Exercise - Copy/Paste from One Project to Another

- 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 tab**. Click **Project**, then change the Projects filter to **Visible to me**, then select the **Templates** project. Click **Ok**. The Templates project can be used to define and store standard plans and workflows.

Game Plan View Settings								
Calendar 🗌	Ga	ame Plan Res Load 🗌 🔽 Automatically save s	ettings					
Project		Lifecycles: Active x	~					
Resources	\checkmark	Projects: Visible to me	~					
Lifecycles	\checkmark	Search						
Criticality	~							
Task Type	~	▼ Templates (1)						
Specific Tasks	~	✓ Templates▼ R&D (3)						
Linked Tasks	\checkmark	 XP 2000 [Mary M] Sustaining Engineering [Bob B] Misc. Other 						
Date Range	\checkmark							
Other	~							
Warnings List	~							

4. Go to WBS 2.1.1, Materials Procurement → Mechanical → Prototype: <Part Name> <P#>.

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2.1.1.8	Prototype Part Read					Prototype	Part Ready for Build:	<part name=""> <p#></p#></part>	H	
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- 5. **<Part Name>** and **<P#>** are variable text fields intended to be replaced during the paste operation. Variable text is defined as any text between a **less than** and a **greater than** sign.
- 6. Right-click on summary task **Prototype: <Part Name> <P#>** to select it and all its subtasks then click **More** → **Copy**.
- 7. Switch to project **XP 2000**.
- 8. Right-click on **Prototype Build** at the top of the Game Plan then click **More** \rightarrow **Paste**.
- 9. In the Paste Window, reassign tasks assigned to the ME resource (ME = Mechanical Engineer) to Sue S and reassign the Purchasing tasks to Ken K. Using generic resources in templates is a great way to assign resources to tasks by role, then during the paste operation they can be reassigned to a team member all at once.

Paste Window						
Lifecycle	Lifecycle Planned		Criticality	Same as Original 👻		
Start Type	Same as Original		In Summary Task	Prototype Build (Bob)		
Earliest Task Start Date	27 Dec 2022					
Replace Resources	5		Replace Text 🗹 Title 🗹 Description			
Original Resource	New Resource		Replace this:	With this:		
ME	Sue S	•	<part name=""></part>			
Purchasing	Ken K	•	<p#></p#>			
						
				+ New Row		
				Ok Cancel		

- 10. Replace the variable text in the task titles.
 - In the cell to the right of **<Part Name>** enter **Housing, Bracket**
 - In the cell to the right of **<P#>** enter **123456**

Paste Window						
Lifecycle	Planned	~	Criticality	Same as Original 🔹		
Start Type	Same as Original	Ŧ	In Summary Task	Prototype Build (Bob)		
Earliest Task Start Date	27 Dec 2022					
Replace Resources			Replace Text 🗹 🛛	Title 🗹 Description		
Original Resource	New Resource		Replace this:	With this:		
ME	Sue S	•	<part name=""></part>	Housing, Bracket		
Purchasing	Ken K	•	<p#></p#>	123456		
				+ New Row Ok Cancel		

11. Click **Ok**. The new summary task and subtasks are created, resources reassigned, and titles modified.



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

This completes this exercise.