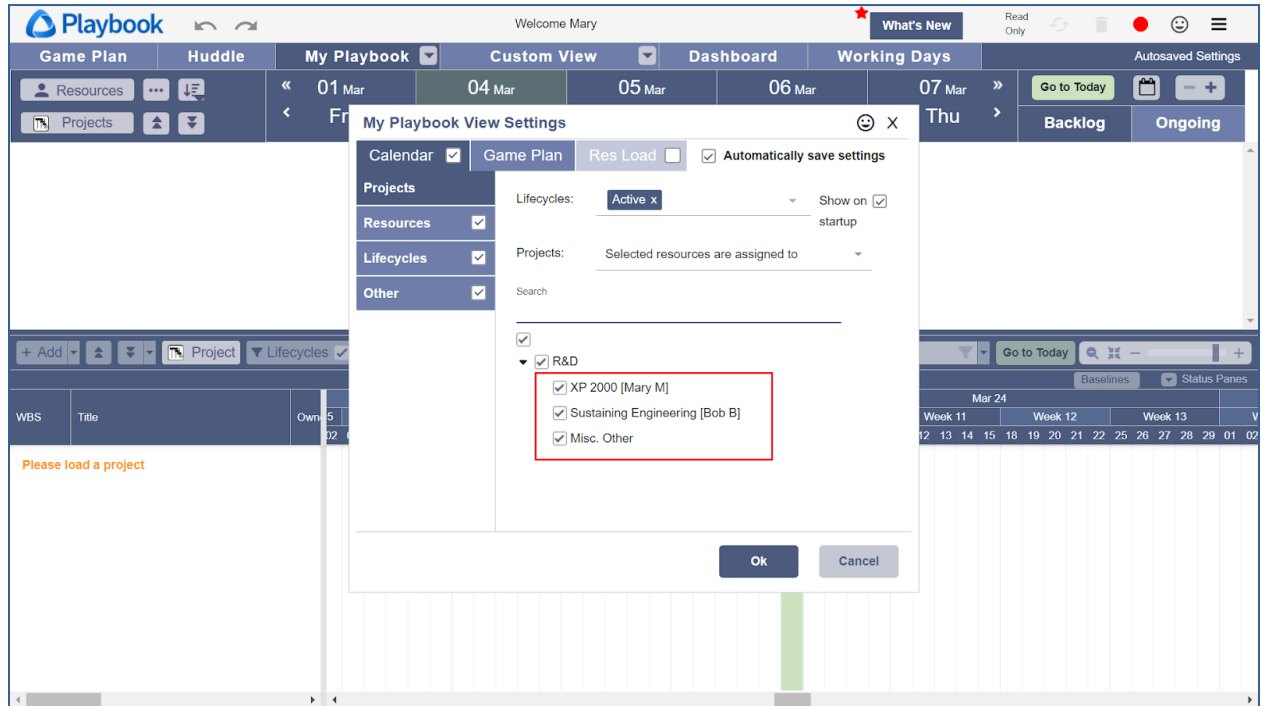


Exercise – Create & Manage Project Plans

1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Sign in as Mary. Username = **Mary**, password = **PlayBook2021**
3. Click **Ok** to load projects: **XP 2000**, **Sustaining Engineering**, and **Misc. Other**.



4. Planning and task creation are typically done in the Game Plan view. The following steps will show you how to quickly create several types of tasks and dependencies.
5. Switch the project from XP 2000 to Sustaining Engineering. Click **Game Plan** ¹, then **Project** ², **Sustaining Engineering** ³, then click **Ok**.

The screenshot shows the Playbook application interface. At the top, the 'Game Plan' tab is selected, indicated by a red box and the number 1. Below the tabs, the 'Project' button is highlighted with a red box and the number 2. The main area displays a project named 'Sustaining Engineering' with a list of tasks. A 'Gameplan Settings' dialog is open, showing the 'Game Plan' tab. In this dialog, the 'Project' dropdown is set to 'Sustaining Engineering', which is highlighted with a red box and the number 3. The 'Lifecycles' section shows 'Active x' and 'Projects in my group'. The 'Task Type' section shows 'No Group (3)' and 'XP 2000'. The 'Summary' section shows 'Sustaining Engineering' selected, which is highlighted with a red box and the number 3. The 'Linked Tasks' and 'Other' sections are also visible. The 'Ok' button is at the bottom right of the dialog.

WBS	Task Title	Week 30
1	▼ Sustaining	08 09
1.1	Determine root cause of	
1.2	Determine Failure Mode	
2	▼ Production Support	
2.1	Shutdown RM400 Line a	

6. To create a task, right-click in the Game Plan, **Add Task > Unrelated**.

The screenshot shows the Playbook interface with the 'Game Plan' tab selected. The project name is 'Sustaining Engineering'. The interface displays a Gantt chart with tasks like 'Determine root cause of low Chassis yield [Sue]', 'Determine Failure Mode of Bezel [Bob]', and 'Shutdown RM400 Line and Restart RD350 [Mary]'. A red box highlights the 'Add Task > Unrelated' menu option.

7. Summary tasks do not have resources but often have owners. As a best practice, select the name of the owner if it is not to be the same as the inherited owner (next level up).

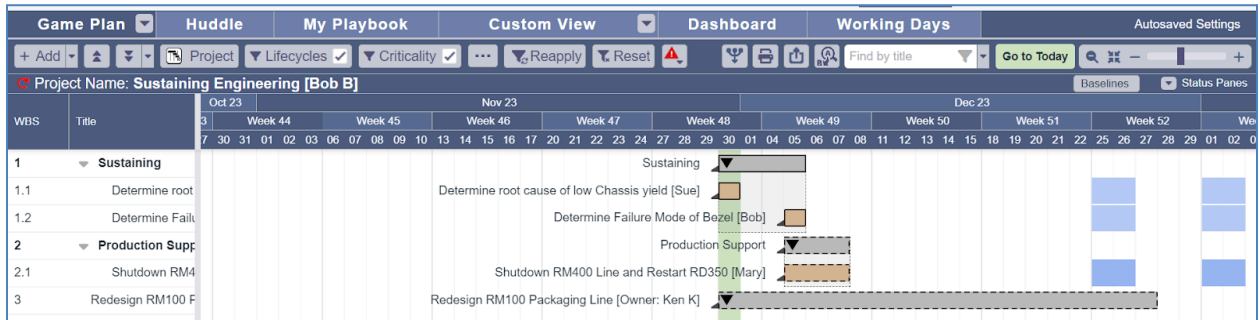
- **Title = Redesign RM100 Packaging Line**
- **Type = Summary**
- **Owner =** Clear the inherited checkmark then select **Ken K**

The 'Create Task' form is shown with the following fields and values:

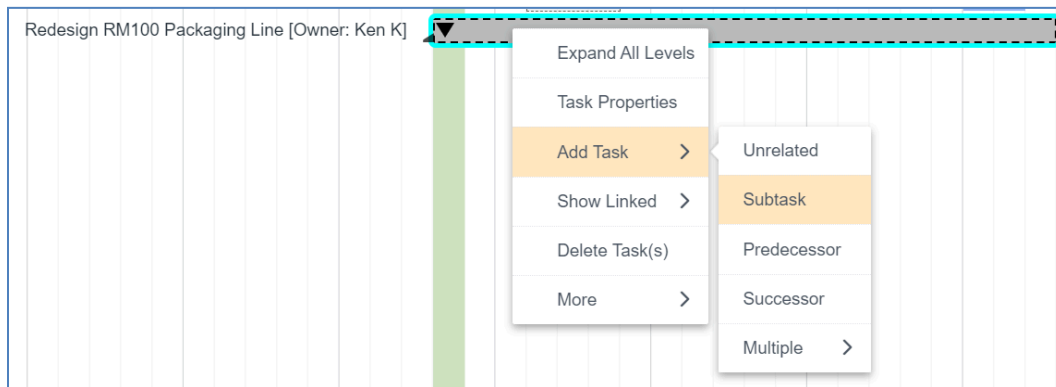
- Title***: Redesign RM100 Packaging Line
- Type***: Summary
- Owner**: ☐ Inherited ☒ Ken K
- Duration***: ☐ Auto ☒ 20 (Weekdays)
- Work***: Per day 0:00, Total 0:00
- Calendar**: Default (weekdays)
- Description (Definition of done)**: Description

Buttons: OK, Cancel

8. A summary task's duration is 20 days, by default, and can be changed to any value or if you want a summary task's duration to be determined by its subtasks, you can check **Auto**. For now, we will leave it at the default value of 20 days with **Auto** unchecked.
9. Summary tasks do not explicitly have hours of work. The total hours of work within a Summary task is the sum of all hours of the tasks contained within the summary task (subtasks). Click **Ok** then review the newly created summary task (highlighted in cyan).



10. Add a subtask. Right-click on the summary taskbar then click **Add Task > Subtask**. Note: Subtasks are automatically considered part of the summary task whereas an Unrelated task is not.



11. On the **Basic tab...**

- **Title = Create layout of new packaging line**
- **Type = Work**
- **Resources = John J (5)** → John's average availability to do project work = 5 hrs/day
- **Duration = 1** (Working Days)
- **Work = 5:00** (Total) → the total work = 5 hrs/day * 1 day = 5 hrs

Create Task	
Basic	Title* Create layout of new packaging line
Summary & Status	Type* Work
Links	Resources John J (5) x
	Duration* 1 Start on 04 Dec 2023
	Working Days 04 Dec 2023
	Work* Per day ↑ 5:00 Calendar
	Per resource Total ↑ 5:00 Resource

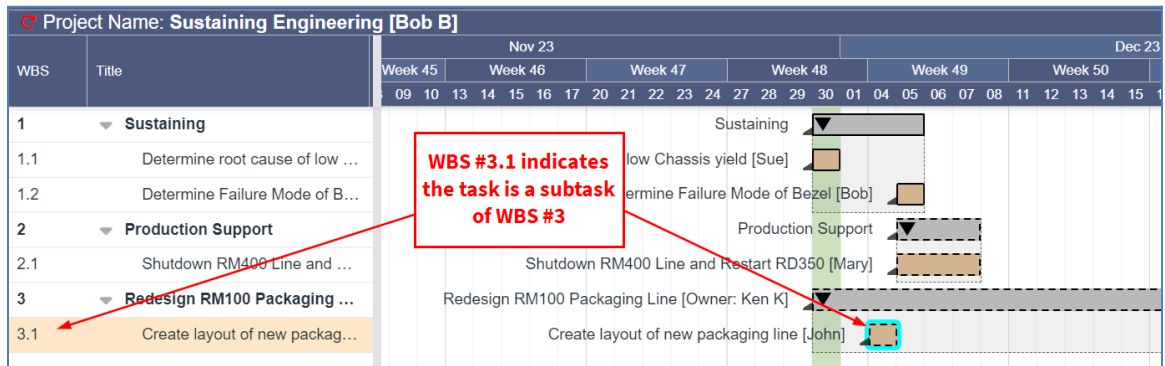
12. On the **Summary & Status tab...**

- **In Summary Task = Redesign RM100 Packaging Line**

Note: this can be used to move the task into another summary task

Create Task	
Basic	In Summary Task Redesign RM100 Packaging Line
Summary & Status	Lifecycle Planned
Links	Criticality Automatic
	Acceptance New
	Blocked <input type="checkbox"/>
	Queued Yes

13. Click **Ok** then review the newly created subtask (highlighted in cyan). Note: since it is a subtask of WBS #3, its WBS # = 3.1. If it were not a subtask, its WBS # = 4.



14. To edit the newly created task, right-click on **Create layout of new packaging line** then click **Task Properties** or double-click.

- Duration = **Work** (total hours) divided by **Availability** (hours per day)
- Since they are interrelated, when one of the values is changed, one will be considered fixed and the remaining one will be updated.

For example, if Duration is changed from 1 day to 2 days, the Total Hours of Work is changed from 5 hours to 10 hours, because John's Availability (5 hrs/day) is considered fixed.

- Green arrows show the value that was explicitly changed, while blue arrows show the variables that have been changed by Playbook.

15. Click the **Revert icon** to reset the duration to 1 day. How do Hours per Day and Total Hours of Work change? Experiment with these until you firmly understand this behavior, then click **Cancel**.

Title* Create layout of new packaging line

Type* Work

Resources John J (5) x

Duration* 2 Working Days

Work* Per day 5:00 Per resource Total 10:00

Calendar Resource

Revert icon

16. Drag **Create layout of new packaging line** to today (green column) using the left mouse button.

Redesign RM100 Packaging Line [Owner: Ken K]

Create layout of new packaging line [John]

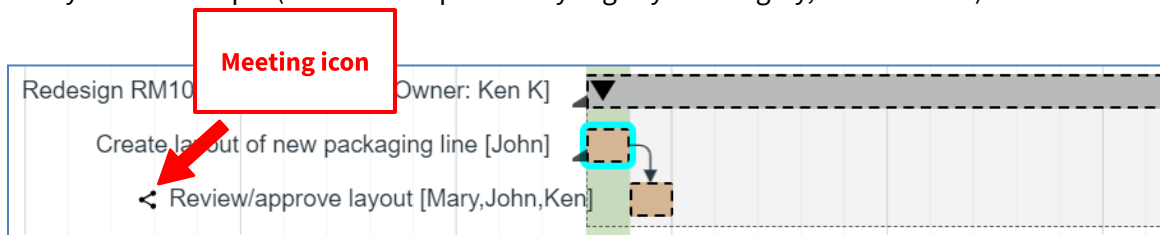
17. Create a Meeting task. Right-click on **Create layout of new packaging line** then click **Add Task > Successor**.

19. On the **Basic tab...**

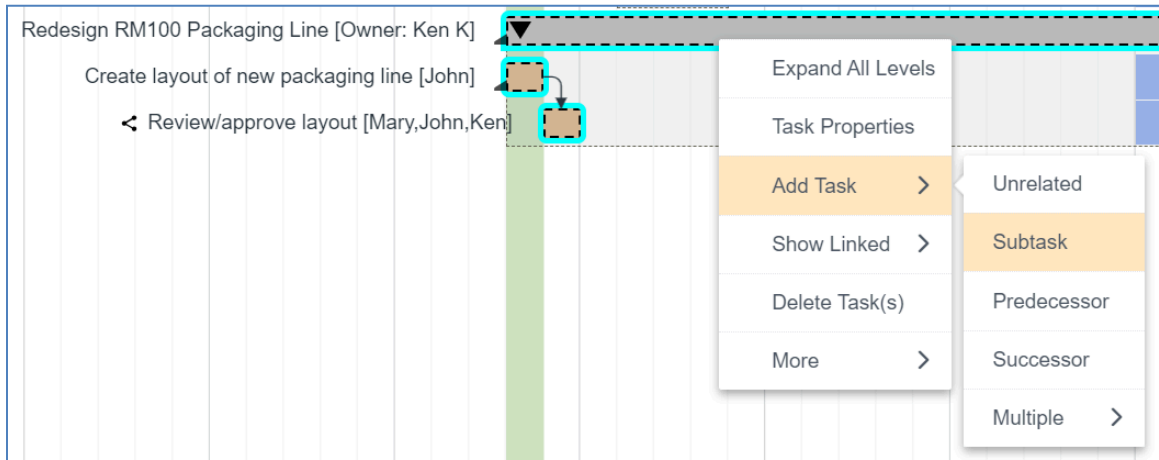
- **Title = Review/approve layout**
- **Type = Meeting**
- **Resources = John J, Mary M, Ken K**
- **Duration = 1** (Working Days)
- **Work = 1:00** (total hours) → Meetings default to 1 hour

Title*	Review/approve layout		
Type*	Meeting		
Resources	John J (5) x Mary M (5) x Ken K (3) x		
Duration*	1	<input type="checkbox"/> Earliest	01 Dec 2023
Working Days			01 Dec 2023
Work*	Per day	1:00	Calendar
Per resource			Resource
	Total	1:00	

20. Click **Ok** and review the newly created successor and its dependency. Note the **meeting icon** to the left of the task's title. Also, notice it is planned to start as soon as possible which is on a Friday in this example (weeks are separated by slightly darker gray, vertical lines).




21. Create a standalone Monitor subtask (no predecessors or successors). Right-click on summary task **Redesign RM100 Packaging Line** then click **Add Task > Subtask**.

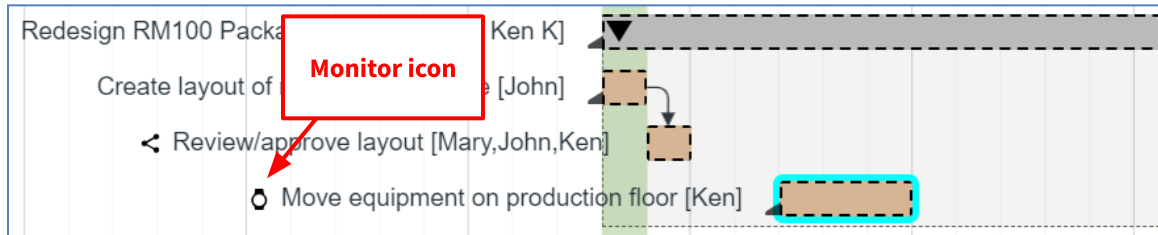


22. On the **Basic tab...**

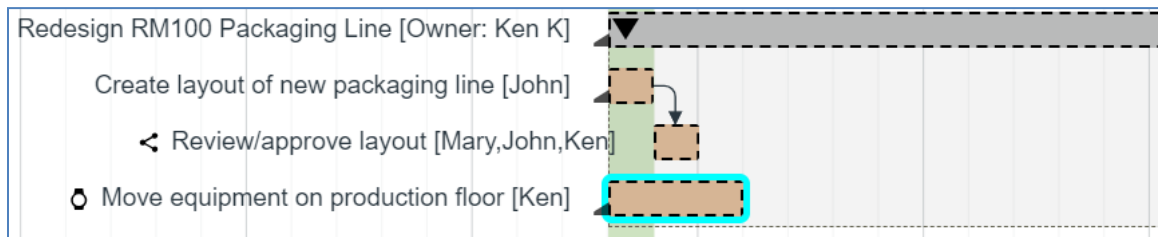
- **Title = Move equipment on production floor**
- **Type = Monitor** → Ken is not doing the work himself, but he is coordinating and managing others to ensure the work gets done
- **Resource = Ken K (3)** → Ken's average availability to do project work = 3 hrs/day
- **Duration = 3** (Weekdays)
- **Work = 1:00** (hours total) → **Hours per day** rounds to the nearest 15 min value

Title*	Move equipment on production floor		
Type*	 Monitor		
Resources	Ken K (3) x		
Duration*	↑ 3	Start on	04 Dec 2023
Weekdays		↑	06 Dec 2023
Work*	Per day ↓ 0:15	Calendar	
Per resource	Total ↓ 1	Resource	

23. Click **Ok** and review the newly created Monitor task. Note the **monitor icon** to the left of the task's title and notice it is not a successor of **Review/approve layout** because we did not use **Add Task → Successor** (I know... you are just doing what you were told - way to follow directions!)

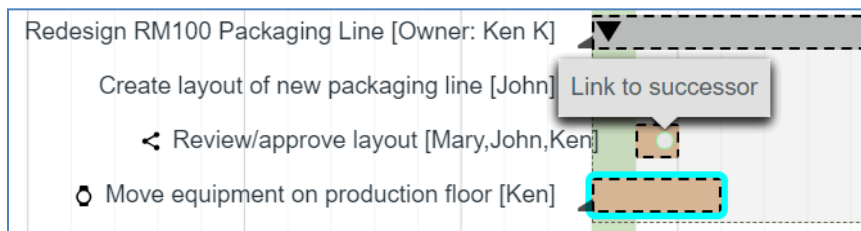


24. Drag **Move equipment on production floor** to start on today (green column) using the left mouse button.



25. To add a dependency (link), we could use Task Properties, **but we will use a shortcut instead...**

Hover over **Review/approve layout** then click on the white dot (**Link to Successor**) then drag to the taskbar, **Move equipment on production floor**. Note: you don't have to drop it on the successors link icon. A line will appear while you are dragging, and a **Valid** message is displayed when the link has been created (see below).



26. Once the link has been created, the successor moves such that it is planned to start after the predecessor's end date.



27. Links can also be created/deleted using Task Properties. Right-click on **Move equipment on production floor** then click **Task Properties** or double-click on it.

28. Click the **Links** tab.

Task Properties

Basic

Summary & Status

Links

Change log

Predecessor Name

End date

Enter the Predecessor Title

Review/approve layout

01 Dec 2023

Successor Name

Start date

Enter the Successor Title

29. Predecessors and Successors can be created using a search function. In the **Predecessors** section, click in the **Search** cell and type **shut** (we are looking for a task that has the word **shutdown** in its title).

As you type, Playbook looks for tasks with those letters in their title and displays them in real time in a results list just below the search cell.

Task Properties

Basic

Summary & Status

Links

Change log

Predecessor Name

End date


shut

Shutdown RM400 Line and Restart RD350

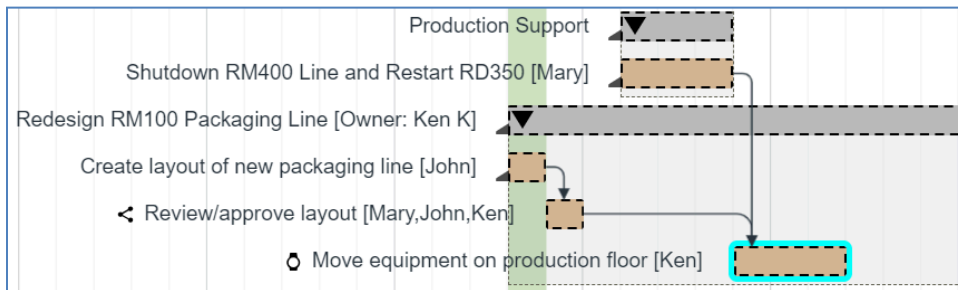
Planned

Work

30. In the results list, click on task **Shutdown RM400 Line and Restart RD350** to add it as a predecessor.

Predecessor Name		End date	
Enter the Predecessor Title			
	 Shutdown RM400 Line and Restart RD350	 07 Dec 2023	
	 Review/approve layout	 01 Dec 2023	

31. Click **Ok**. Did **Move equipment on production floor** move horizontally? If yes, why?







32. Delete a link. Right-click on **Shutdown RM400 Line and Restart RD350** then click **Task Properties**.
33. Click the **Links** tab then click the **delete icon** next to **Move equipment on production floor**.

Task Properties

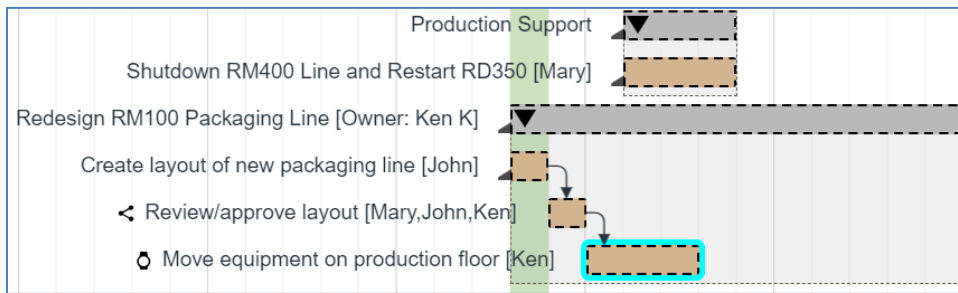
Basic
Summary & Status
Links
Change log

Predecessor Name		End date	
Enter the Predecessor Title			

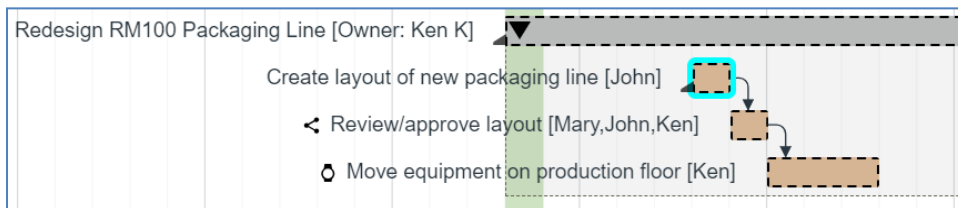
Successor Name		Start date	
Enter the Successor Title			
	 Move equipment on production floor	 08 Dec 2023	

Delete icon

34. Click **Ok**. Did **Move equipment on production floor** move horizontally? If yes, why?



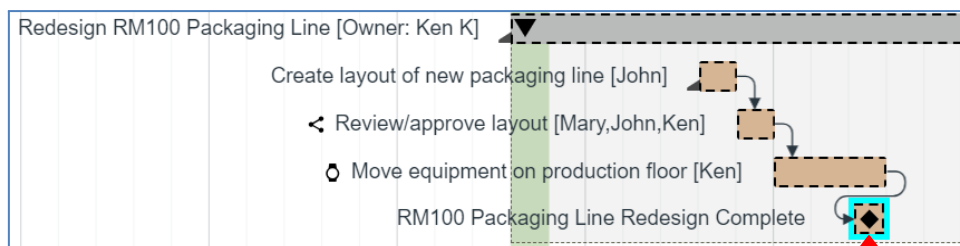
35. Adjust the start dates of tasks. Per the plan it looks like we intend to start this work today, but we know it cannot start for at least another week, so drag the first task **Create layout of new packaging line** to start one week from today. Did the successors move automatically to the right?



36. Create a Milestone. Right-click on **Move equipment on production floor** then click **Add Task > Successor**.

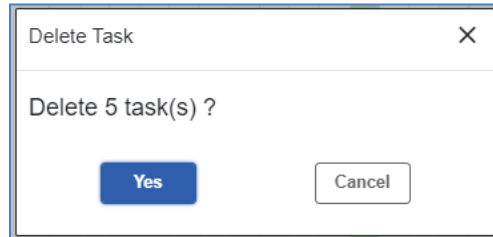
37. On the Basic tab...

- **Title = RM100 Packaging Line Redesign Complete**
- **Type = Milestone**
- **Owner =** leave **Ken** has the inherited owner
- Milestones do not have Work, Duration, or Resources.
- Click **Ok** and review the newly created milestone.
- Since milestones are reached the moment their predecessors have been marked complete, they occur on the predecessor's end date, not the day after.

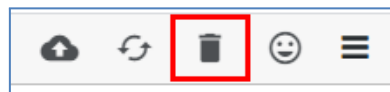


Same end date as predecessor

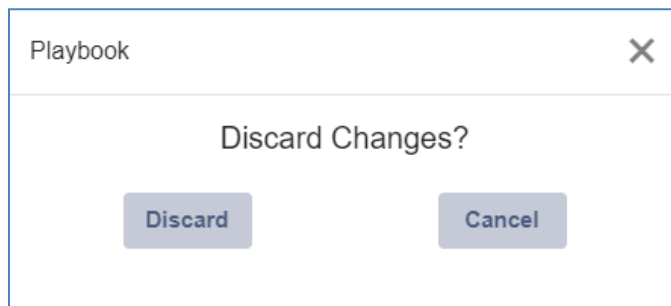
38. Delete a summary task and all its subtasks. Right-click on summary task **Redesign RM100 Packaging Line > Delete Task**.
39. A confirmation window opens asking you to confirm that you will delete the summary task and all its subtasks. Click **Yes**.



40. Click **Discard**.



41. Because you have made changes, you are prompted to Discard or Cancel. Click **Discard**.



Extra! Extra! Read All About It!

This discards all changes made since the previous save.

“Save” and “Save & Sync” are greyed out because you cannot save changes on the training site because it is used by people all over the world and they are all logging in as the same users.

If this was your production site, anyone with Read/Write permissions would be able to save.

42. Sign out of Playbook.

This completes this exercise.