

## Exercise – Task Fundamentals

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. Load project **XP 2000**.

**My Playbook View Settings** [X]

Calendar  | Game Plan | Res Load  |  Automatically save settings

**Projects** (selected)

Resources

Lifecycles

Other

Lifecycles: **Active x** Show on  startup

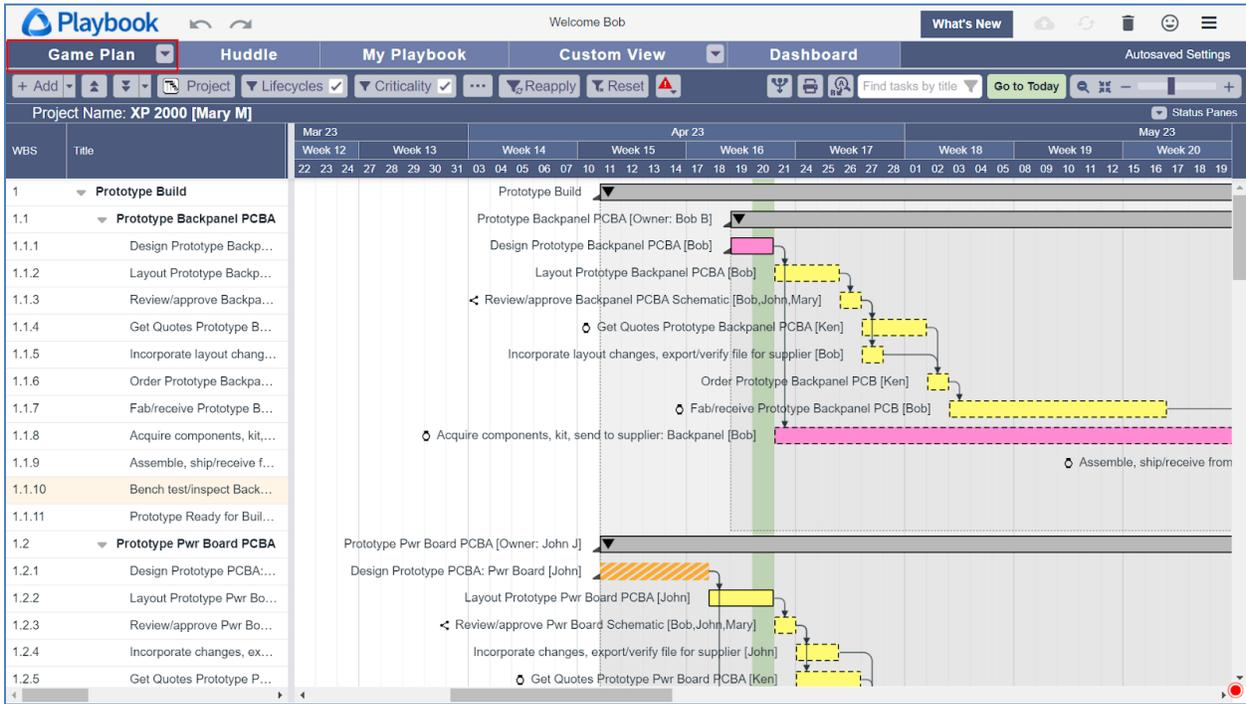
Projects I am active on

Search

▼  R&D

- XP 2000 [Mary M]
- Sustaining Engineering [Bob B]
- Misc. Other

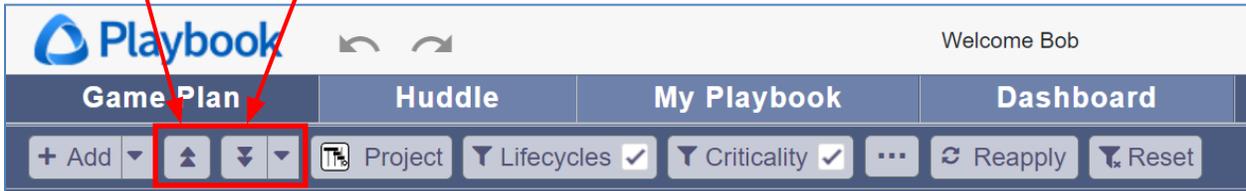
4. Switch to the Game Plan view. Click **Game Plan**.



5. Expand and collapse all summary tasks using **Collapse All**, **Expand All** or by clicking on the black and white triangles in the summary task bars.

**Collapse All**

**Expand All**



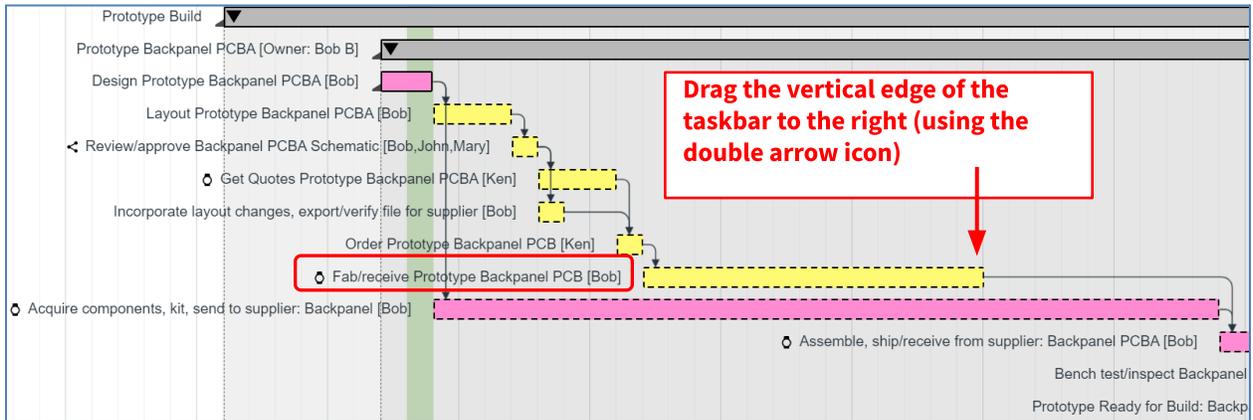
Black Triangle = Expanded (click to collapse the summary task)



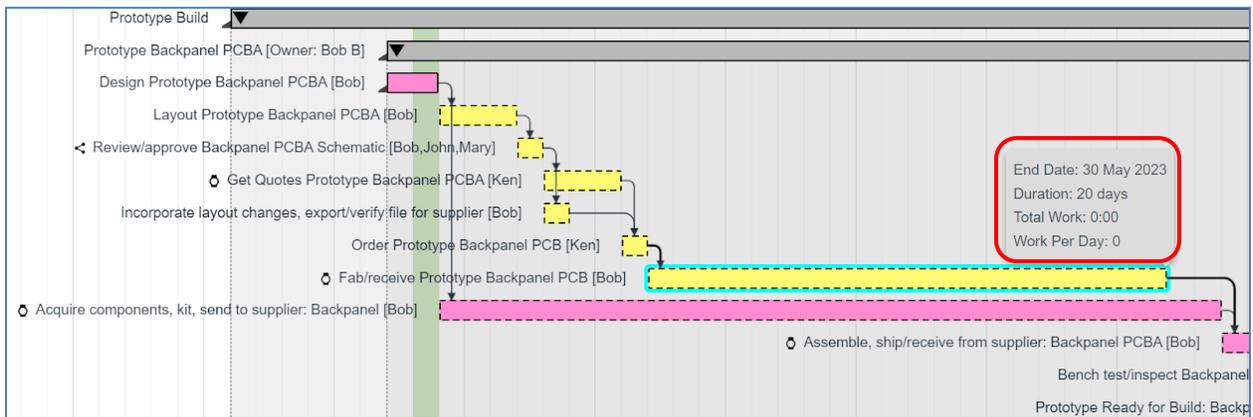
White Triangle = Collapsed (click to expand the summary task)



- A task's duration can easily be changed in the Game Plan. We found out today that Bob's monitor task, **Fab/receive Prototype Backpanel PCB**, will take 20 days instead of the 10 days originally planned. Position the cursor over the bottom-right, vertical edge of the taskbar. Click, hold, and drag the vertical edge to the right.



- The task's duration changes in 0.5-day increments when dragging. Release the mouse button when the duration is = 20 days. Why did some tasks turn from yellow to orange and what does it mean?

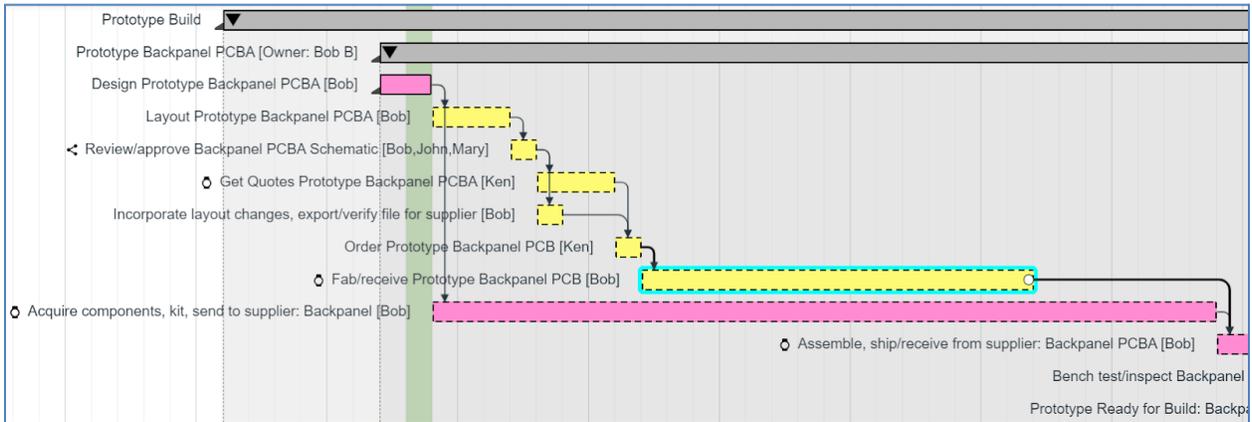


*Extra! Extra! Read All About It!*

*Work tasks are mostly **focus and get it done** tasks  
and Monitor tasks are **do a little work and wait**.*

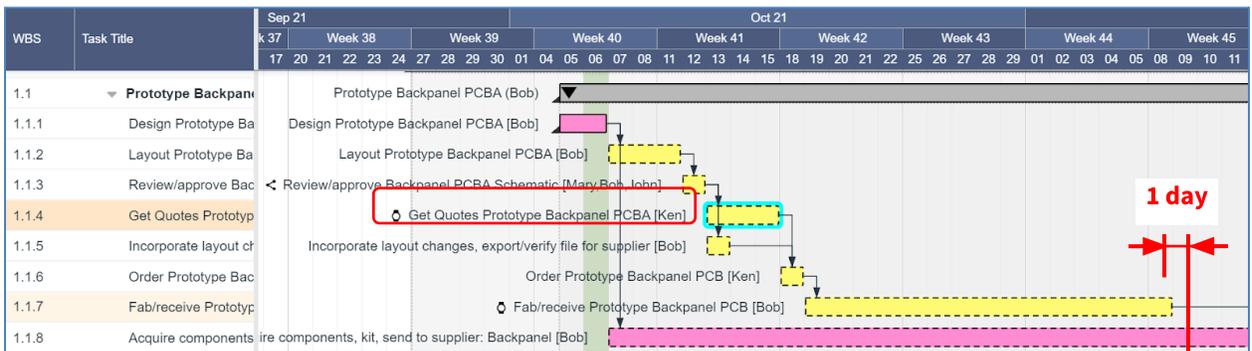
*To make it easy to tell them apart, Monitor tasks have a **watch icon**.*

8. Good news, the PCB supplier just informed us that they will be able to provide the PCB in 15 days instead of 20. Using the same technique, adjust the duration of task **Fab/receive Prototype Backpanel PCB** to 15 days. Why did some tasks change from orange to yellow?

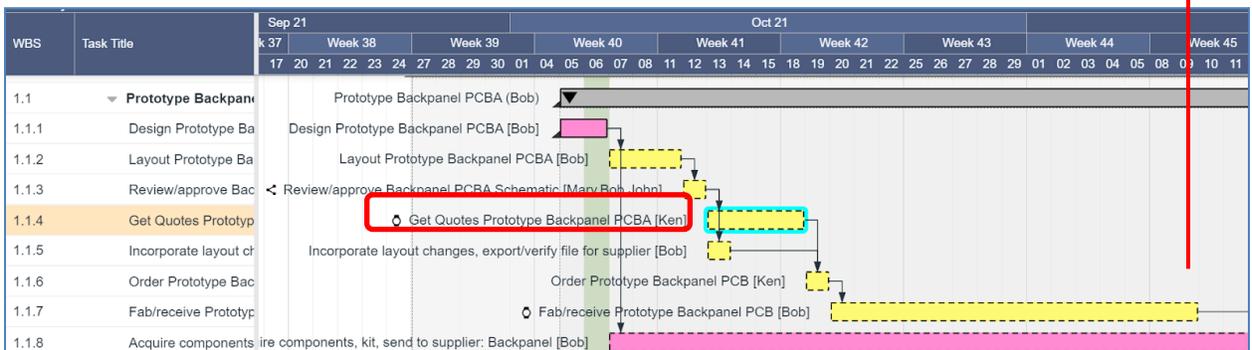


9. Ken finds out from the supplier that they cannot provide a quote in 3 days, but it will take 4 days instead. Change the duration of the task, **Get Quotes Prototype Backpanel PCBA**, to 4 days. Note: All its successors automatically move forward in time 1 day.

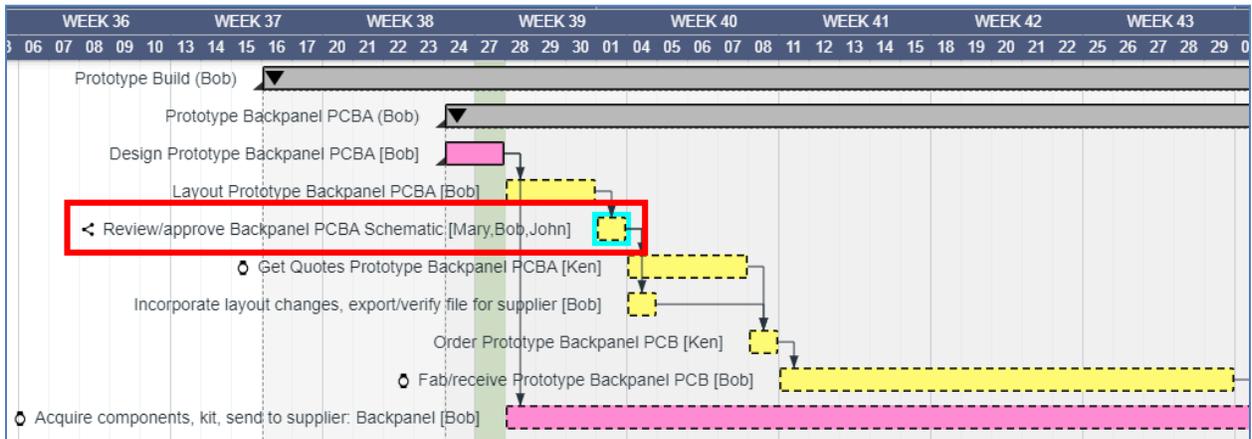
**Before**



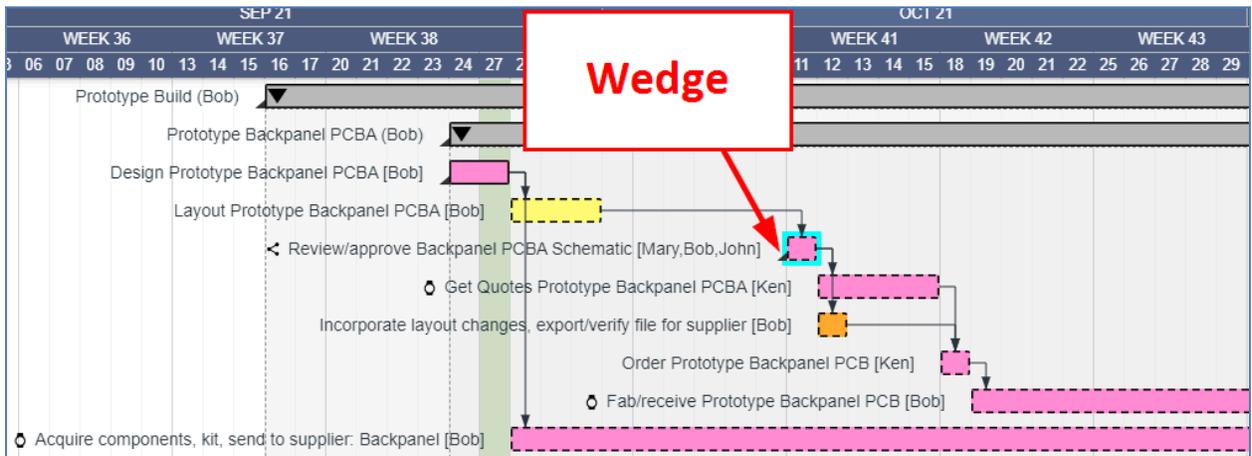
**After**



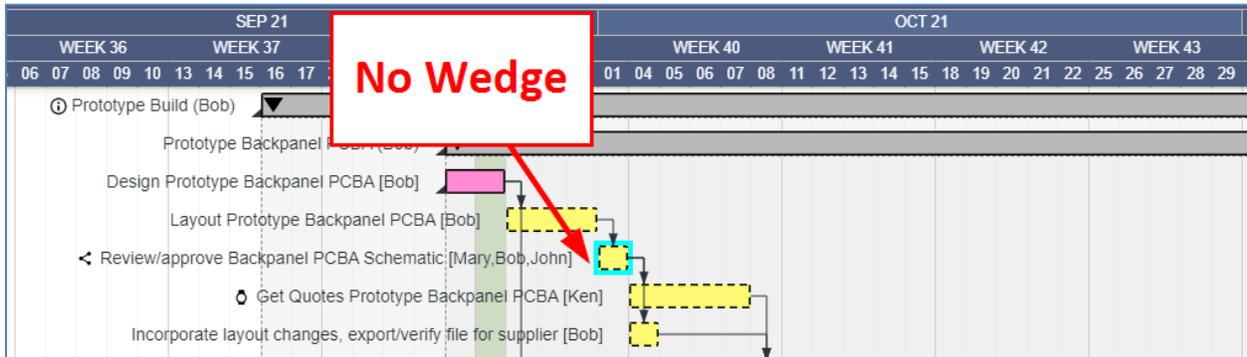
10. A task's start date can easily be changed in the Game Plan. Currently, the Meeting task, **Review/approve Backpanel PCBA Schematic**, is set to start as early as possible (i.e., Start Type = Earliest, hence there is **no wedge** in the lower left corner of the taskbar).



11. Bob coordinated with everyone and has scheduled the review meeting for next Monday. Position the cursor on **Review/approve Backpanel PCBA Schematic**, left click, hold, and drag it one week into the future, then release the mouse button. Note: The successors automatically move forward in time and a **wedge** is displayed in the lower-left corner of the taskbar. Did any tasks turn pink or orange and, if so, what does it mean?

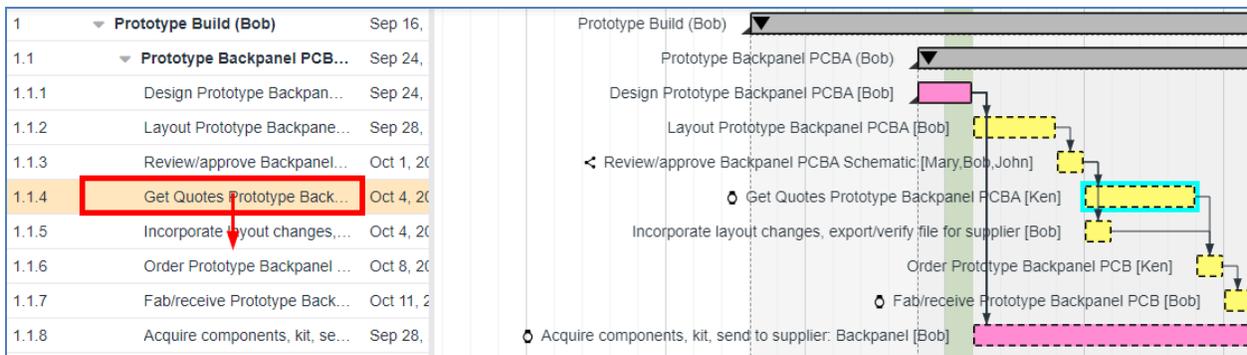


- Drag **Review/approve Backpanel PCBA Schematic** back to the left and drop it to start the day after **Layout Prototype Backpanel PCBA** ends. This changes its Start Type back to **Earliest** and removes the *wedge* and the tasks turn yellow once again.

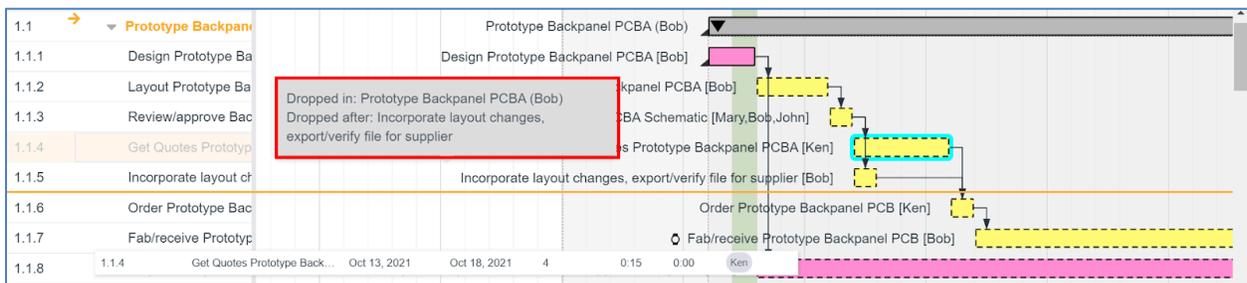


- Tasks can be repositioned vertically to make the plan easier to read and the links easier to follow. In the task grid, left click on **Get Quotes Prototype Backpanel PCBA**, hold, then move the cursor vertically until it is just below **Incorporate layout changes, export/verify file for supplier**, then release the mouse button.

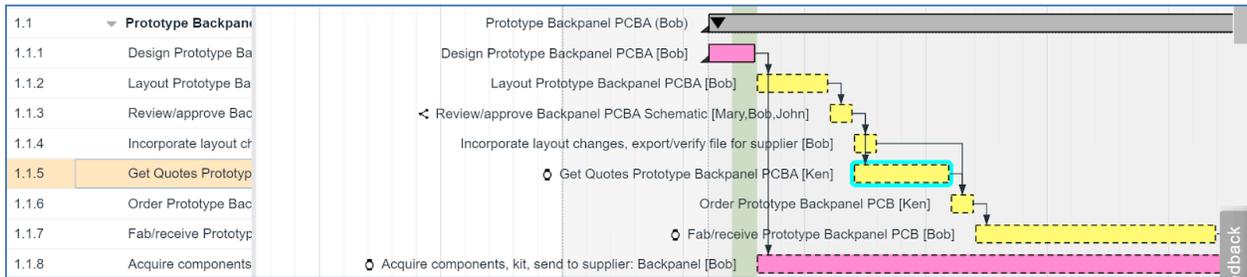
**Before**



Notice the pop-up window. It tells you which summary task you are dropping the task in and which task you are dropping it after.



## After



14. Click **My Playbook**.

15. Show only Mary and the projects she is working on. Click **Projects**. Select **all projects**.

**My Playbook View Settings**

Calendar  Game Plan Res Load   Automatically save settings

**Projects**

Resources

Lifecycles

Other

Lifecycles: Active x Show on  startup

Projects I am active on

Search

▼  R&D

XP 2000 [Mary M]

Sustaining Engineering [Bob B]

Misc. Other

16. Click Resources. **Deselect all** then click **only Mary**. Click **Ok**.

**My Playbook View Settings**

Calendar  Game Plan Res Load   Automatically save settings

**Projects**

**Resources**

Lifecycles

Other

Lifecycles: Active x Not active yet x

Search

All listed below

▼  R&D

Engineering

Bob B

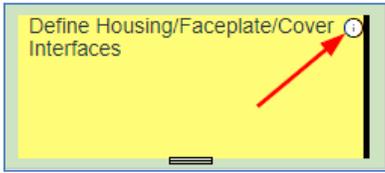
John J

Manufacturing

Mary M

Sue S

17. In the calendar, place the cursor over Mary's task **Define Housing/Faceplate Interfaces** and see the Task Details icon appear.



Define Housing/Faceplate/Cover Interfaces

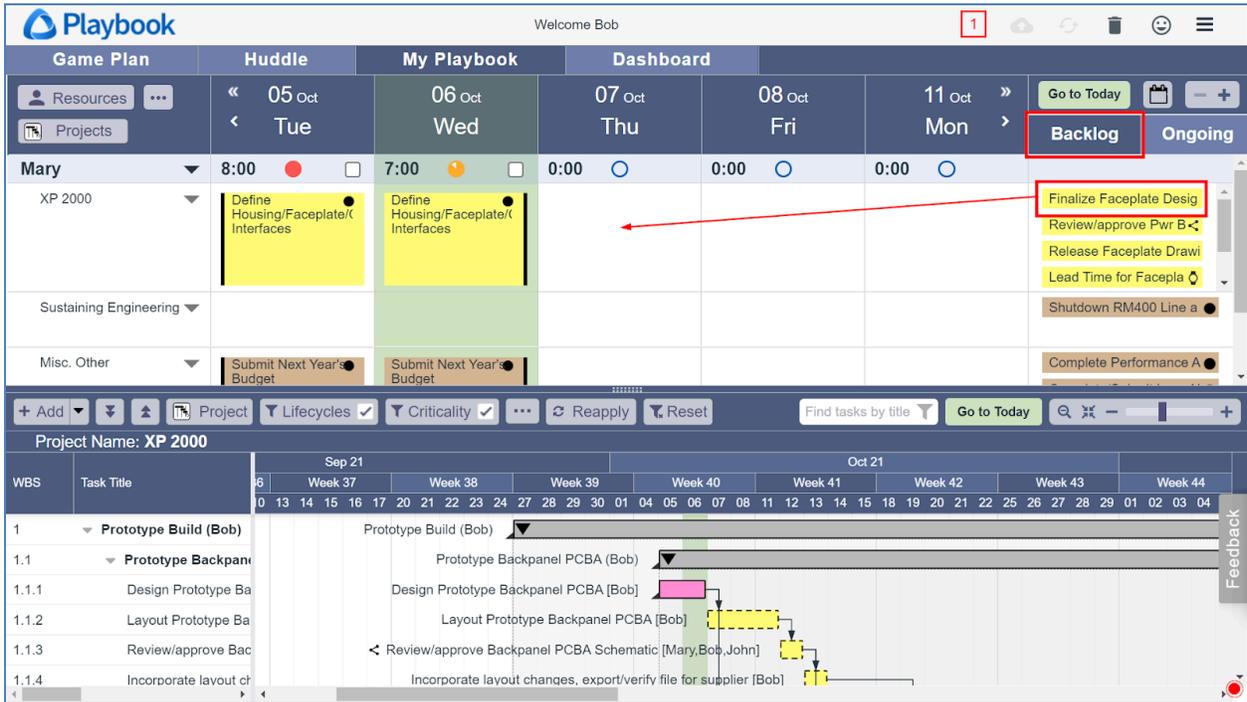
Start - End : 01 Mar 24 - 04 Mar 24

In Summary : Prototype Build > Prototype Build - Enclosure > Injection Molded Faceplate

Description :

|                    |   |
|--------------------|---|
| <b>Start - End</b> | Task's start and end dates                            |
| <b>In Summary</b>  | Name of the summary task containing the task          |
| <b>Description</b> | Detailed description and/or <i>Definition of Done</i> |

18. How does a task go from the backlog (Not Yet Started) to the calendar (Active)? In Mary's Backlog, drag **Finalize Faceplate Design & Drawing** and drop it on **tomorrow**. Voila!



The screenshot shows the Playbook interface. At the top, there's a navigation bar with 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'. Below that is a calendar view for Mary, showing dates from 05 Oct to 11 Oct. A task 'Define Housing/Faceplate/Cover Interfaces' is scheduled for 06 Oct. A 'Backlog' tab is open, showing a task 'Finalize Faceplate Design' with a red arrow pointing to the calendar. Below the calendar is a Gantt chart for 'Prototype Build (Bob)' with a task 'Review/approve Backpanel PCBA Schematic' scheduled for Oct 07.

- Look again in the Game Plan pane. **Finalize Faceplate Design & Drawing** now has a solid border. Solid borders indicate that a task is in-work (Active) while dashed borders indicate that a task is not yet started (Planned, in the backlog).

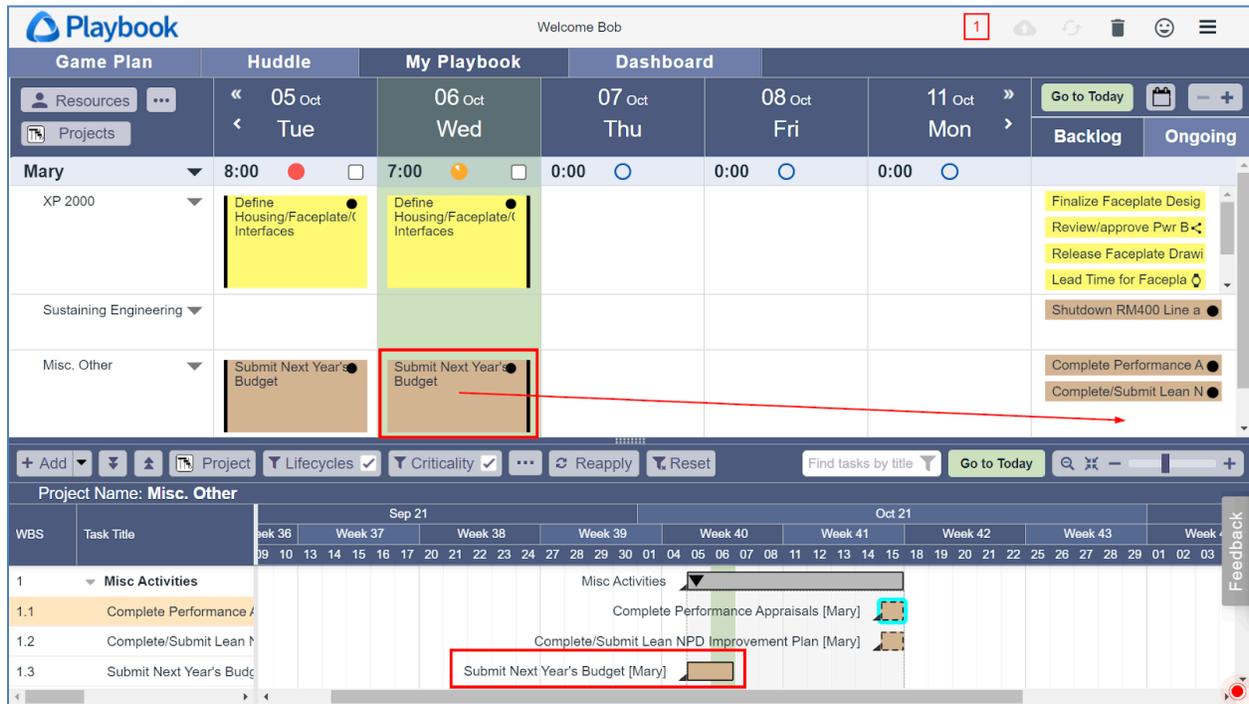
The screenshot shows the Playbook interface with a Gantt chart for project XP 2000. The task 'Finalize Faceplate Design & Drawing' is highlighted with a solid border, indicating it is active. Other tasks are shown with dashed borders, indicating they are in the backlog. Red callout boxes point to the solid and dashed borders with labels: 'Solid border - Active (In Work)' and 'Dashed border - Not Yet Started (in Backlog)'.

- We might decide that an Active task is not really being worked on so we might want to put it back in the Backlog. There are two ways to do this. Right-click on the task, **Finalize Faceplate Design & Drawing**, then click **Task Properties**.

- In the **Summary & Status tab** change the Lifecycle from Active to **Planned**, then click **Ok**.

The screenshot shows the Task Properties dialog box. The 'Summary & Status' tab is selected and highlighted with a red box. The 'Lifecycle' dropdown menu is set to 'Planned' and is also highlighted with a red box. Other fields include 'In Summary Task' (Injection Molded Faceplate (Mary)), 'Criticality' (Automatic), and 'Acceptance' (Accepted).

22. Notice that the task no longer appears in Mary's calendar (it is no longer in-work) and has been placed back in her Backlog. What does its border look like? What is its lifecycle?
23. Now, we will change a task's lifecycle from Active to Planned the easy way. In project **Misc. Other** drag **Submit Next Year's Budget** from today and drop it in the Backlog. Voila!



24. Tasks can also be made Active or moved to the Backlog (Planned) in the Game Plan. In the Backlog click on **Finalize Faceplate Design & Drawing** to find it in the Game Plan. In the Game Plan right-click on **Finalize Faceplate Design & Drawing**, then click **Make Active**. Does it now show as active in the Calendar?
25. To move it to the Backlog in the Game Plan, in the Game Plan right-click on **Finalize Faceplate Design & Drawing**, then click **Set to Planned**. Does it now show as active in the Calendar or is it in the Backlog?

26. Now we will learn about task segment functionality. In the calendar, click Mary's task **Define Housing/Faceplate/Cover Interfaces**.

27. In the Game Plan you can see this task started yesterday and ends today. Since its duration is more than 1 day, it is displayed as multiple segments, one segment per day.

28. In the calendar notice the task's start and end dates are indicated by black, vertical lines.

The screenshot displays the Playbook software interface, divided into two main sections: a calendar view at the top and a Gantt chart view at the bottom.

**Calendar View (Top):**

- Navigation:** Includes tabs for "Game Plan", "Huddle", "My Playbook", and "Dashboard". A "Welcome Bob" message is visible in the top right.
- Calendar Grid:** Shows dates from 24 Sep (Fri) to 30 Sep (Thu). A task "Define Housing/Faceplate/Cover Interfaces" is highlighted in yellow, spanning from 24 Sep to 27 Sep. Red and blue vertical lines mark the start and end of this task.
- Task List:** On the left, tasks are categorized by resource: "Mary" (XP 2000), "Sustaining Engineering", and "Misc. Other".
- Task Details:** On the right, a list of tasks is shown, including "Finalize Faceplate Design & Drawing", "Review/Approve Pwr Board Schematic", "Release Faceplate Drawing", "Lead Time for Faceplate Prototype", "Shutdown RM400 Line and Restart RD300", "Complete Performance Appraisals", and "Complete/Submit Lean NPD Improvement".

**Gantt Chart View (Bottom):**

- Project Name:** XP 2000
- Timeline:** Shows weeks from AUG 21 to OCT 21. A red vertical line marks the current date at the start of WEEK 38 (Sep 24).
- Task Hierarchy:** A tree view on the left lists tasks such as "Injection Molded Faceplate", "Develop FEA model", "Run/Revise FEA model", "Validate/correlate FEA results", "Document/Distribute FEA Results", "Define Housing/Faceplate/Cover Interfaces", "Finalize Faceplate Design & Drawing", "Release Faceplate Drawing", "Order Faceplate Prototype", "Lead Time for Faceplate Prototype", and "Receive & Inspect Faceplates".
- Task Bars:** The Gantt chart shows task bars with dependencies. The "Define Housing/Faceplate/Cover Interfaces" task is highlighted in yellow and spans from Sep 24 to Sep 27. Other tasks are shown in various colors (grey, yellow, green) with arrows indicating dependencies.

29. Extend the task's duration by one day. Right-click on **today's segment** and click **Add Days > 1**. A new segment is added on tomorrow extending the task's duration from 2 days to 3 days in the calendar and in the Game Plan. Did its successors move to the right one day?

30. Since this task's Hours of Work Per Day is set to 4 hours/day, the new segment adds four more hours of work bringing the total to 12 hours. Confirm this using Task Properties.

| Task Properties             |  |
|-----------------------------|--|
| <b>Basic</b>                | Title* Define Housing/Faceplate/Cover Interfaces |
| <b>Summary &amp; Status</b> | Type* Work                                       |
| <b>Links</b>                | Resources Mary x                                 |
| <b>Change log</b>           | Duration* weekdays 3                             |
|                             | Work* Per day 4:00                               |
|                             | Work* Per resource Total 12:00                   |
|                             | Description (Definition of done) Description     |

31. Decrease the duration of a multi-day task. Right-click on any of the segments then **Remove a Day**. This shortens the task by one day, making it again a 2-day task and it reduces the hours of work from 12 hrs to 8 hrs. Confirm this using Task Properties or the Task Grid (WBS on the left).

The screenshot displays the Playbook software interface. The top section shows a Gantt chart with a task 'Define Housing/Faceplate/Cover Interfaces' highlighted in yellow, spanning from Friday, Sep 24 to Monday, Sep 27. The task is assigned to 'Mary'. Below the Gantt chart is a task grid for 'Project Name: XP 2000'. The grid shows the task's duration in weeks, with a red box highlighting the segment from Sep 24 to Sep 27. The task grid also shows other tasks like 'Develop FEA model', 'Run/Revise FEA model', 'Validate/correlate FEA results', 'Document/Distribute FEA Results', 'Finalize Faceplate Design & Drawing', 'Release Faceplate Drawing', 'Order Faceplate Prototype', and 'Lead Time for Faceplate Prototype'.

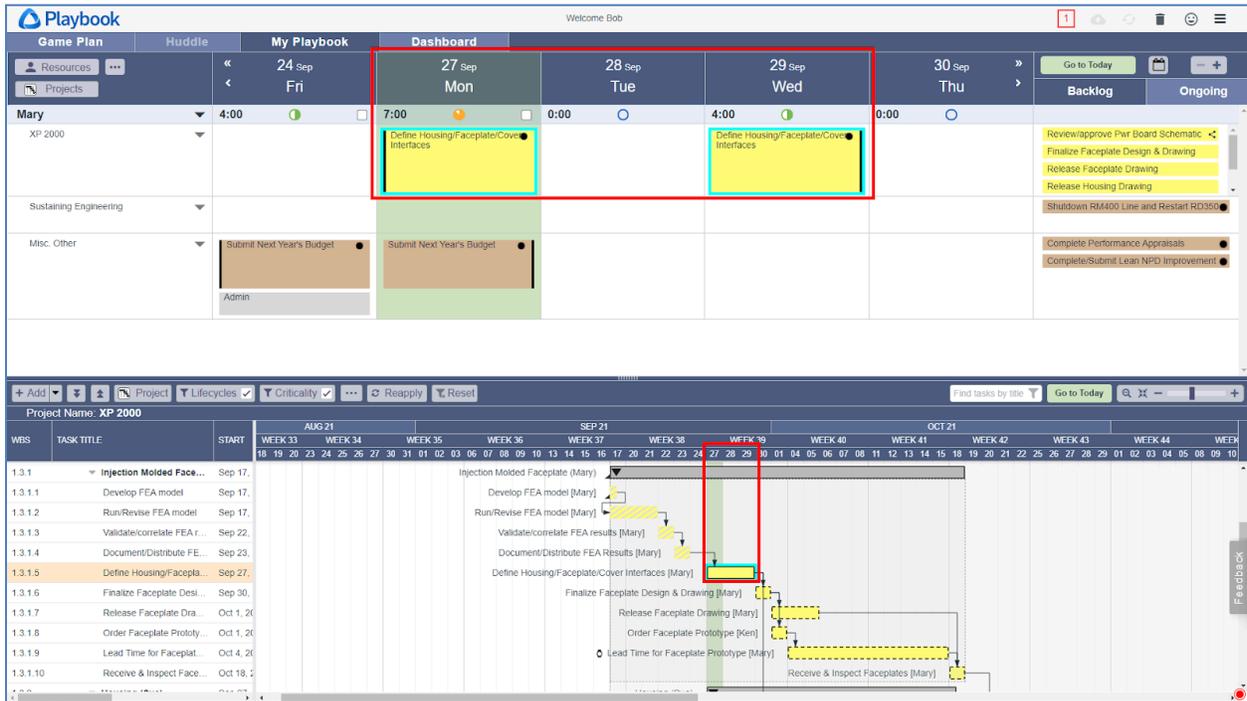
32. If Mary is not able to work on this task today but plans to continue it tomorrow, she drags **today's segment** and drops it on **tomorrow**.
33. Playbook creates a zero-work segment on today and extends the task's duration in the calendar and Game Plan. Confirm there are still only 8 hours of work using Task Properties.

34. The display of zero-work segments can be toggled on/off. Click **Other filters** then uncheck **Segments with zero work** then click **Ok**.

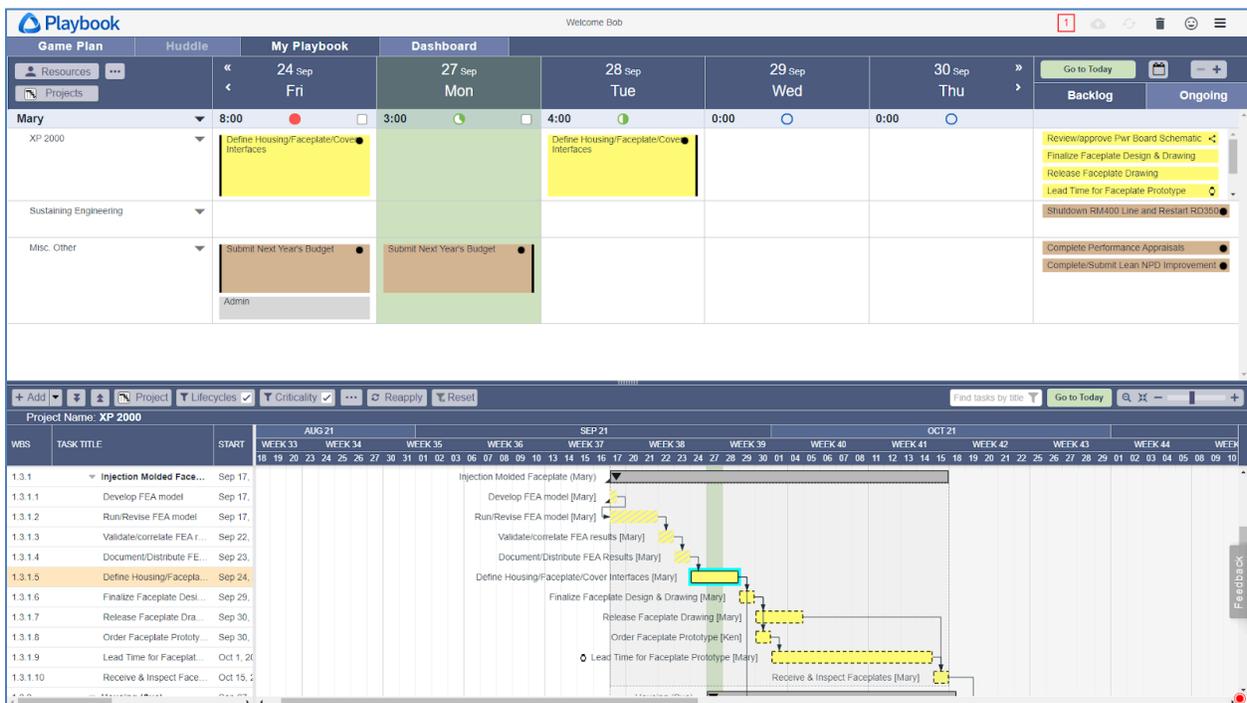
35. The zero-work segment is removed from display in the calendar, but the task's duration looks the same in the Game Plan because it is unchanged.

The screenshot displays the Playbook interface. The top section shows a calendar view for 'My Playbook' with dates from Friday, Sep 24 to Thursday, Sep 30. A task titled 'Define Housing/Faceplate/Cover Interfaces' is shown as a yellow bar spanning from 8:00 on Friday, Sep 24 to 4:00 on Tuesday, Sep 28. A red box highlights this task, and a red arrow points to the gap between Friday and Tuesday, with a text box stating 'Zero-hour segment removed from display'. The bottom section shows the 'Game Plan' view for 'Project Name: XP 2000'. The task 'Define Housing/Faceplate/Cover Interfaces' is shown as a yellow bar in the Game Plan view, spanning from Week 38 to Week 39. A red box highlights this task, and a text box states 'Removing zero-hour segments does not affect its display in the Game Plan'.

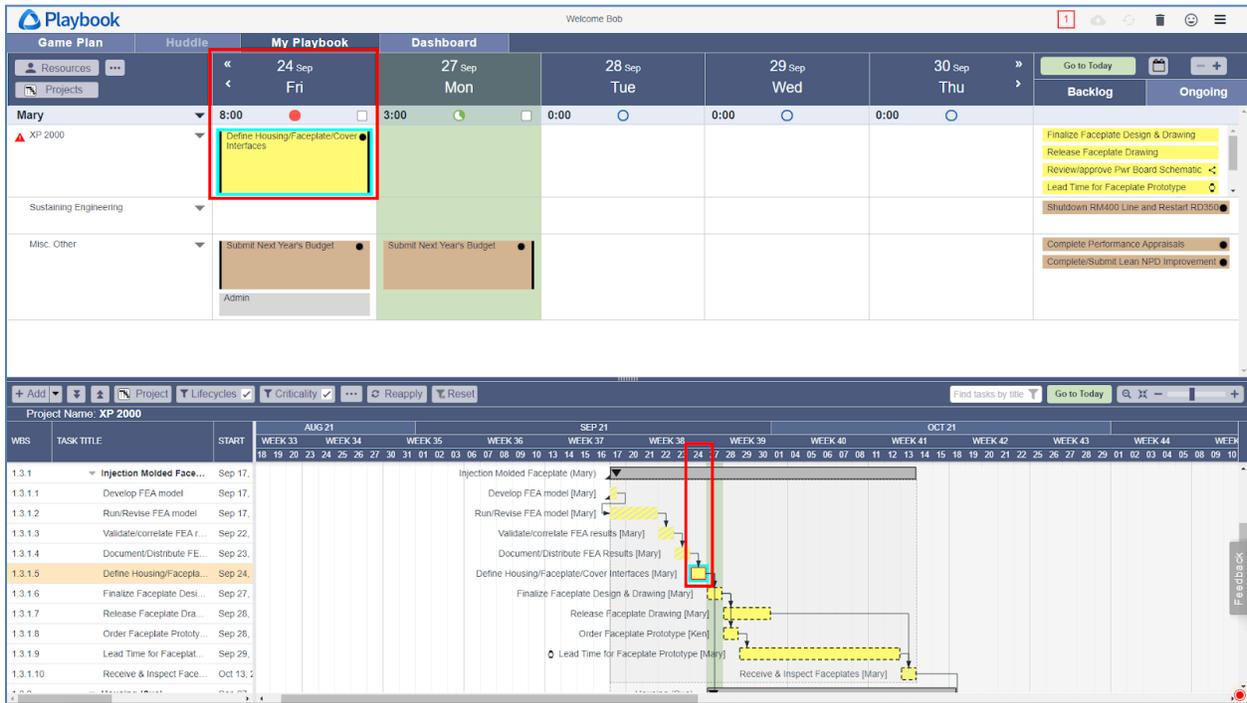
36. Drag **yesterday's segment** to **today**. Since it is the first segment, all segments move forward one day including the zero-work segment. How did the Game Plan change?



37. Drag **today's segment** to **yesterday**. Since it is the first segment, all segments move backward one day. How did the Game Plan change?



38. Remove today and tomorrow's segments. Right-click on **tomorrow's segment** then click **Remove a Day**. Right-click on **today's segment** (zero-work segment) then right-click **Remove a Day**.



39. The **warning icon** to the left of the project's name lets Mary know that she has one or more tasks that are out-of-date in the XP 2000 project.

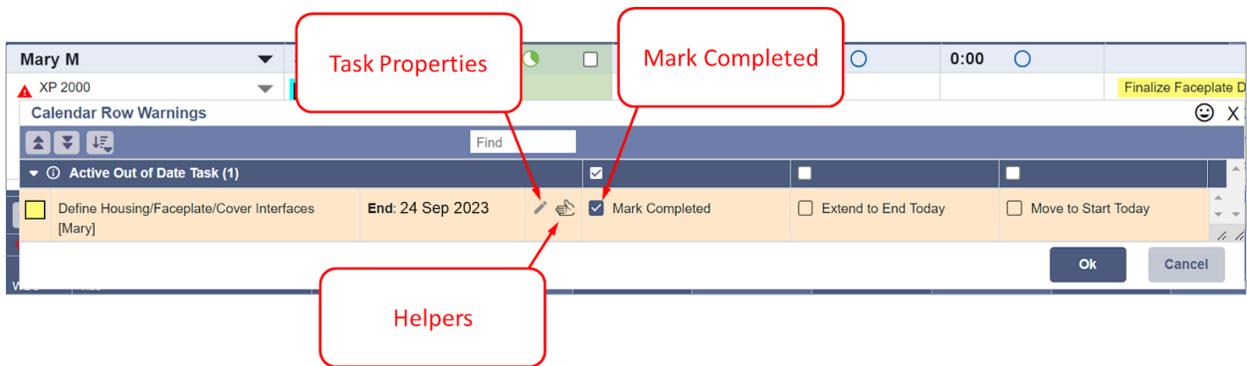


40. Note: Out-of-date tasks are highlighted with a red border in the Calendar and in the Game Plan. **Housing/Faceplate/Interfaces** is out-of-date because it ends in the past and is not marked complete.

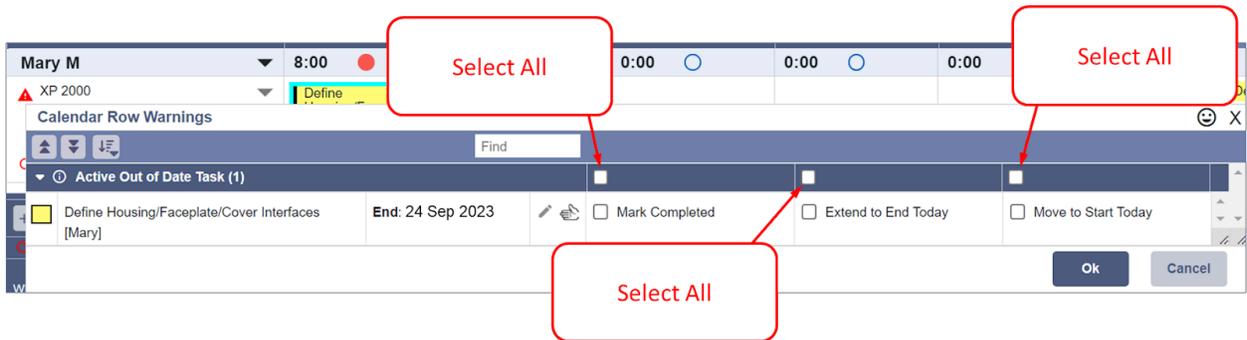
41. Click the **Warning icon** to open the **Update Out-of-Date Task Wizard**.



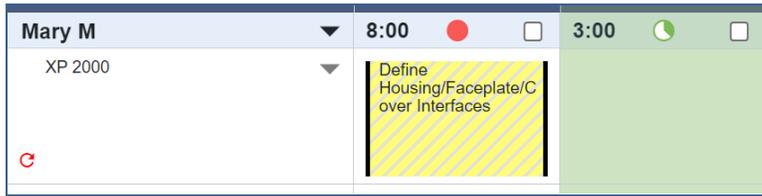
42. The wizard makes it easy to update out-of-date tasks. Select **Mark Completed**, then click **Ok**.



43. Note: all out-of-date tasks are listed in the wizard and each option has a **Select All** to make it easy to apply the fix to multiple tasks.



44. Completed tasks are crosshatched at 45 degrees.



45. Marking a task complete is important because it flags the successor as “ready to work on” and the successor might be assigned to someone else. So, if you do not mark your task complete, your teammate will not know their task is ready for them to work on and vice-versa.

46. Sign Bob out of Playbook.

47. Click **Discard**.

***This completes this exercise.***