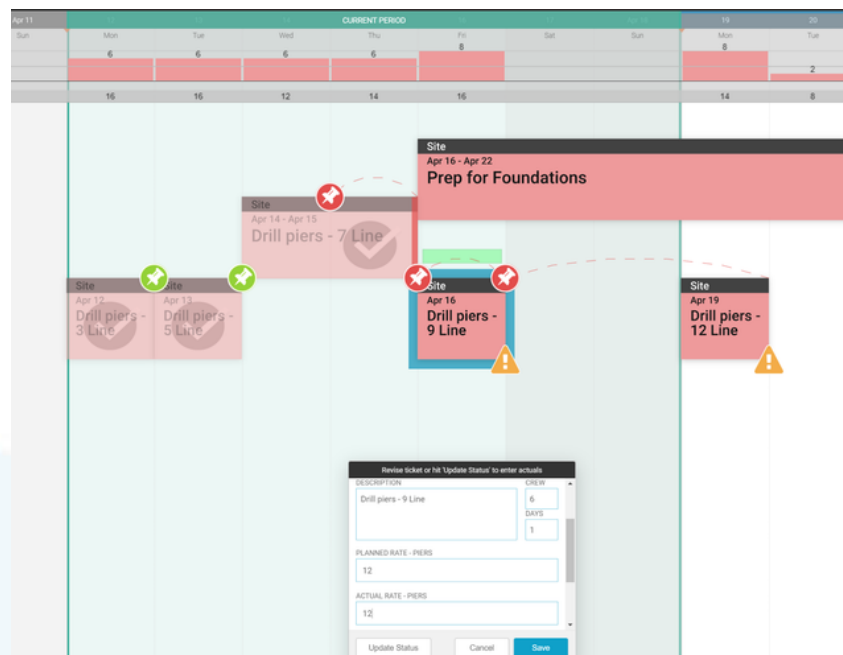
Milestones

Constraints

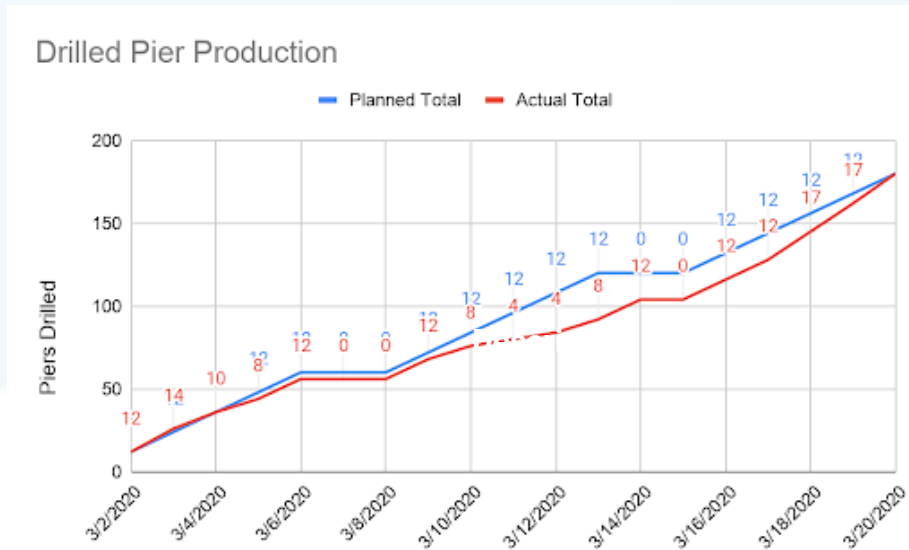
Show on Ticket Form

DISCARD SAVE

3. Create and plan activities following your normal workflow and fill in the “Planned” field where appropriate.
4. When time to status activities, open the activity details and fill in the value for the “Actual” field.



- Update the activity status as “Complete” or “Completed with Changes” as per your normal workflow.
- To review and analyze these new fields, export a plan or project CSV. The data can then be sorted, filtered, or summarized to see how production is progressing against the overall plan.



Note: Analysis can be done using spreadsheet software.

Help is available

For help with creating custom fields, visit the FAQ here:

[Use Custom Fields | Touchplan.io Help Center](#)

For help exporting a plan or project CSV, visit the FAQ here:

[Export Reports | Touchplan.io Help Center](#)

For live help, click on the “Support” drop down in the top right corner of your planning screen and click the “Live Chat” button. This will connect you to a CS representative who will be able to answer any questions that you may have.

Issues, concerns, defects in this note?

We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat