

Exercise – Let’s Get Started

Please review the following instructions to perform the exercises.

- The exercises have multiple pages of steps and use a live Playbook training site.
- You can navigate from page to page within Playbook Academy or you can download a PDF of the exercise – see the image below.
- Two screens are recommended but not required.
- The training site is read-only; therefore, your changes cannot be saved.
- Once you have completed all steps in an exercise, please click **Complete & Continue** to receive credit.

The screenshot displays the Playbook Academy interface. On the left is a navigation sidebar with the Playbook logo and a list of lessons. The main content area shows an exercise titled "Exercise - Let's Get Started" with two steps. A login form is visible, and a "COMPLETE & CONTINUE" button is at the bottom. Red callout boxes provide instructions: "Tools to navigate to the next page" points to the browser's page navigation controls; "Download a PDF of the exercise" points to the PDF icon in the top right; and "Click here only after you have completed all steps on all pages" points to the "COMPLETE & CONTINUE" button.

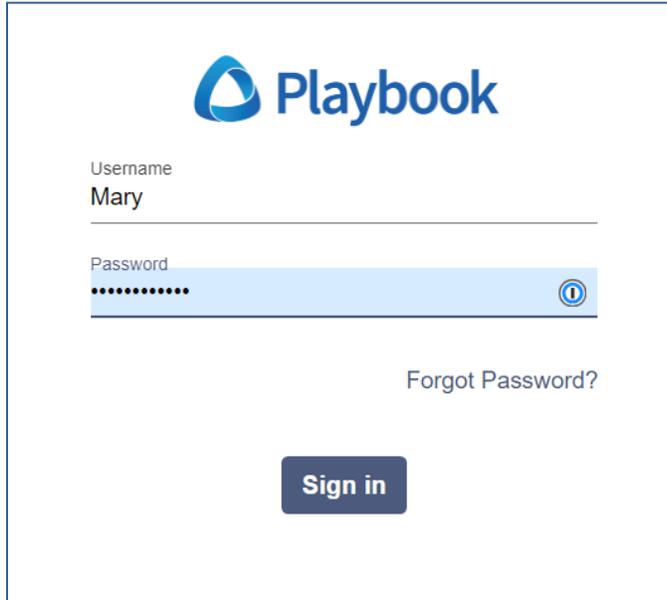
Tools to navigate to the next page

Download a PDF of the exercise

Click here only after you have completed all steps on all pages

COMPLETE & CONTINUE →

1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Sign in as Mary...
 - Username =**Mary**
 - Password =**PlayBook2021**



Playbook

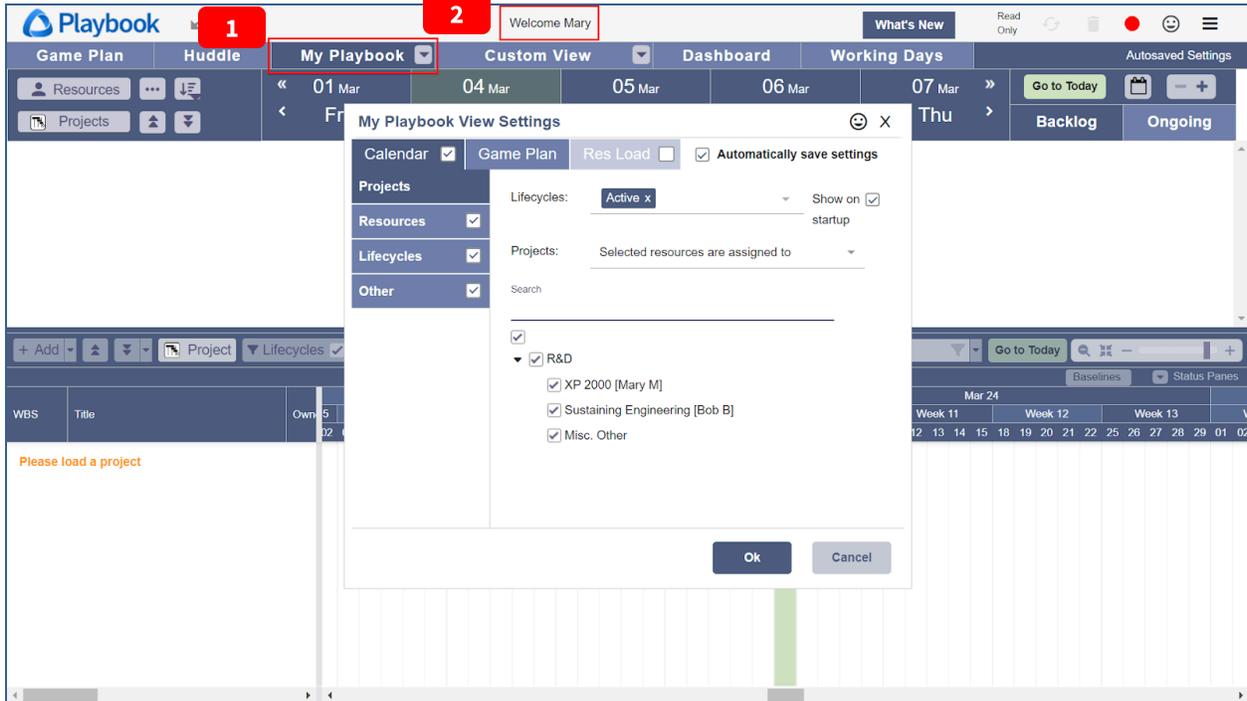
Username
Mary

Password
..... ⓘ

[Forgot Password?](#)

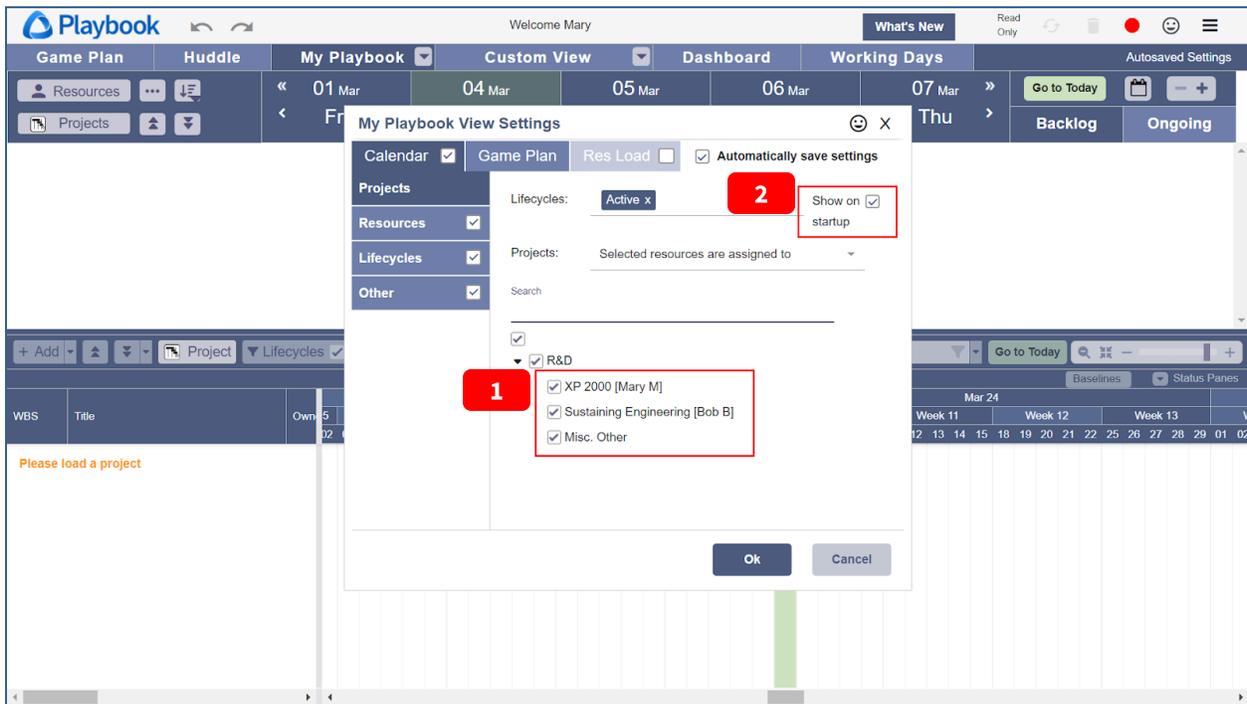
Sign in

3. You are now in the **My Playbook** view **1** logged in as **Mary**.



4. Projects **XP 2000**, **Sustaining Engineering**, and **Misc. Other** are selected to load **1**.

5. Ensure **Show on startup** is selected **2** to automatically display this window each time Mary signs in Playbook then click **Ok**.

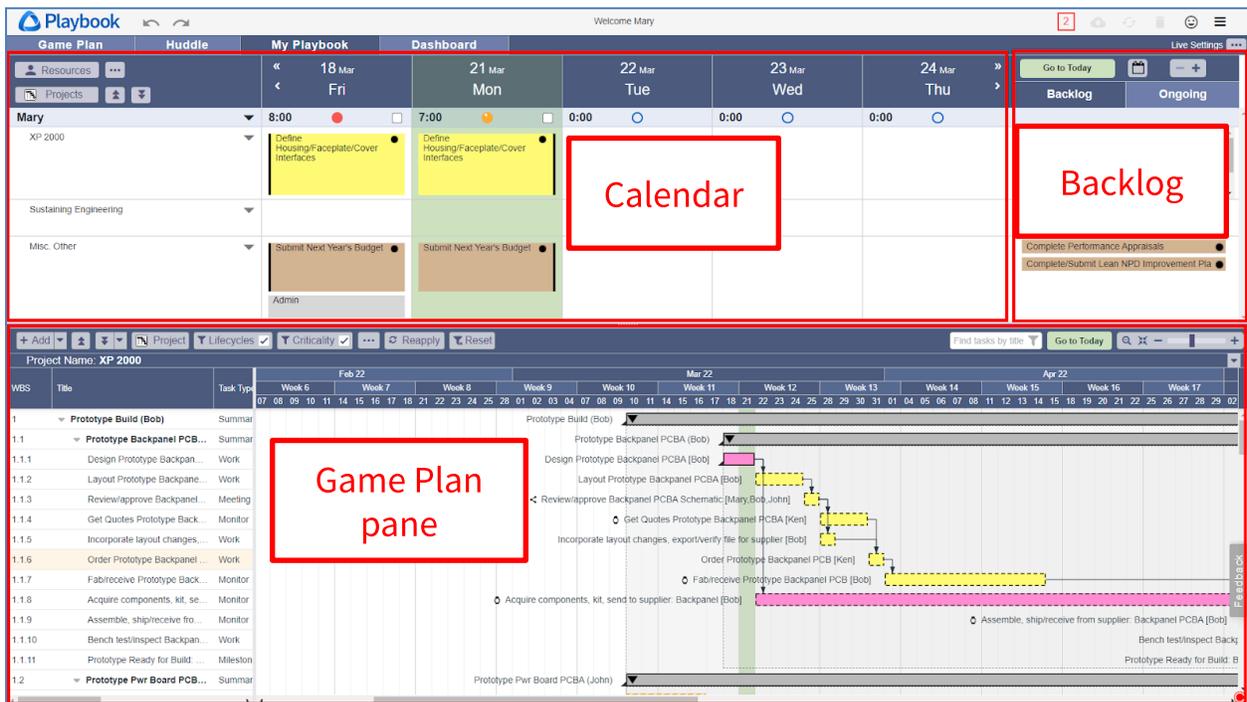


6. There are six tabs:



- **Game Plan** - is where Team Members do most of their planning. It is an intuitive, flexible, drag and drop planning view everyone can easily understand and change.
- **Huddle** - is used to facilitate the team’s daily “standup” meetings. The purpose of the standup meeting is to identify blockages, synchronize handoffs of work, and to ensure each person’s priorities are clear and correct.
- **My Playbook** - is where each Team Member manages their tasks on all their projects.
- **Custom View** - is where custom views can be created, managed, and accessed.
- **Dashboard** - is used to access the Key Performance Indicator reports, e.g., Resource Loading, Project Status and Schedule Risk, Team Member Performance, etc.
- **Working Days** - is used to manage non-working time using calendars.

7. In the My Playbook tab, there are three main areas: Calendar, Backlog, and the Game Plan pane. Tasks that are actively in-work are shown in the Calendar and tasks while tasks that have not been started are shown in the Backlog. The Game Plan pane allows you to see the impact to the timeline as changes are made to tasks in the Calendar as well as the links between tasks.



- The projects are listed below Mary's name in the first column. Each row shows a single project's tasks, active which are on one or more calendar days and those not yet started which are in the backlog.

Each row is a project

Mary's active tasks (in-work) on project XP2000

Mary's backlog tasks (not yet in work) on project XP2000

- The Game Plan pane can be resized by dragging the **horizontal, blue bar** up and down.

Drag to resize the Game Plan pane

10. To switch to the Game Plan view, click the **Game Plan** tab in the upper-left corner.

The screenshot shows the Playbook software interface. At the top, there are tabs for 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'. The 'Game Plan' tab is selected. Below the tabs, there's a calendar view showing dates from 18 Mar to 24 Mar. The main area displays a Gantt chart for the project 'XP 2000'. The chart shows tasks like 'Define Housing/Faceplate/Cover Interfaces' and 'Submit Next Year's Budget' with their respective durations and start/end times. A sidebar on the left shows a task list for 'Prototype Build (Bob)' with sub-tasks like 'Design Prototype Backpanel PCB', 'Layout Prototype Backpanel PCB', etc.

11. To show the XP 2000 project plan, click **Project**, **XP 2000**, then **Ok**.

The screenshot shows the Playbook software interface with the 'Game Plan Settings' dialog box open. The dialog box has tabs for 'Calendar' and 'Game Plan'. The 'Project' tab is selected, and the 'XP 2000' project is highlighted in the 'R&D (3)' section. The background shows the Gantt chart for the XP 2000 project. The dialog box also has sections for 'Resources', 'Lifecycles', 'Criticality', 'Task Type', 'Summary', 'Linked Tasks', and 'Other'.

12. The **Task Grid** on the left can be resized or entirely collapsed.

Task Grid

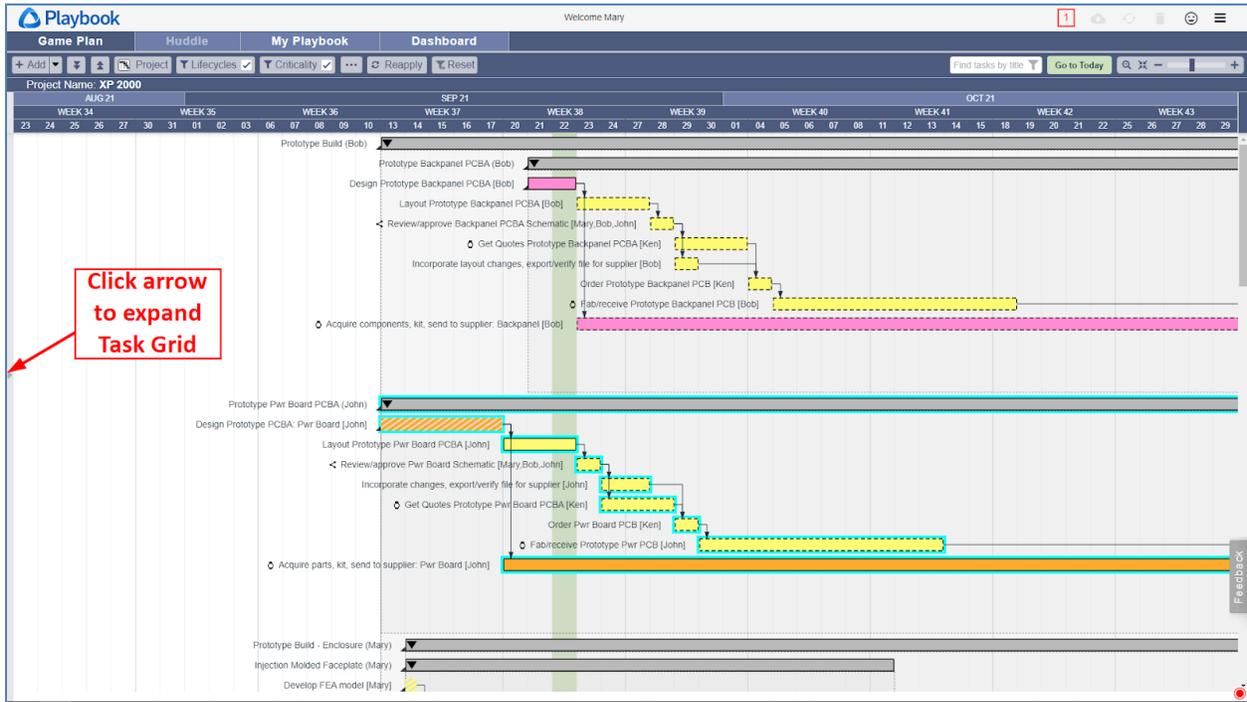
WBS	TASK TITLE	START
1	Prototype Build (Bob)	Sep 1
1.1	Prototype Backpanel PCB...	Sep 2
1.1.1	Design Prototype Backpan...	Sep 2
1.1.2	Layout Prototype Backpane...	Sep 2
1.1.3	Review/approve Backpanel...	Sep 2
1.1.4	Get Quotes Prototype Back...	Sep 2
1.1.5	Incorporate layout changes...	Sep 2
1.1.6	Order Prototype Backpanel ...	Oct 4
1.1.7	Fab/receive Prototype Back...	Oct 5
1.1.8	Acquire components, kit, se...	Sep 2
1.1.9	Assemble, ship/receive fro...	Nov 4
1.1.10	Bench test/inspect Backpan...	Nov 1
1.1.11	Prototype Ready for Build...	Nov 1
1.2	Prototype Pwr Board PCB...	Sep 1
1.2.1	Design Prototype PCB: P...	Sep 1
1.2.2	Layout Prototype Pwr Boar...	Sep 2
1.2.3	Review/approve Pwr Board...	Sep 2
1.2.4	Incorporate changes, expor...	Sep 2
1.2.5	Get Quotes Prototype Pwr ...	Sep 2
1.2.6	Order Pwr Board PCB	Sep 2
1.2.7	Fab/receive Prototype Pwr ...	Sep 2
1.2.8	Acquire parts, kit, send to s...	Sep 2
1.2.9	Assemble, ship/receive fro...	Nov 1
1.2.10	Bench test/inspect: Pwr Bo...	Nov 8
1.2.11	Prototype Ready for Build...	Nov 8
1.3	Prototype Build - Enclosu...	Sep 1
1.3.1	Injection Molded Facepla...	Sep 1
1.3.1.1	Develop FEA model	Sep 1

Task Grid Expanded

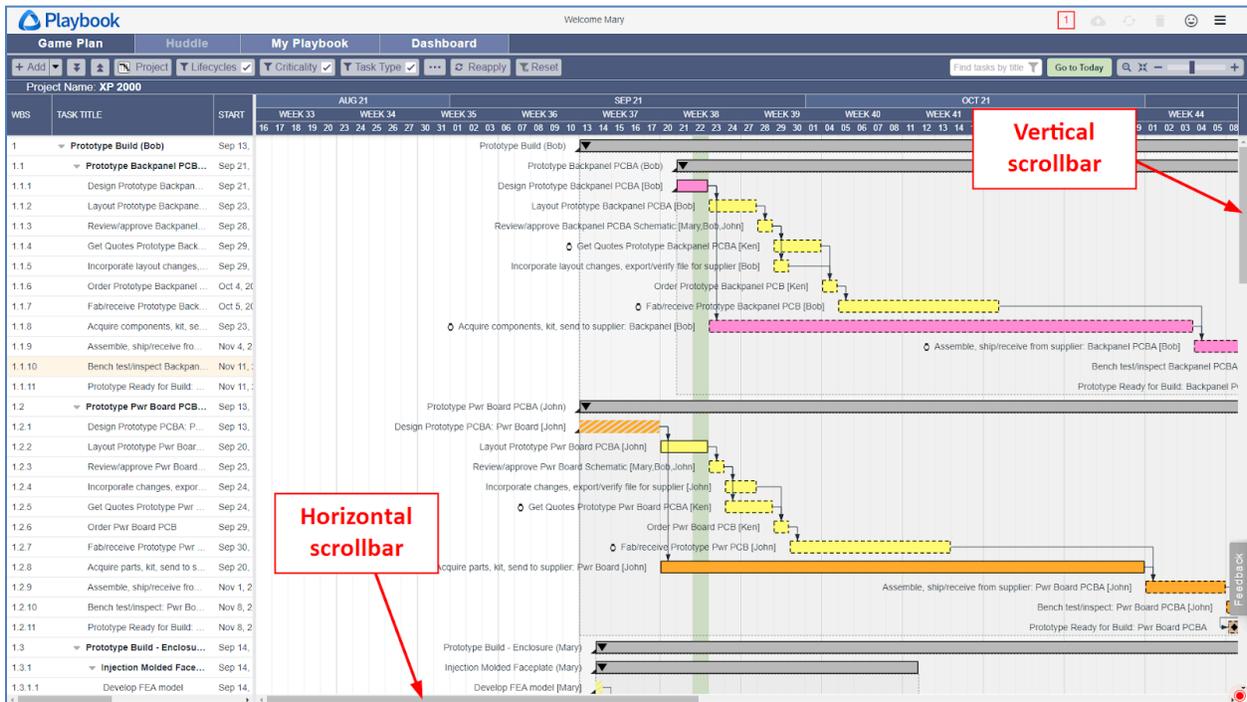
Task Grid Expanded

WBS	TASK TITLE	START	END	DURATION	WORK TOTAL	WORK PER DAY	ASSIGNED RESOURCES
1	Prototype Build (Bob)	Sep 13, 2021	Nov 19, 2021	50	0.00	0.00	
1.1	Prototype Backpanel PCB...	Sep 21, 2021	Nov 11, 2021	38	1.00	0.00	
1.1.1	Design Prototype Backpan...	Sep 21, 2021	Sep 22, 2021	2	10.00	5.00	Bob
1.1.2	Layout Prototype Backpane...	Sep 23, 2021	Sep 27, 2021	3	18.00	6.00	Bob
1.1.3	Review/approve Backpanel...	Sep 28, 2021	Sep 28, 2021	1	0.30	0.30	Bob, John, Mary
1.1.4	Get Quotes Prototype Back...	Sep 29, 2021	Oct 1, 2021	3	0.15	0.00	Ken
1.1.5	Incorporate layout changes...	Sep 29, 2021	Sep 29, 2021	1	6.00	6.00	Bob
1.1.6	Order Prototype Backpanel ...	Oct 4, 2021	Oct 4, 2021	1	1.00	1.00	Ken
1.1.7	Fab/receive Prototype Back...	Oct 5, 2021	Oct 18, 2021	10	1.00	0.00	Bob
1.1.8	Acquire components, kit, se...	Sep 23, 2021	Nov 3, 2021	30	0.45	0.00	Bob
1.1.9	Assemble, ship/receive fro...	Nov 4, 2021	Nov 10, 2021	5	1.00	0.15	Bob
1.1.10	Bench test/inspect Backpan...	Nov 11, 2021	Nov 11, 2021	1	2.00	2.00	Bob
1.1.11	Prototype Ready for Build...	Nov 11, 2021	Nov 11, 2021	0	0.00	0.00	
1.2	Prototype Pwr Board PCB...	Sep 13, 2021	Nov 8, 2021	41	1.00	0.00	
1.2.1	Design Prototype PCB: P...	Sep 13, 2021	Sep 17, 2021	5	30.00	6.00	John
1.2.2	Layout Prototype Pwr Boar...	Sep 20, 2021	Sep 22, 2021	3	6.00	2.00	John
1.2.3	Review/approve Pwr Board...	Sep 23, 2021	Sep 23, 2021	1	2.00	2.00	Bob, John, Mary
1.2.4	Incorporate changes, expor...	Sep 24, 2021	Sep 27, 2021	2	12.00	6.00	John
1.2.5	Get Quotes Prototype Pwr ...	Sep 24, 2021	Sep 26, 2021	3	0.15	0.00	Ken
1.2.6	Order Pwr Board PCB	Sep 29, 2021	Sep 29, 2021	1	1.00	1.00	Ken
1.2.7	Fab/receive Prototype Pwr ...	Sep 30, 2021	Oct 13, 2021	10	1.00	0.00	John
1.2.8	Acquire parts, kit, send to s...	Sep 20, 2021	Oct 29, 2021	30	0.15	0.00	John
1.2.9	Assemble, ship/receive fro...	Nov 1, 2021	Nov 5, 2021	5	1.00	0.15	John
1.2.10	Bench test/inspect: Pwr Bo...	Nov 8, 2021	Nov 8, 2021	1	2.00	2.00	John
1.2.11	Prototype Ready for Build...	Nov 8, 2021	Nov 8, 2021	0	0.00	0.00	
1.3	Prototype Build - Enclosu...	Sep 14, 2021	Nov 19, 2021	49	1.00	0.00	
1.3.1	Injection Molded Facepla...	Sep 14, 2021	Oct 11, 2021	20	1.00	0.00	
1.3.1.1	Develop FEA model	Sep 14, 2021	Sep 14, 2021	0.5	3.00	6.00	Mary

Task Grid Collapsed



13. Vertical scrolling is performed using the mouse wheel or by dragging the vertical scrollbar. Horizontal scrolling is performed using the horizontal scrollbar.



14. Go to Today reset the plan horizontally such that Today (green column) is in the center.

The screenshot shows the Playbook Game Plan interface for project XP 2000. The top navigation bar includes 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'. Below this is a search bar with 'Find tasks by title' and a 'Go to Today' button. The main area is a Gantt chart with columns for weeks from AUG 21 to WEEK 44. A green vertical column labeled 'Today' is positioned at the center of the chart. A red callout box with the text 'Move the "Today" column (green) to the center' has an arrow pointing to this green column. The Gantt chart displays various tasks such as 'Prototype Build (Bob)', 'Prototype Backpanel PCB...', and 'Prototype Pwr Board PCB...' with their respective start and end dates and dependencies.

15. The Game Plan can be zoomed in/out via a scrollbar or by clicking the plus/minus icons.

The screenshot shows the Playbook Game Plan interface for project XP 2000, zoomed in. The top navigation bar and search bar are visible. The Gantt chart is zoomed in, showing more detail of the tasks. In the top right corner, there are zoom controls: a scrollbar and plus/minus icons. A red callout box with the text 'Zoom in/out' has an arrow pointing to these controls. The Gantt chart displays various tasks such as 'Prototype Build (Bob)', 'Prototype Backpanel PCB...', and 'Prototype Pwr Board PCB...' with their respective start and end dates and dependencies.

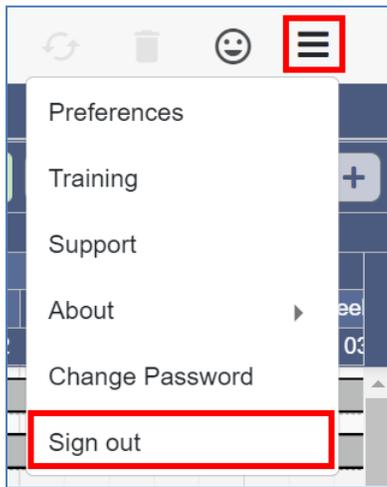
16. The Game Plan can be zoomed to fit the screen and set back to its default zoom level.

The screenshot shows the Playbook Game Plan interface for project XP 2000. The interface is divided into several sections: a top navigation bar with tabs for 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'; a search bar with 'Find tasks by title' and 'Go to Today'; and a main Gantt chart area. The Gantt chart displays a project schedule from August 21 to October 8, with tasks organized into hierarchical levels. A red box highlights the zoom controls in the top right corner, with arrows pointing to the 'Reset to default zoom level' and 'Zoom to fit the plan on the screen' buttons.

17. Changes on the training site cannot be saved but you can reset all your changes by clicking **Discard**. This discards all changes since the last save.

The screenshot shows the Playbook Game Plan interface for project XP 2000, similar to the previous image. The interface is divided into several sections: a top navigation bar with tabs for 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'; a search bar with 'Find tasks by title' and 'Go to Today'; and a main Gantt chart area. A red box highlights the 'Discard all changes' button in the top right corner.

18. Sign Mary out of Playbook.



This completes this exercise.