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**.

🛆 Playbook 🛛 🗠 🔿		Welcome M	lary		* What	's New	Read Only	■ 🕒 ≡
Game Plan Huddle	My Playbook 🕻	Custom Vi	ew 🔽 Das	hboard	Working	Days		Autosaved Settings
👤 Resources 🛛 🗤 🚛	« 01 Mar	04 Mar	05 _{Mar}	06 ма	r	07 _{Mar}	» Go to To	day 🛗 🗕 🕂
🖪 Projects 🔹 🟹	Fr My Playb	ook View Settings			Θ×	Thu	Backl	og Ongoing
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	Resources				startup			
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+ Add - 🛦 - The Project - Li	fecycles 🗸	✓ ▼ ✓ R&D						९ ж - 🛛 +
			P 2000 [Mary M]			Mar		aselines Status Panes
WBS Title	Own 5	_	ustaining Engineering [Bo	b B]		Week 11	Week 12	Week 13
Please load a project	02 (🗹 N	lisc. Other			12 13 14 15	5 18 19 20 21	22 25 26 27 28 29 01 02
Please load a project								
				Ok	Cancel			
				UK	Cancer			
4	▶ ◀			- -				•

- 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 , then Project , Sustaining Engineering , then click Ok.

1	Playbook			Welco	ome Mary		
G	ame Plan	Huddle	Му	Playbook	Dashboard		
+ Add	2 🖪	Project T Lifec	Gameplan Se	ettings		>	<
Pro	ject Name: Sustair	ning Engineerii	Calendar	Game Plan			
WBS	Task Title	Week 36 08 09 1	Project	Lifecycles:	Active x	~	18
1	 Sustaining 		Resources		Projects in my group	~	
1.1	Determine root	cause of	Lifecycles	Search			
1.2	Determine Failu		Criticality	✓			-
2	Production Sup		Task Type	No Gro	up (3)		
2.1	Shutdown RM40	JU Line a	Summary	3 × Sust	2000 taining Engineering		
			Linked Tasks		c. Other		
			Other	✓			
				**			
						Ok Cancel	

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

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Ga	ame Plan	Huddle				My P	layt	000	k			Da	shb	oard												
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Proje	ct Name: Sustai	ning Engineerin																								
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1.2	Determine Failu	ire Mode of Bezel	١							Dete	rmin	e Fai	lure M	ode of	Bezel	[Bo	b]									
2	 Production Sup 	pport	ę										P	roducti	on Si	uppo	ort	▼								
2.1	Shutdown RM4	00 Line and Re…	١					Shut	tdowr	n RM4	00 L	ine a	nd Res	tart RD	0350 [[Mar	ry]									
														Add ⁻	Task	>	k	Un	relat	ed						
																		Mu	ltiple	e	>					

- 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**

Create Task	Title*	Redesign RM100 Packag	ing Line
Basic	Туре*	Summary -	
Summary & Status	Owner	Inherited Ken K	
Links			
	Duration* Weekdays	Auto † 20 🕞	 Start on ▼ 30 Nov 2023 → 27 Dec 2023 ►
	Work* Per resource	Per day 0:00 Total 0:00	Calendar Default (weekdays) 👻
	Description (Definition of done)	Description	
			Ok

- 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).

Ga	ıme Plan 🔽 🛛 H	ud	dl	e				M	У	P	la	yb	0	o k						С	u	sto	on	n \	Vi	ie۱	N			•]		I)a	sł	۱b	Da	rc	i				W	or	ki	ng) C)a	ys	;											A	uto	sa	/ed	Se	əttir	ıgs	
+ Add	1 * * * * 1 F	roj	ect	Ι	T	Lif	ec	ycl	es	~		T	С	itic	ali	ty	~	Ι	••••	•		í,	Re	eap	op	ly		Ç	Res	set		4	ŕ			Ψ	I	8	Ι	Ů		Ģ.	F	inc	l by	/ tit	le			1		-	G	o to	То	da	y	9	3	IK.	-			L			+	
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WBS	Title	3			Ve	ek (44					Ne	ek 4					۷	Vee	k 4	16					w	eel						v	/ee	k 4	8				w	eel	(49					w	eek	50					We	ek						We	ek (52					/e
		7	30	31	C	1	02	03	3 ()6	07	· (8	09	10	1	3	14	15	5	16	1	7	20		21	22	2	3	24	2	27	28	29) :	30	01	0	4	05	06	C	7	08	11	1	12	13	14	4	15	18	1	9	20	21	2	2	25	26	3 2	27	28	2	9 (01	02	0
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1.1	Determine root															۵)et	err	nin	e r	oc	t ca	aus	se	of	lov	v C	ha	ssi	s yi	ielo	d	[Sue	9]	1																																	
1.2	Determine Failu																							C	Det	terr	nin	e F	ail	ure	N	10	de d	f B	lez	el [l	Bob	o]	1																													
2	 Production Supp 																														1	Pr	odu	ctic	on :	Sup	ро	rt	Ā	•			_ [
2.1	Shutdown RM4																			s	hu	ıtdo	wr	n R	RM	40	0 L	ine	ar	d F	Re	st	art I	RD:	350	D [N	lary	/]	4																													
3	Redesign RM100 F															Re	de	sig	ın F	RN	110	00 F	Pad	cka	ag	ing	Lir	e	[Ov	ne	er:	K	en k	[]	Ā	7																													ſ			

 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.

Redesign RM100 Packaging Line [Owner: Ken K]		
	Expand All Levels	
	Task Properties	
	Add Task 💙	Unrelated
	Show Linked	Subtask
	Delete Task(s)	Predecessor
	More >	Successor
		Multiple >

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

Create Task	Title*	Create layout	of new	packaging	line	
Basic	Туре*	II. Work		•		
Summary & Status	Resources	John J (5) x				
Links			•			
	Duration*	1			(Start on 🔍 04 Dec 2023 04 Dec 2023
	Work* Per resource	· -			Calendar Resourc	ce 👻

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	In Summary Task	Redesign RM100 Packaging Line
Basic	in Summary Task	
Summary & Status	Lifecycle	Planned -
Links		
	Criticality	Automatic 👻
	Acceptance	New
	Blocked	
	-	
	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.

						Nov	23																			C	Dec 2
WBS	Title	Wee	ek 45		W	'eek 4	6			Weel	: 47			N	/eek	48			We	eek 4	49			W	/eek	50	
		09	9 10	13	14	15	16 1	72	20 2	1 22	23	24	27	28	29	30	01	04	05	06	07	08	11	12	13	14	15
1	 Sustaining 		_						_			S	Susta	inin	g 🛓	▼											
1.1	Determine root cause of low		N	/BS	#3.	.1 in	dica	ate	s	low C	hass	sis y	rield	[Sue]												
1.2	Determine Failure Mode of B		th				sub	otas	sk	ərmin	e Fa	ilure	e Mo	de c	f Be	zel [Bob]										
2	Production Support		1		ot V	NBS	5#3						Pr	odu	ction	Sup	port		▼			l					
2.1	Shutdown RM400 Line and					S	hutdo	own	RM	400 L	ine a	and	Rest	art F	RD3	50 [N	1ary]										
3	Redesign RM100 Packaging			Red	esigr	n RM	1100	Pacl	kagi	ng Lir	ne [C	wne	er: Ke	en K													
3.1	Create layout of new packag									ut of																	

- 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.

Title*	Create layo	out of ne	w pack	aging line	
Туре*	II. Work		~		
Resources	John J (5)) x			
_					Start on 👻
Duration*	t	2	5		04 Dec 2023
Working Days 🔻				t	05 Dec 2023 🖍
Work* Per resource	Per day	5:00		Calenda	r
Ferresource	Total 🕇	10:00	5	Resou	Irce 💌

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**.



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/ap	prove layo	out		
Туре*	< Meet	ting	~		
Resources	John J (5) x Mar	y M (5) x	Ken K (3	i) x
Duration*		1		÷O	Earliest • 01 Dec 2023
Working Days 🔻					01 Dec 2023
Work*	Per day	1:00		Calenda	r
Per resource	Total	1:00		Resou	rce 🔻

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**.

Redesign RM100 Packaging Line [Owner: Ken K]			
Create layout of new packaging line [John]	Expand All Leve	els	
< Review/approve layout [Mary,John,Ken]	Task Properties		
	Add Task	> <	Unrelated
	Show Linked	>	Subtask
	Delete Task(s)		Predecessor
	More	>	Successor
			Multiple >

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)** \rightarrow 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				
Туре*	Monitor	~			
Resources	Ken K (3) x				
Duration* Weekdays	t 3	ĥ	✓ Start on ▼ 04 Dec 2023		
Work*	Perday ↓ 0:′	15 🛌	↑ <u>06 Dec 2023</u> ∽ Calendar		
Per resource	Total ↓ 1	2	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	Predecessor Name	End date
Basic	Enter the Predecessor Title	
Summary & Status	(i) Review/approve layout	
Links		
Change log	I	
	Successor Name Enter the Successor Title	Start date

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.

	Search cell		
Task Properties	Predecessor Name		End date
Basic	shut		
Summary & Status	 Shutdown RM400 Line and Restart RD350 	Planned	Work
Links			
Change log			

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



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*.



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

Production Support
Shutdown RM400 Line and Restart RD350 [Mary]
Redesign RM100 Packaging Line [Owner: Ken K]
Create layout of new packaging line [John]
Review/approve layout [Mary,John,Ken]
Move equipment on production floor [Ken]

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?

Redesign RM100 Packaging Line [Owner: Ken K]	
Create layout of new packaging line [John]	
< Review/approve layout [Mary,John,Ken]	
Move equipment on production floor [Ken]	

- 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.

Redesign RM100 Packaging Line [Owner: Ken K]	
Create layout of new packaging line [John]	1
< Review/approve layout [Mary,John,Ken]	
Move equipment on production floor [Ken]	Ь
RM100 Packaging Line Redesign Cor	nplete
	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**.

Delete Task		×
Delete 5 task(s) ?		ia La
Yes	Cancel	

40. Click *Discard*.

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

Playboo	ok			×
	D	iscard Change	s?	
	Discard		Cancel	

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.