## Exercise – Filter to Show Only Predecessors or Successors

The Game Plan can be filtered to only show a task's predecessors and/or successors making it much simpler to view task dependencies.

- 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. Go to the Game Plan view and activate project **XP 2000**.
- 4. Click in the *Search/Find cell* and type the word **build**. The Game Plan automatically filters only those tasks containing the text *build* in their titles.

G	ame Plan 🔽 🛛 Hu	ddle	Му	Play	book	Custom Vi	ew 🔽	Dashboard	i		Autosave	ed Settings
+ Add	🔹 🛓 🔹 💽 Project	Lifecycl	es 🖌 🔻 C	riticality	y 🖌 🚥 🌄	Reapply 🕻 Reset		¥ 🔒 🕵	build 🗙	Go to Today	Q # -	+
Proje	ect Name: XP 2000 [Mary N	1									Baselines 💽	Status Panes
				Ap	r 23				May 23			
WBS	Title	14	Week	15	Week 16	Week 17	Week 18	Week 19	Week 20	Week 21	Week 22	Wee
		0	7 10 11 12	13 14	17 18 19 20 2	21 24 25 26 27 28	01 02 03 04	05 08 09 10 11 1	2 15 16 17 18	19 22 23 24 25	26 29 30 31 01	02 05 06 0
1	<ul> <li>Prototype Build</li> </ul>				Prototype Build	V						
1.1	<ul> <li>Prototype Backpanel</li> </ul>	СВА		Pr	rototype Backpane	I PCBA [Owner: Bob B	3]					
1.1.11	Prototype Ready for	Buil										Prototy
1.2	Prototype Pwr Board	CBA ito	type Pwr Boa	rd PCB/	A [Owner: John J]	▼						
1.2.11	Prototype Ready for	Buil									Proto	otype Ready fo
1.3	Prototype Build - Encl	osure Pr	ototype Build	- Enclos	sure [Owner: Mary	M V						
1.3.5	Mechanicals Ready f	or B						Me	echanicals Ready fo	r Build 💽		
1.3.6	Build first 3 Protot	ypes										В
1.3.9	Prototype Build Com	olete										

5. In the grid, click the Shared Summary task WBS 1.3.6, **Build first 3 Prototypes.** The plan navigates to the Shared task and highlights it and its Shared subtasks in cyan (orange in the task grid). Note: you might need to expand the Shared Summary task to see the Shared Subtasks (three white dots in a triangular pattern).

Proje	ct Name: XP 2000 [Mary M]																							
		May 23 Jun 23																						
WBS	Title	Week 2	Week 21 Week 2			22 Week 2					Week 24				Week 25				Week 26					
		25 2	26 2	9 30	31 0	1 02	05	06 C	7 08	09	12	13	14	15	16 1	9 20	) 21	22	23	26	27	28	29	30
1	<ul> <li>Prototype Build</li> </ul>																							
1.1	Prototype Backpanel PCBA																	_	]					
1.1.11	Prototype Ready for Buil							Protot	ype R	eady	/ for	Build	l: Ba	ackp	anel F	CBA	Ą	٠	l					
1.2	Prototype Pwr Board PCBA															]								
1.2.11	Prototype Ready for Buil				Pro	ototyp	e Re	eady f	or Bui	ld: P	wr B	oard	PC	ΒA	K	3								
1.3	Prototype Build - Enclosure																							
1.3.5	Mechanicals Ready for B…	}																						
1.3.6	<ul> <li>Build first 3 Prototypes</li> </ul>							E	Build f	irst 3	8 Pro	totyp	oes (	Bob	John,	Mar	y,Su	e]						
1.3.6.1	Build first 3 Prototypes											Buil	d firs	st 3 I	Protot	pes	s [Su	e]						
1.3.6.2	Build first 3 Prototypes											Buil	d firs	st 3 I	Protot	pes	Bol	b]						
1.3.6.3	Build first 3 Prototypes										ł	Build	firs	t 3 P	rototy	pes	[Johi	n]						
1.3.6.4	Build first 3 Prototypes										E	Build	first	3 P	rototy	pes	[Mar	y]						
1.3.9	Prototype Build Complete															F	Proto	type	Buil	ld Co	omple	ete		

6. In the Search/Find cell, click **X** to clear the search. Notice the selected task stays visible after the search has been cleared.



7. Right-click on the Shared task Build first 3 Prototypes then click **Show Linked > Predecessor -All**.

Build first 3 Prototypes [Mary,Bob,Sue,John]	
Build first 3 Prototypes [Sue] Make A	ctive
Build first 3 Prototypes [Bob] 🚺 Mark C	ompleted
Build first 3 Prototypes [John]	roperties
Build first 3 Prototypes [Mary]	sk 🗲
Chesign Review [Mary,B Show L	inked > Predecessors - One
Prototype Buil Delete	Task(s) Predecessors - All
Engin More	> Successors - One
EB Backpanel PCB, Townson	Successors - All
EB Backpanel Schematio	
EB Back	panel Layou Both directions - One
✓ EB Backpanel Review/a	approve PCB Both directions - All

8. All predecessors to **Build first 3 Prototypes** are displayed. You might have to scroll horizontally and vertically to see them.

G	ame Plan Hu	ddle	My Playbook	Dashboard								
+ Add	🕶 ∓ 🚖 🌇 Project 🗅	T Lifecycles	🛛 🕇 Criticality 🔽 🚥	C Reapply Reset					Find tasks by tit	le 🍸 🛛 Go to Today	/ Q X -	+
Proj	ect Name: XP 2000											
WBS	TASK TITLE	START	OCT : VEEK 40 WEEK 41	21 WEEK 42 WEEK 43	WEEK 44 WEEK 45	NOV 21 WEEK 46	WEEK 47	WEEK 48	WEEK 49	DEC 21 WEEK 50	WEEK 51	WEEK 52
			07 08 11 12 13 14 15	18 19 20 21 22 25 26 27 28 2	9 01 02 03 04 05 08 09 10 11	12 15 16 17 18	19 22 23 24 25 26	29 30 01 02 03	06 07 08 09 10	13 14 15 16 17	20 21 22 23 24	27 28 29 30
1	<ul> <li>Prototype Build (Bob)</li> </ul>	Sep 17,										Î
1.1	<ul> <li>Prototype Backpanel F</li> </ul>	CB Sep 27,										
1.1.1	Design Prototype Back	oan Sep 27,										
1.1.2	Layout Prototype Backp	ane Sep 29,										
1.1.3	Review/approve Backpa	anel Oct 4, 2										
1.1.4	Get Quotes Prototype E	ack Oct 5, 2	" <b>`</b> ]									
1.1.5	Incorporate layout chan	ges, Oct 5, 2										
1.1.6	Order Prototype Backpa	anel Oct 8, 2										
1.1.7	A course componente, ki	back Oct 11,	2[000]									
1.1.0	Assemble, shin/racakie	fro Nov 10		Assamble chin/racaive from suppl	ier Backnanel RCBA (Bohl							
1.1.0	Banch lastinepart Back	man Nov 17		Assemble, sinpreceive non supp	Banch test/inspect Backpanel PCB	A (Rob)						
12	= Prototyne Pwr Board E	CB Sep 17			Denen teorinopeti baciparen ob							
1.2.1	Design Prototype PCBA	C P Sep 17.				-						
1.2.2	Layout Prototype Pwr B	oar Sep 24										
1.2.3	Review/approve Pwr Bo	ard Sep 29,										
1.2.4	Incorporate changes, ex	cpor Sep 30,										
1.2.5	Get Quotes Prototype F	wr Sep 30,										
1.2.6	Order Pwr Board PCB	Oct 5, 2	ic .									
1.2.7	Fab/receive Prototype F											
1.2.8	Acquire parts, kit, send	to s Sep 24,										
1.2.9	Assemble, ship/receive	fro Nov 5, 3	2 Assemble	e, ship/receive from supplier: Pwr Boar	rd PCBA (John)	1						oa ch
1.2.10	Bench test/inspect: Pwr	Bo Nov 12,		Bench te	st/inspect: Pwr Board PCBA [John]							peed
1.3	Prototype Build - Enclosed	osu Sep 20,										ŭ.
1.3.1	<ul> <li>Injection Molded Fa</li> </ul>	ace Sep 20,										
1.3.1.3	Validate/correlate Fi	EA r Sep 23,										
1.3.1.4	Document/Distribute	e FE Sep 24,										
1.3.1.5	Define Housing/Fac	epla Sep 27,										
		,	•									10

9. Click the *Unfilter Dependents icon* to display all tasks.

	Playbook								Welcome Bob						2 🕜	• • T	٢	≡
G	ame Plan Huddle		My	/ Playbook		Dashl	board						Unfilter Dep	endents				1
+ Add	Add 🛡 🔻 🔝 Project 🕇 Lifecycles 🔲 🕇 Criticality 🛩 🥶 🖉 Reapply 🕆 Reset											- <u>.</u>	Find tasks by title	Go to Today	Q X -	1	+	
Proj	ect Name: XP 2000																	
											NOV 21				DEC 21			
WBS	TASK TITLE	START	/EEK 40	WEEK 41	15 10	WEEK 42	WEEK 43		EEK 44	WEEK 45	WEEK 46	WEEK 47	WEEK 48	WEEK 49	WEEK 50	WEEK 51	W	EEK 52
1	<ul> <li>Prototype Build (Bob)</li> </ul>	Sep 17,	07 00	11 12 13 14	15 10	19 20 21 2	2 23 20 21 20	29 01 02	03 04 05 00	5 09 10 11 1.	15 10 17 10	19 22 23 24 23 20	5 29 30 01 02 03 0	5 07 08 09 10 1.	5 14 15 10 17	20 21 22 23 2	4 21 20	23 34
1.1	Prototype Backpanel PCB	Sep 27,												1				
1.1.1	Design Prototype Backpan	Sep 27,																
1.1.2	Layout Prototype Backpane	Sep 29,											<b> </b>		-			
1.1.3	Review/approve Backpanel	Oct 4, 20											U	nfilter				
1.1.4	Get Quotes Prototype Back	Oct 5, 20	Шh										dar	ondont	_			
1.1.5	Incorporate layout changes,	Oct 5, 20	-										laet	endent	5			
1.1.6	Order Prototype Backpanel	Oct 8, 20	u 🕻	h,										icon				
1.1.7	Fab/receive Prototype Back	Oct 11, 2	[Bob]	()			3						L					
1.1.8	Acquire components, kit, se	Sep 29,																
1.1.9	Assemble, ship/receive fro	Nov 10,			٥	Assemble, shi	p/receive from sup	oplier: Backpa	anel PCBA (Bo	(b)								
1.1.10	Bench test/inspect Backpan	Nov 17,						Bencl	h test/inspect E	Backpanel PCB/	[Bob]							

10. Right-click on the Shared task Build first 3 Prototypes then click **Show Linked > Successors -All**.

Build first 3 Prototypes [Mary,Bob,Sue,John]		
Build first 3 Prototypes [Sue]	Make Active	
Build first 3 Prototypes [Bob]	Mark Completed	
Build first 3 Prototypes [John]	Task Properties	
Build first 3 Prototypes [Mary]	Add Task >	
< Test Prototypes [Mary,John]	Show Linked	Prodococcoro Opo
< ■ Contract < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < > < < < < < < < < < < < < < < < < < < < <	Show Linked 7	Fiedecessors - One
Prototype Build	Delete Task(s)	Predecessors - All
Engine	More >	Successors - One
EB Backpanel PCBA	[Owner: Ken K]	Successors - All
EB Backpanel	Schematic [Bob]	
	EB Backpanel Layout	Both directions - One
< EB Backpanel	Review/approve PCB/	Both directions - All

11. All successors to **Build first 3 Prototypes** are displayed.

Proje	Project Name: XP 2000																	
			SEP 21						DCT 21			NOV 21						
WBS	TASK TITLE	START	WEEK 37	WEEK 38	WEEK 3	9	WEEK 40	WEEK 41		WEEK 42	WEEK 43	WEEK 44	WEEK 45	WEEK 46	WEEK 47			
			5 16 17	20 21 22 23	24 27 28 29 3	0 01 04	05 06 07	08 11 12 13 14	15 18	19 20 21 22	25 26 27 28 29	01 02 03 04 05	08 09 10 11 12	15 16 17 18 19	22 23 24 25	26 29		
1	<ul> <li>Prototype Build (Bob)</li> </ul>	Sep 17, 2	(b)													1		
1.3	Prototype Build - Enclosu	Sep 20, 2	(Mary)	V												1		
1.3.5	<ul> <li>Build first 3 Prototypes</li> </ul>	Nov 18, 2										* Build first 3 Pro	ototypes [Mary,Bob,S	ue,John]	h			
1.3.6	Test Prototypes	Nov 22, 2											< Test Prototy	ypes [Mary,John]	Citation,			
1.3.7	Design Review	Nov 25, 2											< Design	Review [Mary,Bob,	Sue, John]	6		
1.3.8	Prototype Build Complete	Nov 25, 2												Prototype Build C	omplete	1		
			·													<i>.</i>		

- 12. Click the **Unfilter Dependents icon** to display all tasks.
- 13. Experiment with the other options.
  - Predecessors One
  - Successors One
  - Both directions One
  - Both directions All
- 14. Sign Bob out of Playbook and **Discard changes**.

## This completes this exercise.