Solution Note - Importing a P6 Master Schedule

Converting a P6 schedule into Touchplan's ticket import format for upload

Problem Statement

Users want to transfer the activities created in P6 into Touchplan without the need to manually re-enter the tickets in Touchplan.
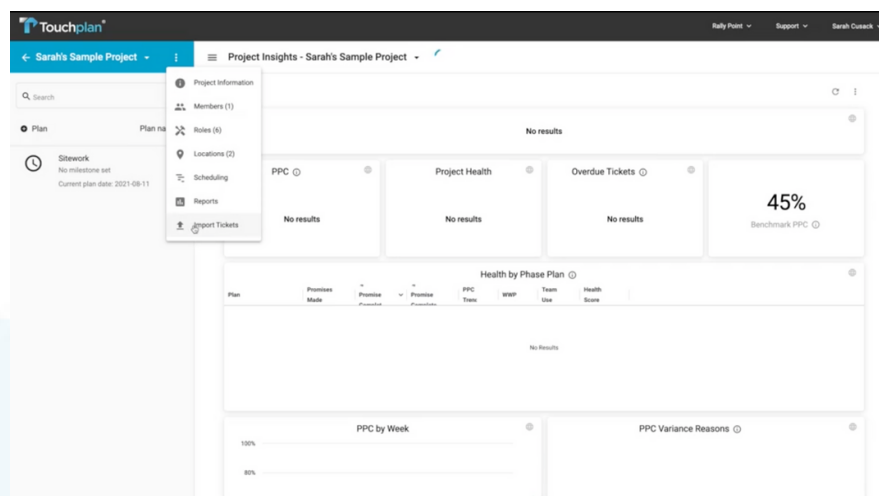
Solution

Export activities from P6 into an Excel format, then upload them into Touchplan. Tasks, constraints, and milestones can be created automatically using ticket import and placed on both the active- and pull-side.

Related Materials

Object	Link	Description
FAQ	[Ticket Import Video](#)	How to Use Ticket Import

Step-by-step instructions

1. Open the project where the tickets will be imported

Email info@touchplan.io for more information on Touchplan. Visit touchplan.io for more information.

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2. Select the project "overflow menu"
    a. Select to import tickets

3. Download the blank sample file
    a. Select to import tickets

4. The columns from P6 can be translated into the Touchplan ticket import template
    a.P6 task_code -> Touchplan External Schedule ID
    b. P6 task_name -> Touchplan Description
    c. P6 resp_ID (responsibility ID) -> Touchplan Role
    d. P6 Original Duration -> Touchplan Duration
    e. P6 Planned Start -> Touchplan Planned Start
    f. P6 Actual Start -> Touchplan Actual Start
    g. P6 Actual Finish -> Touchplan Actual Finish

5. The additional columns that can be filled out on the Touchplan ticket import template will provide more information to the tickets once they are imported
    a. Ticket position is a required field that will determine if tickets are created as look ahead tickets or as pull tickets

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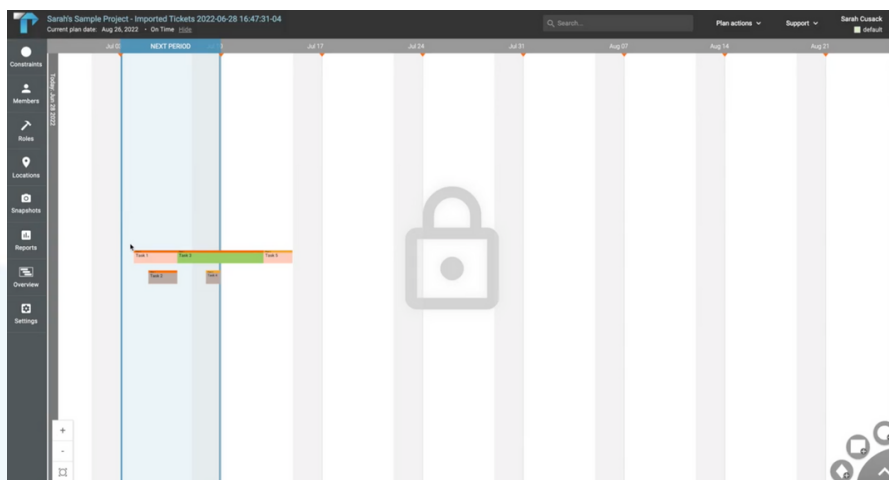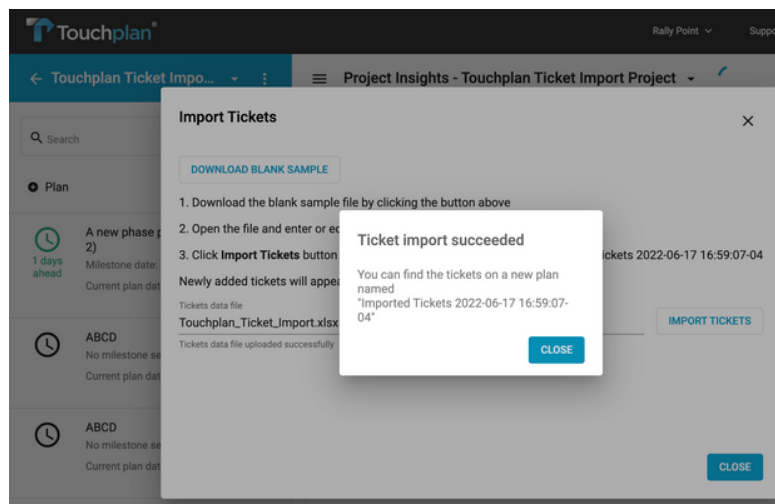
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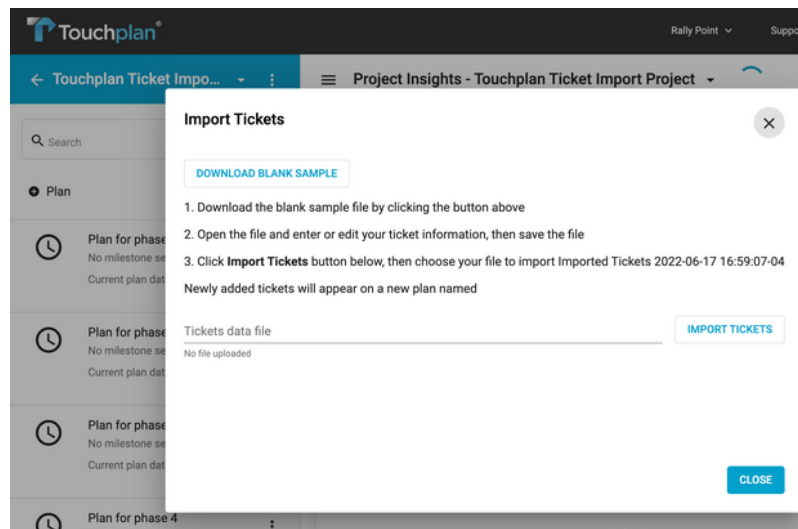
6. Once the information has been entered into the Touchplan ticket import spreadsheet, return to the **Import Ticket** menu in Touchplan

7. Select the file Touchplan Ticket Import template with the P6 data copied onto it and choose to import it
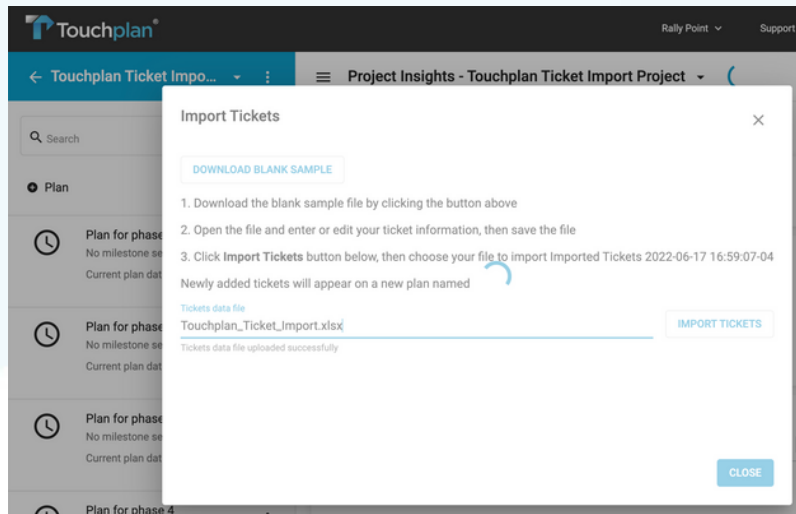
8. The tickets will be created into a new plan in the project

Note: The data in the role and location columns of the Touchplan ticket import template must match the roles and locations that are defined in the Touchplan project itself

Help is available
For help with creating ticket imports, visit the FAQ here:
[Use Ticket Import | 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

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