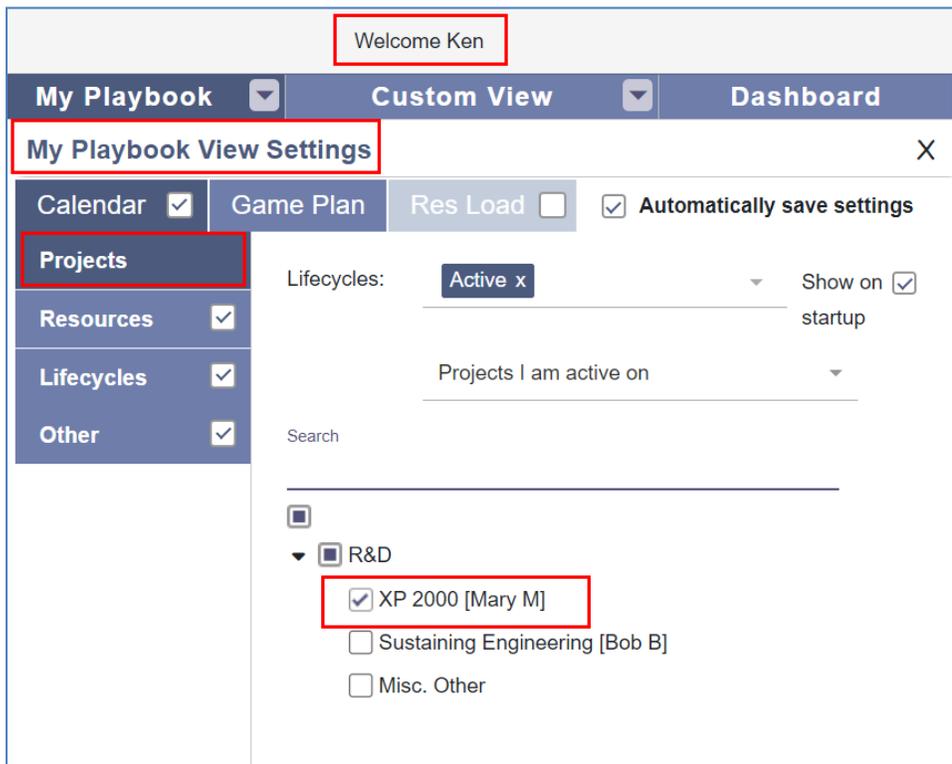


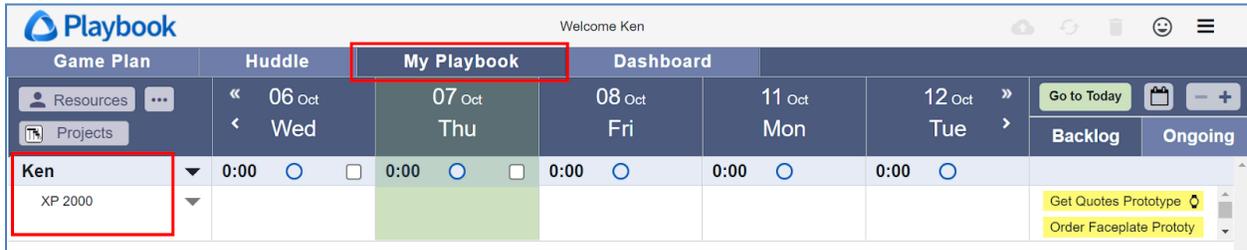
Exercise – Team Huddles - Effective & Efficient

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

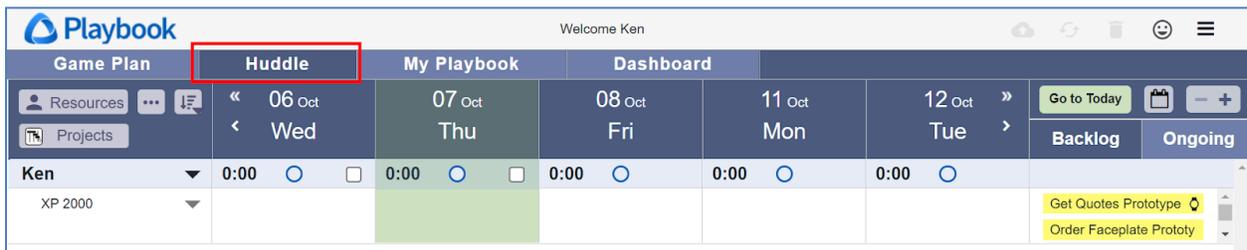
1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Ken is the Project Leader for the XP 2000 project, so he will configure his Huddle view to ensure he is ready to lead the team’s daily huddle.
3. Sign in Playbook as Ken. Username = **Ken**, password = **PlayBook2021**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



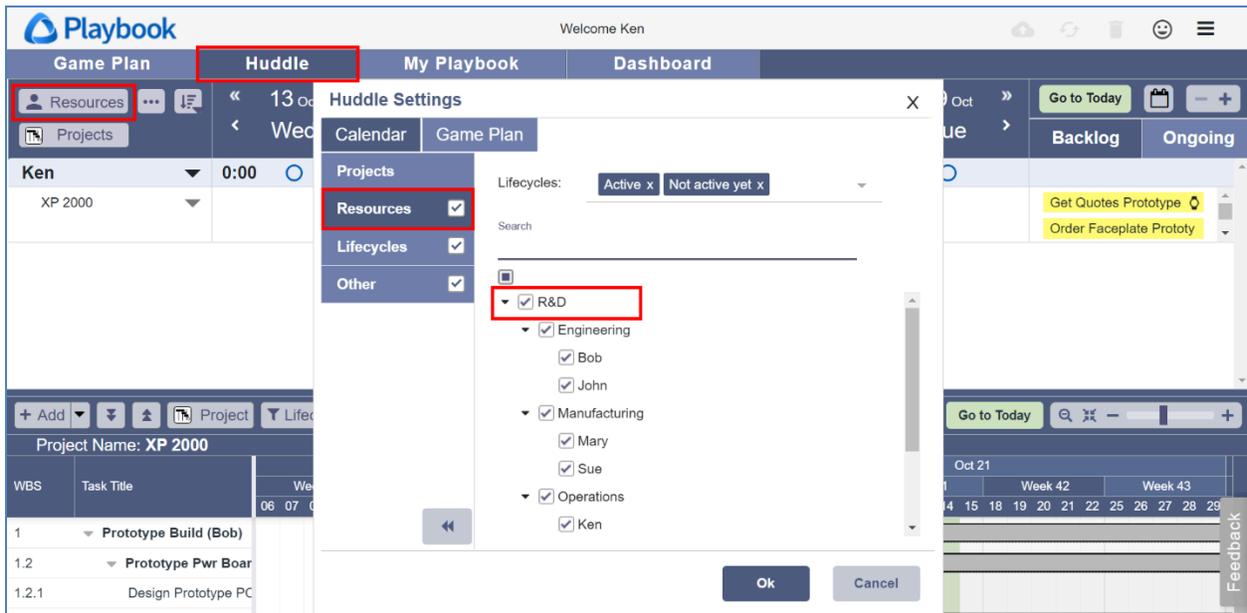
- You are now logged as Ken, in the **My Playbook** view, project XP 2000 is loaded, and Ken is the only resource showing in the calendar. My Playbook is used by each team member to manage their work across all their projects, so when Ken signs in he sees himself and his projects and when Mary signs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



- 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.



- 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**.



- 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 Settings

Calendar Game Plan Res Load Automatically save settings

Projects

Lifecycles: Active x Show on startup

Projects: I am assigned to

Search

R&D

- XP 2000 [Mary M]
- Sustaining Engineering [Bob B]
- Misc. Other

- 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

Game Plan Huddle My Playbook Dashboard

Resources Projects

Go to Today

Resource	06 Oct Wed	07 Oct Thu	08 Oct Fri	11 Oct Mon	12 Oct Tue
Bob	5:00 Design Prototype Backpanel PCBA	5:00 Design Prototype Backpanel PCBA	0:00	0:00	2:00 Determine Failure Mode of Bezel
John	2:00 Acquire parts, kit; Layout Prototype Pwr Board PCBA	2:00 Acquire parts, kit; Layout Prototype Pwr Board PCBA	0:00 Acquire parts, kit	0:00 Acquire parts, kit	0:00 Acquire parts, kit

Backlog: Acquire components, kit; Layout Prototype Backpa; Review/approve Pwr B; Review/approve Back; Incorporate layout chang

Feedback

10. 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 ≥ 30 days in the past, it is recommended not to load them in the calendar by default.

Huddle View Settings [Smiley] [X]

Calendar **Game Plan** **Res Load** **Automatically save settings**

Projects

Resources

Lifecycles

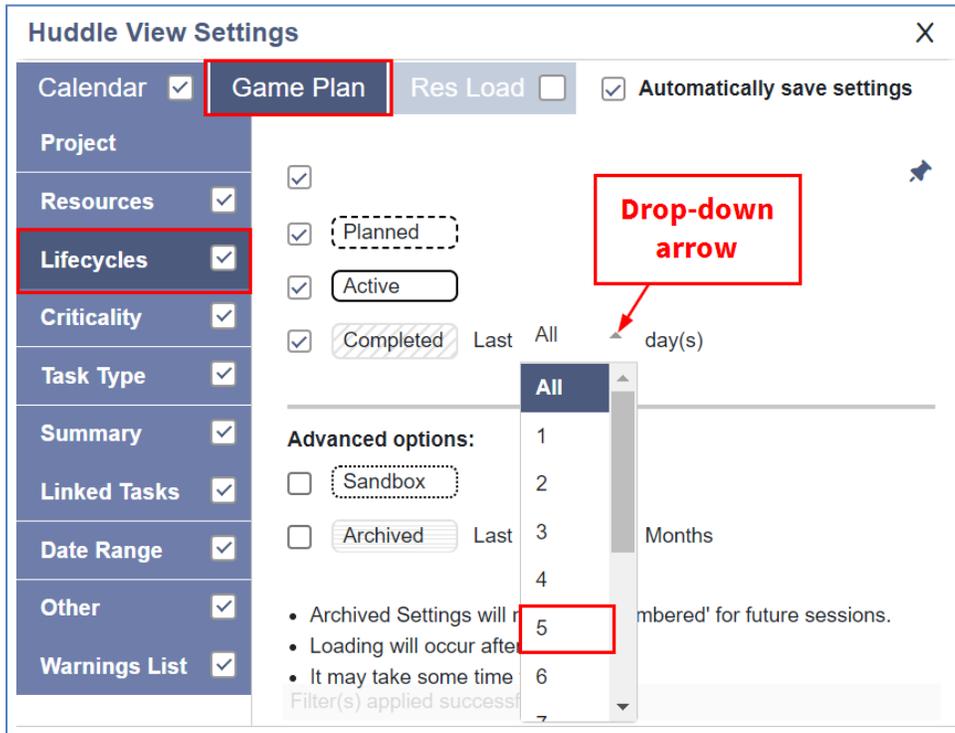
Other

Planned, Active and Completed are always shown

Archived Last 2 Months

- 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 Settings [Smiley] [X]

Calendar Game Plan Res Load Automatically save settings

Projects

Resources

Lifecycles

Other

Calendar

Subtype icon

Subtype icon

Milestone priority

Milestone priority

Slack

Slack

Queued icon

Queued icon

Empty rows

Empty rows

Resources with empty rows

Resources with empty rows

Whole day total

Whole day total

Segment times

Segment times

Segments with zero work

Segments with zero work

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).

Days of Slack

Whole day totals

Subtype icons

Empty Rows are not displayed - Bob's Sustaining project is not empty while John's is, so John's is not displayed

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

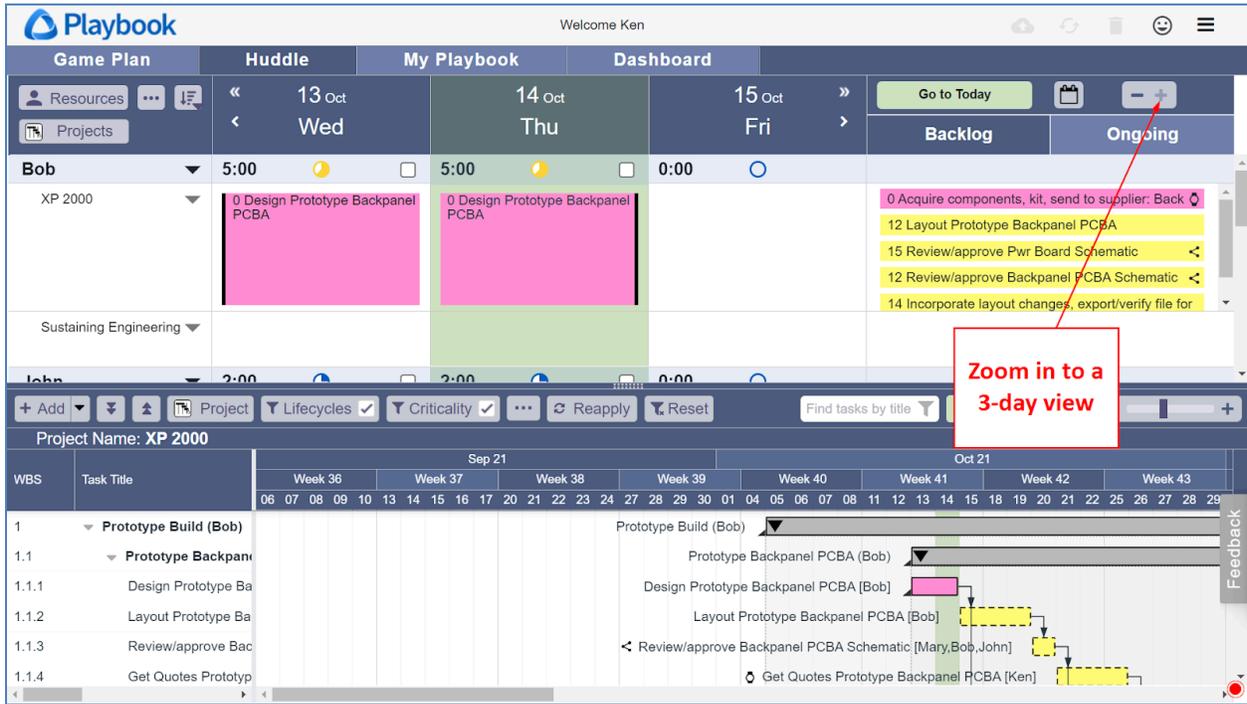
- a. Option 1: Resize the width of the backlog by dragging this vertical line.

Drag to resize the width of the Backlog

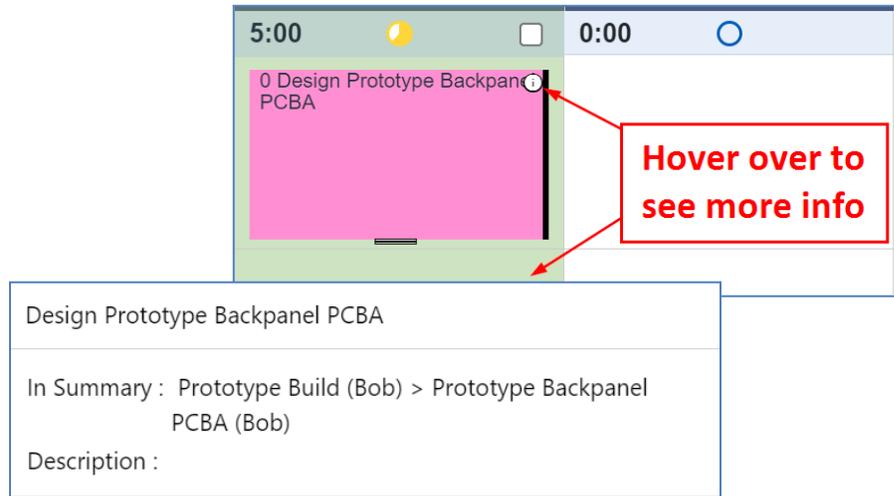
Project Name: XP 2000

WBS	Task Title	Sep 21							Oct 21								
		Week 36	Week 37	Week 38	Week 39	Week 40	Week 41	Week 42	Week 43	Week 36	Week 37	Week 38	Week 39	Week 40	Week 41	Week 42	Week 43
1	Prototype Build (Bob)																
1.1	Prototype Backpanel PCBA (Bob)																
1.1.1	Design Prototype Backpanel PCBA [Bob]																
1.1.2	Layout Prototype Backpanel PCBA [Bob]																
1.1.3	Review/approve Backpanel PCBA Schematic [Mary,Bob,John]																
1.1.4	Get Quotes Prototype Backpanel PCBA [Ken]																

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.

Resources	13 Oct Wed	14 Oct Thu	15 Oct Fri	Backlog	Ongoing
Bob	0 Design Prototype Backpanel PCBA	0 Design Prototype Backpanel PCBA		0 Acquire components, kit, send to supplier: Back	12 Layout Prototype Backpanel PCBA 15 Review/approve Pwr Board Schematic 12 Review/approve Backpanel PCBA Schematic 14 Incorporate layout changes, export/verify file for
John	2:00	2:00	0:00	15 Review/approve Pwr Board Schematic	16 Incorporate changes, export/verify file for supplie 12 Review/approve Backpanel PCBA Schematic
Ken	0:00	0:00	0:00	15 Get Quotes Prototype Pwr Board PCBA	22 Order Faceplate Prototype
Mary	8:00	7:00	0:00	22 Finalize Faceplate Design & Drawing	15 Review/approve Pwr Board Schematic 30 Release Faceplate Drawing 22 Lead Time for Faceplate Prototype
Sue	0:00	6:00	0:00		? Shutdown RM400 Line and Restart RD350

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

Resources	13 Oct Wed	14 Oct Thu	15 Oct Fri	Backlog	Ongoing
Bob	0 Design Prototype Backpanel PCBA	0 Design Prototype Backpanel PCBA		0 Acquire components, kit, send to supplier: Back	12 Layout Prototype Backpanel PCBA 15 Review/approve Pwr Board Schematic 12 Review/approve Backpanel PCBA Schematic 14 Incorporate layout changes, export/verify file for
John	2:00	2:00	0:00	15 Review/approve Pwr Board Schematic	16 Incorporate changes, export/verify file for supplie 12 Review/approve Backpanel PCBA Schematic
Mary	8:00	7:00	0:00	22 Finalize Faceplate Design & Drawing	15 Review/approve Pwr Board Schematic 30 Release Faceplate Drawing 22 Lead Time for Faceplate Prototype
Sue	0:00	6:00	0:00		? Shutdown RM400 Line and Restart RD350

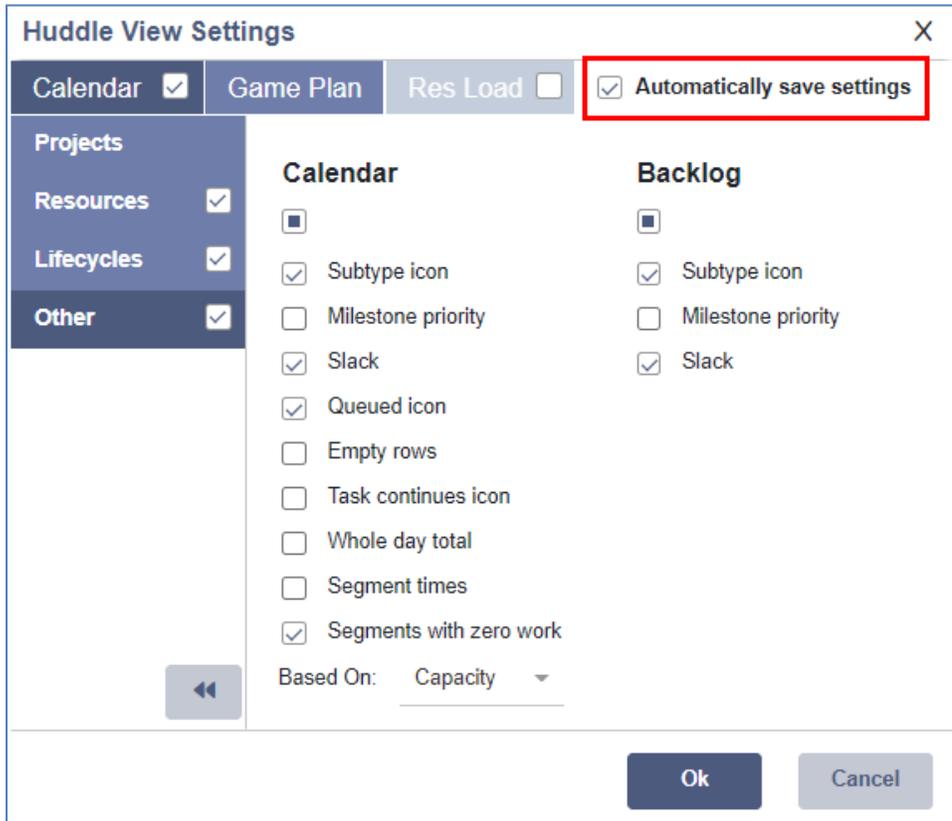
- c. Option 3: **Sort by Criticality** – team members are sorted based on the criticality of their tasks. Since the primary goal of the daily huddle is to keep the project flowing smoothly, it makes sense to first talk to whoever is working on the critical path task today to ensure they have everything 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.

The screenshot displays the Playbook software interface. At the top, there are navigation tabs: 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'. The 'Huddle' tab is active, showing a calendar view for 13 Oct (Wed), 14 Oct (Thu), and 15 Oct (Fri). A dropdown menu is open over the '13 Oct' column, with 'Criticality' selected. The main area shows a grid of tasks for team members: Bob, John, Sue, and Marv. Bob's tasks are highlighted in pink, John's in yellow, Sue's in light green, and Marv's in brown. A 'Backlog' and 'Ongoing' section is visible on the right side of the grid.

Resource	13 Oct Wed	14 Oct Thu	15 Oct Fri
Bob	0 Design Prototype Backpanel PCBA	0 Design Prototype Backpanel PCBA	
John	15 Layout Prototype Pwr Board PCBA	15 Layout Prototype Pwr Board PCBA	
Sue		21 Define Housing/Faceplate/Cover Interfaces	
Marv		? Determine root cause of low Chassis yield	

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



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

This completes this exercise.