

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.

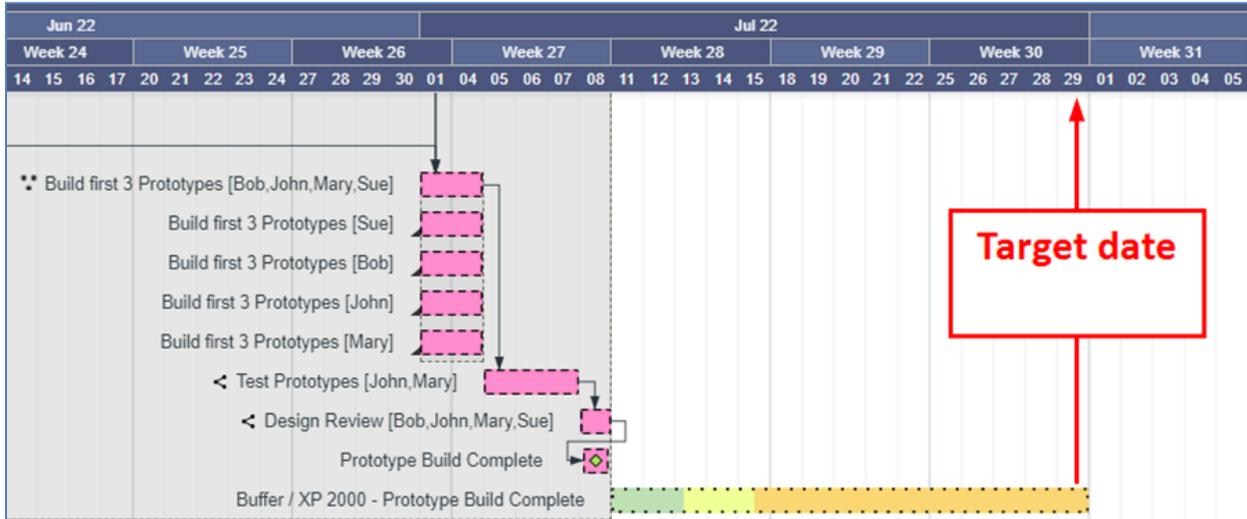
1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Sign in to Playbook as Bob. Username = **Bob**, password = **PlayBook2021**
3. Go to the Game Plan view and activate project **XP 2000**.
4. Right-click on Major Milestone **Prototype Build Complete** (WBS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

The screenshot displays the Playbook software interface for project XP 2000. The top navigation bar includes 'Game Plan', 'Huddle', 'My Playbook', 'Custom View', and 'Dashboard'. Below this, there are controls for '+ Add', 'Project', 'Lifecycles', 'Criticality', 'Reapply', and 'Reset'. The main area shows a Gantt chart with a task list on the left and a timeline from Week 22 to Week 28. The task list includes:

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

The Gantt chart shows tasks as horizontal bars. The 'Prototype Build Complete' milestone is marked with a blue diamond. A context menu is open over this milestone, listing options such as 'Set Target Date / Buffer', 'Make Active', 'Mark Completed', 'Task Properties', 'Add Task', 'Show Linked', 'Delete Task(s)', and 'More'. The 'Set Target Date / Buffer' option is highlighted in red.

- 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).

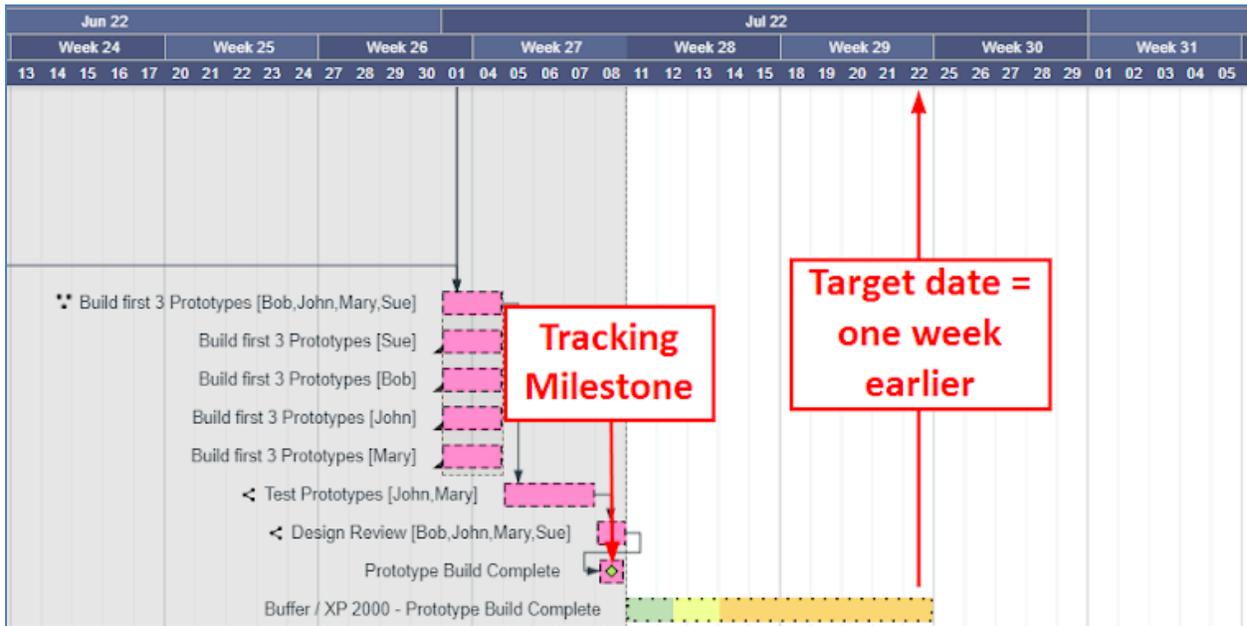


6. In this example, the team had already committed to a due date for the Prototype Build before having developed a detailed project plan. The due date they committed to is one week earlier, so they must decide how best to model the buffer. They have two options.
 - a. Option 1: Shorten the buffer's duration 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**.

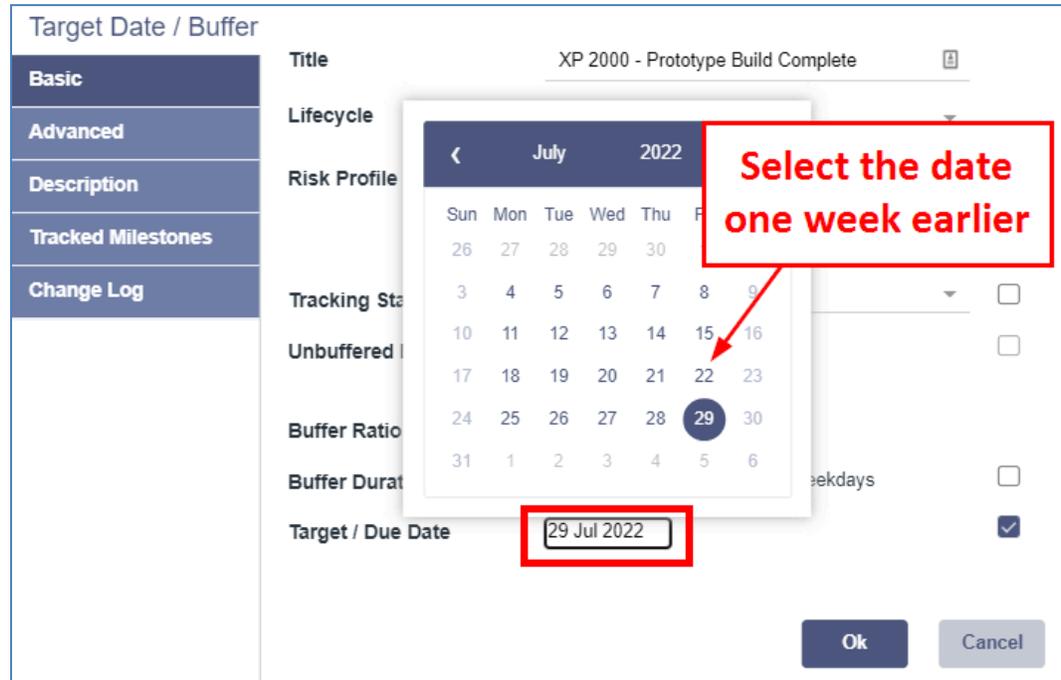
i. Under Actual, set **Buffer Duration = 10 days** instead of 15 days. Click **Ok**.

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 Fixed? <input type="checkbox"/>
	Unbuffered Duration 8.6 weeks Fixed? <input type="checkbox"/>
	Buffer Ratio Ideal: 33 Actual: 23 Initial: 23 %
	Buffer Duration 15 ↓ 10 10 weekdays Fixed? <input checked="" type="checkbox"/>
	Target / Due Date ↓ 22 Jul 2022 Fixed? <input type="checkbox"/>

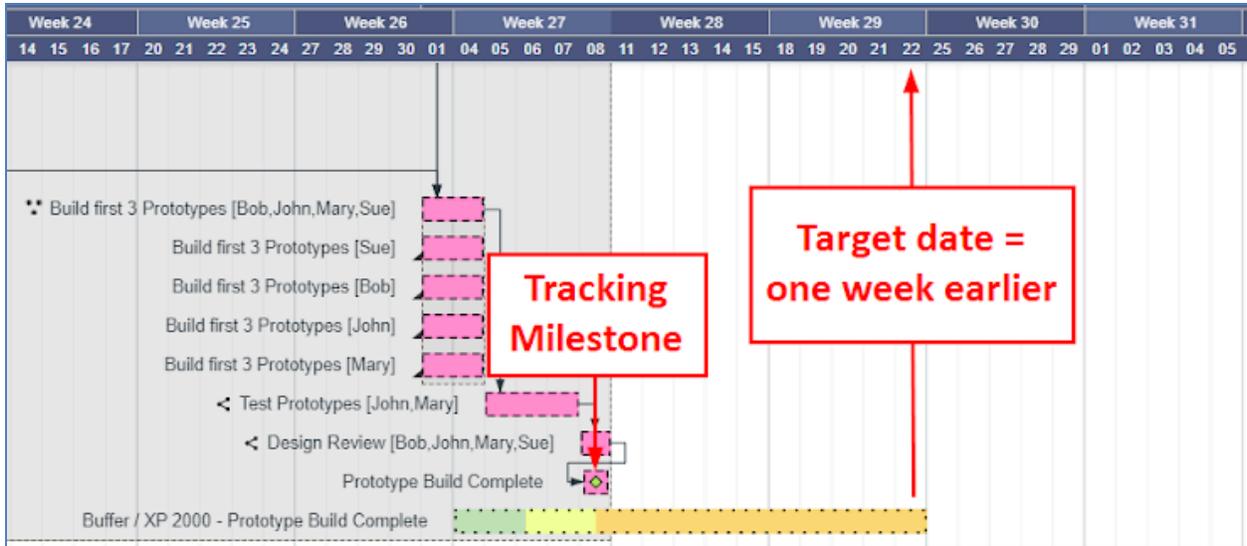
ii. The **Target / Due Date** is now one week earlier.



- 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**.



- 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.