Deltek Acumen Touchstone 8.0

Quick Start Guide

October 30, 2019

This edition published October 2019.

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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.

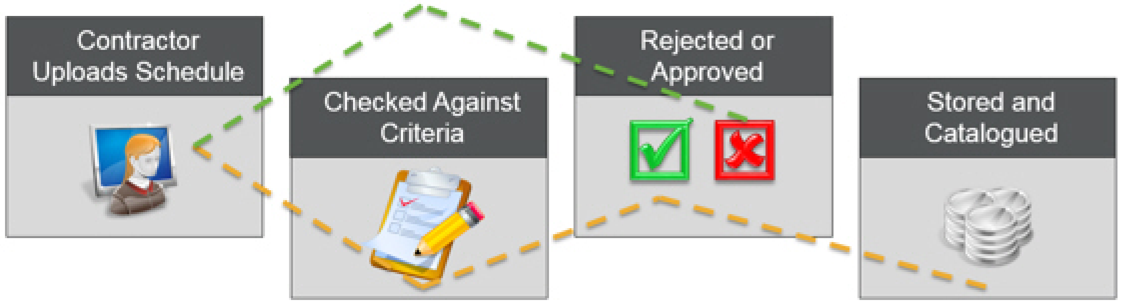
How Touchstone Works

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

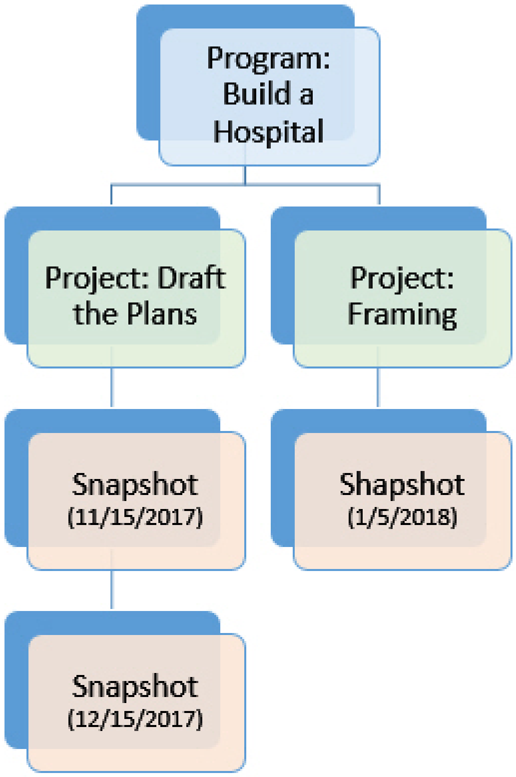
The Program Manager sets the criteria used to evaluate the schedules (called "projects" in Acumen Touchstone) at the program level. Setting the criteria at this level allows you to standardize and view metrics across projects. Each program has its own set of measures. For example, a hospital program will most likely have different criteria to a construction program. A program can include many schedule 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 program 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



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.

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 Programs 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, and 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 a schedule is submitted, it is measured against the criteria set up in the associated program. 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 or exceed the score, it is rejected and the person who submitted it is provided with information about the issues.

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. A project that is not associated with a program will not 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 11:59pm 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 changes to **Closed**.

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

Templates

Field Mappings

Use Field Mappings to map schedule fields to Touchstone 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. Further, 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.
- **Submittal Fails if One Metric Fails (default)** — This method calculates the score on a per-submittal basis and the final score is an average of the per-submittal 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 where as 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, and 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

Using your own Acceptance Criteria

To use your own acceptance criteria:

1. Create an acceptance criteria template.
2. On the template, 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 communications settings, among other things.

Benchmark Attributes

Benchmark attributes are qualitative measures of success for the project that are used in benchmark reporting. After each period end, 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.

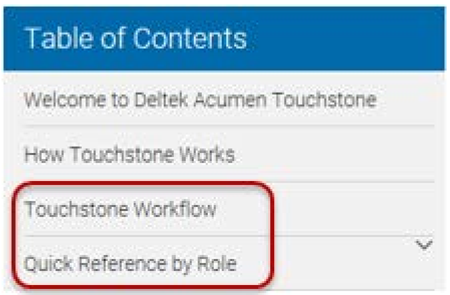
You can only import into one folder at a time. If you want the metrics to be in more than one folder in Touchstone, you must import again and select a different folder.

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.

1. IT Administrator: Create user accounts in 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 log in 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 EPM Security Administrator

Use EPM Security Administrator and the Access Control Tabs in Touchstone 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 Security Administrator and assigned a Named or Submitter license. Users might be:	**How to...** ▪ Enable EPM Security Administrator Audit Log ▪ Email Users to Let them Know How to Log In to Touchstone

Task	Related Topics in Online Help
▪ Touchstone Administrators ▪ Project Managers ▪ Subcontractors (Submitters) **Note:** When you set up a user in EPM SA, make sure you add a password. Touchstone does not accept a blank password for login. In EPM SA, you create roles that specify access to certain areas of Touchstone. When you create a user, you assign them to 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 a user has read-only access to a project but is a member of a group that has full access to the same project, the user will have full access.	**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?

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.

> **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
Set system preferences for email servers In the Submittals view, you have the ability to email the Submitter (that is, the person who uploaded the schedule). For example, you may want to email them 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. In order to use custom or additional metrics in the acceptance criteria templates, you must import a metric library.	**How to...** ▪ Import a Metric File **Learn more about...** ▪ Metrics Overview ▪ What Happens When I Import a Metric File?

Task	Related Topics in Online Help
Create acceptance criteria templates The ability to score schedule quality allows project teams 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 it's 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 where as 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...** ▪ Field Mappings Overview ▪ Default Field Mappings ▪ Field Mappings Mapped Fields Tab

Task	Related Topics in Online Help
Grant users access to field mapping and acceptance criteria templates After users are set up in EPM Security Administrator, you add them to the Access Control tab for each object to which they need access. ▪ **Field Mappings** — Add users who need to set up or view field mapping templates. ▪ **Acceptance Criteria** — Add users who need to set up or view acceptance criteria templates. After the Project Manager has set up the Programs and Projects, they will use the Program and Projects Access Control tabs to grant users access to those areas.	**How to...** ▪ Grant Users Access to Field Mapping Templates ▪ Grant Users Access to Acceptance Criteria Templates **Learn more about...** ▪ Field Mappings Access Control Tab ▪ Acceptance Criteria Access Control Tab
Change the upload file size If needed, you can change the 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.	

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

Task	Related Topics in Online Help
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 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 Metric Variables tab are overwritten; however, the values in the Override Metric Variable Values grid are <u>not</u> overwritten.	**How to...** ▪ Override a Metric Variable Value **Learn more about...** ▪ 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 a user is 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 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.	**How to...** ▪ 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 The ability to score schedule quality allows project teams 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. After you create each project, you can select the acceptance criteria template that you want to use for the project. If a project is not associated with an acceptance criteria template, it will not display in the Submittals view and the submitter will not be able to upload schedules.	**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	**How to...** ▪ Assign a Field Mapping Template to a Project

Task	Related Topics in Online Help
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	**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
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 programs 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

Project Manager: Send Submitter log in 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 log in details. Let them know that they will need to upload a schedule using the frequency you have set.	**How to...** ▪ Email Touchstone Licensed Users **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 the 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 (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 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 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 ▪ 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 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, and 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" in Related Topics for more information and an example	**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 Snapshots **Learn more about...** ▪ Understanding Benchmark Attributes ▪ Why do we Need to Add Missing Snapshots?

How Scoring Works

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.

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.

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.

Scoring Analysis Report

After a submittal is scored, Touchstone creates an Excel report that includes the scoring information. This report is emailed out 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 failed the metric
- Threshold colors (for example, green shows a passing score and red shows a failing score)

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 or not it is accepted, rejected, or missing) 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 5 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, rejected, or missing. Accepted and rejected snapshots automatically display on the Projects Snapshot tab. If you want to include missing snapshots, you must click Other Actions > Add Missing Snapshots in the Projects view.

For example, you have three projects: Finance, Engineering, 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), and the previous closed period for Engineering (rejected) since Engineering did not upload a snapshot for the latest period.

You navigate to the Projects view and click Other Actions > Add Missing Snapshots. The missing Engineering snapshot is added to the grid. You add benchmark attribute options to the missing 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 Engineering missing snapshot when it calculates the average benchmark attribute values.

Options 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:

Step	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 ▪ Projects Snapshot tab ▪ Submittals hub

Step	Description	Related Topics in the Online Help
4	View average benchmark attribute options for all associated projects.	▪ View the average benchmark attribute option

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