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**.
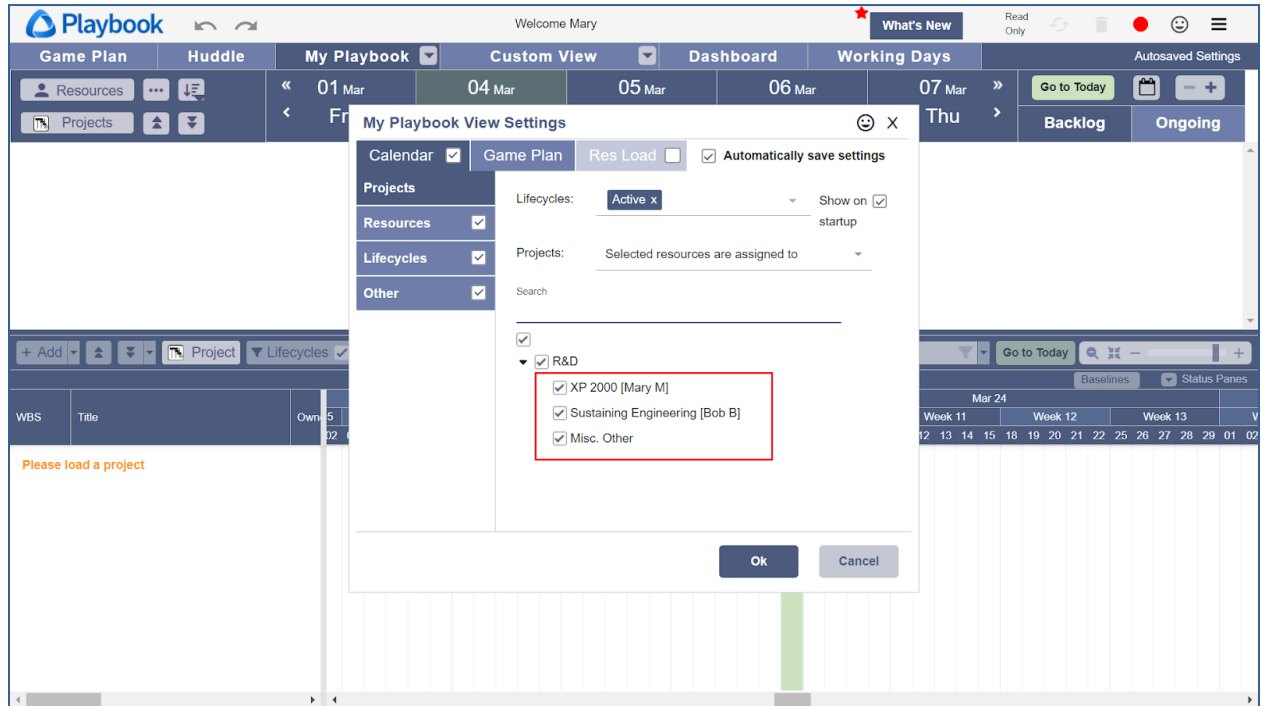
4. Planning and task creation are typically done in the Game Plan view. The following steps will show you how to quickly create several types of tasks and dependencies.

5. Switch the project from XP 2000 to Sustaining Engineering. Click **Game Plan** 1, then **Project** 2, **Sustaining Engineering** 3, then click **Ok**.

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

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**

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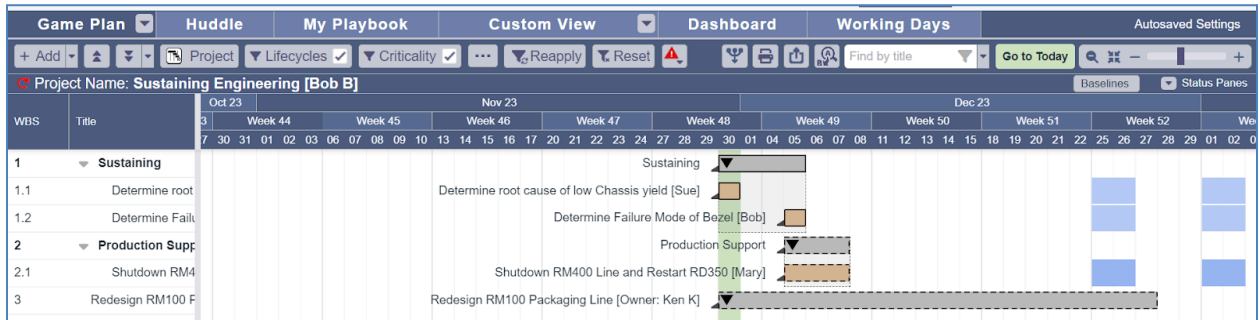
10. Add a subtask. Right-click on the summary taskbar then click **Add Task > Subtask**. Note: Subtasks are automatically considered part of the summary task whereas an Unrelated task is not.
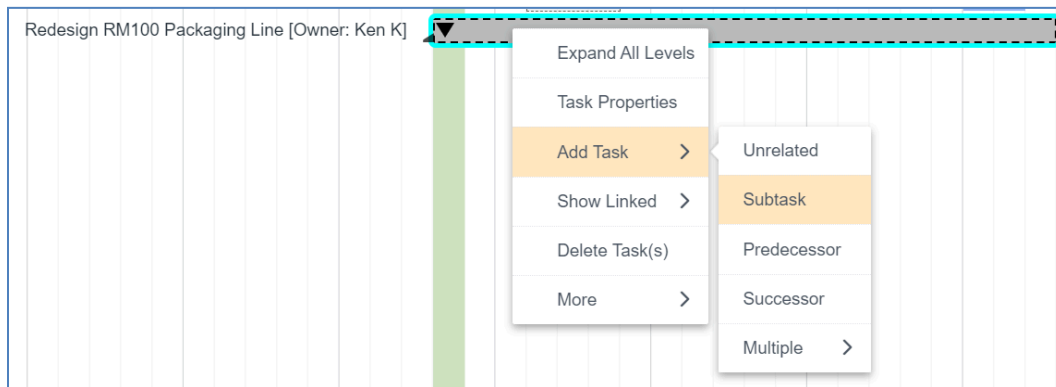
11. On the **Basic tab**…

- **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)

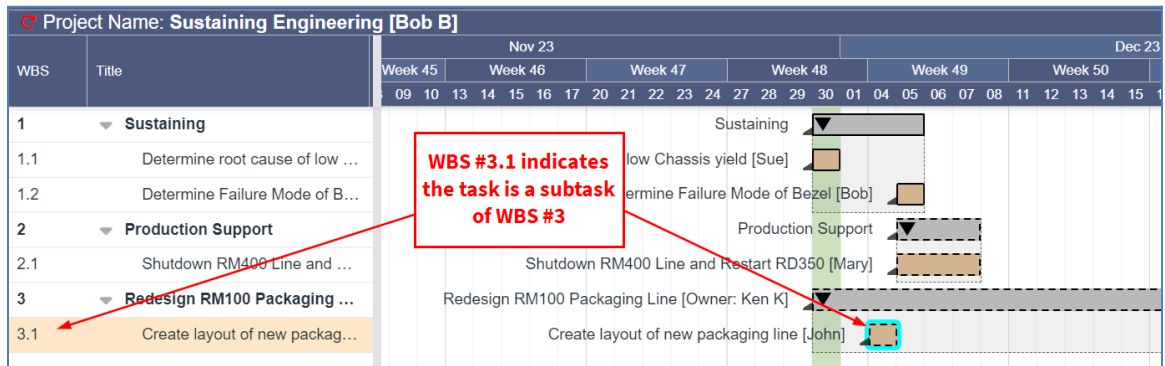- **Work = 5:00** (Total) → the total work = 5 hrs/day * 1 day = 5 hrs

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

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**.

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

17. Create a Meeting task. Right-click on **Create layout of new packaging line** then click **Add Task > Successor**.
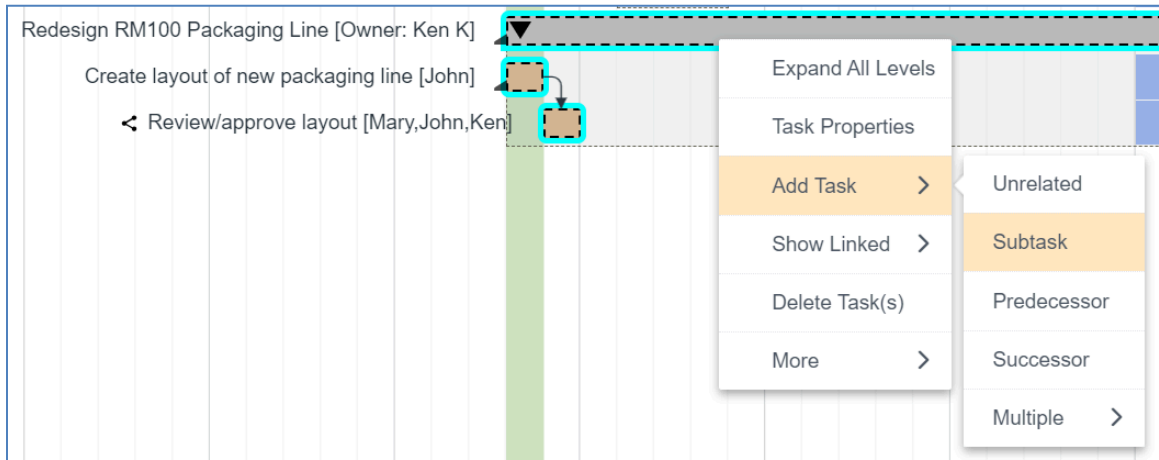
19. On the **Basic tab**…

- **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

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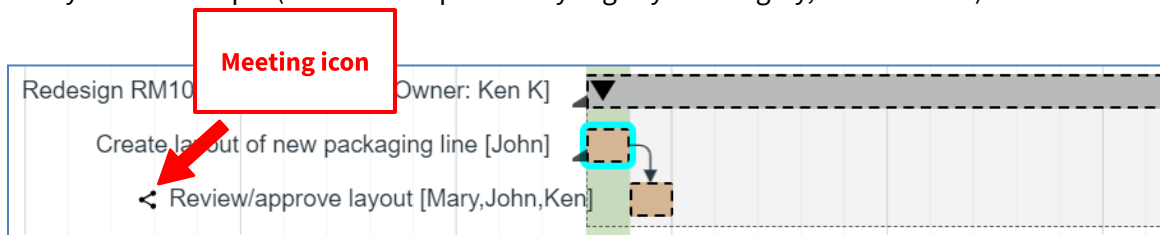
21. Create a standalone Monitor subtask (no predecessors or successors). Right-click on summary task **Redesign RM100 Packaging Line** then click **Add Task > Subtask**.


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

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!)
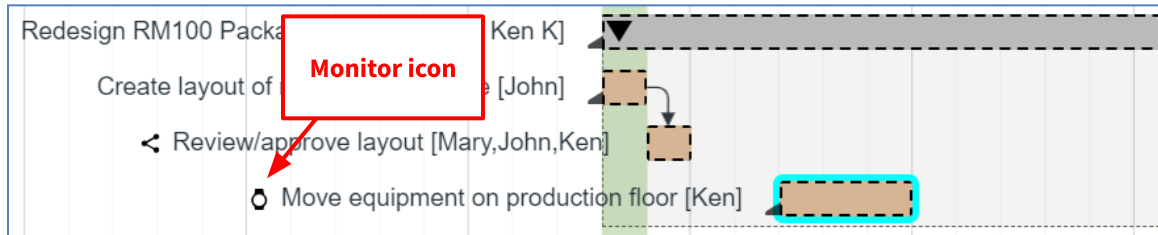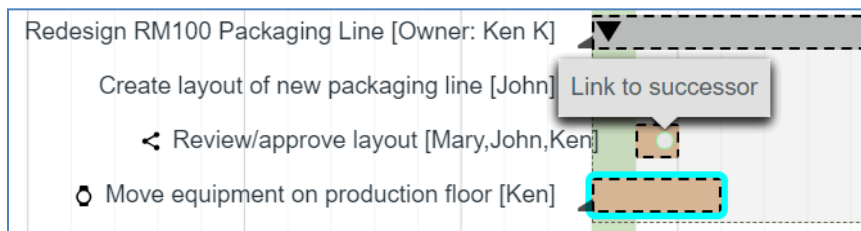

24. Drag **Move equipment on production floor** to start on today (green column) using the left mouse button.
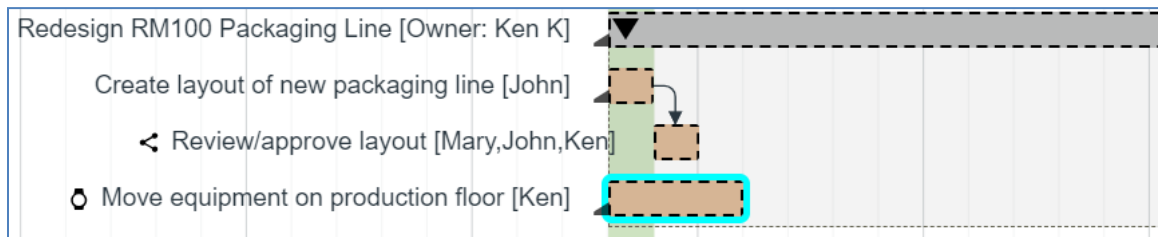
25. To add a dependency (link), we could use Task Properties, ***but we will use a shortcut instead…***

    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**.

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.

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*.

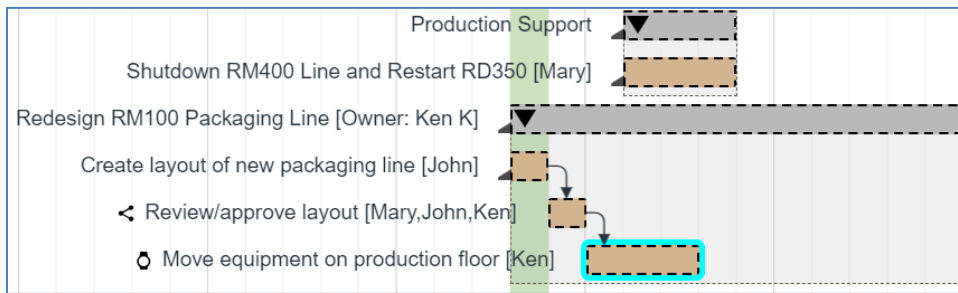34. Click **Ok**. Did **Move equipment on production floor** move horizontally? If yes, why?


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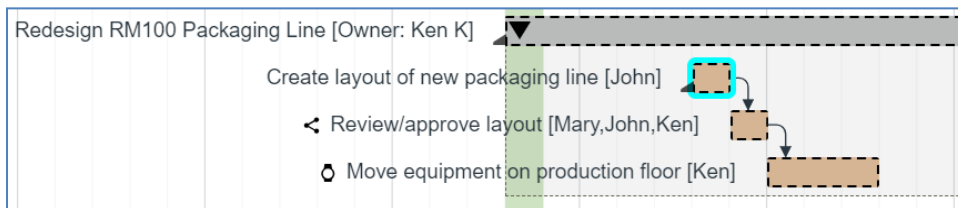
36. Create a Milestone. Right-click on **Move equipment on production floor** then click **Add Task > Successor**.

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.
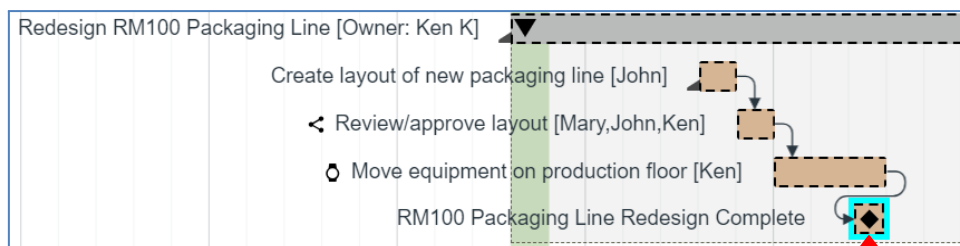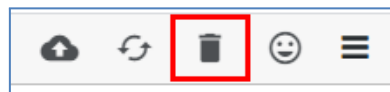

Same end date as predecessor

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**.
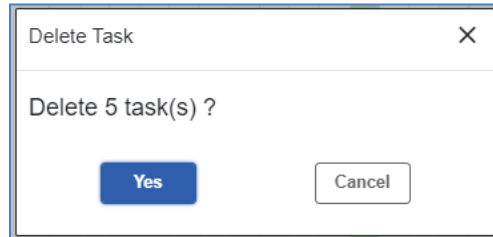
40. Click *Discard*.

41. Because you have made changes, you are prompted to Discard or Cancel. Click **Discard**.
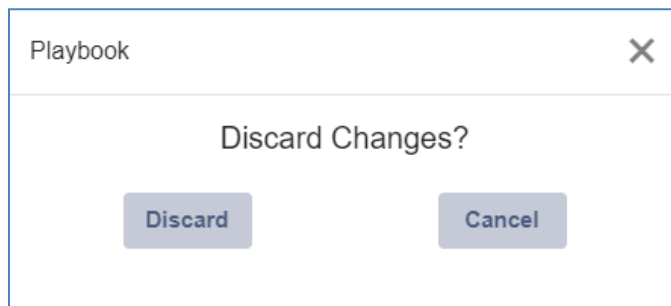
Extra! Extra! Read All About It!

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.