

Exercise – Create a Buffer with a Predefined Due Date

In this exercise you will learn how to create and configure a buffer with a predefined due date. Perhaps the due date was committed with the stakeholders before a thorough plan was fleshed out. Generally, due dates should only be committed to after a realistic plan has been developed including the buffer. The end date of the buffer establishes the due date.

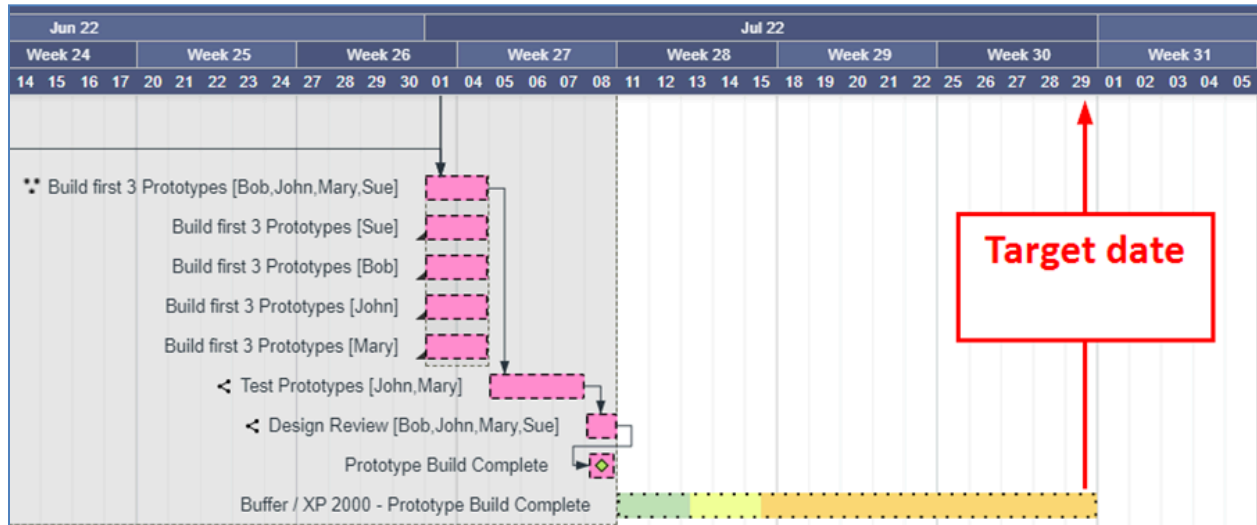
1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Sign in to Playbook as Bob. Username = **Bob**, password = **PlayBook2021**
3. Go to the Game Plan view and activate project **XP 2000**.
4. Right-click on Major Milestone **Prototype Build Complete** (WBS 1.3.9) then **Set Target Date/Buffer**.

The screenshot shows the Playbook Game Plan interface for project XP 2000. The task list on the left includes:

WBS	Title	Task Type
1	Prototype Build (Bob)	Summary
1.1	Prototype Backpanel PCBA (...)	Summary
1.2	Prototype Pwr Board PCBA (J...)	Summary
1.3	Prototype Build - Enclosure (...)	Summary
1.3.1	Injection Molded Faceplat...	Summary
1.3.2	Housing (Sue)	Summary
1.3.3	Cover (Sue)	Summary
1.3.4	Fit Check Faceplate, Housing...	Meeting
1.3.5	Build first 3 Prototypes	Work
1.3.6	Test Prototypes	Meeting
1.3.7	Design Review	Meeting
1.3.8	Prototype Build Complete	Major Milestone
2	(EB) Engineering Build	Summary
2.1	EB PCBA: Backpanel Board (...)	Summary
2.1.1	Update EB PCBA Schematic:...	Work
2.1.2	Layout EB PCBA: Backpanel ...	Work
2.1.3	Review/approve Backpanel B...	Work
2.1.4	Get Quotes EB PCBA: Backp...	Monitor
2.1.5	Incorporate layout changes, e...	Work
2.1.6	Order PCB: Backpanel Board	Work
2.1.7	Fab/receive EB PCB: Backpa...	Monitor
2.1.8	Acquire parts, kit, send to PC...	Monitor

The Gantt chart shows tasks and milestones plotted against a timeline from Week 22 to Week 28. The 'Prototype Build Complete' milestone is highlighted with a red box. A context menu is open over this milestone, with the 'Set Target Date / Buffer' option highlighted by another red box.

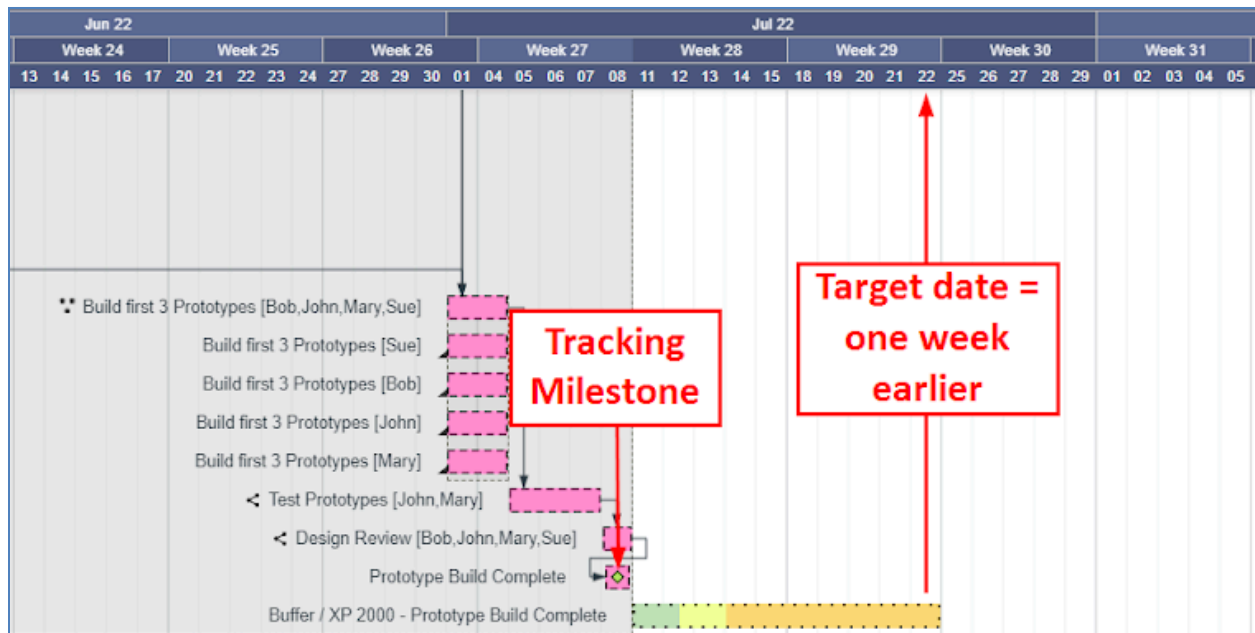
5. In Buffer Properties click **Ok** to accept all the default settings. The buffer has been created and it has a dashed border indicating it is in planning and not yet active. Note the **Target / Due Date** (your Target/Due Date will be different from 29 Jul 22, but the key is to notice that the buffer begins the day after the Tracking Milestone and extends its full duration to the Target / Due Date).



6. In this example, the team had already committed to a due date for the Prototype Build before having developed a detailed project plan. The due date they committed to is one week earlier, so they must decide how best to model the buffer. They have two options.
 - a. Option 1: Shorten the buffer's duration such that the buffer begins the day after the Tracking Milestone and ends one week earlier. Right-click on the buffer then click **Buffer Properties**.
 - i. Under Actual, set **Buffer Duration = 10 days** instead of 15 days. Click **Ok**.

Target Date / Buffer									
Basic	Title XP 2000 - Prototype Build Complete ⓘ								
Advanced	Lifecycle In planning ▼								
Description	Risk Profile Medium ▼								
Tracked Milestones									
Change Log									
	Tracking Start Date 11 May 2022 Today ▼ <input type="checkbox"/> Fixed?								
	Unbuffered Duration 8.6 weeks <input type="checkbox"/> Fixed?								
	<table border="1"> <thead> <tr> <th>Ideal</th> <th>Actual</th> <th>Initial</th> <th>%</th> </tr> </thead> <tbody> <tr> <td>33</td> <td>23</td> <td>23</td> <td></td> </tr> </tbody> </table>	Ideal	Actual	Initial	%	33	23	23	
Ideal	Actual	Initial	%						
33	23	23							
	Buffer Ratio 15 ↓ 10 10 weekdays <input checked="" type="checkbox"/> Fixed?								
	Target / Due Date ↓ 22 Jul 2022 ↺ <input type="checkbox"/> Fixed?								

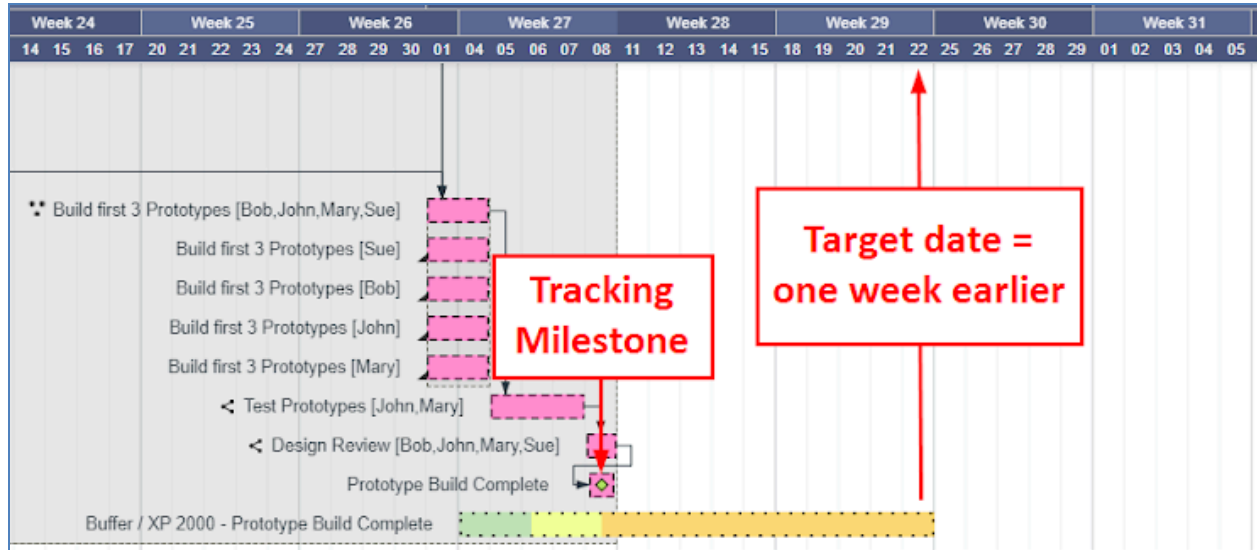
- ii. The **Target / Due Date** is now one week earlier.



- iii. However, there are a couple of issues with this approach. The buffer is too small for the amount of work there is to do, and it gives the false impression that the project is on track (in the green, low schedule risk).
- b. Option 2: Move the **Target / Due Date** one week earlier without shortening the buffer's duration. Right-click on the buffer then click **Buffer Properties**.
 - i. Under Actual, set **Buffer Duration = 15 days** instead of 10 days.
 - ii. Click **Target / Due Date**, *select the date one week earlier* then click **Ok**.

The screenshot shows the 'Target Date / Buffer' dialog box. The 'Basic' tab is active. The 'Target / Due Date' field is set to '29 Jul 2022'. A calendar pop-up is displayed, showing the month of July 2022. A red box highlights the date '29 Jul 2022' in the calendar, and a red arrow points to it from a text box that says 'Select the date one week earlier'. The 'Target / Due Date' field itself also contains '29 Jul 2022' and is highlighted with a red box. At the bottom right are 'Ok' and 'Cancel' buttons.

- iii. The buffer's start date and Target / Due Date are one week before the Tracking Milestone. The buffer is appropriately sized and clearly indicates the project is at a higher level of schedule risk (on the cusp between medium and high (yellow and orange)).



27. Sign Bob out of Playbook and **Discard changes**.

This completes this exercise.