Exercise - Team Huddles - Effective & Efficient

In this exercise you will learn how to set up and configure the Huddle view to maximize their effectiveness and efficiency.

- 1. Open a Chrome or Edge browser and enter the following: https://training3.playbookteam.com
- 2. Ken is the Project Leader for the XP 2000 project, so he will configure his Huddle view to ensure he is ready to lead the team's daily huddle.
- 3. Sign in Playbook as Ken. Username = Ken, password = PlayBook2021
- 4. Click **Projects**, select project **XP 2000** to load, then click **Ok**.

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My Playbook \	/iew Setting	s	Х
Calendar 🗹	Game Plar	Res Load	✓ Automatically save settings
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		&D XP 2000 [Mary M] Sustaining Engineerin Misc. Other	g [Bob B]

5. You are now logged as Ken, in the **My Playbook** view, project XP 2000 is loaded, and Ken is the only resource showing in the calendar. My Playbook is used by each team member to manage their work across all their projects, so when Ken signs in he sees himself and his projects and when Mary signs in she sees herself and her projects.

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XP 2000	▼													Get Quotes P	rototype 🐧 🔒	
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6. Click the **Huddle view**. The Huddle view is used to conduct the daily team huddle meeting, so Ken will configure it differently than his My Playbook view. Each view's settings are saved separately for each person.

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7. First, Ken will need to show all the resources on his team. Click **Resources** to open the Huddle View Settings options, then select *all R&D resources*.

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8. Ken can also select the projects he wants to show in the huddle, typically a single project but he could include other projects his team members support to better see the demands on their time. Click **Projects** select **XP 2000** and **Sustaining Engineering** then click **Ok**.

Huddle View Set	luddle View Settings											
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Other 🗹	Search											
	 R&D XP 2000 [Mary M] Sustaining Engineering [Bob B] Misc. Other 											

9. Ken now sees all R&D resources and their tasks, active and not yet started (in the calendar and in the backlog), on projects XP 2000 and Sustaining Engineering. For example, Bob is actively working on a critical path task on project XP 2000, and as well as a Sustaining Engineering task he intends to start later this week.

🛆 Playbook			Welcome Ken			ି 🗎 😂 ≡
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XP 2000 💌	Design Prototype Backpanel PCBA	Design Prototype Backpanel PCBA				Acquire components, ko
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XP 2000 💌	Acquire parts, kit O	Acquire parts, kit,	Acquire parts, kit	Acquire parts, kit O	Acquire parts, kit,	Review/approve Pwr B <
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Sustaining Engineering 🔻						Feedba

 Ken can also decide which task lifecycles he wants to show in the calendar and in the Game Plan pane by default. Click **Resources** to open the Huddle Settings options, then click Lifecycles.

Note: in the calendar, Planned, Active and Completed tasks are always shown and you can choose if you want to load and show Archived tasks. Since Archived tasks are typically \geq 30 days in the past, it is recommended not to load them in the calendar by default.

Huddle View S	ettings) X
Calendar 🗹	Game Plan Res Load 🗌 🔽 Automatically save settin	gs
Projects		
Resources	Planned, Active and Completed are always shown	
Lifecycles	Archived Last 2 Months	
Other	 Archived settings will not be 'Remembered' for future sessions. Loading will occur after OK click. It may take some time to load. To show more, load the project into the Plan and set filter there 	

11. In the Huddle View Settings window, click the Game Plan tab then click Lifecycles. Note: in the Game Plan pane, Planned and Active tasks are selected. Click on the Completed Last days drop-down arrow and select 5. The Game Plan pane in the Huddle view will now only display Completed tasks in the last 5 days which helps to reduce clutter.



12. In the Huddle View Settings window, click the **Calendar tab** then click **Other**. Ken selects his desired settings for the Calendar and Backlog to run streamlined, effective huddles. Select and unselect the options in the Calendar and Backlog to match the image below, then click **Ok**.

Huddle View Se	ettings	Θ×
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Projects	Calendar	Backlog
Resources		
Lifecycles	Subtype icon	Subtype icon
Other	Milestone priority	Milestone priority
	Slack	Slack
	Queued icon	
	Empty rows	
	Resources with empt	y rows
	✓ Whole day total	
	Segment times	
	Segments with zero v	vork
	Based On: Capacity	▼

- **Subtype icon** = icons used to indicate Monitor vs Meeting vs Shared tasks etc.
- **Milestone Priority** = Milestone priority is published on all upstream tasks if one is provided. Only applies to Major milestones.
- **Slack** = the number of days a task's completion can be delayed before it becomes a critical path task and impacts the timeline.
- **Queued icon** = a filled dot which indicates all predecessors have been marked completed (or the task does not have any predecessors) and the task is ready to be worked on.
- **Empty rows** = a Project in which a resource has no active tasks in the past or in the current calendar view and no tasks planned to start in the past or in the next two weeks (i.e., no tasks displaying in the backlog). This reduces clutter and improves performance.
- **Resources with empty rows** = this is an extension of **Empty Rows**. If all projects are empty for a resource, the Resource row is removed entirely from the Huddle view. This reduces clutter and improves performance.
- Whole day total = the total number of hours on all tasks across projects on each day.
- Segment times = displays each task segment's Hours of Work.
- **Segments with zero work** = zero-work segments are displayed or removed from display.
- **Based On: Capacity or Availability** = the utilization dials are based on the resource's capacity or availability, e.g., 75% of 8 hours (capacity) or 75% of 6 hours (availability).

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	Interfaces	Interfaces			15 Review/approve P <
XP 2000 🔻	21 Define Housing/Faceplate/Cc Interfaces	21 Define Housing/Faceplate/Cc Interfaces			22 Finalize Faceplate De 15 Review/approve P < 30 Release Faceplate Dr

13. Ken can't read all the task titles because some are too long.

a. Option 1: Resize the width of the backlog by dragging this vertical line.



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b. Option 2: Zoom the calendar from a 5-day view to a 3-day view.

c. Option 3: Hover over the task details icon to get more information.



- 14. Ken also has a few options to sort his team members from top to bottom in the Huddle view.
 - a. Option 1: **Sort by Name** team members are sorted alphanumerically based on their first name.

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b. Option 2: **Sort by Department** – team members are sorted alphanumerically based on their department.

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c. Option 3: **Sort by Criticality** – team members are sorted based on the criticality of their tasks. Since the primary goal of the daily huddle is to keep the project flowing smoothly, it makes sense to first talk to whoever is working on the critical path task today to ensure they have everything they need, to identify any blockages they may have, and to look for ways for others to help them complete their work as efficiently as possible.

In this example, Bob remains at the top because he is working on the team's critical path task today. If Sue had been working on the critical path task today, she would have been automatically sorted to the top of the Huddle view.

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- 15. Ken has successfully prepared his Huddle view to facilitate the team's daily huddle most effectively.
- 16. Because his custom settings are being automatically saved, his Huddle view will look the same the next time he signs into Playbook. Yay!

Huddle View Settings X						
Calendar 🔽	Game Plan Res Load	Automatically save settings				
Projects	Calandar	Deekler				
Resources		Васкю				
Lifecycles	Subtype icon	Subtype icon				
Other	Milestone priority	Milestone priority				
	Slack	🖂 Slack				
	Queued icon					
	Empty rows					
	 Task continues icon 					
	Whole day total					
	 Segment times 					
	Segments with zero work					
4	Based On: Capacity -					
		Ok				

17. Sign Ken out of Playbook then click **Discard**.

This completes this exercise.