

# Touchplan

## Implementation Handbook For Design Teams

# Introduction

The Touchplan Implementation Handbook for Design teams allows users to gain a deeper understanding of how they can effectively use Touchplan in the design process. By utilizing Touchplan, teams can work collaboratively to ensure clean handoffs of information so all packages of work are accounted for. This handbook will teach Design teams how to set up a project, use constraints effectively, and more. With the Touchplan Implementation Handbook for Design teams, teams can create a project that encourages visibility and accountability throughout the team. With Touchplan Design teams can:



### Collaboration

Minimize confusion and miscommunication by letting users take ownership of their project work.



### Increase Visibility

View the status of tickets and constraints to track the team's progress throughout the plan



### Address Roadblocks

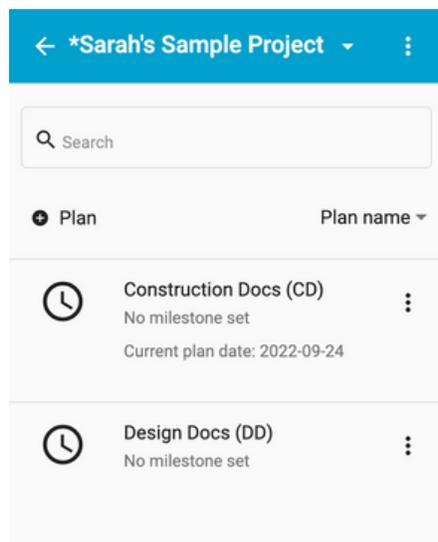
Identify possible issues in the schedule and adjust the plan to ensure project goals are met.

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## Setting Up a Project

Design teams need to think about their planning goals as they set up their Touchplan project to ensure that they are creating a collaborative planning space. Below are some suggestions about how to set up a Touchplan project based on the project team's planning goals.

### Phase Plans

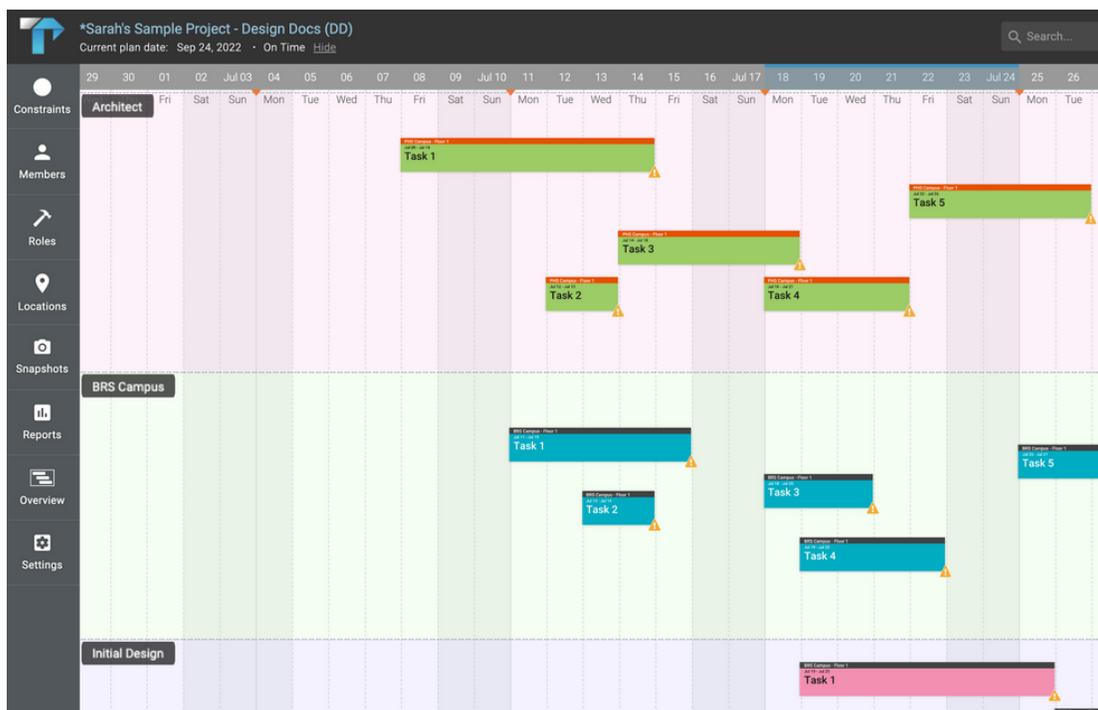


Phase Plans are separate planning boards that allow project members to know where to put certain areas of work. Design teams should create phase plans that reflect their team's planning needs and goals to ensure that all packages of work are accounted for.

Design teams often find success when they break out their phase plans by major deliverables (Ex. Construction Docs or Design Docs). This allows teams to concentrate on similar groups of tasks and makes it easy to visualize the separate timelines for each deliverable.

To create a new phase plan, select the **+ Plan** in the top left corner of the Phase Plan List, and add the phase plan name and the start and end date. Click **Save** and the new Phase Plan will be added to the project.

## Swim Lanes



Swim lanes are visual boundaries or areas in the plans that allow users to understand where they should be placing work. Design teams can use swim lanes to group similar work together so teams can see all of the work they are responsible for in one place.

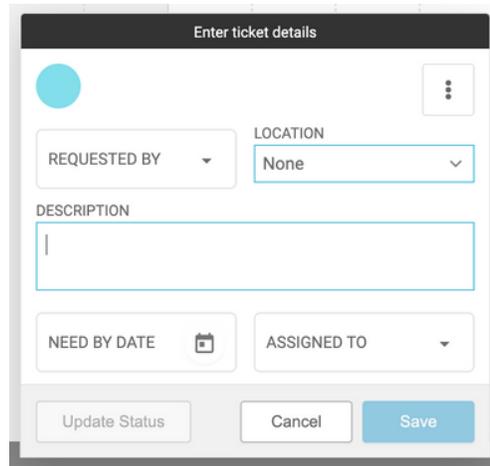
Teams can name their swim lanes after roles/disciplines, locations, or deliverables. Teams need to align their swim lanes with the projects overall planning goals and preferences. If teams align the project's swim lanes with their goals they will be able to create a more visible Below are three different suggestions on how to set up swim lanes:

- **Option 1:** This option is best for teams who want to concentrate on their specific team's tasks. By structuring each swim lane by role, the teams will be able to work independently without having to view another team's work.
  - **Roles:** have the roles match the swim lanes. This will make it easier to filter reports.
  - **Swim lanes:** name the swim lanes after the roles in the project.
  
- **Option 2:** This option is best for teams who want to understand where work is happening in the project and emphasize collaborative planning. By naming the project's swim lanes after locations in the project, teams will be able to view the entire plan in chronological order and easily view the entire plan at once.
  - **Locations:** have the location's names match the swim lanes. This will make it easier to filter reports.
  - **Swim lanes:** name the swim lanes after the location in the project.
  
- **Option 3:** This option is best for teams who want to work independently and are focused on deliverable deadlines. By structuring swim lanes by deliverables, deliverable deadlines will be emphasized in the planning process. This helps the team stay focused on deliverable deadlines and understand each task that is needed to complete the deliverables.
  - **Locations:** have the locations match the names of the swim lane deliverables. This will make it easier to filter reports.
  - **Swim lanes:** name the swim lanes after the deliverables in the project.

Please keep in mind, that these are not hard and fast rules, but rather suggestions worth considering. Each project is unique but these guidelines should help ensure admin users don't set up the project in a way that will make it harder to collaborate. The key to setting up Touchplan is to foster collaboration and make it easy for the trade partners to navigate and participate in the process.

To create a Swim Lane, click on the **Plan Actions** tab on the top right side of the plan view. In the drop-down menu, select **Add swim lane**, and a shaded row will appear in the plan view. Enter the Swim Lane name and choose a color, and click **Save** once you are finished.

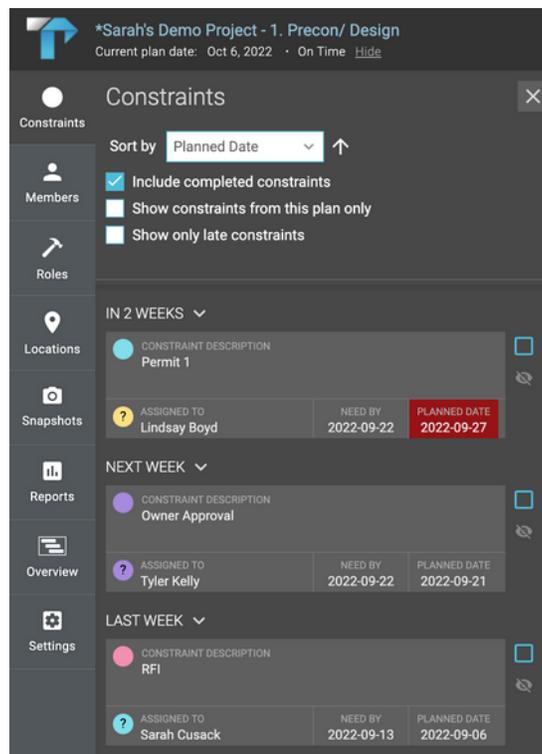
## Constraints and the Constraint Log



The screenshot shows a mobile application form titled "Enter ticket details". At the top left is a blue circle icon. Below it are two dropdown menus: "REQUESTED BY" and "LOCATION" (currently set to "None"). A large text input field for "DESCRIPTION" is below these. Further down are "NEED BY DATE" (with a calendar icon) and "ASSIGNED TO" (with a dropdown arrow). At the bottom are three buttons: "Update Status", "Cancel", and "Save".

It is vital to a project's success that all project members are aware of the constraints, which are a condition outside of the control of the project team that must be satisfied to complete scheduled tasks. Some examples of constraints are permits, receiving owner approval on plans, and RFI's. Users can assign constraints to other project members, making it visible who is responsible for getting seeing to the completion of the condition. Constraints allow teams to identify and track specific conditions easily, this increased visibility ensures that teams stay on track with meeting deadlines and milestones.

To create a constraint ticket, click on the **circle ticket icon** in the right corner of the Plan View. Add a description, select a location from the Location dropdown and assign a Need by Date, Requested By, and Assigned To.



The screenshot shows a mobile application interface for a project plan. The title is "\*Sarah's Demo Project - 1. Precon/ Design" with a sub-header "Current plan date: Oct 6, 2022 · On Time Hide". A sidebar on the left contains navigation icons for Constraints, Members, Roles, Locations, Snapshots, Reports, Overview, and Settings. The main content area is titled "Constraints" and has a "Sort by" dropdown set to "Planned Date". There are three filter checkboxes: "Include completed constraints" (checked), "Show constraints from this plan only", and "Show only late constraints". The constraints are grouped by time periods: "IN 2 WEEKS", "NEXT WEEK", and "LAST WEEK".

Constraint Description	Assigned To	Need By	Planned Date
Permit 1	Lindsay Boyd	2022-09-22	2022-09-27
Owner Approval	Tyler Kelly	2022-09-22	2022-09-21
RFI	Sarah Cusack	2022-09-13	2022-09-06

Teams can easily identify and track constraints in a project using the Constraint Log. By using the Constraint Log, teams can be aware of upcoming deadlines and if any constraints are late. This increased visibility in the plan ensures that project members are accountable for their work and that the progress of constraints is monitored in the project.

To access the Constraint Log, click on the **Constraints** tab on the left side of the Plan View. All constraints in the project will be listed, to sort through the constraint list select an option from the Sort by drop-down menu. Users then have the option to choose to view completed constraints, constraints from the current plan, or late constraints.

### Constraint Terms:

- [Assigned To](#): the individual who is responsible for the constraint.
- [Completed Date](#): the date that the constraint has been completed.
- [Constraint Description](#): description of the constraint as it is written in the plan.
- [Constrained Tasks](#): list of the tickets that are directly affected by the constraint- i.e. what will be delayed or unable to be completed until the constraint is complete.
- [Date Identified](#): the date the constraint was created.
- [Notes](#): the notes that were typed into the constraint while it was in edit mode.
- [Planned Date](#): the date that the user plans to complete the constraint by a user (this is done by opening the constraint to edit mode).
- [Priority](#): the three levels (On Track, Needs Attention & Critical) of status depending on progress towards removing the constraint and the importance of the activities constraint.
- [Requested By Date](#): the day the constraint was requested to be completed by.

## Custom Fields

**Custom fields** [X]

+ Custom field All roles ▼

**Responsible Party**  
Text

Field label  
**Responsible Party**

Type  
Text  
Can't change type after creation

Ticket types

- Tasks
- Milestones
- Constraints

Show on ticket form [DISCARD] [SAVE]

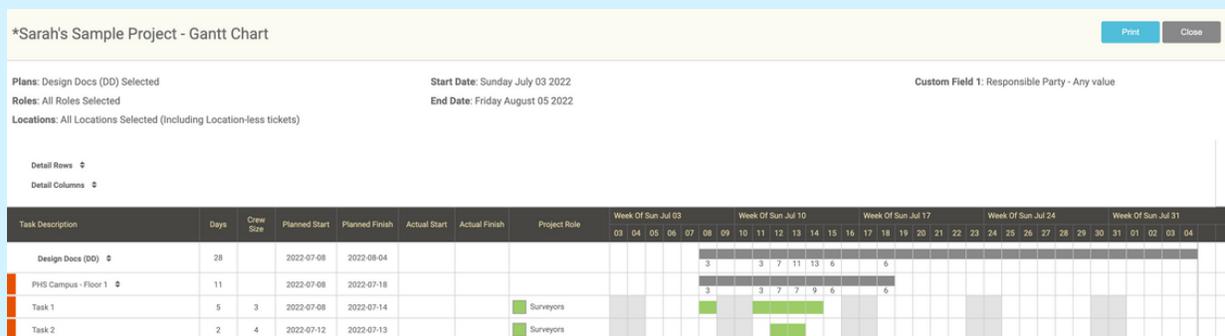
Custom Fields allows teams to create new text fields in tickets to track additional information in Touchplan. This feature allows for greater customization of tickets in projects and can promote accountability among users. While some project teams use custom fields to track materials, Design teams can use custom fields to track the responsible party for each ticket. This will allow teams to identify what project member in each role was in charge of making sure the task was complete.

Teams can also use custom fields as a comments section to make notes of tasks that are ready to be signed off or tasks that require additional tasks to be finished to be considered complete. This allows teams to keep track of the progress made in the plan or if there is any additional information that other team members need to know for the completion of the task.

By using custom fields teams can create more insight and accountability in the project team as they gain an understanding of who is responsible for each task. Teams can then use the Custom Field filtering in reports teams can dive deep into their custom fields metrics.

### Example:

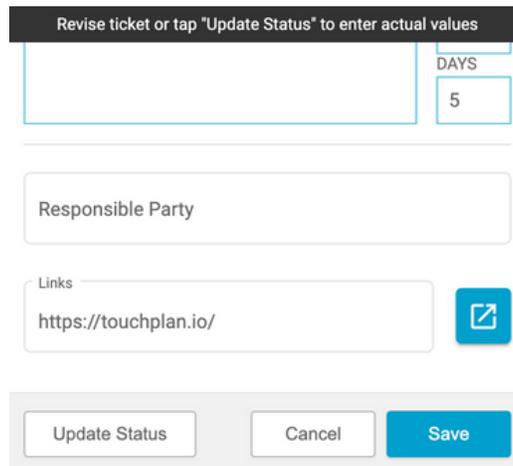
There are four members part of the architecture role, when each member of the team is assigned a ticket they will sign their initial or name in the Custom Field. Carly has just been assigned a task ticket, and she will put her initials/name in the Responsible Party custom field so the team understands that she is responsible for this task.



In the Reports tab, the team can filter each report to search for each specific team member and view which tickets they have been responsible for. A team member wants to see how many tickets Carly is responsible for. To see all of Carly's tickets, the user selected Exactly Matches from the filter options and entered CG in the custom field description.

To create a custom field, click on **Settings** and then click **Custom Fields**. Click on **+ Custom Field**, enter the custom field name, and choose the **Custom Field Type**. Select the ticket type and roles the custom field should be applied to and click **Save** for the Custom Field to be added to tickets.

### Custom Fields- Clickable Links



Revise ticket or tap "Update Status" to enter actual values

DAYS  
5

Responsible Party

Links  
<https://touchplan.io/>

Update Status Cancel Save

One of the most useful Custom Field types for Design teams is clickable links. With clickable links, teams can add links to tickets that will take them directly to external sites. Teams can easily access additional planning information, documents, drawings, and more by adding links to the necessary tickets. By using clickable links, teams will be able to better track important links and have all stakeholders aware of additional project information.

To create a clickable link, an admin user will need to first create a clickable link custom field by clicking on Settings and then click **Custom Fields**. Click on **+ Custom Field**, enter the custom field name and choose **Clickable Link** under the Custom Field Type. Select the ticket type and roles the custom field should be applied to and click **Save** for the Custom Field to be added to the tickets.

**External link settings**

Enter allowed websites for link custom fields.  
Separate each sites using commas.

Allow list

google.com, touchplan.io

CANCEL SAVE

Once the clickable link custom field has been created and added to tickets it is time to authorize specific websites. To approve a website so the link will be able to direct users to the correct site, click on **Settings** and then select **Advanced Settings**. Select **External Link Settings**, enter the website URLs that are approved to be linked on the project, and click **Save**.

**Tip:**

If a URL is not added to the External Link Settings the link will not direct users to the website when they add the link to the ticket.

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## Exercise

Gain a better understanding of the planning process in Touchplan before the first team meeting by running a build the plan exercise. Practice the planning process by breaking out a plan, and creating swim lanes and custom fields. Work through building a sequence of tickets and make sure users understand the purpose of constraints. Have each team member practice adding clickable links and answer any questions that arise during the meeting.

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## **Summary**

By setting up a project in Touchplan to reflect the workflow and goals of a Design team, teams will be set up for success. The goal of Touchplan is to allow teams to create a project that will help them collect data on how effective they have been planning. By using the Implementation Handbook for Design Teams, teams can gain a deeper understanding of how to build a project to increase visibility and team collaboration.