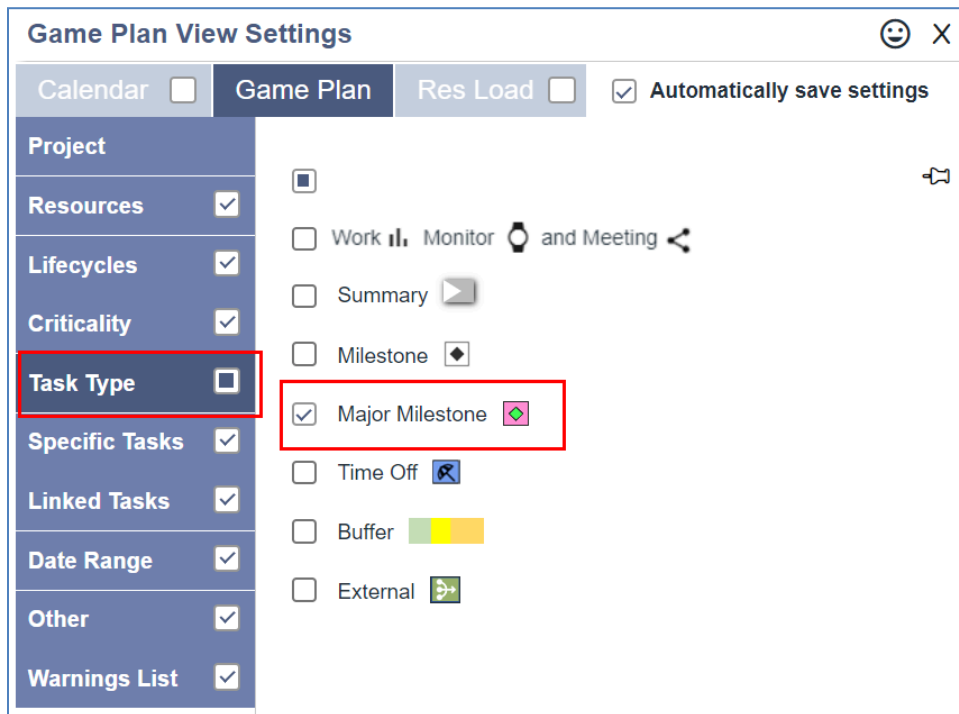


Exercise – Create a Typical Buffer

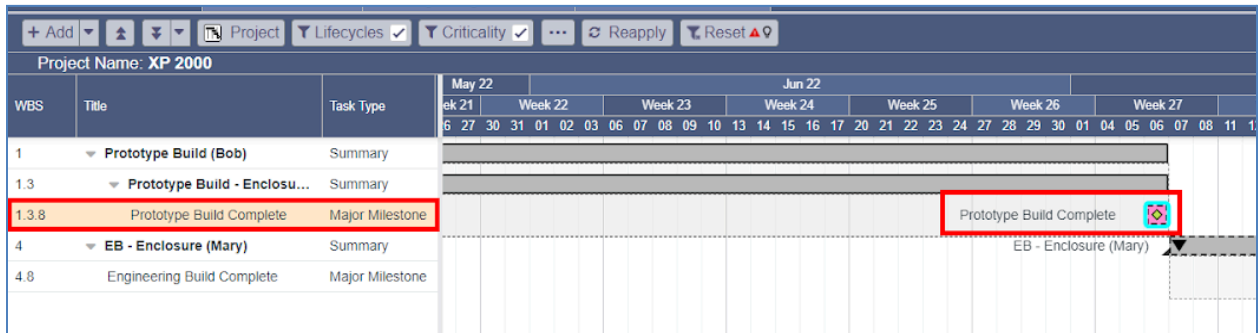
1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Sign in Playbook as Bob. Username = **Bob**, password = **PlayBook2021**
3. Go to the Game Plan view and activate Project **XP 2000**.
4. Before we create a buffer, we need to find the Major Milestone we want to track in the buffer. In the Game Plan view header, click the **Other** filter.



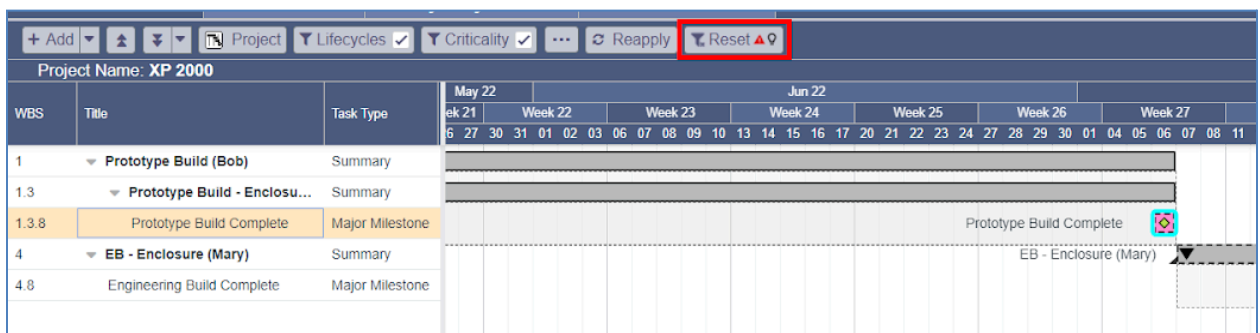
5. In the Game Plan Settings, click Task Type then **deselect everything except for Major Milestones** then click **Ok**.



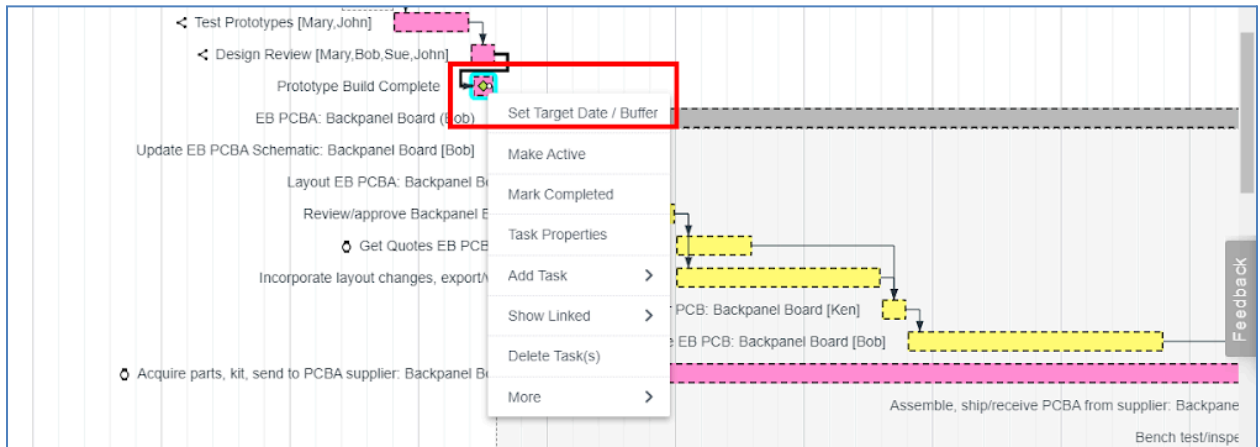
6. In the Task Grid, select the Major Milestone, **Prototype Build Complete** (WBS 1.3.9).



7. In the Game Plan view header, click **Reset** to reset all filters. Note: the selected task remains in view.



8. Right-click on the Major Milestone **Prototype Build Complete** then click **Set Target Date/Buffer**.



9. Note the default title name. Leave it as is to ensure the buffer title is unique in the entire Playbook database. Note: the default format is **Project name – Milestone name**.

Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile Medium
Tracked Milestones	
Tracking Start Date	09 May 2022 Today
Unbuffered Duration	8.6 weeks
Buffer Ratio	33 33 35 %
Buffer Duration	14 15 15 weekdays
Target / Due Date	27 Jul 2022

10. Note the default lifecycle is set to **In planning**. Since we are planning the buffer and the project is not yet active, we will leave it as is. Also, none of the values are fixed (see **Fixed?** column).

Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile Medium
Tracked Milestones	
Tracking Start Date	09 May 2022 Today
Unbuffered Duration	8.6 weeks
Buffer Ratio	33 33 35 %
Buffer Duration	14 15 15 weekdays
Target / Due Date	27 Jul 2022

11. Note the **Tracking Start Date = Today** and the **Unbuffered Duration = 8.6 weeks**.

Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile Medium
Tracked Milestones	
Tracking Start Date	09 May 2022 Today
Unbuffered Duration	8.6 weeks
Buffer Ratio	Ideal Actual Initial 33 33 35 %
Buffer Duration	14 15 15 weekdays
Target / Due Date	27 Jul 2022

12. Note the default **Risk Profile = Medium** and consequently the **Buffer Duration = 15 days** (Buffer Ratio = 33%) and note the **Target / Due Date**.

Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile Medium
Tracked Milestones	
Tracking Start Date	09 May 2022 Today
Unbuffered Duration	8.6 weeks
Buffer Ratio	Ideal Actual Initial 33 33 33 %
Buffer Duration	15 15 14 weekdays
Target / Due Date	27 Jul 2022

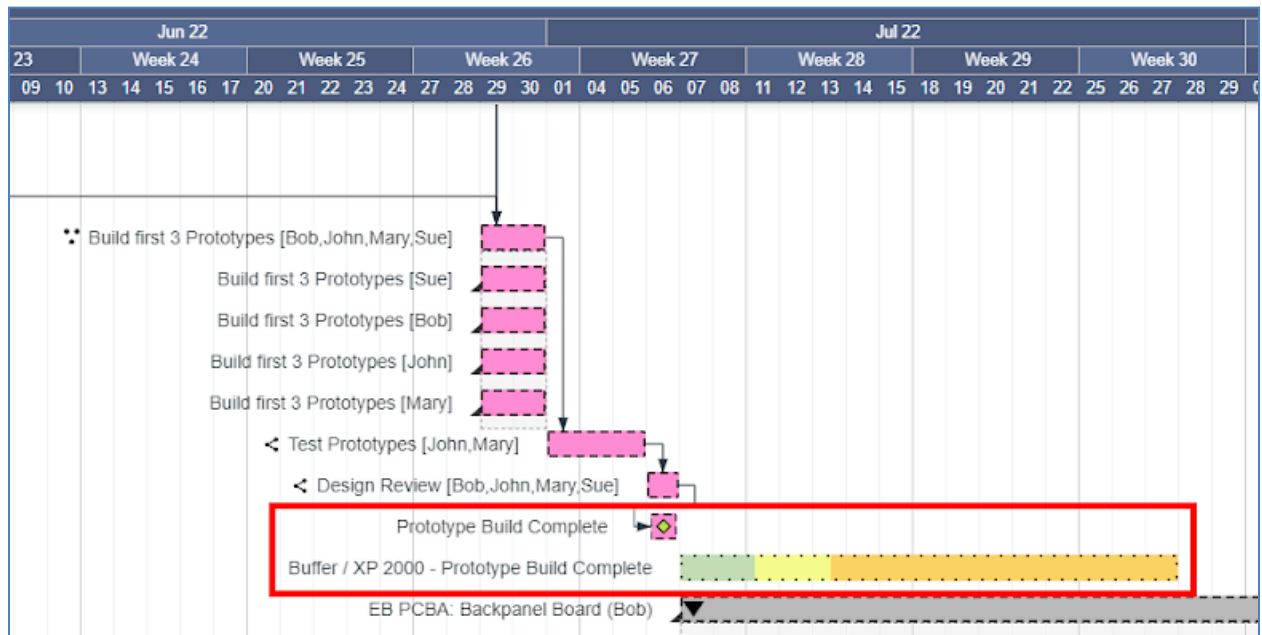
13. Set the **Risk Profile = Low** and note the **Buffer Duration = 9 days** (Buffer Ratio = 20%) and note the updated **Target / Due Date**.

Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile Low
Tracked Milestones	
Tracking Start Date 09 May 2022 Today	
Unbuffered Duration 8.6 weeks	
Buffer Ratio 20 20 20 %	
Buffer Duration 9 9 9 weekdays	
Target / Due Date 19 Jul 2022	

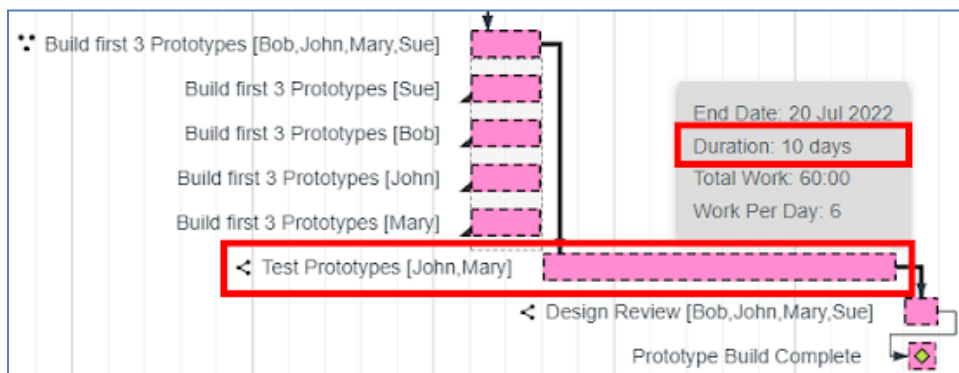
14. Set the **Risk Profile = High** and note the **Buffer Duration = 29 days** (Buffer Ratio = 66%) and note the updated **Target / Due Date**.

Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile High
Tracked Milestones	
Tracking Start Date 09 May 2022 Today	
Unbuffered Duration 8.6 weeks	
Buffer Ratio 66 66 66 %	
Buffer Duration 29 29 28 weekdays	
Target / Due Date 16 Aug 2022	

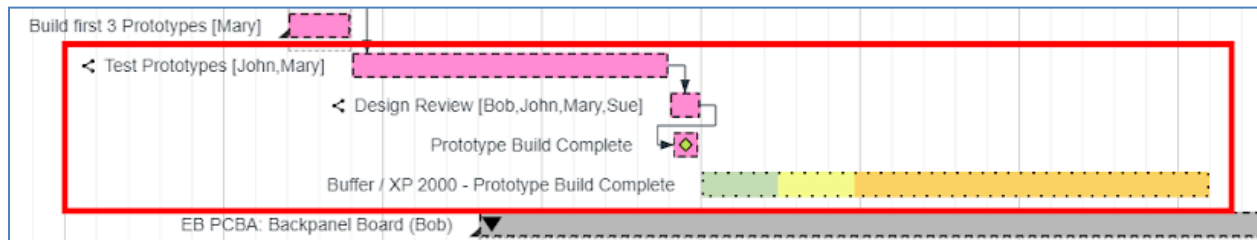
15. Set the **Risk Profile = Medium** since that is typical of most projects then click **Ok**. The buffer is created, has a dotted outline to indicate its **Lifecycle = In planning**, and note the **Target / Due Date**.



16. Change the duration of **Test Prototypes** to **10 days** (drag the right vertical edge).



17. The buffer's start date, duration, and Target / Due Date all changed because the buffer's lifecycle = In planning which means none of the upstream tasks are in work yet, therefore as a result the buffer changes.



18. Now the team is ready to start the work, so it is time to make the buffer's Lifecycle = Active. Right-click on the buffer then click **Buffer Properties**. Note that none of the values are fixed (no checkboxes in the fixed column).

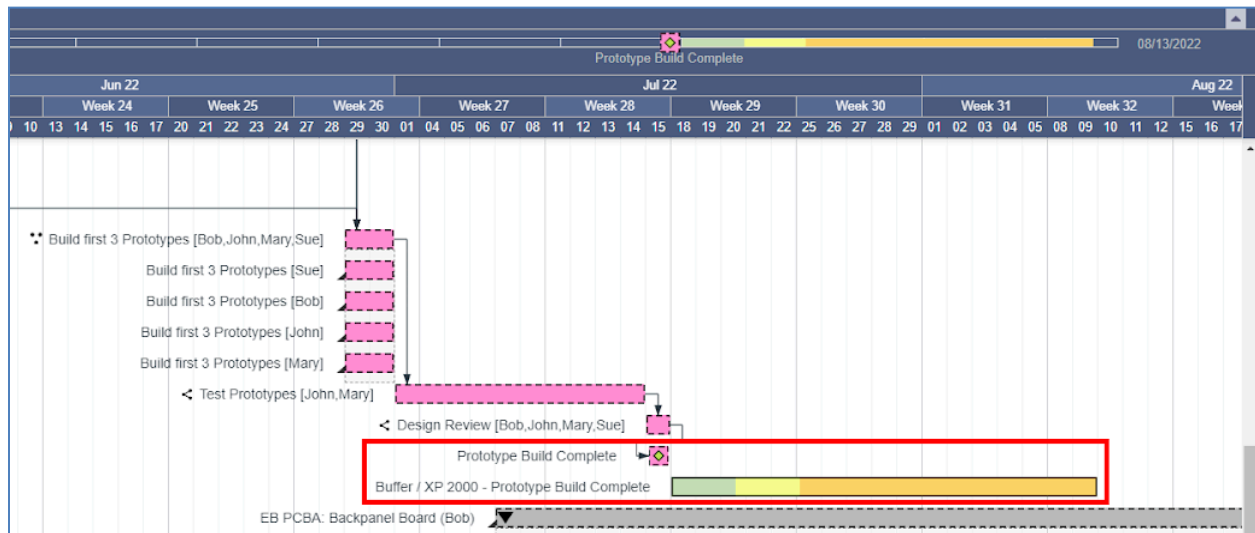
Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle In planning
Description	Risk Profile Medium
Tracked Milestones	
Change Log	
Tracking Start Date	09 May 2022 Today
Unbuffered Duration	10 weeks
Buffer Ratio	33 33 33 %
Buffer Duration	17 17 17 weekdays
Target / Due Date	09 Aug 2022
Fixed? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Target Date is automatic and has updated.	
Ok Cancel	

19. Set **Lifecycle = Active**. Note that all values are now fixed, and the buffer will not change as changes are made to the plan. Instead, we will start monitoring buffer consumption.

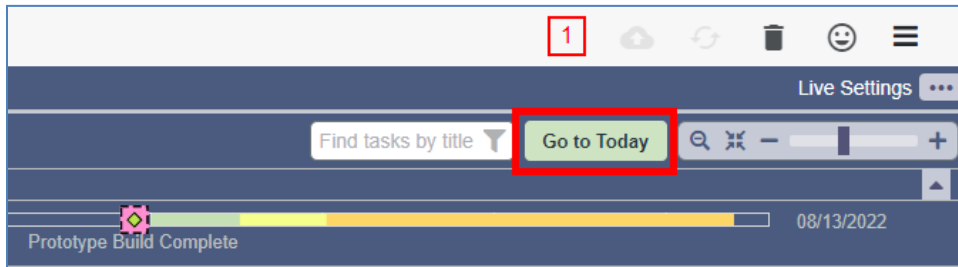
Target Date / Buffer	
Basic	Title XP 2000 - Prototype Build Complete
Advanced	Lifecycle Active
Description	Risk Profile Medium
Tracked Milestones	
Change Log	
	Tracking Start Date 09 May 2022 Specific Date
	Unbuffered Duration 10 weeks
	Buffer Ratio Ideal Actual Initial %
	33 33 33
	Buffer Duration 17 17 17 weekdays
	Target / Due Date 09 Aug 2022

Fixed?
☒
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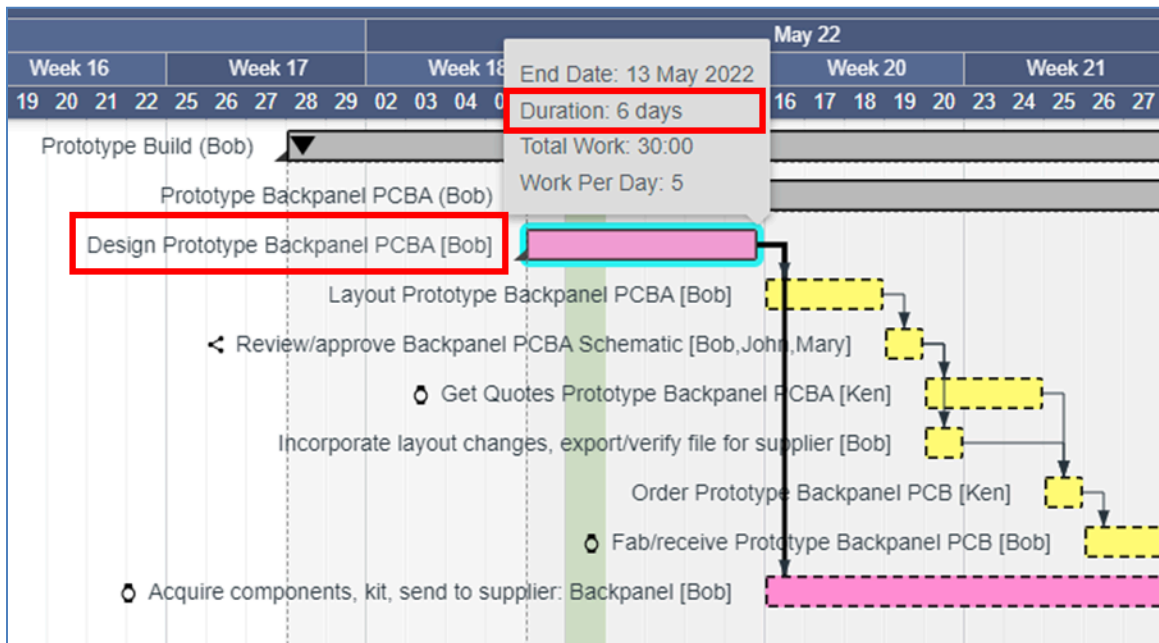
20. Click **Ok**. The buffer's outline is now solid to indicate its **Lifecycle = Active**.



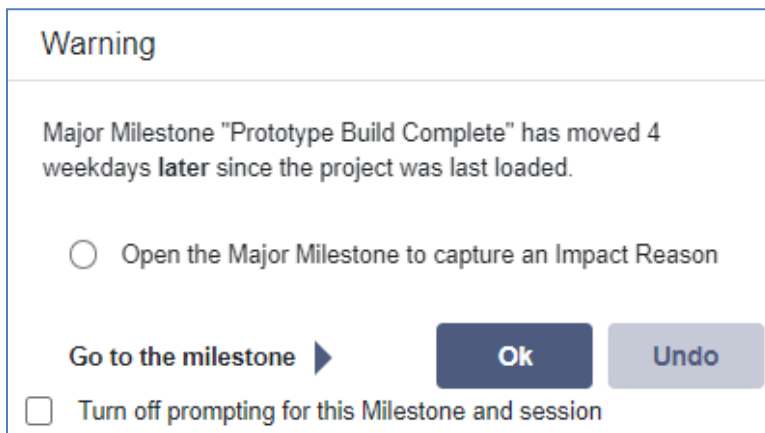
21. Click **Go to Today**, then scroll to the top of the plan.



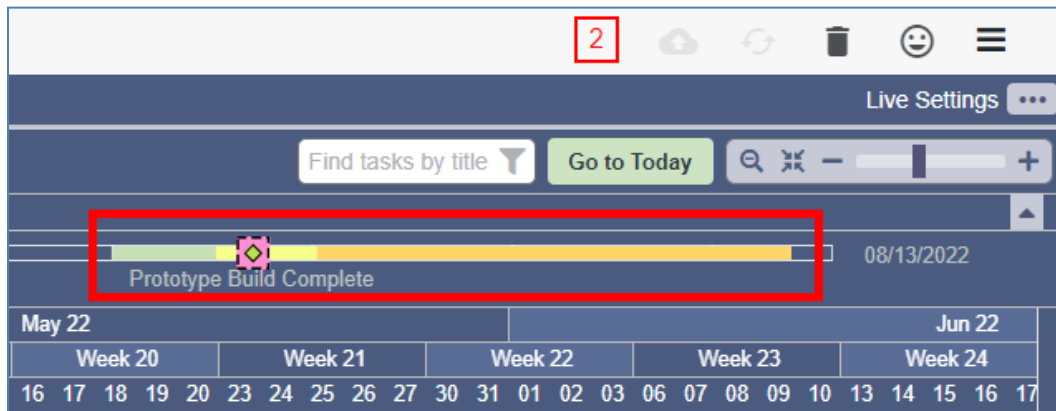
22. Change the duration of **Design Prototype Backpanel PCBA** to **6 days**.



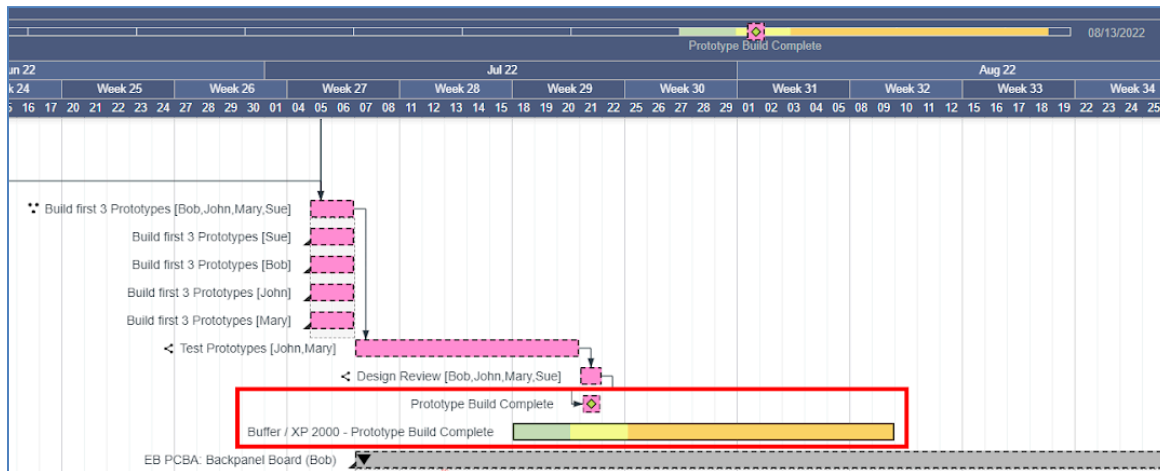
23. A message appears informing you that the change you made caused a major milestone to move 4 days later (which means you used 4 days of buffer). The message gives you the option to capture an Impact Reason, go to the milestone in the plan, or undo the change. To accept the change as-is, click **Ok**.



24. In the Game Plan view header click on the buffer in the Buffer Status Pane. This handy feature always gives you visibility to the buffers and their milestones. And you can also use it to navigate to the buffer as we did here.



25. Note the Major Milestone has moved relative to the buffer, and it is above the yellow zone indicating that the team is starting to consume the buffer a little too fast at this phase of the project. It is time for the team to start exploring ways to save a little time on any upcoming critical path tasks in the next few weeks.



26. Sign Bob out of Playbook and **Discard**.

This completes this exercise.