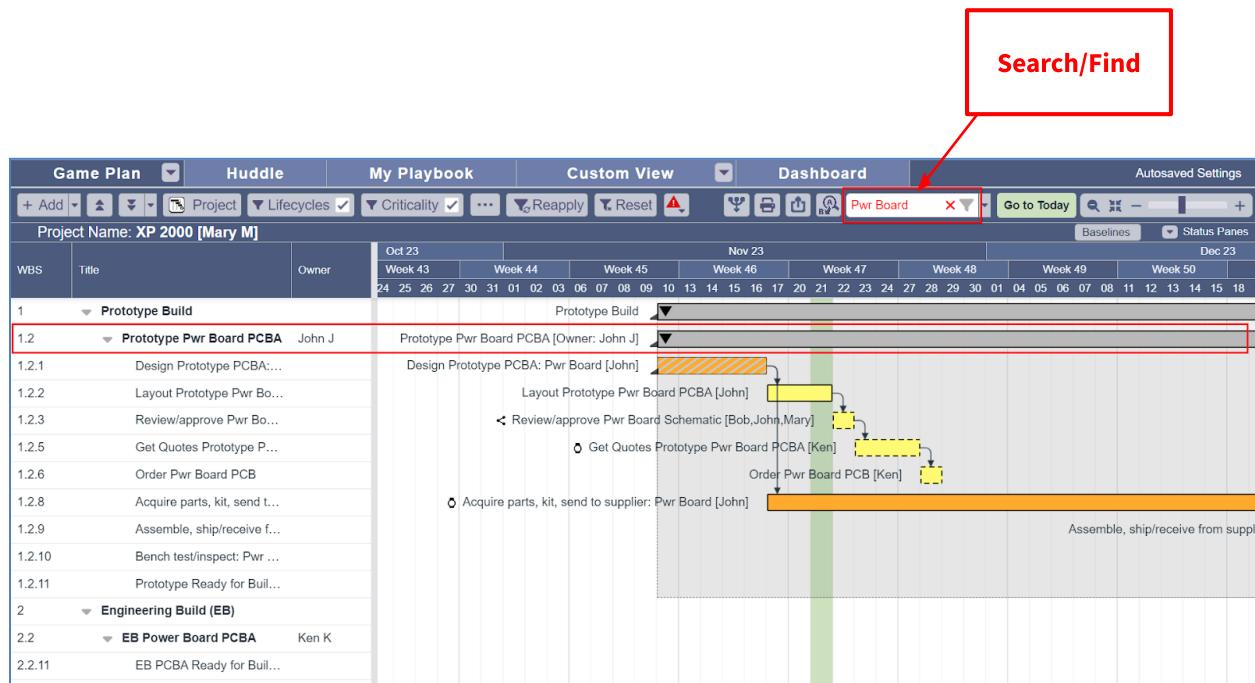


## Exercise – Game Plan Filters, Search/Find & Blocked Tasks

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. Switch to the **Game Plan** and ensure **XP 2000** is the active project.
4. In the Search/Find cell, enter **Pwr Board** locate the summary task, **Prototype Pwr Board PCBA**.

Note: Search is not case-sensitive. Using the drop-down menu to the right of the cell, you can also limit the search to the task's title, description or both.



5. Click the **Lifecycles** filter to open the filters window.

The screenshot shows the Game Plan interface with the 'Lifecycles' filter selected. The 'Lifecycles' tab is highlighted with a red box. The 'Completed' checkbox is checked, and the 'Last All day(s)' dropdown is set to 'All'. The 'Ok' button is visible at the bottom right of the dialog.

6. Drag the **Filters window** so you can see the completed task **Design Prototype Pwr Board PCBA** in the Game Plan (crosshatched at 45 degrees).

The screenshot shows the Game Plan interface with the 'Completed' tasks visible. A red box highlights the 'Completed' checkbox in the 'Game Plan View Settings' dialog. The 'Design Prototype PCBA: Pwr Board [John]' task is highlighted with a crosshatch pattern, indicating it is a completed task.

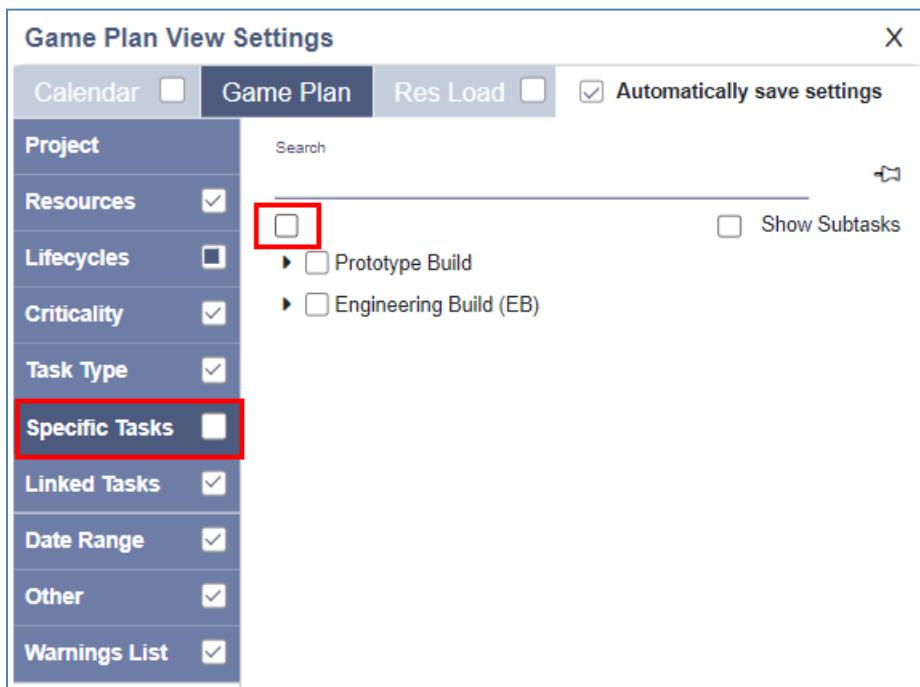
7. **Uncheck Completed Last...** and notice completed tasks are no longer visible.

The screenshot shows the Game Plan application interface. At the top, there are tabs for Game Plan, Huddle, My Playbook, Custom View, and Dashboard. Below the tabs, a toolbar includes buttons for Add, Project, Lifecycles, Criticality, Reapply, Reset, and a search field for 'Pwr Board'. The main area displays a Gantt chart for a project named 'XP 2000 [Mary M]'. The chart spans from October 23 to November 23, showing various tasks like 'Prototype Build', 'Prototype Pwr Board PCBA', and 'Review/approve Pwr Bo...'. A red arrow points from the 'Completed Last [ ] day(s)' checkbox in the 'Game Plan View Settings' dialog to a completed task in the Gantt chart.

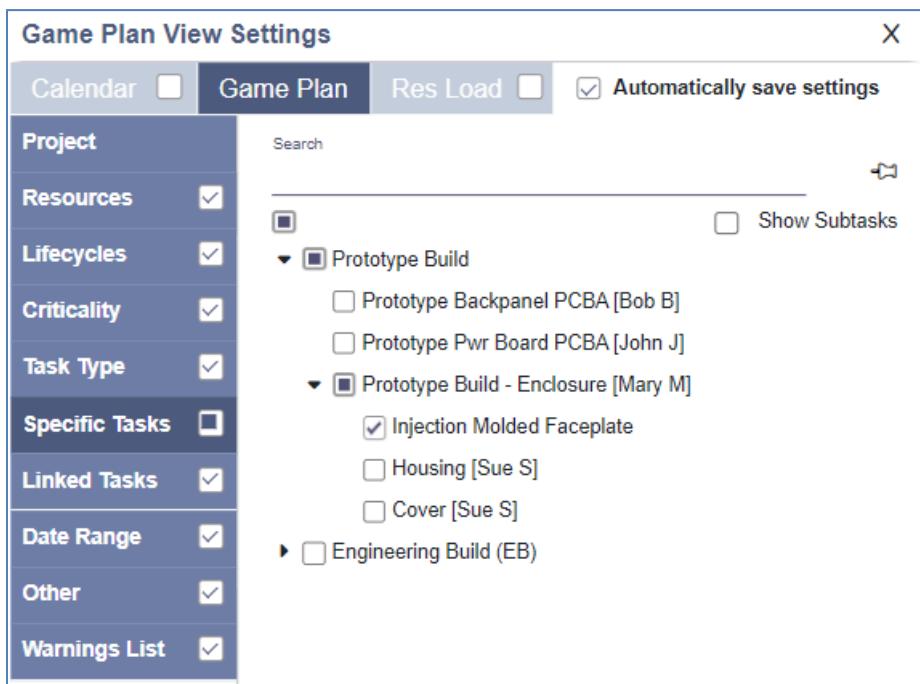
8. In the Search/Find cell, **remove (red X)** Pwr Board to show all tasks in the Game Plan.



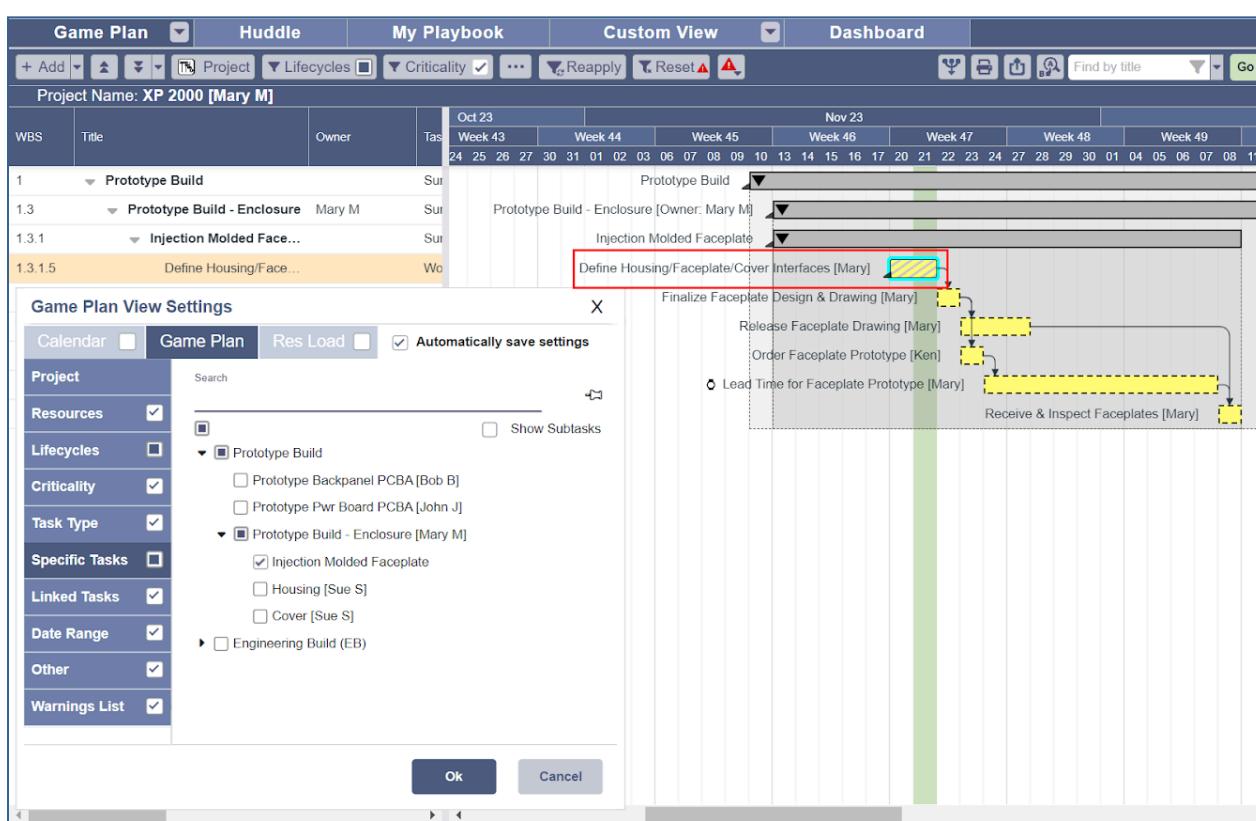
9. To make it easier for Mary to work with only her portion of the plan without having to see and wrestle with the rest of the plan's complexity, click the **Specific Tasks** filter, and uncheck **Select All**.



10. Expand **Prototype Build** then expand **Prototype Build - Enclosure** then check **Injection Molded Faceplate**. A check is automatically added to its parent summary tasks and the Game Plan immediately filters off all tasks that are not within the **Injection Molded Faceplate** summary task. Note: you might need to scroll the Game Plan horizontally to see all the tasks.



11. As filters are applied the Game Plan automatically updates, however when changes are made in the Game Plan, the filters do not automatically update and can be reapplied when desired.
12. In the Game Plan, right-click on **Define Housing/Faceplate/Cover Interfaces** then click **Mark Completed**. Even though the completed tasks are filtered off, this newly completed task continues to show.



13. Instead of tasks suddenly disappearing, you decide when you are ready to reapply the filters.  
Click **Reapply**.

The screenshot shows the Game Plan application interface. At the top, there's a navigation bar with tabs like 'Game Plan', 'Huddle', 'My Playbook', 'Custom View', and 'Dashboard'. Below the navigation bar is a toolbar with various icons and a search bar labeled 'Find by title'. A red arrow points from the text 'Click Reapply.' to the 'Reapply' button in the toolbar.

The main area displays a Gantt chart for a project named 'XP 2000 [Mary M]'. The chart spans from October 23 to November 23, showing tasks like 'Prototype Build', 'Injection Molded Face...', and 'Finalize Faceplate D...'. A green shaded area highlights a specific time period.

A 'Game Plan View Settings' dialog box is overlaid on the interface. It contains a 'Search' field and several filter categories with checkboxes:

- Project**: Resources (checked), Lifecycles (unchecked), Criticality (checked), Task Type (checked).
- Resources**: Prototype Build (checked).
- Lifecycles**: Prototype Build - Enclosure (checked).
- Criticality**: Prototype Backpanel PCBA [Bob B] (unchecked), Prototype Pwr Board PCBA [John J] (unchecked).
- Task Type**: Prototype Build - Enclosure [Mary M] (checked). Sub-tasks listed under this are 'Injection Molded Faceplate' (checked), 'Housing [Sue S]' (unchecked), and 'Cover [Sue S]' (unchecked).
- Specific Tasks**: Prototype Build (unchecked).
- Linked Tasks**: Prototype Build - Enclosure (checked).
- Date Range**: Lead Time for Faceplate Prototype [Mary] (checked).
- Other**: Engineering Build (EB) (unchecked).
- Warnings List**: (unchecked).

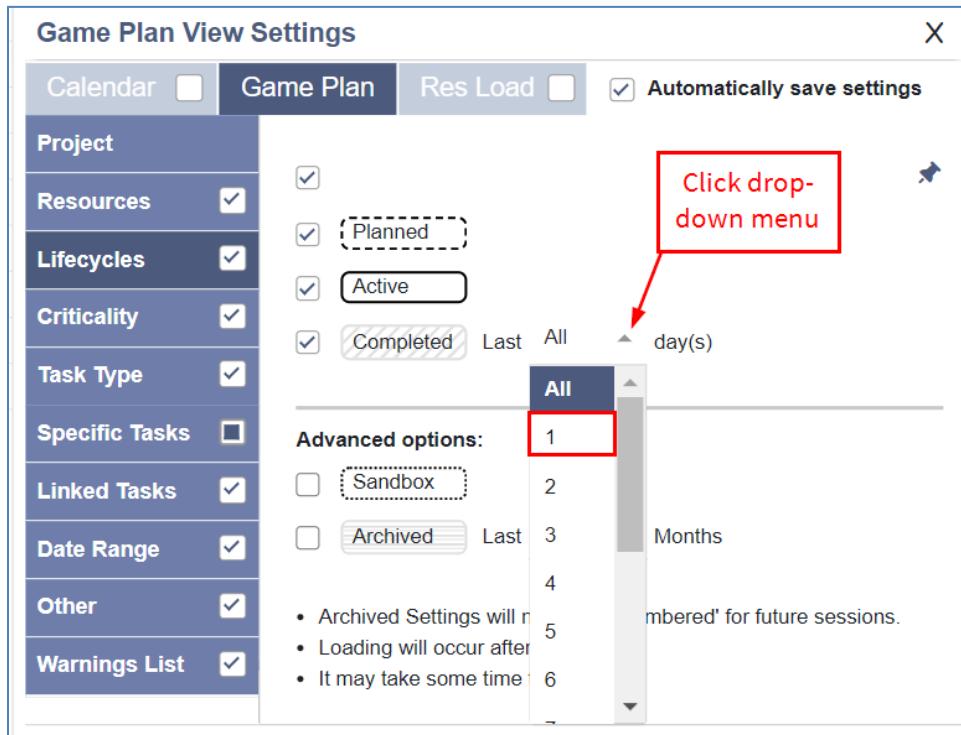
At the bottom of the dialog box are 'Ok' and 'Cancel' buttons.

14. During the huddle, it may be helpful to display completed tasks within a user-specified number of days in the past rather than all completed tasks (each completed task takes one row of space in the Game Plan). To display all completed tasks, click **Lifecycles** then check **Completed Last All days**.

The screenshot shows the Game Plan application interface. On the left, the 'Game Plan View Settings' dialog is open, with the 'Lifecycles' checkbox selected and the 'Completed' radio button checked. A red box highlights the 'Completed' checkbox and its dropdown settings. On the right, the Gantt chart displays a project timeline from Oct 23 to Nov 23. A specific sequence of tasks is highlighted with a red box: 'Develop FEA model [Mary]', 'Run/Revise FEA model [Mary]', 'Validate/correlate FEA results [Mary]', 'Document/Distribute FEA Results [Mary]', and 'Define Housing/Faceplate/Cover Interfaces [Mary]'. These tasks are shown as completed, indicated by green bars and a green background for the entire row.

15. Notice the completed chain of tasks starting with **Develop FEA model** and ending with **Define Housing/Faceplate/Cover Interfaces**.

16. In **Completed Last...** in the drop-down menu select the number one, **1**.



17. Only the completed task **Define Housing/ Faceplate /Cover Interfaces** is displayed because it is one day or less in the past. You may have to scroll the plan horizontally to see all the tasks.

**Game Plan View Settings**

Calendar  Game Plan  Res Load  Automatically save settings

**Project**

- Resources
- Lifecycles
- Criticality
- Task Type
- Specific Tasks
- Linked Tasks
- Date Range
- Other
- Warnings List

**Completed** Last 1 day(s)

**Advanced options:**

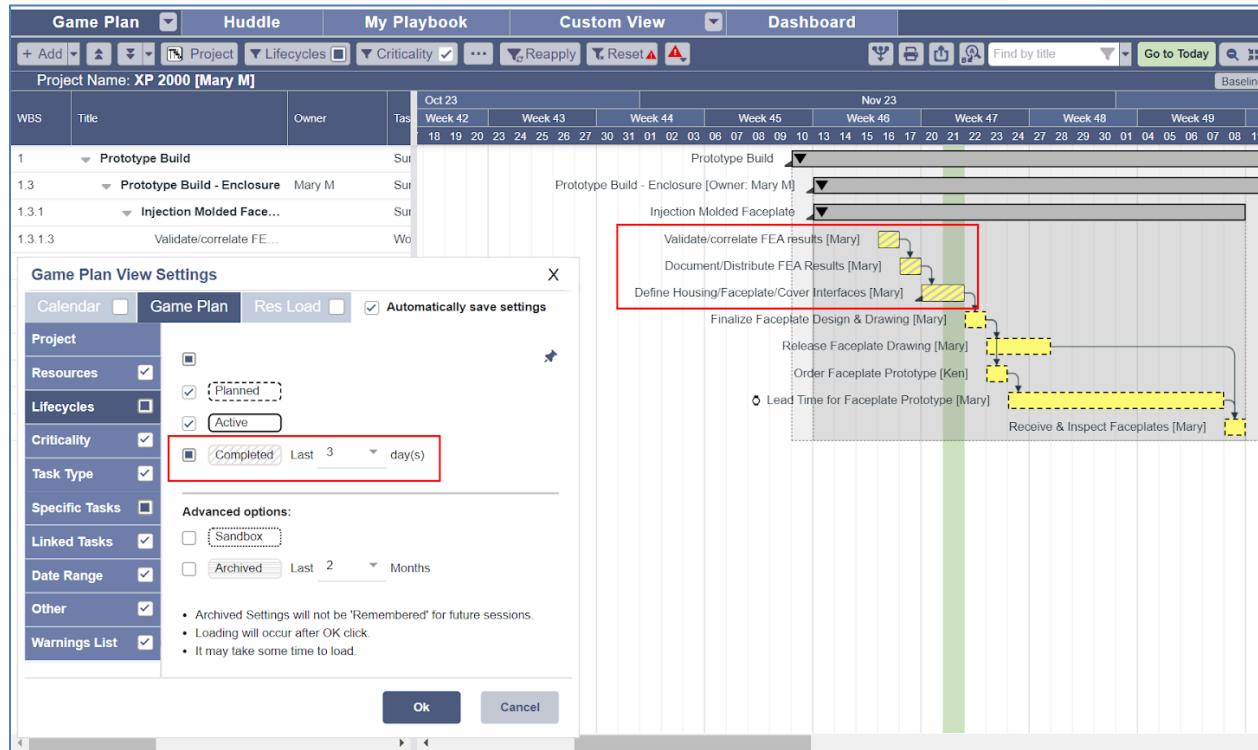
- Sandbox
- Archived Last 2 Months

• Archived Settings will not be 'Remembered' for future sessions.  
• Loading will occur after OK click.  
• It may take some time to load.

**Ok** **Cancel**

18. In **Completed Last...** in the drop-down menu select the number one, **2**. Do you also see **Document/Distribute FEA Results?**

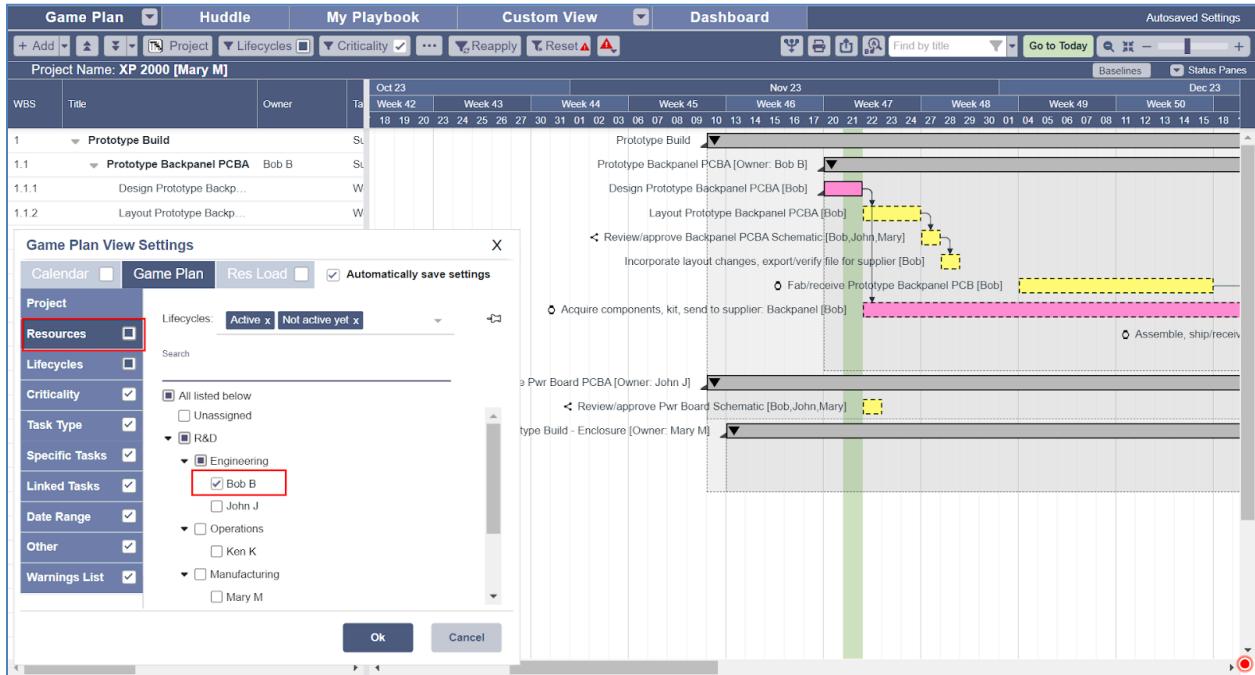
19. In **Completed Last...** in the drop-down menu select the number one, **3**. Do you also see **Validate/Correlate FEA Results?** I am sure you get the idea!



20. Bob wants to filter the Game Plan to see only tasks assigned to him. To ensure all tasks are displayed in the Game Plan, in the **Specific Tasks** filter check **Select All**.

The screenshot shows the Game Plan application interface. At the top, there are tabs for Game Plan, Huddle, My Playbook, Custom View, and Dashboard. Below the tabs is a toolbar with various icons and a search bar. The main area displays a Gantt chart for a project named 'XP 2000 [Mary M]'. The chart spans from October 23 to December 23, showing tasks for 'Prototype Build' and 'Pwr Board PCBA'. A 'Game Plan View Settings' dialog box is open on the left side of the screen. This dialog box has several filter categories with checkboxes: Project (checked), Resources (checked), Lifecycles (unchecked), Criticality (checked), Task Type (checked), Specific Tasks (checked and highlighted with a red box), Linked Tasks (checked), Date Range (checked), Other (checked), and Warnings List (checked). There is also an 'Automatically save settings' checkbox. The 'Specific Tasks' section lists tasks under 'Prototype Build' and 'Pwr Board PCBA', all of which have checkboxes checked. At the bottom of the dialog box are 'Ok' and 'Cancel' buttons.

21. In the **Resource** filter **uncheck Select All** to deselect all resources then **check Bob**. Only the tasks assigned to Bob are displayed and their summary tasks.

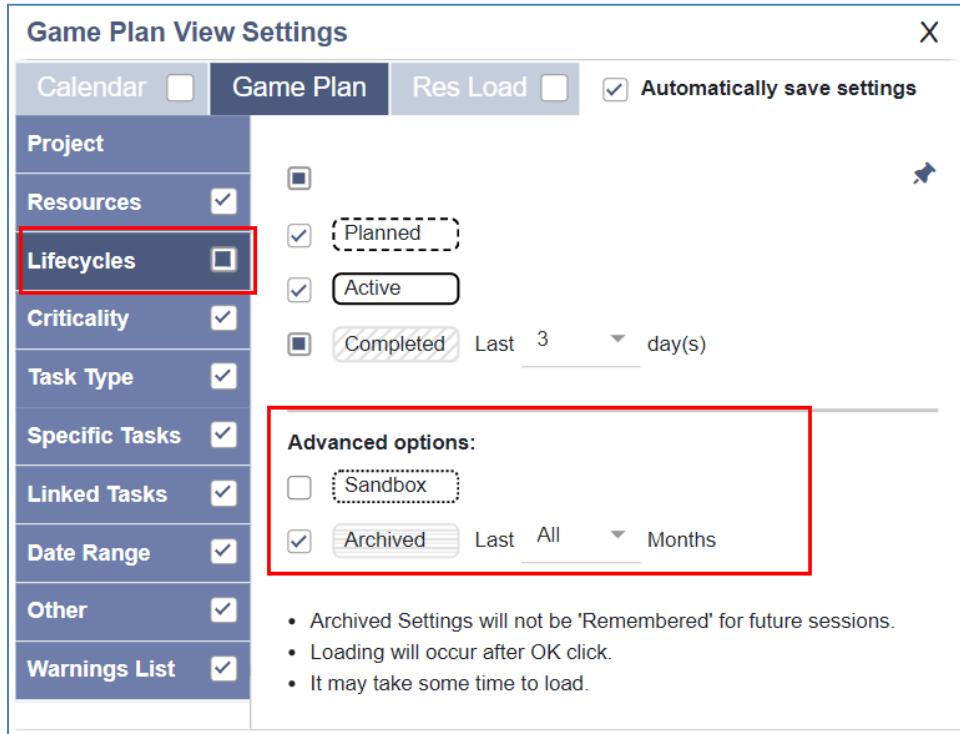


[Extra! Extra! Read All About It!](#)

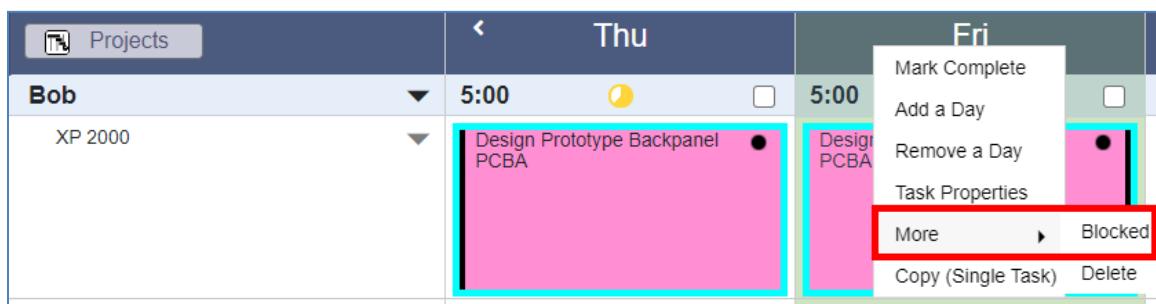
**Unassigned** shows tasks that are not assigned to anyone.  
It is better to assign them to someone and reassign them later,  
Otherwise, they tend to fall in the cracks because no one sees them in their backlog.

22. Display all tasks. In the **Resource** filter click **Select All**.
23. The **Lifecycle** filter gives you the ability to toggle on/off Planned, Active and Completed tasks. These filters are saved for future sessions when you sign out.

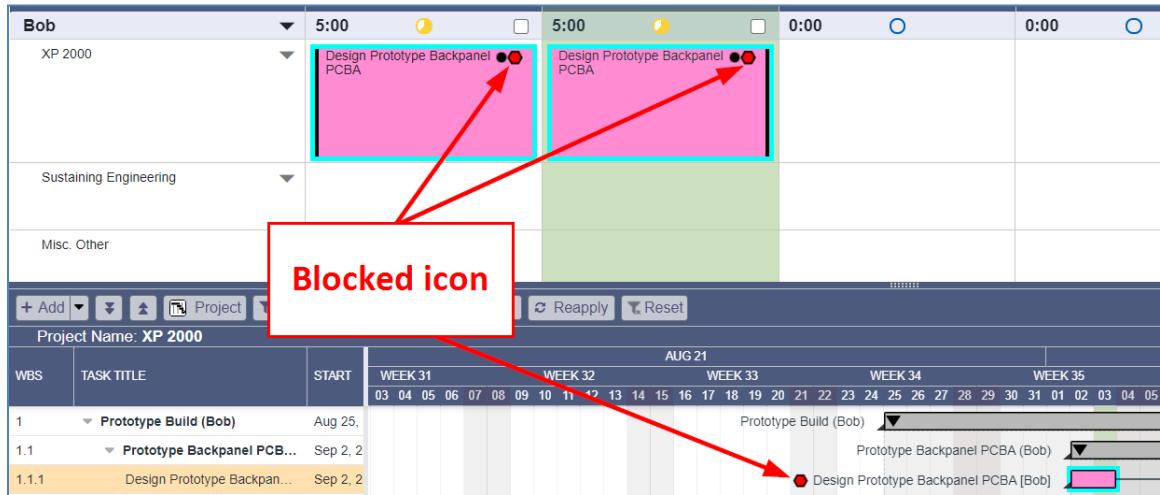
24. You can also toggle on/off Sandbox and Archived tasks. These filters are not saved for future sessions when you sign out.



25. Familiarize yourself with the rest of the filters: **Criticality**, **Task Type**, **Linked Tasks**, and **Other**. Click **Ok** in the **Filter window** when you are finished.
26. Now we will have a look at how to flag a task as blocked. Switch to the **My Playbook** tab and show project **XP 2000** and only show **Bob**.
27. To show your teammates when you are blocked on a task the task must be Active or queued in the backlog (unqueued tasks, by definition, cannot be blocked). Right-click **Design Prototype Backpanel PCBA** then click **More → Blocked**.



28. A **blocked icon** is displayed on the task in the calendar and in the Game Plan. This is useful during the Huddle to quickly communicate who is blocked, especially the critical path. This is also useful if you can't attend tomorrow's huddle and need to communicate that you are blocked and might need some assistance to get it removed.



29. To remove the *blocked icon*, right-click **Design Prototype Backpanel PCBA** then click **More → Not Blocked**.

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

**This completes this exercise.**