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Deltek Acumen Touchstone 8.11.3

Quick Start Guide

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Overview

Acumen Touchstone is a web-based portal for the collection, automated scoring, and benchmarking of project schedules. It provides a single, centralized repository for storing and evaluating project schedules and updates where reviews, approvals, and updates happen automatically.

When contractors and internal project teams submit monthly schedules, the reviewer first looks at the schedule quality. For example, did the user fix the missing relationships that were incorrect last month? If not, they may have to send the user a note reminding them again to fix the issue. Reviewing schedule quality for each submitted schedule is a time-consuming process. In addition, reviewers may have different interpretations of the criteria which leads to data and reporting inconsistencies.

With Touchstone, requirements and criteria are automatically and consistently enforced. This allows all project stakeholders to work from the same set of criteria, which saves time, enforces schedule quality rules, and provides unprecedented project insight.

You can customize quantitative and qualitative measures (metrics) to fit your individual projects. For example, a construction company that builds bridges, schools, and roads may have a different set of metrics for each type of project.

How Touchstone Works

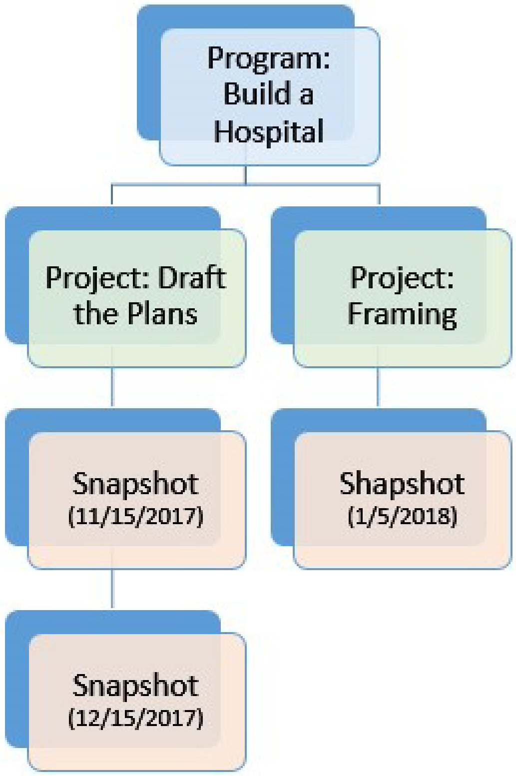
Acumen Touchstone is installed onto a local Web Server and is accessed via an internet web portal.

The Program Manager sets the criteria used to evaluate the schedules (called “projects” in Acumen Touchstone) at the project level. Setting the criteria at this level allows you to standardize and view metrics across projects.

The Submitter logs onto a web portal and uploads their schedule each period. The frequency at which the schedule is uploaded is set at the project level (for example, monthly, bi-weekly, or weekly). A snapshot of the project is created each time a schedule is uploaded.

Touchstone measures the snapshot schedule data against the criteria that was defined at the project level. If the data doesn’t meet or exceed the schedule quality and score, it is rejected and the Submitter is given a list of things to correct. After the project is accepted, it becomes available to the Project Manager for analysis, who can rest assured that the basic quality has already been reviewed.

Example of How Programs, Projects, and Snapshots Fit Together



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Touchstone Areas

Hubs

Hubs provide you with a set of tools, applications, and reports to help you manage all aspects of your data.

The first time that you open a hub, an introductory message displays, explaining the hub's functionality and the available options.

Note: Use the **Find Application** search field to locate applications on the Navigation page quickly. Your role security determines your application access and, therefore, determines which applications are returned in the search.

Programs Hub

A program is associated with one or more projects and is used to standardize benchmark attributes across all associated projects. This allows you to maintain the same standard across many projects and to evaluate multiple projects based on the same benchmarks.

For example, you might have a program called "Building Construction," and the associated projects might be "Foundation and Framing," "Electrical wiring," and "Interior Decorating." You can set a Customer Satisfaction attribute at the program level (Building Construction) that applies to all associated projects (Foundation and Framing, Electrical Wiring, Interior Decorating).

After schedule snapshots are uploaded and accepted, you can select a Customer Satisfaction value (for example, **happy**, **unhappy**) for each snapshot. Touchstone calculates the average value which you can see on the Program's Overview tab in the Benchmark Attributes grid. This gives you a good idea of how Customer Satisfaction is doing across all related projects.

Projects Hub

Use the Projects hub to view all of the projects in Touchstone to which you have access as well as the program to which they are associated. You can also add, edit, or delete projects as well as enter benchmark attribute values.

A project must be associated with a program in order for you to submit a schedule. Projects only display in the Submittals view when they are associated with a program. You cannot use benchmark attributes for the project if it is not linked to a program.

When you submit a schedule, it is measured against the criteria set up in the associated project. Touchstone compares the uploaded schedule to the acceptance criteria metrics and scores the schedule based on the metric influence selector values. For each condition that the schedule meets, it accumulates a point value, whether the point value is negative or positive. The score is then normalized on a scale of **0** to **100** and compared to the **Minimum Acceptance Score** on the Acceptance Criteria tab (**Templates » Acceptance Criteria**).

If the schedule doesn't meet the score, it is rejected and the person who submitted it is provided with information about the issues for each metric in the scoring report.

When the schedule meets or exceeds the score, it is accepted. Project fields such as **Project % Complete** and **Activity Count** are updated based on data from the uploaded schedule, and the schedule becomes available to the Reviewer for analysis.

Submittals Hub

Use the Submittals hub to upload your schedule, see the status of an uploaded schedule, and add benchmark attribute values, among other things.

The programs are the parent rows and the grid collapses to the program level. The grid contains only the project data for which you have access to view. Only projects that are associated with a program will display in the grid.

Each project row includes a **Window Close Date**. This is the date by which you must have your schedule uploaded. That is, you have until 11:59 pm the day before this date to upload your schedule. If you miss that date, you can no longer upload your schedule, the status changes to **Missing**, and the **Upload Now** link will display the next open submittal period.

> **Note:** For more information about scoring, see How Scoring Works.

Reporting

Benchmarking

Use benchmark reporting to compare projects using acceptance criteria and benchmark attributes of your choice. You can customize reports specifically for your projects using different criteria and at different project phases.

Touchstone presents the benchmark report data based on a percent complete scale. You can compare projects of different lengths based on how they perform at various percent complete milestones, allowing you to measure success over time.

Benchmark reporting uses acceptance criteria and benchmark attributes to customize reports. Acceptance criteria are groups of metrics which you determine. For example, you can create a group to evaluate schedule quality and another group to evaluate performance. Benchmark attributes are qualitative measures of project success. You enter values for each project submittal, allowing you to track measures of success over time.

> **Note:** For more information about the benchmark reporting feature, see the *Benchmark Reporting Feature Guide*.

Templates

Field Mappings

Use Field Mappings to map schedule fields to Touchstone fields. You need to use field mapping when the field you are importing does not have the same name as the Touchstone field into which you want to import it in Touchstone. For example, the user may name their field **Controller** in the Scheduling tool; however, the field into which that data must be imported in Touchstone is named **Program Manager**.

You have to tell Touchstone to import the data in the **Controller** field into the **Program Manager** field. You do this by mapping the fields.

Touchstone uses a standard import template to import data from schedule projects. However, you can also custom map any data in the project file. For example, you may have a user-defined field or a code field with location information that you want mapped to a Touchstone field.

Field mapping is flexible in that an individual Touchstone field can get its data from any source schedule field. Furthermore, the mappings between source projects may be different. For example, **Baseline Start** may come from **Start1** in Project A and **Baseline Start Date** in Project B. By mapping the field, you ensure that the data is imported into a common Touchstone field.

The field mappings operate at the project level; that is, each project can have its own field mapping template. This makes it easy to take data from different scheduling tools or submitters and normalize it in Touchstone. You select the template on the Projects Configuration tab.

Acceptance Criteria

The ability to score project schedule submittals on schedule quality, execution performance, use of logic and more is a key feature of Touchstone and allows project teams to determine how best to assess their portfolio or schedule health.

You can specify whether you want Touchstone to use metric-based or submittal-based scoring to evaluate metrics used for calculating the score. You set the scoring method on the Acceptance Criteria tab. Submittal-based scoring is the default setting.

- **Average of Metrics:** Metric-based scoring allows incremental improvements to tasks to be reflected in the overall score. Touchstone calculates the score using an average of the metric scores. The metric-based method typically produces higher scores, as a single task needs to fail in multiple areas simultaneously in order to receive a very low score.
- **Record Fails if One Metric Fails (default):** This method calculates the score on a per-record basis and the final score is an average of the per-record scores. This places a premium on absolute compliance with the assigned metrics. The breach of any single metric on a task prevents those tasks from receiving a “passing grade.”

After you import a metric file, you can add any of the imported metrics to your acceptance criteria on the Acceptance Criteria tab. Use sliders to adjust the influence value of each metric within a range of **-10** to **10**.

The acceptance criteria operate at the project level; that is, each project is associated with an acceptance criteria template that includes the metrics used to evaluate the submittals. This makes it easy to use different metrics on different types of projects or projects in different phases. Projects in different phases may use different metrics or metric variables for scoring. For example, a long duration during the building phase may be 44 days, whereas a long duration during the design phase might be 66 days. You select the Acceptance Criteria template on the Projects Configuration tab.

Touchstone compares the uploaded schedule to the acceptance criteria metrics and scores the schedule based on the metric influence selector values. For each condition that the schedule meets, it accumulates a point value, whether the point value is negative or positive. The score is then normalized on a scale of **0** to **100** and compared to the **Minimum Acceptance Score** on the Acceptance Criteria tab.

If the score is equal to or greater than the **Minimum Acceptance Score**, the schedule passes and Touchstone displays **Accepted** in the Submittals view **Status** column. If the score is less than the **Minimum Acceptance Score**, Touchstone displays **Rejected** in the **Submittals Status** column and the submitter can view a report of the issues that caused the schedule to fail.

Whenever a new metric file is imported into a specific metric folder, any metrics on the Acceptance Criteria tab that are found in a folder with the same name as those imported are overwritten, but their influence values for the acceptance criteria are retained.

Default Acceptance Criteria

Touchstone includes the following default acceptance criteria templates that are based on the Acumen metric groups of the same name:

- **FUSE Schedule Quality:** This template includes the same metrics and influence as Acumen has for the same group.
- **FUSE Schedule Quality plus Baseline Compliance:** This template has the same metrics and influence that Acumen has for the Schedule Quality and Advanced/Baseline Compliance groups.
- **DCMA 14 Point:** This template has the same metrics and influence that Acumen has for the same group. The template includes metrics for evaluating a schedule against the DCMA's 14 Points.

Use Your Own Acceptance Criteria

To use your own acceptance criteria:

1. Create an acceptance criteria template.
2. Add metrics, set the influence value, enter a minimum score, and select a scoring method. In order to add metrics, you have to import a metrics file.
3. Assign the template to a project.

Settings

General

Specify custom email footer templates, among other things.

Custom Email Footer Templates

If you want to include information in the footer of the system-generated emails, you can add a custom email footer template. For example, you might want to add your company logo or contact information.

Use the options on the Email Footer Template tab in **Settings » General** to create custom templates and to specify which template Touchstone should use. Use the rich text menu options to format your text. You can also upload images (.jpg, .jpeg, .bmp, .png, .gif) or link to a website.

In addition to system-wide custom email footer templates, you can use the **Default Email Footer Template** field on the Projects Access Control tab to select a different custom email footer template for each project. The template you select applies to all system-generated emails for the selected project (for example, when the user receives a confirmation email for a project submittal). If you leave the field set to **<Default Template>**, Touchstone uses the email template selected in the **Default Email Footer Template** field on the Email Footer Template tab in **Settings » General**.

If you do not specify a default template on the Email Footer Template tab, the emails will not contain a footer.

Benchmark Attributes

Benchmark attributes are qualitative measures of success for the project that you use in benchmark reporting. After each period ends, you enter the benchmark attribute values in the Submittals view or on the Projects Snapshot tab for each project snapshot.

> **Note:** For more information, see Understanding Benchmark Attributes.

Metrics

A metric is a standard or measure for use in determining how well a project is planned and executed.

Metric results can be numeric (for example, cost or duration) or percentages (for example, percentage of total project duration). Percentages are useful for portraying results within a given context.

When you install Touchstone, default metrics are installed in a Default Metrics folder. If you would like to use custom or additional metrics, you can import metrics or replace existing metrics by importing an .aft file (Acumen metric file). After you select the file, you can select the source folders that you want to import and the destination folder. You can use an existing destination folder or create a new one.

You can only import into one folder at a time. If you want the metrics to be in more than one folder in Touchstone, you must import again and select a different folder.

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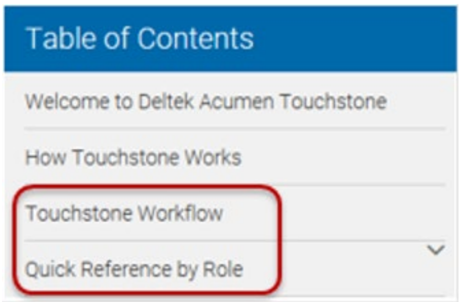
Touchstone Workflow

This topic includes information about initial setup through to uploading a schedule and reviewing benchmarks.

> **Note:** If you view this topic in the online help, you can use the links in **Related Topics** to go directly to the information or steps that you need.
>
> For information and links specific to your role, see the **Quick Reference by Role** topic in the online help.



Click one of the links below to view the related topic. The topics are listed in the order in which they must occur.

1. IT Administrator: Create User Accounts in PPM Administrator and/or EPM Security Administrator
2. Touchstone Administrator: Initial Touchstone Setup
3. Project Manager: Create a Program
4. Project Manager: Create Projects
5. Project Manager: Send Submitter Login Details
6. Submitter: Log Into Touchstone for the First Time
7. Submitter: Upload a Schedule Snapshot
8. Project Manager: Select and View Benchmark Attributes

IT Administrator: Create User Accounts in PPM Administrator and/or EPM Security Administrator

You can manage users, groups, roles, and licenses in either the new web-based PPM Administrator and/or the traditional EPM Security Administrator. You do not need to use both.

Use PPM Administrator to define security rights and permissions.

Task	Related Topics in Online Help
Add users to PPM Administrator and assign a Touchstone license.	**How to...** ▪ Display the Communication Email Tab

In order for users to have access to different areas of Touchstone, they must be added to PPM Administrator and assigned a Named or Submitter license. Users might be: ▪ Touchstone Administrators ▪ Project Managers ▪ Subcontractors (Submitters) In PPM Administrator, you create roles that specify access to certain areas of Touchstone. When you create a user, you assign them a role. For example, if you disable Settings for a role, the users assigned to that role won't see the Settings group in the Touchstone Navigation pane. Security uses the most permissive access. For example, if you are in a group that has read-only access to a project and are also given write access as a user, you would have write access.	▪ Specify Email Server Settings ▪ Email Users to Let Them Know How to Log In to Touchstone **Fields and Options** ▪ Communication Email Tab

Use EPM Security Administrator to define security rights and permissions.

Task	Related Topics in Online Help
Add users to EPM Security Administrator (EPM SA) and assign a Touchstone license. In order for users to have access to different areas of Touchstone, they must be added to EPM SA and assigned a Named or Submitter license. Users might be: ▪ Touchstone Administrators ▪ Project Managers ▪ Subcontractors (Submitters) **Note:** When you create a new user, the username is **new user** by default. In addition, you will be sent a temporary password via email. Deltek recommends changing the user name and password upon first login. In addition, you will need to provide the following details of the new user: ▪ First name ▪ Last name ▪ Primary role ▪ Email address	**How to...** ▪ Enable EPM Security Administrator Audit Log ▪ Email Users to Let Them Know How to Log In to Touchstone **Learn more about...** ▪ EPM Security Administrator ▪ Access Control Overview ▪ User Roles in EPM Security Administrator ▪ What Happens When You Delete a User in EPM Security Administrator?

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In EPM SA, you create roles that specify access to certain areas of Touchstone. When you create a user, you assign them a role. For example, if you disable Settings for a role, the users assigned to that role won't see the Settings group in the Touchstone Navigation pane. Security uses the most permissive access. For example, if you are in a group that has read-only access to a project and are also given write access as a user, you would have write access.	

Touchstone Administrator: Initial Touchstone Setup

Before users can start working in Touchstone, you need to set up system email preferences, import metrics files, create acceptance criteria, benchmark attribute, and field mapping templates, and grant access to the templates.

> **Attention:** Due to the recent integration with PPM Administrator, Touchstone updated its email settings. You will need to log in to PPM Administrator to customize your email settings before setting up your system email preferences in Touchstone.

> **Note:** Before you begin, use the My Preferences dialog box to specify the date format, decimal symbol, and digit grouping symbol that you would like to use. You can also set the default view that you want Touchstone to display when you log in. Each user can set up their own preferences.

Task	Related Topics in Online Help
Configure email settings in PPM Administrator. In PPM Administrator, log in and go to the **Communication** tab to complete the required fields. The email settings fields allows you to determine which host or SMTP server will be used to send emails from, which username and password will get access to the server, and the display name that appears in the System Email address.	**Fields and Options** ▪ Communication Email Tab **How to...** ▪ Display the Communication Email Tab
Set system preferences for email servers. In the Submittals view, you can send an email to the Submitter (that is, the person who uploaded the schedule). For example, you may want to send an email to ask a question about the schedule. The email server information is needed for this purpose.	**How to...** ▪ Specify Email Server Settings ▪ Specify Default Email Addresses
Import an .aft Acumen metric file. Acceptance criteria use metrics to analyze the schedules. Default metrics are installed as part of your Touchstone installation.	**How to...** ▪ Import a Metric File **Learn more about...** ▪ Metrics Overview

In order to use custom or additional metrics in the acceptance criteria templates, you must import a metric library.	▪ What Happens When I Import a Metric File?
Create acceptance criteria templates. Project teams can score schedule quality to determine how best to assess their portfolio or schedule health. The acceptance criteria operate at the project level; that is, each project can have its own acceptance criteria template that includes project-specific metrics and influence values. After you create the template, the Project Manager can assign it to one or more projects. Projects in different phases may use different metrics or metric variables for scoring. For example, a long duration during the building phase may be 44 days, whereas a long duration during the design phase might be 66 days.	**How to...** ▪ Create a New Acceptance Criteria Template with Metrics and Score ▪ Change the Minimum Acceptance Score ▪ Remove a Metric from an Acceptance Criteria Template **Learn more about...** ▪ Acceptance Criteria Overview ▪ How Scoring Works
Create benchmark attributes. Benchmark attributes are values that you manually enter for each project submittal. They are qualitative measures of success for the project that are used in benchmark reporting. Benchmark attributes are assigned at the program level and are applicable to all associated projects. You create the attributes in the Benchmark Attributes view in **Settings » Benchmark Attributes**. After you create the attributes and add options and values, the Project Manager can select the attributes they want to use with their program.	**How to...** ▪ Create a Benchmark Attribute **Learn more about...** ▪ Understanding Benchmark Attributes ▪ Benchmark Attributes View
Create field mapping templates. Touchstone uses a standard import template to import data from project schedules based on the schedule type (Open Plan, Microsoft Project, or Primavera P6). However, it also allows you to use field mapping templates to custom map any data in the project file. For example, you may have a user-defined field or a code field with location information that you want mapped to a Touchstone field. You can create different field mapping templates to suit the different projects. After you have created a template, and mapped schedule fields to Touchstone fields, the Project Manager can assign that template to one or more projects.	**How to...** ▪ Create a New Field Mapping Template and Map Fields ▪ Copy an Existing Field Mapping Template ▪ Map a Schedule Field to a Touchstone Field **Learn more about...** ▪ Why Do I need to Map Fields? ▪ Field Mappings Overview ▪ Default Field Mappings ▪ Field Mappings Mapped Fields Tab

Change the upload file size. If needed, you can change the maximum upload file size in the web.config files. Touchstone has two web.config files—one for the PPM.API and one for the Touchstone API. The file size must be set to the same value in both.	For more information, see the *Deltek Acumen Touchstone Installation and Administration Guide*.
Set up Company Email Signatures. You create the attributes in the company-specific email signatures with logos in **Settings » General » Email Footer Template Tab**. After you create the footer template, select it in the **Default Email Footer Template** field at the bottom of the form.	

Project Manager: Create a Program

A program is associated with one or more projects and is used to standardize benchmark attributes across all associated projects. This allows you to maintain the same standard across many projects and to evaluate multiple projects based on the same benchmarks.

> **Note:** Before you begin, use the My Preferences dialog box to specify the date format, decimal symbol, and digit grouping symbol that you would like to use. You can also set the default view that you want Touchstone to display when you log in. Each user can set up their own preferences.

Task	Related Topics in Online Help
Create a program. Programs define common benchmarking attributes to be used for all projects within the program. They also track overall dates, progress, and costs for the program. In addition to creating a new program, you can make a copy of an existing program to use as the basis for a new program.	**How to...** ▪ Create a New Program ▪ Copy a Program **Learn more about...** ▪ Programs Overview
Associate benchmark attributes Benchmark attributes are values that you manually enter for each project submittal. They are qualitative measures of success for the project that are used in benchmark reporting. At the program level, you define which attributes you will be tracking for the program. Individual values are entered for each project snapshot.	**How to...** ▪ Add Benchmark Attributes to a Program **Learn more about...** ▪ Understanding Benchmark Attributes
(Optional) Override metric variable values. The variables listed on the Metric Variables tab (**Settings » Metrics**) apply to all projects in Touchstone and are used in metrics that make up acceptance criteria; however, there may be instances when you want to use a different variable value for	**How to...** ▪ Override a Metric Variable Value **Learn more about...**

some of your programs. For example, a program for an offshore platform may have different values than a program for a refinery. In this case, you can add the variable to the Override Metric Variable Values grid (**Programs » Configuration tab**) and edit the value as needed. The adjusted variable values apply to all projects associated with the selected program. When you import a new metric file, the values in the grid on the Metrics Hub Metric Variables tab are overwritten; however, the values in the Programs Hub Configuration Tab Override Metric Variable Values grid are not overwritten.	▪ Programs Configuration Tab ▪ Metric Variables Tab ▪ What Happens When I Import a Metric File?
Grant users access to programs. After users are set up in EPM Security Administrator, you add them to the Access Control tab for each program to which they need access. When users are granted access to a program, they do not automatically gain access to the associated projects. After you create and associate each project, you use the Projects Access Control tab to give users access to the project. This allows you to control who can see and work on each project in a program. For example, you can allow a user to have access to Project A but not Project B even though both projects are associated with the same program.	**How to...** ▪ Grant Users Access to Programs **Learn more about...** ▪ Programs Access Control Tab

Project Manager: Create Projects

Before your subcontractors can submit schedules, you must first set up projects. Use the Projects hub to view all of the projects in Touchstone to which you have access as well as the program to which they are associated. You can also add, edit, or delete projects, and enter benchmark attribute values.

Task	Related Topics in Online Help
Create projects. You can create projects from the Projects hub or from the Programs hub Projects tab. The only difference is whether the project is manually or automatically associated with the program. ▪ When you create a project from the Projects hub, you select the program to which you want the project associated. ▪ When you create the project from the Programs hub Projects tab, the project is automatically associated with the selected program.	**How to...** ▪ Create a New Project from the Projects Hub ▪ Create a New Project from the Programs Hub Projects Tab
Associate your projects with a program. The benchmark attributes operate at the program level and are standardized across all associated projects. This allows you to	**How to...**

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maintain the same standard across many projects and to evaluate multiple projects based on the same benchmarks. In order to utilize the benchmark attribute feature for a project, you must associate the project with a program. You can associate projects with a program from the Projects hub or from the Programs hub Projects tab.	▪ Associate a Project with a Program Using the Projects Hub ▪ Associate a Project with a Program Using the Programs Hub Projects Tab
Select an acceptance criteria template. Project teams can score schedule quality to determine how best to assess their portfolio or schedule health. The acceptance criteria operate at the project level; that is, each project is associated with an acceptance criteria template that includes the metrics used to evaluate the submittals. The Touchstone Administrator creates the acceptance criteria templates. While you create each project, you can select the acceptance criteria template that you want to use for the project.	**How to...** ▪ Assign an Acceptance Criteria Template to a Project **Learn more about...** ▪ Acceptance Criteria Overview ▪ How Scoring Works
Select a field mapping template. Touchstone uses a standard import template to import data from project schedules. However, it also allows you to custom map any data in the project file. For example, you may have a user-defined field or a code field with location information that you want mapped to a Touchstone field. Field mapping templates are defined in **Templates » Field Mappings**.	**How to...** ▪ Assign a Field Mapping Template to a Project **Learn more about...** ▪ Field Mappings Overview
Specify how often the schedule should be uploaded. Set the frequency for which you want schedules uploaded and the number of days permitted for an upload. The **Window Close Date** in the Submittals view is calculated using this information.	**How to...** ▪ Set the Schedule Upload Frequency **Learn more about...** ▪ Projects Configuration Tab
Define Time Now. The **Time Now** field displays both on the Projects Overview and Programs Overview tabs, in the Projects and Programs List views, and in the Submittal view. It displays the exact date value extracted from the schedule file and is not adjusted to the local time zone. It is populated using data from the last snapshot for each associated project and displays **None** until at least one associated project has an uploaded snapshot. **Time Now** is called **Status Date** in Microsoft Project, **Data Date** in P6 XER, **last_recalc_date** in P6 XML, and **Time Now** in Open Plan.	**Learn more about...** ▪ Projects Configuration Tab

This field displays in red when the **Time Now** value is not current. You must define "Current" on the Projects Configuration tab. If a submitter submits a schedule and the Time Now value is not current, Touchstone includes a warning in the email after the schedule is submitted. If the submitter tries to submit a schedule when the **Time Now** value is not current and the option to **Reject submittals if the time now date is not current** has been selected on the Projects Configuration tab, Touchstone displays a warning message and the schedule is not uploaded.	
Grant users access to projects. After users are set up in EPM Security Administrator, you add them to the Access Control tab for each project to which they need access. At a minimum, you must grant submitters access to the projects for which they need to upload their schedules. When a user is granted access to a project, they do not automatically have access to the associated program. You have to add them to the program's Access Control tab if you want them to have program access.	**How to...** ▪ Grant Users Access to Projects **Learn more about...** ▪ Access Control Overview ▪ Projects Access Control Tab
(Optional) Add a custom email footer template. If you want to include information in the footer of the system-generated emails, you can add a custom email footer template. For example, you might want to add your company logo or contact information. The template you select on the Project's Access Control tab applies to all system-generated emails for the selected project. If you leave the field set to **<Default Template>**, Touchstone uses the email template selected in the **Default Email Footer Template** field on the Email Footer Template tab in **Settings » General**. If you do not select a default template, the emails will not contain a footer. You can create custom email footer templates using the options on the Email Footer Template tab.	**How to...** ▪ Upload an Image to an Email Footer Template **Learn more about...** ▪ Project's Access Control Tab ▪ Email Footer Template Tab

Project Manager: Send Submitter Login Details

After you have set up your programs and projects, your submitter can start uploading their schedule.

Task	Related Topics in Online Help
Contact your submitter and provide them with their Touchstone login details.	**How to...**

Let them know that they will need to upload a schedule using the frequency you have set.	▪ Email Touchstone Users To Let Them Know How to Log In **Learn more about...** ▪ Schedule File Types and Maximum Size ▪ Projects Configuration Tab

Submitter: Log into Touchstone for the First Time

After you have received an email with your login details, you can log into Touchstone.

Task	Related Topics in Online Help
After your account has been set up in PPM Administrator and EPM Security Administrator and you have received an email with your user ID and temporary password, you can log into Touchstone. When you log in, you enter your user ID and temporary password and select your data source. After you click **Login**, Touchstone displays a Set Password dialog box where you must create a new password. When you create your password and click **Save**, Touchstone displays the Login screen again and you can log in using your new password.	**How to...** ▪ Log Into Touchstone for the First Time (with a Temporary Password) **Learn more about...** ▪ Security and Licensing in EPM SA and Touchstone

Submitter: Upload a Schedule Snapshot

The Submitter logs onto a web portal and uploads their schedule each period. The frequency at which the schedule is uploaded is set at the project level via the Projects Configuration tab (for example, monthly, bi-weekly, or weekly). A snapshot of the project is created each time a schedule is uploaded.

Task	Related Topics in Online Help
Use the Submittals hub to upload a schedule. Touchstone compares the uploaded schedule to the acceptance criteria metrics and scores the schedule based on the metric influence selector values. For each condition that the schedule meets, it accumulates a point value, whether the point value is negative or positive. The score is then normalized on a scale of 0 to 100 and compared to the Minimum Acceptance Score on the Acceptance Criteria tab. If the score is equal to or greater than the Minimum Acceptance Score, the schedule passes and Touchstone displays **Accepted** in the Submittals view **Status** column. If the score is less than the Minimum Acceptance Score, Touchstone displays **Rejected** in the	**How to...** ▪ Upload a Schedule Snapshot ▪ View the Scoring Analysis Report for a Submittal **Learn more about...** ▪ Schedule Types That You Can Upload to Touchstone ▪ I Can't See the Project in the Submittals View

Submittals Status column and the submitter can view a report of the issues that caused the schedule to fail. **Note:** The schedule is stored in the Touchstone data source regardless of the score.	▪ How Scoring Works

Project Manager: Select and View Benchmark Attributes

After a project is uploaded, it becomes available to the Project Manager for analysis.

Task	Related Topics in Online Help
Benchmark attributes options are manually entered for each project submittal. They are qualitative measures of success for the project that are used in benchmark reporting. **Select benchmark attributes for each snapshot.** For each reporting cycle of a project snapshot, which is typically based on input from the project team, the Reviewer selects attribute options on the Projects Snapshots tab or in Submittals. Touchstone adds up the option values selected on the last uploaded snapshot for each associated project and divides by the number of snapshots to calculate an average for each benchmark attribute. The benchmark option closest to that value is the average. **Note:** See Understanding Benchmark Attributes for more information and an example. **Missing Snapshots.** When the **Window Close Date** has passed, the **Status** column changes to **Missing** and you can no longer click **Upload Now** in the **Uploaded** column (**Upload Now** no longer displays). You will need to add the missing snapshot if you want to select new benchmark attribute options for the period that Touchstone can use in the average benchmark calculations that display on the Programs Overview tab. There is one way to add missing snapshots to a project: ▪ **Upload a schedule for a prior period:** If you are the owner, owner-delegate, or in the SYSADMIN group, you can upload a schedule for a period that has already closed. In addition to the schedule that you upload, Touchstone also adds snapshot placeholders on the Snapshots tab for any other missing snapshots.	**How to...** ▪ Select Benchmark Attribute Values Using the Submittals Hub ▪ Select Benchmark Attribute Values Using the Projects Snapshot Tab ▪ View the Average Benchmark Attributes ▪ Add Missing Snapshot Placeholders ▪ Upload a Schedule for a Prior Period **Learn more about...** ▪ Understanding Benchmark Attributes ▪ Why Do We Need to Add Missing Snapshots?

How Scoring Works

Note: For more information about the scoring process, see "How Scoring Works" in the Touchstone online help (**Hubs » Submittals » Learn More About...**).

The ability to score schedule quality, execution performance, risk modeling, use of logic, and more is a key feature of Touchstone and allows project teams to determine how best to assess their portfolio or schedule health.

Touchstone calculates a score for an uploaded schedule based on the acceptance criteria metrics that are defined at the project level. The score determines whether the schedule is accepted or rejected.

You can see the name of the acceptance criteria template that was used for scoring on the Projects Configuration tab. If a schedule is not uploaded for the current period, the score column in the Submittals view for this period is blank.

Metric-Based or Record-Based Scoring

You can specify on the Acceptance Criteria template whether you want Touchstone to use metric-based or record-based scoring.

With metric-base scoring, Touchstone calculates the score using an average of the metric scores. Metric-based scoring allows incremental improvements to tasks to be reflected in the overall score. The metric-based method typically produces higher scores as a single task needs to fail in multiple areas simultaneously in order to receive a very low score.

Record-based scoring calculates the score on a per-record basis. A record or activity scores a 0 if it fails one metric. The final score is an average of the per-record scores. This places a premium on absolute compliance with the assigned metrics. The breach of any single metric on a task prevents those tasks from receiving a "passing grade." This is the default setting.

Acceptance Criteria

Each project must have an Acceptance Criteria template. The template sets the minimum acceptance criteria score and specifies the metrics that are used to calculate the acceptance criteria score. You can select the acceptance criteria template on the Projects Configuration tab.

The acceptance criteria operate at the project level; that is, each project is associated with an acceptance criteria template that includes the metrics used to evaluate the submittals. When you submit a schedule in the Submittals view, Touchstone uses the acceptance criteria to determine if the schedule is accepted or rejected.

The Minimum Acceptance Score is set on the Acceptance Criteria Template and is a number between 0 and 100. Touchstone compares an uploaded schedule to the acceptance criteria metrics and scores the schedule based on the metric influence selector values. Influence values indicate how one metric counts towards the overall score for a group of metrics. The higher the value, the more impact the metric in question has on the score.

If the score is equal to or greater than the Minimum Acceptance Score, the schedule passes and Touchstone displays **Accepted** in the Submittals view **Status** column. If the score is less than the Minimum Acceptance Score, Touchstone displays **Rejected** in the **Submittals Status** column and the submitter can view a report of the issues that caused the schedule to fail.

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> **Note:** Acumen Touchstone reads external relationships and external activities. This makes the count of relationships more accurate for metrics. External Activities from P6 XER schedule or MPP schedules are part of the list of activities used in calculating a score for an uploaded schedule unless metrics exclude external activities. P6 XML schedules and Open Plan BK3 files, however, do not carry the external activity, which is why you cannot use them in the list of activities for calculating a score.

Scoring Complete

As soon as Touchstone finishes scoring the schedule, the system sends an email to the user who uploaded the schedule (the submitter) and copies the project owner. The email includes the status, the name of the schedule, the score, and the number of errors found in the uploaded schedule. It also includes an Excel report of the score as an attachment (See "Scoring Analysis Report" below).

If the submitter doesn't have an email set up in EPM SA, the system only sends the email to the project owner and notes in the email that the submitter's email is missing.

If the project owner doesn't have an email, the email is sent to the submitter and the Touchstone default sender's email address (set in the Touchstone General setting).

Passing Score

The schedule is accepted if Touchstone checks the uploaded schedule against the acceptance criteria and it scores the same or greater than the Minimum Acceptance Score. A message displays in the Submittals view letting you know that the schedule has been accepted. You can click the link in the **Score** column (**Submittals hub » Submittals view or Projects hub » Snapshot tab**) to view a Microsoft Excel report where you can see how the schedule scored for each metric.

Failing Score

If Touchstone checks the uploaded schedule against the acceptance criteria and it scores less than the Minimum Acceptance Score, the schedule is rejected. A message displays letting you know that the schedule failed. You can click the link in the **Score** column (**Submittals hub » Submittals view or Projects hub » Snapshot tab**) to view a Microsoft Excel report where you can see how the schedule scored for each metric. If the **Window Close Date** has not yet passed, the issues can be corrected and the schedule can be uploaded again.

Failing Metric

If Touchstone checks the uploaded schedule against the acceptance criteria and it fails a metric that is set to **Automatically Reject an upload**, the schedule is rejected. A message displays letting you know that the schedule failed.

You can click the link in the **Score** column (**Submittals hub » Submittals view or Projects hub » Snapshot tab**) to view a Microsoft Excel report where you can see how the schedule scored for each metric. If the **Window Close Date** has not yet passed, the issues can be corrected and the schedule can be uploaded again.

Unable to Score

If Touchstone is unable to score the schedule, the score is not updated and the system sends an email to the user who uploaded the schedule (the submitter) and copies the project owner. The email includes a list of things that the submitter needs to correct. If the submitter doesn't have an email set up in EPM SA, the system only sends the email to the project owner and notes in the email that the submitter's email is missing. If the project owner doesn't have an email, the email is sent to the submitter and the default sender's email address (set in Touchstone General setting).

The email subject will be, "Touchstone Submittal Scoring Error" and the message will include a description of the error.

- If scoring fails because there are no metrics in the acceptance criteria, check the acceptance criteria template for the project.
- If scoring fails because of an unknown error, any available exception information is included in the email.
- If the user uploads a multi-project file, Touchstone will not accept it.
- If the user uploads a version of the project file that is not supported by Touchstone, an error will occur.
- If the user uploads a project file with a Project Time Now that is not current and the project is configured to reject that submittal, an error will occur.

Scoring Analysis Report

After a submittal is scored, Touchstone creates an Excel report that includes the scoring information. This report is sent by email with the status email as an attachment. You can also click the hyperlink in the Submittals view **Score** column to download the report.

The file name format is Touchstone - <submitted schedule filename> - <submitted date> Report.xlsx and includes the name of the submitted schedule file as well as the date it was submitted. For example, Touchstone - My Submitted Schedule - 06Feb2019 Report.xlsx.

The report includes:

- Name and Description of the project
- Name of the acceptance criteria template
- Window Close Date and date submitted
- File Name of the submitted schedule
- Score
- A header for each metric in the acceptance criteria followed by any activities that tripped the metric
- Threshold colors (for example, green shows a passing score and red shows a failing score)

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Understanding Benchmark Attributes

Benchmark attributes are used in benchmark reporting and are qualitative measures of success for the project.

You create attributes in the **Settings » Benchmark Attributes** view. After defining them, you add them to a program using the Benchmark Attributes grid on the Programs Overview tab so that they are available for all associated projects.

At the end of each period and based on feedback from your customer and project team, you select an option for each attribute on the latest snapshot (regardless of whether it is accepted or rejected) for each project associated with your program. You do this on the Projects Snapshots tab or in the Submittals view.

Touchstone adds up the option values selected on the last snapshot for each associated project and divides by the number of projects with values. The average option (the option closest to that value) displays in the Benchmark Attributes grid on the Programs Overview tab.

The data in the Benchmark Attributes grid on the Programs Overview tab is refreshed every time you display or refresh the view, so when you add, edit, or delete a benchmark attribute, you can see the change the next time you view the Programs Overview tab.

Example

In Program Alpha, you have a benchmark attribute called **Customer Satisfaction** that has the following five options and values:

Attribute Option Name	Value
Very Unhappy	1
Unhappy	2
Satisfied	3
Happy	4
Very Happy	5

Three schedule snapshots from associated projects are uploaded. Based on input from the project team, the Reviewer selects options in the **Customer Satisfaction** column for each snapshot.

Schedule Snapshot	Customer Satisfaction
Project A snapshot	Satisfied
Project B snapshot	Very Unhappy
Project C snapshot	Very Happy

Touchstone adds up the values of the selected options and divides by the number of projects reporting this attribute, in this case 3:

(Satisfied = 3) + (Very Unhappy = 1) + (Very Happy = 5) = 9/3 = 3

A value of 3 equals the option "Satisfied," so Touchstone displays **Satisfied** for the Customer Satisfaction benchmark attribute on the Programs Overview tab for Program Alpha.

Which Snapshot Does Touchstone Use to Calculate the Average Benchmark Attribute Value?

Touchstone uses the values for the attributes options entered on the last snapshot for each associated project, regardless of whether the snapshot status is accepted or rejected. Accepted and rejected snapshots automatically display on the Projects Snapshot tab.

If you want to include missing snapshots, you can either add missing snapshot placeholders (click **Other Actions » Add Missing Snapshots** in the Projects view) or upload a schedule for a prior period (in the Submittals view, hover over a project and click the **Upload Schedules for Prior Periods** icon that displays to the left of the project).

For example, you have three projects: Finance, Engineering, and Planning.

- Finance and Planning upload snapshots for the last period. The Finance snapshot was accepted but the Planning snapshot was rejected.
- Engineering did not upload a snapshot for the last period.

Project	Period Ending 3/15	Period Ending 2/15	Period Ending 1/15
Finance	Snapshot uploaded and accepted	Snapshot uploaded and accepted	Snapshot uploaded and accepted
Engineering	<Snapshot was not uploaded>	Snapshot uploaded and rejected	Snapshot uploaded and accepted
Planning	Snapshot uploaded and rejected	Snapshot uploaded and accepted	Snapshot uploaded and accepted

Touchstone adds up the attribute values for the latest snapshot from all three projects:

- The most recent closed period for Finance (accepted) and Planning (rejected)
- The previous closed period for Engineering (rejected) since Engineering did not upload a snapshot for the latest period

You add missing snapshot placeholders or upload a schedule for a prior period, and Touchstone adds the missing Engineering snapshot to the grid. You can now add benchmark attribute options to that snapshot.

Project	Period Ending 3/15	Period Ending 2/15	Period Ending 1/15
Finance	Snapshot uploaded and accepted	Snapshot uploaded and accepted	Snapshot uploaded and accepted

Engineering	Snapshot uploaded and accepted	Snapshot uploaded and rejected	Snapshot uploaded and accepted
Planning	Snapshot uploaded and rejected	Snapshot uploaded and accepted	Snapshot uploaded and accepted

Touchstone now includes the values for the missing Engineering snapshot when it calculates the average benchmark attribute values.

Option vs. Values

- An option is the name that displays in the attribute drop-down list when you make a benchmark attribute selection in the Submittals view or on the Projects Snapshot tab. For example, for a Customer Satisfaction benchmark attribute, you might have **Happy** or **Unhappy** options.
- The value is the number you assign to the option. For example, **Happy** may have a value of 5 and **Unhappy** may have a value of 1. Touchstone uses these values when it calculates the average that displays on the Programs Overview tab.

Deleting a Benchmark Attribute from the Programs Overview Tab

If you delete an attribute from the Benchmark Attributes grid on the Programs Overview tab, values for the deleted attribute are deleted for all snapshot records in the associated projects.

Deleting a Benchmark Attribute from Touchstone

When you delete a benchmark attribute in the **Settings » Benchmark Attributes** view, all values for that attribute are deleted from all snapshot records in Touchstone, and the benchmark attribute is removed from the Benchmark Attributes grid on the Program Overview tab for all projects in Touchstone.

Deleting a Benchmark Attribute Option

When you delete a benchmark attribute option on the Edit Attribute dialog box (**Settings » Benchmark Attributes » Options**), the benchmark attribute for all snapshots where the option was selected (**Projects » Snapshot tab**) is cleared.

If there is only one attribute option, you cannot delete it since an attribute must have at least one option. You can click in the value or option cell to edit it, or delete the attribute on the Benchmark attributes tab.

Using Benchmark Attributes

Follow these steps to make use of benchmark attributes:

Steps	Description	Related Topics in the Online Help
1	Define benchmark attributes.	▪ Define Benchmark Attributes ▪ Benchmark Attributes Tab

2	Add benchmark attributes to the program.	▪ Add Benchmark Attributes to a Program ▪ Programs Overview Tab
3	At the end of each period, select attribute values for each snapshot.	▪ Select Benchmark Attribute Values ▪ Project Snapshot Tab ▪ Submittals Hub
4	View average benchmark attribute options for all associated projects.	▪ View the Average Benchmark Attribute Option