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.

	Exercise - Let's Get St	irted	
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< Go to Dashboard Playbook for Basic Users - 3.1	7	 Open a Chrome or Edge browser and enter the following: https://training.playbod 	
0% complete	s to navigate to	2. Log in Playbook as Mary	Download a PDF of
Search by lesson title th	e next page	User Name = Mary Password = PlayBook2021	
Getting Started 0/7 ^			
Training Requirements PREREQUISITE		C Playbook	
(10:06) The Goal		User Name Mary	
(19:49) How does Playbook prevent unnecessary delays? PREREQUISITE		Password	
O (Optional) Learning Assessment - The Goal		Click here only after Forgot Password?	
(7:40) Let's Get Started PREREQUISITE		all steps on all pages	
Exercise - Let's Get Started PREREQUISITE		Sign in	
 (Optional) Learning Assessment - Playbook Interface 			
◯ Fundamentals of Playbook 0/17 ∨		COMPLETE & CONTINUE ->	
○ Fast Feedback 0/15 ∨	*		

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

licemame	
Mary	
Password	
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	Forgot Password

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

🔼 Playbook 🛛 🗠 📿		Welcome Mar	у	What's	s New	Read Only	● ☺ ≡
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6. There are six tabs:

A Playbook			Welcome Mary What's New										
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Resources ••	• 🖳	« 20 Dec	21 Dec	22 Dec	25 Dec	c 26 Dec	»						
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- **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.

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1.1.3	Review/approve Backpanel	Meeting			< Review/a	pprove Backpanel PCBA Sche	matic [Mary,Bol	o,John]					
1.1.4	Get Quotes Prototype Back	Monitor	l pa	ne		Get Quotes Prototy	pe Backpanel F	CBA [Ken]	b				
1.1.5	Incorporate layout changes,	Work	٢		Incor	orate layout changes, export/	verify file for su	pplier (Bob)					
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1.1.10	Bench test/inspect Backpan	Work										E	Bench test/inspect Back;
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1.2	 Prototype Pwr Board PCB 	Summar		Prototype	e Pwr Board PCB	A (John)							
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8. 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.



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

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

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





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

Task Grid Expanded

	Playbook						Welcome Mary	1 💩 🗇 📋 😂 🚍
G	ame Plan Huddle	Mj	y Playbook	Das	hboard			
		Task G	rid Expa	anded				Find tasks by title 🍸 Go to Today 🔍 🗶 🗕 🔶 🕂
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1	 Prototype Build (Bob) 	Sep 13, 2021	Nov 19, 2021	50	0:00	0:00		Protótype Build (Bob)
1.1	Prototype Backpanel PCB	Sep 21, 2021	Nov 11, 2021	38	1:00	0:00		Prototype Backpanel PCBA (Bob)
1.1.1	Design Prototype Backpan	Sep 21, 2021	Sep 22, 2021	2	10:00	5:00	Bob	Design Prototype Backpanel PCBA (Bob)
1.1.2	Layout Prototype Backpane	Sep 23, 2021	Sep 27, 2021	3	18:00	6:00	Bob	Layout Prototype Backpanel PCBA (Bob)
1.1.3	Review/approve Backpanel	Sep 28, 2021	Sep 28, 2021	1	0:30	0:30	Bob John Mary	< Review/approve Backpanel PCBA Schematic (Mary,Bob,John)
1.1.4	Get Quotes Prototype Back	Sep 29, 2021	Oct 1, 2021	3	0:15	0:00	Ken	Get Quotes Prototype Backpanel PCBA [Ken]
1.1.5	Incorporate layout changes,	Sep 29, 2021	Sep 29, 2021	1	6:00	6:00	Bob	Incorporate layout changes, export/verify file for supplier [Bob]
1.1.6	Order Prototype Backpanel	Oct 4, 2021	Oct 4, 2021	1	1:00	1:00	Ken	Order Prototype Backpanet PCB [Ken]
1.1.7	Fab/receive Prototype Back	Oct 5, 2021	Oct 18, 2021	10	1:00	0:00	Bob	Fab/receive Prototype Backpanel PCB [Bob]
1.1.8	Acquire components, kit, se	Sep 23, 2021	Nov 3, 2021	30	0:45	0:00	Bob	Acquire components, kit, send to supplier: Backpanel (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		Prototype Pwr Board PCBA (John)
1.2.1	Design Prototype PCBA: P	Sep 13, 2021	Sep 17, 2021	5	30:00	6:00	John	Design Prototype PCBA: Pwr Board (John)
1.2.2	Layout Prototype Pwr Boar	Sep 20, 2021	Sep 22, 2021	3	6:00	2:00	John	Layout Prototype Pwr Board PCBA [John]
1.2.3	Review/approve Pwr Board	Sep 23, 2021	Sep 23, 2021	1	2:00	2:00	Bob John Mary	< Review/approve Pwr Board Schematic (Mary,Bob,John)
1.2.4	Incorporate changes, expor	Sep 24, 2021	Sep 27, 2021	2	12:00	6:00	John	Incorporate changes, export/verify file for supplier [John]
1.2.5	Get Quotes Prototype Pwr	Sep 24, 2021	Sep 28, 2021	3	0:15	0:00	Ken	Get Quotes Prototype Pwr Board PCBA [Ken]
1.2.6	Order Pwr Board PCB	Sep 29, 2021	Sep 29, 2021	1	1:00	1:00	Ken	Order Pwr Board PCB [Ken]
1.2.7	Fab/receive Prototype Pwr	Sep 30, 2021	Oct 13, 2021	10	1:00	0:00	John	Fab/receive Prototype Pwr PCB [John]
1.2.8	Acquire parts, kit, send to s	Sep 20, 2021	Oct 29, 2021	30	0:15	0:00	John	Acquire parts, kit, send to supplier: Pwr Board [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	Line and the second
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		Prototype Build - Enclosure (Mary)
1.3.1	Injection Molded Face	Sep 14, 2021	Oct 11, 2021	20	1:00	0:00		Injection Molded Faceplate (Mary)
1.3.1.1	Develop FEA model	Sep 14, 2021	Sep 14, 2021	0.5	3:00	6:00	Mary	Develop FEA model (Mary)

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F	rototype Build - Enclosure (Ma	ary)						
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	Develop FEA model [Ma	\$(Y) 🚬 🗌						Í

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

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Proj	ject Name: XP 2000									
WBS	TASK TITLE	START	AUG 21 WEEK 33 WEEK 34	WEEK 35 WEEK 36	SEP 21 WEEK 37	WEEK 38 V	MEEK 39 WEE	OC1 K 40 WEEK 41	21	WEEK 44
			16 17 18 19 20 23 24 25 26 27 30	0 31 01 02 03 06 07 08 09 10	13 14 15 16 17 20 2	1 22 23 24 27 28	3 29 30 01 04 05 06	5 07 08 11 12 13 14	Vertical	9 01 02 03 04 05 08
1	 Prototype Build (Bob) 	Sep 13,		Prototype Build (Bob)	▼					^
1.1	Prototype Backpanel PCB	Sep 21,		Prototype Bac	kpanel PCBA (Bob)	/			scrollbar	
1.1.1	Design Prototype Backpan	Sep 21,		Design Prototype Bac	kpanel PCBA [Bob]	_ _		L		
1.1.2	Layout Prototype Backpane	Sep 23,		Layout Proto	type Backpanel PCBA [Bo	00]				
1.1.3	Review/approve Backpanel	Sep 28,		Review/approve Back	panel PCBA Schematic [M	Mary,Bob,John] [<mark>.</mark>			
1.1.4	Get Quotes Prototype Back	Sep 29,		0 G	et Quotes Prototype Back	kpanel PCBA [Ken]	 h			
1.1.5	Incorporate layout changes,	Sep 29,		Incorporate layout	changes, export/verify file	le for supplier [Bob]				
1.1.6	Order Prototype Backpanel	Oct 4, 20			Order P	Prototype Backpanel P	PCB [Ken]			
1.1.7	Fab/receive Prototype Back	Oct 5, 20			Fab/receit	ive Prototype Backpa	nel PCB (Bob)			
1.1.8	Acquire components, kit, se	Sep 23,		Acquire components, kit, send	to supplier: Backpanel [Bo	ob]				
1.1.9	Assemble, ship/receive fro	Nov 4, 2						 Assemble, 	ship/receive from supplier: Backpa	nel PCBA [Bob]
1.1.10	Bench test/inspect Backpan	Nov 11, :							Bench	test/inspect Backpanel PCBA
1.1.11	Prototype Ready for Build:	Nov 11, :							Prototype	Ready for Build: Backpanel P
1.2	Prototype Pwr Board PCB	Sep 13,		Prototype Pwr Board PCBA (John)	▼					
1.2.1	Design Prototype PCBA: P	Sep 13,	Design F	Prototype PCBA: Pwr Board [John] 🤰						
1.2.2	Layout Prototype Pwr Boar	Sep 20,		Layout Prototype Pwr Boa	rd PCBA [John]	_ ,				
1.2.3	Review/approve Pwr Board	Sep 23,		Review/approve Pwr Board	Schematic [Mary,Bob,Jof	hn] 🛄				
1.2.4	Incorporate changes, expor	Sep 24,		Incorporate changes, ex	port/verify file for supplier	[John]				
1.2.5	Get Quotes Prototype Pwr	Sep 24,	Horizontal	Get Quotes P	rototype Pwr Board PCB/	A [Ken]	H			
1.2.6	Order Pwr Board PCB	Sep 29,	Tionzontai		Order Pw	r Board PCB [Ken]	÷,			
1.2.7	Fab/receive Prototype Pwr	Sep 30,	scrollbar		Fab/receive Pro	totype Pwr PCB [Joh	n)			
1.2.8	Acquire parts, kit, send to s	Sep 20,		cquire parts, kit, send to supplier: P	wr Board [John]					
1.2.9	Assemble, ship/receive fro	Nov 1, 2						Assemble, ship/receive	from supplier: Pwr Board PCBA [Jo	hn]
1.2.10	Bench test/inspect: Pwr Bo	Nov 8, 2							Bench test/inspect:	Pwr Board PCBA [John]
1.2.11	Prototype Ready for Build:	Nov 8, 2							Prototype Ready for B	iulid: Pwr Board PCBA
1.3	Prototype Build - Enclosu	Sep 14,		Prototype Build - Enclosure (Mary)	V					
1.3.1	Injection Molded Face	Sep 14,	Λ.	Injection Molded Faceplate (Mary)	V					
1.3.1.1	Develop FEA model	Sep 14,		Develop FEA model [Mary]	2-1					

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			16 17 18 19 20 23 24 25	26 27 30 31 01 02 03	06 07 08 09 10 1	3 14 15 16 17 2	20 21 22 23 24 27	28 29 30 01 04	05 06 07 08 11	12 .5 14 15 18	19 20 21 2	25 26 27 28 2	9 01 02 03	04 05 08
1	 Prototype Build 	(Bob) Sep	13,	Pro	totype Build (Bob)		_					1		
1.1	 Prototype Ba 	ickpanel PCB Sep	21,		Prototype Bac	kpanel PCBA (Bob)								
1.1.1	Design Proto	type Backpan Sep	21,		Design Prototype Bac	Kpanel PCBA [Bob]								
1.1.2	Layout Protot	type Backpane Sep	23,		Layout Protot	ype Backpanel PCB.	A [B00]							
1.1.3	Get Ouctor 5	ove backpartet Sep	20,	·	neview/approve backp	al Ouoles Prototuno	Backsonal BCBA Woo	·						
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116	Order Prototy	ne Backnanel Oct	20	Move the	e "Today'	Or	ter Prototype Backpan	el PCB [Ken]	_					
1.1.7	Fab/receive F	Prototype Back Oct :	20	column (green) to	o Fab/r	receive Prototype Back	panel PCB (Bob)	*					_
1.1.8	Acquire comp	ponents, kit, se Sep	23.		Breen, ce	obver: Backpane	el (Bob)							
1.1.9	Assemble, sh	nip/receive fro Nov	4, 2	the c	enter					O Assemble, ship	/receive from su	pplier: Backpanel P	CBA [Bob]	*
1.1.10	Bench test/in:	spect Backpan Nov	11,:									Bench test/	inspect Backpa	anel PCBA
1.1.11	Prototype Re	ady for Build: Nov	11,:									Prototype Rear	dy for Build: Ba	ckpanel P
1.2	 Prototype Pw 	vr Board PCB Sep	13,	Prototype Pwr B	oard PCBA (John) 🗼	/						1		
1.2.1	Design Proto	type PCBA: P Sep	13,	Design Prototype PCBA:	Pwr Board [John] 🍃	////////	1							
1.2.2	Layout Protot	type Pwr Boar Sep	20,	Lay	out Prototype Pwr Boar	rd PCBA (John)								
1.2.3	Review/appro	ove Pwr Board Sep	23,	< Revie	ew/approve Pwr Board	Schematic (Mary,Bol	þ.John]							
1.2.4	Incorporate d	hanges, expor Sep	24,	In	corporate changes, exp	port/verify file for sup	plier [John]							
1.2.5	Get Quotes P	Prototype Pwr Sep	24,		Get Quotes Pr	ototype Pwr Board F	PCBA [Ken]	∎H,						
1.2.6	Order Pwr Bo	oard PCB Sep	29,			Orde	er Pwr Board PCB [Ken	i Chy						
1.2.7	Fab/receive F	Prototype Pwr Sep	30,			Fab/receive	Prototype Pwr PCB [J	lohn)						×
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1.2.9	Assemble, sh	hip/receive fro Nov	1, 2						Assemb	e, ship/receive from	supplier: Pwr E	oard PCBA [John]		š
1.2.10	Bench test/in:	spect: Pwr Bo Nov	3, 2								Benc	h test/inspect: Pwr 8	Board PCBA [Jo	ohn]
1.2.11	Prototype Re	ady for Build: Nov	3, 2								Prototy	pe Ready for Build:	Pwr Board PCE	A 🍽
1.3	 Prototype Bu 	Jild - Enclosu Sep	14,	Prototype Bu	illd - Enclosure (Mary)	·				1				
1.3.1	- Injection	Molded Face Sep	14,	Injection Mo	ided Faceplate (Mary)									
1.3.1.1	Develop F	FEA model Sep	14,	Deve	hop HEA model [Mary]	27								۲

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

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



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1.1	Prototype Backpanel PCB	Sep 21,			Prototype Ba	ackpanel PCBA (Bot				Reset to			-	
1.1.1	Design Prototype Backpan	Sep 21,			Design Prototype B	ackpanel PCBA [Bot				default	t I			
1.1.2	Layout Prototype Backpane	Sep 23,			Layout Prot	totype Backpanel PC	BA (Bob)	h,				Z	oom	to fit
1.1.3	Review/approve Backpanel	Sep 28,		< F	Review/approve Bac	kpanel PCBA Schen	natic [Mary,Bob,John]	Ċ.	Z	oom iev	/ei	+	he nla	n on
1.1.4	Get Quotes Prototype Back	Sep 29,			0	Get Quotes Prototyp	e Backpanel PCBA [Ker	N (ne pie	
1.1.5	Incorporate layout changes,	Sep 29,			Incorporate layo	ut changes, export/v	erify file for supplier (Bot	o 🚺 🚽				t	he sc	reen
1.1.6	Order Prototype Backpanel	Oct 4, 20				c	Order Prototype Backpar	nel PCB [Ken] [h.					
1.1.7	Fab/receive Prototype Back	Oct 5, 20				Ō Fal	b/receive Prototype Baci	kpanel PCB [Bob]	c					-
1.1.8	Acquire components, kit, se	Sep 23,		Acquire ci	omponents, kit, send	d to supplier: Backpa	inel (Bob)							∎-į
1.1.9	Assemble, ship/receive fro	Nov 4, 2								Assemble, :	ship/receive from	n supplier: Backpan	el PCBA [Bob]	
1.1.10	Bench test/inspect Backpan	Nov 11, :										Bench to	est/inspect Bar	kpanel PCBA
1.1.11	Prototype Ready for Build:	Nov 11, :										Prototype F	teady for Build	Backpanel P
1.2	Prototype Pwr Board PCB	Sep 13,		Prototype Pwr Bo	ard PCBA (John)	•								
1.2.1	Design Prototype PCBA: P	Sep 13,		Design Prototype PCBA: I	Pwr Board (John)		7							
1.2.2	Layout Prototype Pwr Boar	Sep 20,		Layo	ut Prototype Pwr Bo	oard PCBA [John]								
1.2.3	Review/approve Pwr Board	Sep 23,		< Review	w/approve Pwr Boar	rd Schematic (Mary,E	Sob,John]							
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1.2.5	Get Quotes Prototype Pwr	Sep 24,			👌 Get Quotes	Prototype Pwr Board	PCBA [Ken]	<u>n H</u>						
1.2.6	Order Pwr Board PCB	Sep 29,				On	der Pwr Board PCB [Ker	տ 🛄						
1.2.7	Fab/receive Prototype Pwr	Sep 30,				Fab/receiption	ve Prototype Pwr PCB [John]						
1.2.8	Acquire parts, kit, send to s	Sep 20,		Acquire parts, k	it, send to supplier:	Pwr Board [John]							-	oa c
1.2.9	Assemble, ship/receive fro	Nov 1, 2							Ass	emble, ship/receive f	from supplier: Pv	r Board PCBA [Joh	n]	
1.2.10	Bench test/inspect: Pwr Bo	Nov 8, 2									Be	ench test/inspect: P	wr Board PCB	۲ [John]
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1.3	Prototype Build - Enclosu	Sep 14,		Prototype Bui	ld - Enclosure (Mar)	y) 🔽								
1.3.1	- Injection Molded Face	Sep 14,		Injection Mok	ded Faceplate (Mary	vi 🔽								
1.3.1.1	Develop FEA model	Sep 14,		Devel	op FEA model [Mary	vi 🚬								

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

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.



18. Sign Mary out of Playbook.



This completes this exercise.