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 🔽	G	ame Plan	Res Load 🗌	Automatically	save settings				
Projects		Lifecycles:	Active x	~	Show on 🗸				
Resources	~				startup				
Lifecycles	~		Projects I am ac	tive on	▼				
Other	~	Search							
		 R&D X S M 	P 2000 [Mary M] ustaining Engineering lisc. Other	g [Bob B]					

	Playbook	\mathbf{r}			Welcome Bob			What's New	6 <i>G</i>	Î 🙂	≡
G	ame Plan 🛛 🔽	Huddle	My Pla	aybook	Custom View		Dashboard			Autosaved	Settings
+ Add	· * · .	Project 🔽 Life	cycles 🖌 🔻 Critica	ality 🔽 🚥 🜄 F	Reapply 🔽 Reset 🗸		🖤 🖶 👧 Find	tasks by title 🔻 😡	to Today 🔍 💥	(-	+
Proj	ect Name: XP 200	00 [Mary M]								💌 SI	atus Panes
			Mar 23			Apr 23				May 23	
WBS	Title		Week 12 Week	ek 13 Week	14 Week 15	Week	16 Week 17	Week 18	Week 19	Weel	20
			22 23 24 27 28 2	29 30 31 03 04 05	06 07 10 11 12 13	14 17 18 19	20 21 24 25 26 27 2	8 01 02 03 04 05	08 09 10 11 ⁻	12 15 16 17	18 19
1	Prototype Bui	ld		Protot	ype Build						^
1.1	 Prototype 	Backpanel PCBA		Prototype	Backpanel PCBA [Owne	:: Bob B]					
1.1.1	Design F	Prototype Backp		Design	Prototype Backpanel PC	BA [Bob] 📕					
1.1.2	Layout F	Prototype Backp			Layout Prototype Backp	anel PCBA (Bob	1 <mark></mark> h				
1.1.3	Review/	approve Backpa		< Review/a	approve Backpanel PCBA	Schematic [Bo	b,John,Mary]				
1.1.4	Get Quo	tes Prototype B			👌 Get Quotes I	Prototype Backp	anel PCBA [Ken]	h			
1.1.5	Incorpor	ate layout chang		Inco	rporate layout changes, e	export/verify file	for supplier [Bob]				
1.1.6	Order Pr	rototype Backpa				Order Pro	ototype Backpanel PCB [K	en]			
1.1.7	Fab/rece	eive Prototype B				Fab/receive	Prototype Backpanel PC	B [Bob]			
1.1.8	Acquire	components, kit,		Acquire compone	nts, kit, send to supplier:	Backpanel (Bob	1				
1.1.9	Assemb	le, ship/receive f							Asser	mble, ship/rec	eive from
1.1.10	Bench te	est/inspect Back									
1.1.11	Prototyp	e Ready for Buil									
1.2	 Prototype 	Pwr Board PCBA	Prototype Pv	vr Board PCBA [Owne	r: John J] 🛛 🔽						
1.2.1	Design F	Prototype PCBA:	Design Pro	totype PCBA: Pwr Boa	ard [John]						
1.2.2	Layout F	Prototype Pwr Bo		Layout Proto	otype Pwr Board PCBA [J	ohn]					
1.2.3	Review/	approve Pwr Bo		< Review/appro	ve Pwr Board Schematic	[Bob,John,Mary	ı 📥				
1.2.4	Incorpor	ate changes, ex		Incorporate	e changes, export/verify f	le for supplier [J	lohn]				
1.2.5	Get Quo	tes Prototype P		0	Get Quotes Prototype Pv	r Board PCBA	Ken]				
4		•	4								

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	Expa	and All		
🛆 Pla	ybo	ok	50		Welcome Bob
Gam	e Plan		Huddle	My Playbook	Dashboard
+ Add -	±	* -	R Project T Lifecyc	eles 🗸 🝸 Criticality 🖌 🚥	C Reapply T Reset

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



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



6. 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.



7. 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?

Prototype Build	
Prototype Backpanel PCBA [Owner: Bob B]	
Design Prototype Backpanel PCBA [Bob]	
Layout Prototype Backpanel PCBA (Bob)	
< Review/approve Backpanel PCBA Schematic [Bob,John,Mary]	
o Get Quotes Prototype Backpanel PCBA [Ken]	End Date: 30 May 2023
Incorporate layout changes, export/verify file for supplier [Bob]	Total Work: 0:00
Order Prototype Backpanel PCB [Ken]	Work Per Day: 0
♂ Fab/receive Prototype Backpanel PCB [Bob]	
Acquire components, kit, send to supplier: Backpanel (Bob)	
	Assemble, ship/receive from supplier: Backpanel PCBA [Bob]
	Bench test/inspect Backpanel
	Prototype Ready for Build: Backp

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**.

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

1.1.7

1.1.8

Fab/receive Prototyc

Acquire components ire components, kit, send to supplier: Backpanel [Bob]

		Sep	21			Oct 2						
BS	Task Title	k 37	Week 38	Week 39	Week 40	Week 41	Week 42	Week 43		Week 44		Week 45
		17	20 21 22 23 24	4 27 28 29 30	01 04 05 06 07 0	08 11 12 13 14 15	18 19 20 21 22	25 26 27 28	29 01 0	02 03 04	05 08	09 10 [·]
	 Prototype Backpane 		Prototype B	Backpanel PCBA (E	Bob)							
.1	Design Prototype Ba		Design Prototype E	Backpanel PCBA [B	Bob]							
.2	Layout Prototype Ba		Layout Pro	ototype Backpanel	PCBA [Bob]							
.3	Review/approve Bac	< F	Review/approve Ba	ckpanel PCBA Sch	nematic [Mary,Boh, Jol	<mark>⊨n] [</mark>]					1.0	lav
.4	Get Quotes Prototyp		٥	Get Quotes Proto	type Backpanel PCB	A [Ken]	7				10	ay
5	Incorporate layout ch		Incorporate layo	out changes, expor	rt/verify file for supplie	er [Bob]	1					
.6	Order Prototype Bac				Order Prototype Ba	ickpanel PCB [Ken]	h				1	
.7	Fab/receive Prototyp			0	Fab/receive Prototype	e Backpanel PCB [Bob]						_
 ter	Acquire components	ire c	omponents, kit, sen	d to supplier: Back	kpanel [Bob]							
ter	Acquire components	ire c	omponents, kit, sen	d to supplier: Bacł	kpanel [Bob]							
.8 ter	Acquire components	ire co Sep	21 West 28	d to supplier: Back	kpanel [Bob]	Oct 2	Wash #2	Mont 42		March 44		
.8 : er s	Acquire components	Sep k 37	21 21 Week 38 20 21 22 23 24	d to supplier: Back Week 39 4 27 28 29 30	Kpanel [Bob]	Oct 2 Week 41 18 11 12 13 14 15	I Week 42 18 19 20 21 22	Week 43	29 01 0	Week 44 02 03 04	05 08	Week 41
.8 ter	Acquire components	Sep k 37 17	21 Week 38 20 21 22 23 24 Prototype B	d to supplier: Back Week 39 4 27 28 29 30 ackpanel PCBA (f	kpanel [Bob] Week 40 01 04 05 06 07 0	Oct 2 Week 41 08 11 12 13 14 15	1 Week 42 18 19 20 21 22	Week 43 25 26 27 28	29 01 (Week 44 02 03 04	05 08	Week 4 0 3 10
.8 ter	Acquire components	Sep k 37 17	21 21 Week 38 20 21 22 23 24 Prototype B	d to supplier: Back Week 39 4 27 28 29 30 Sackpanel PCBA (E Sackpanel PCBA (E	Week 40 01 04 05 06 07 0 30b) 9	Oct 2 Week 41 18 11 12 13 14 15	I Week 42 18 19 20 21 22	Week 43 25 26 27 28	29 01 (Week 44 02 03 04	05 08	Week 48 0 3 10 1
.8 ter 35	Acquire components	Sep k 37 17	21 Week 38 20 21 22 23 24 Prototype B Design Prototype B	d to supplier: Back Week 39 4 27 28 29 30 Sackpanel PCBA [E Sackpanel PCBA [E	Week 40 01 04 05 06 07 0 30b) Image: Contract of the second seco	Oct 2 Week 41 18 11 12 13 14 15	1 Week 42 18 19 20 21 22	Week 43 2 25 26 27 28	29 01 (Week 44 02 03 04	05 08	Week 45 0 3 10 1
.8 ter .1 .2	Acquire components	Sep k 37 17	21 Week 38 20 21 22 23 24 Prototype B Design Prototype B Layout Pro	d to supplier: Back Week 39 4 27 28 29 30 Backpanel PCBA [E Backpanel PCBA [E	Week 40 01 04 05 06 07 0 Bob) PCBA [Bob] PCBA [Bob] <td< td=""><td>Oct 2 Week 41 18 11 12 13 14 15</td><td>1 Week 42 18 19 20 21 22</td><td>Week 43 25 26 27 28</td><td>29 01 0</td><td>Week 44 02 03 04</td><td>05 08</td><td>Week 45 0 3 10 1</td></td<>	Oct 2 Week 41 18 11 12 13 14 15	1 Week 42 18 19 20 21 22	Week 43 25 26 27 28	29 01 0	Week 44 02 03 04	05 08	Week 45 0 3 10 1
.8 ter .1 .2 .3	Acquire components Task Title Prototype Backpan Design Prototype Ba Layout Prototype Ba Review/approve Bac	Sep k 37 17	21 Week 38 20 21 22 23 24 Prototype B Layout Pro Review/approve Ba	d to supplier: Back Week 39 4 27 28 29 30 Backpanel PCBA [E Backpanel PCBA [E totype Backpanel ckoanel PCBA Sch	Week 40 01 04 05 06 07 0 Bob)	Oct 2 Week 41 18 11 12 13 14 15	1 Week 42 18 19 20 21 22	Week 43 25 26 27 28	29 01 0	Week 44 02 03 04	05 08	Week 45 0 3 10 1
.8 ter .1 .2 .3 .4	Acquire components Task Title Prototype Backpan Design Prototype Ba Layout Prototype Ba Review/approve Bac Get Quotes Prototyp	Sep k 37 17	21 Week 38 20 21 22 23 24 Prototype B Layout Pro Review/approve Ba	d to supplier: Back Week 39 4 27 28 29 30 Backpanel PCBA (E Backpanel PCBA [E totype Backpanel ckoanel PCBA Sc) Get Quotes Proto	Week 40 01 04 05 06 07 0 Bob) PCBA [Bob] Ptype Backpanel PCB	Oct 2 Week 41 18 11 12 13 14 15	I Week 42 18 19 20 21 22	Week 43 25 26 27 28	29 01 (Week 44 02 03 04	05 08	Week 45 0 3 10 1
.8 ter .1 .2 .3 .4 .5	Acquire components Task Title Prototype Backpane Design Prototype Ba Layout Prototype Ba Review/approve Bac Get Quotes Prototyp Incorporate layout cf	Sep k 37 17	21 Week 38 20 21 22 23 24 Prototype B Layout Pro Review/approve Ba Incorporate layou	d to supplier: Back Week 39 4 27 28 29 30 Backpanel PCBA [E Backpanel PCBA [E choenel PCBA Sci Get Quotes Proto out changes, export	Week 40 01 04 05 06 07 0 Bob) PCBA [Bob] PCBA [Bob] Atype Backpanel PCB; triverify file for supplie	Oct 2 Week 41 18 11 12 13 14 15 http://www.com/com/com/com/com/com/com/com/com/com/	I Week 42 18 19 20 21 22	Week 43 25 26 27 28	29 01 (Week 44 02 03 04	05 08	Week 45 0 2 10 1

S Fab/receive Prototype Backpanel PCB [Bob]

 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?

SEP 21			OCT 2	1	
WEEK 36 WEEK 37	WEEK 38		WEEK 41	WEEK 42	WEEK 43
3 06 07 08 09 10 13 14 15 16 17 2	20 21 22 23 24 27 2	Wedge	11 12 13 14 15	18 19 20 21 2	22 25 26 27 28 29
Prototype Build (Bob)		wedge			
Prototype Backpanel P	PCBA (Bob)				
Design Prototype Backpanel F		1			
Layout Prototype Bac	kpanel PCBA [Bob]		7		
< Review	w/approve Backpanel PC	BA Schematic [Mary,Bob,John]	ii,		
	👌 Get Quote	s Prototype Backpanel PCBA [Ken			
Inc	corporate layout changes	, export/verify file for supplier [Bob	1	-	
		Order Prototype Back	panel PCB [Ken]		
		Fab/receive Prototype E	ackpanel PCB [Bob]		
Acquire components, kit, send to supplie	er: Backpanel [Bob] 🛛 🚦				

12. 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.

SEP 21		1							OC	Г 2 1							
WEEK 36 WEEK 37			WE	EK 4	0		WE	EK	41		W	EEK 4	2		WEE	EK 43	3
06 07 08 09 10 13 14 15 16 1	No Wedge	01 04	05	06 ()7 08	11	12	13	14 1	5 18	19	20 2	21 22	25	26 2	72	8 29
③ Prototype Build (Bob)																	
Prototype Backpan	el Positicos,																
Design Prototype Backpar																	
Layout Prototype	Backpanel PCBA [Bob]	<u>h</u>															
< Review/approve Backpane	< Review/approve Backpanel PCBA Schematic [Mary,Bob,John]																
Get Quotes Prototype Backpanel FCBA [Ken]																	
Incorporate layout char	iges, export/verify file for supplier [Bo	b]	<u> </u>														

13. 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.

<u>Before</u>

1	Prototype Build (Bob) Sep 16,	Prototype Build (Bob)
1.1	Prototype Backpanel PCB Sep 24,	Prototype Backpanel PCBA (Bob)
1.1.1	Design Prototype Backpan Sep 24,	Design Prototype Backpanel PCBA [Bob]
1.1.2	Layout Prototype Backpane Sep 28,	Layout Prototype Backpanel PCBA [Bob]
1.1.3	Review/approve Backpanel Oct 1, 20	< Review/approve Backpanel PCBA Schematic [Mary,Bob,John]
1.1.4	Get Quotes Prototype Back Oct 4, 20	Get Quotes Prototype Backpanel FCBA [Ken]
1.1.5	Incorporate byout changes, Oct 4, 20	Incorporate layout changes, export/verify file for supplier [Bob]
1.1.6	Order Prototype Backpanel Oct 8, 20	Order Prototype Backpanel PCB [Ken]
1.1.7	Fab/receive Prototype Back Oct 11, 2	Fab/receive Prototype Backpanel PCB [Bob]
1.1.8	Acquire components, kit, se Sep 28,	Acquire components, kit, send to supplier: Backpanel [Bob]

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.

1.1	>	 Prototype Backpane 	Prototype Backpanel PCBA (Bob)
1.1.1		Design Prototype Ba	Design Prototype Backpanel PCBA [Bob]
1.1.2		Layout Prototype Ba	Dropped in: Prototype Backranel PCBA (Bob)
1.1.3		Review/approve Bac	Dropped after: Incorporate layout changes, BA Schematic [Mary,Bob,John]
1.1.4		Get Quotes Prototyp	export/verify file for supplier s Prototype Backpanel PCBA [Ken]
1.1.5		Incorporate layout ch	Incorporate layout changes, export/verify file for supplier [Bob]
1.1.6		Order Prototype Bac	Order Prototype Backpanel PCB [Ken]
1.1.7		Fab/receive Prototyp	Fab/receive Prototype Backpanel PCB [Bob]
1.1.8	_	1.1.4 Get Quotes Prot	totype Back Oct 13, 2021 Oct 18, 2021 4 0:15 0:00 Ken

<u>After</u>

1.1	Prototype Backpane	Prototype Backpanel PCBA (Bob)
1.1.1	Design Prototype Ba	Design Prototype Backpanel PCBA [Bob]
1.1.2	Layout Prototype Ba	Layout Prototype Backpanel PCBA (Bob)
1.1.3	Review/approve Bac	< Review/approve Backpanel PCBA Schematic [Mary,Bob,John]
1.1.4	Incorporate layout ch	Incorporate layout changes, export/verify file for supplier [Bob]
1.1.5	Get Quotes Prototyp	Get Quotes Prototype Backpanel PCBA [Ken]
1.1.6	Order Prototype Bac	Order Prototype Backpanel PCB [Ken]
1.1.7	Fab/receive Prototyp	o Fab/receive Prototype Backpanel PCB [Bob]
1.1.8	Acquire components	Acquire components, kit, send to supplier: Backpanel (Bob)

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

My Playbook V	View	/ Settings			Х
Calendar 🗹	G	ame Plan	Res Load 🗌	✓ Automatically	save settings
Projects		Lifecycles:	Active x	~	Show on 🗸
Resources	~				startup
Lifecycles	~		Projects I am ac	ctive on	Ŧ
Other	✓	Search			
		♥ ♥ ♥ R&D ♥ X ♥ S ♥ M	P 2000 [Mary M] ustaining Engineerin lisc. Other	g [Bob B]	

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

My Playbook V	iew Settings	Х
Calendar 🗹	Game Plan Res Load 🗌 🖂 Automatically save	settings
Projects	Lifecycles: Active x Not active yet x	.
Resources	Search	
Lifecycles	⊿	
Other	 ✓ 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
Define Housing/Faceplate/Cover O Interfaces	Start - End : 01 Mar 24 - 04 Mar 24 In Summary : Prototype Build > Prototype Build - Enclosure > Injection Molded Faceplate Description :

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

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!

	Playbook					Welcome E	ob		1	6		☺ ≡		
G	ame Plan	Н	uddle	Му	Playbook		Dashboa							
L Re	esources	«	05 Oct		06 Oct		07 Oct		08 Oct		11 Oct	»	Go to Today	🗂 - +
R P	rojects	<	Tue		Wed	Thu		Fri			>	Backlog	Ongoing	
Mary	,	• 8:00	•	7:00	•	0:00	0	0:00	0	0:00	0			^
XP 2	2000	Defi Hou	ne sing/Eaceplate/(Define	g/Eaceplate/(Finalize Face	olate Desig
	Interfaces			Interfac	ces								Review/appro	ve Pwr B<
													Release Face	Eacepla
Sust	aining Engineering	-											Shutdown RM	1400 Line a
	a													
Misc	. Other	Sub Bud	mit Next Year's ● get	Submit Budget	t Next Year's●								Complete Per	formance A
+ Add	- - - -	Project		Crit	icality 🖌 🚥	C Rea	pply	et	Find tasks	s by title	T Go t	to Today	/ Q X -	+
Proje	ect Name: XP 20	00												
WBS	Task Title		Sep 21 6 Week 37		Neek 38	Week 39	Wee	k 40	Oc Week 41	:t 21	Week 42		Week 43	Week 44
			0 13 14 15 16	17 20 21	22 23 24 27	28 29 30	01 04 05 0	5 07 08	11 12 13 14 1	5 18 19	9 20 21 2	22 25	26 27 28 29 0	1 02 03 04
1	- Prototype Bu	ild (Bob)		Prototype E	Build (Bob)									back
1.1	 Prototype 	Backpane			Prototype Backp	anel PCBA	(Bob)							edt
1.1.1	Design Pr	ototype Ba		Design	Prototype Back	oanel PCBA	[Bob]	Ŋ						щ
1.1.2	Layout Pre	ototype Ba			Layout Prototyp	oe Backpan	el PCBA [Bob]		<mark></mark>					
1.1.3	Review/ap	oprove Bac		< Review	/approve Backpa	nel PCBA S	chematic [Mary	Bob,John	ı 👛 j					
1.1.4	Incorporat	te lavout ch ▶	4	Inco	orporate layout cl	nanges, exp	ort/verify file for	supplier [Bobl []					,

19. 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).



- 20. 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**.
- 21. In the **Summary & Status tab** change the Lifecycle from Active to **Planned**, then click **Ok**.

Task Properties	la Quanta Trat								
Basic	In Summary Task	Injection molded Faceplate (Mary)							
Summary & Status		· · · · · · · · · · · · · · · · · · ·							
Links	Lifecycle	Planed							
Change log									
	Criticality	Automatic • (i)							
	Acceptance	Accepted							
	e Blocked								

- 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!

ÔF	Playbook					elcome Bob				1 💩 🗇 📋 😌 🚍						
Ga	ame Plan	Hud	dle	My	Playboo	k	Da	ashboar	d							
💄 Re	sources	« 0	5 Oct	(06 Oct		07 d	Oct		08 Oct		11 Oct	»	Go to Toda	/ 🗂	-+
🖪 Pr	ojects	r	Гue		Wed		Th	u		Fri		Mon	>	Backlog		ngoing
Mary	•	r 8:00	•	7:00	•		0:00 🔘		0:00	0	0:00	0				^
XP 2	• • • • • • • • • • • • • • • • • • • •	Define	/Faceplate/(Define	g/Faceplate	2								Finalize Fa	ceplate D	esig
		Interface	es	Interfac	ces									Review/ap	prove Pwr	B<
														Release Fa	iceplate D	rawi —
														Lead Time	for Facep	
Susta	aining Engineering 🔻	r												Shutdown	RM400 Li	ne a 🌒
				_		_										- 1
Misc.	. Other 📃 🔻	Submit I Budget	Next Year's	Submit Budget	t Next Year's t	•								Complete I	Performan	ce A
														Complete/	Submit Le	an N 🕒
															-	•
+ Add	▼ ¥ ★ 🖪	Project T	Lifecycles 🗸	Criti	icality 🖌	•••	2 Reapply	T Rese	et	Find task	ks by title	Go	to Toda	у 🤉 ж -	·	+
Proje	ect Name: Misc. (Other														_
	Taak Titla	ok 2	6 Wook	Sep 21	Wook 29		Week 20		Mook 40	Wook	Oct 21	Wook	2	Wook 42		Wook
1105		J9 1	0 13 14 15	16 17 20) 21 22 23	24 2	27 28 29 30	01 04 0	5 06 07	08 11 12 13	14 15 1	8 19 20	21 22	25 26 27 28	29 01	02 03 p
1	 Misc Activities 						Misc Act	ivities	·							Fee
1.1	Complete Perfo	rmance /					Cor	mplete Perf	ormance A	Appraisals [Mary]						
1.2	Complete/Subn	nit Lean N				Co	mplete/Subm	it Lean NPD) Improver	ment Plan [Mary]						
1.3	Submit Next Ye	ar's Budç			Submit	Next Ye	ear's Budget [Mary]								
•																, O

- 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.

	Playbook				Welcome Bob			1 🛆 🕘 📋 😂	≡
G	ame Plan Huddl	e	My Playbook	Dashboard					
R R	esources Projects	« «	24 _{Sep} Fri	27 _{Sep} Mon	28 _{sep} Tue	29 _{Sep} Wed	30 _{Sep} » Thu >	Go to Today 🗂 – Backlog Ong	+ joing
Mary	•		•	9	0	0	0		*
XP 2	.000 👻	Define nterfa	Housing/Faceplate/Cover ces	Define Housing/Faceplate/Cover Interfaces				Finalize Faceplate Design & Drawing Review/approve Pwr Board Schematic Release Faceplate Drawing Lead Time for Faceplate Prototype	Î.
Sust	aining Engineering							Shutdown RM400 Line and Restart RE	350
Misc.	. Other 🗸	Subm	t Next Year's Budget	Submit Next Year's Budget				Complete/Submit Lean NPD Improvem	• hent •
+ Add Proje	T S 2 Project T Lif	ecycles 🗸	T Criticality 🗸 🚥 🕯	Reapply TReset	0000		Find tasks by title	रू Go to Today Q 원 –	+
MDC		CTADT	AUG 21		SEP 21	MEEK 20 MEEK 40	OCT 21		MEEN
WDS	DASK IIILE	START	18 19 20 23 24 25 26 2	7 30 31 01 02 03 06 07 08 09 10	13 14 15 16 17 20 21 22 25 24	27 8 29 30 01 04 05 06 07 0	WEEK 41 WEEK 42 8 11 12 13 14 15 18 19 20 21 2	WEEK 43 WEEK 44 2 25 26 27 28 29 01 02 03 04 05 08	8 09 10
1.3.1	Injection Molded Face	Sep 17,		Injection Molded Fac	eplate (Mary)				^
1.3.1.1	Develop FEA model	Sep 17,		Develop FEA	model [Mary] 🔪				
1.3.1.2	Run/Revise FEA model	Sep 17,		Run/Revise FEA	model [Mary]				
1.3.1.3	Validate/correlate FEA r	Rop 22							
1.3.1.4		. 3ep 22,		Validate/co	rrelate FEA results [Mary]				
	Document/Distribute FE.	. Sep 22,		Validate/co Document/	rrelate FEA results [Mary]				8
1.3.1.5	Document/Distribute FE. Define Housing/Facepla.	. Sep 22, . Sep 23, . Sep 24,		Validate/co Document/ Define Housing/l	rrelate FEA results [Mary] Distribute FEA Results [Mary] Faceplate/Cover Interfaces [Mary]	<u>_</u>			dback
1.3.1.5 1.3.1.6	Document/Distribute FE. Define Housing/Facepla. Finalize Faceplate Desi	 Sep 22, Sep 23, Sep 24, Sep 28, 		Validate/co Document/ Define Housing/I Fir	rrelate FEA results [Mary]				=eedback
1.3.1.5 1.3.1.6 1.3.1.7	Document/Distribute FE. Define Housing/Facepla. Finalize Faceplate Desi. Release Faceplate Dra	 Sep 22, Sep 23, Sep 24, Sep 28, Sep 29, 		Validate/co Document/ Define Housing/i Fil	rrelate FEA results [Mary]				Feedback
1.3.1.5 1.3.1.6 1.3.1.7 1.3.1.8	Document/Distribute FE. Define Housing/Facepla. Finalize Faceplate Desi. Release Faceplate Dra Order Faceplate Protoly.	 Sep 22, Sep 23, Sep 24, Sep 28, Sep 29, Sep 29, 		Validatičo Document/ Define Housing/I Fil	rrelate FEA results [Mary] Distribute FEA Results [Mary] acceptate/Cover Interfaces [Mary] alize Faceptate Design & Drawing [Mar Release Faceptate Drawing] Order Faceptate Prototype	Mary) (1			Feedback
1.3.1.5 1.3.1.6 1.3.1.7 1.3.1.8 1.3.1.9	Document/Distribute FE. Define Housing/Facepla. Finalize Faceplate Desi. Release Faceplate Dra Order Faceplate Prototy. Lead Time for Faceplat.	 Sep 22, Sep 23, Sep 24, Sep 28, Sep 29, Sep 29, Sep 30, 		Validateco Document/ Define Housing/I Fil	Trelate FEA results [Mary] Distribute FEA Results (Mary) aceptate/Cover Intertaces (Mary) altze Faceptate Design & Drawing (Mar Release Faceptate Droking) Order Faceptate Prototype C Lead Time for Faceptate Prototype	Mary]			Feedback
1.3.1.5 1.3.1.6 1.3.1.7 1.3.1.8 1.3.1.9 1.3.1.10	Document/Distribute FE. Define Housing/Facepla. Finalize Faceplate Desi. Release Faceplate Protoy. Lead Time for Faceplate. Receive & Inspect Face.	 Sep 22, Sep 23, Sep 24, Sep 28, Sep 29, Sep 29, Sep 30, Oct 14, 		Validateco Document Define Housing?	orelate FEA results (Mary) Distribute FEA Results (Mary) alize Faceplate Design & Drawing (Mar Release Faceplate Drawing) Order Faceplate Prototype • Lead Time for Faceplate Prototy	Mary C	ites (Mary)		Feedback

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

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	Title*	Define Housing/Faceplate/Cover Interface	ces	
Basic	Туре*	II. Work 👻		
Summary & Status	Resources	Mary x		~
Links				
Change log	Duration*	3	Earliest 🔍 24 Sep 2021	_ →
	weekdays		28 Sep 2021	
	Work* Per resource	Per day 4:00		
		Total 12:00		
	Description (Definition of done)	Description		2

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).



- 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**.

Calendar	Gar	ne Plan	Х
Projects		Colondar Booklag	
Resources	~	Calendar Backlog	
Lifecycles	~	Subtype icon Subtype icon	
Other		Milestone priority Milestone priority	
		Slack Slack	
		Queued icon	
		Empty rows	
		Task continues icon	
		✓ Whole day total	
		Segment times	
		Segments with zero work	
		Ok Can	cel

	laybook							Welcom	ne Bob							1 🛆	ं 🕯	٢	≡
Gar	ne Plan	Huddle		My Playl	ook	Dashboard													
. Res	ources		«	24 Sen		27 set			28 Sep		29 s	en		30 sen		Go to Today	m		÷
	piects			Fri		Mon			Tue		We	d		Thu		Backlog		Ongoi	
	5,000				_				, ac			u		-		васкю		Ungoi	ng .
Mary		•	8:00	•		3:00		4:00	0	0:00	0		0:00	0					
XP 200	10	· · ·	Interfac	Housing/Hacepla ces	te/Cover			Interfaces	ising/Faceplate/Cover	·						Finalize Faceplate	M Board S Design & F	criematic <	
						~										Release Faceplate	Drawing		1.
							\sim									Lead Time for Face	plate Proto	otype 😋	5 .
Sustain	ning Engineering	–														Shutdown RM400 I	line and R	estart RD35	00
										<u> </u>									-
Misc. C	Other	•	Submit	Next Year's Bud	get 🔹	Submit Next Year's B	udget	Zer	o-nour							Complete Performa	ince Appra	isals	•
							se	egmen	it remov	ed						Complete/Submit E	eannedi	inpiovemen	
			Admin					from	dicplay										
								ITOIII	uispiay										
											_					-			
												Remo	ving	zero-ho	ur				
+ Add -	🕴 🖈 🖪 Proje	ct T Lifeo	vcles 🗸	T Criticality	× ••• 1	C Reapply	1					segm	ents	does no	t	Go to Today	a x -	-	+
Projec	t Name: XP 2000				_		,					- 4			_				_
MDC .			OTADT	AUG	21	WEEK 25	WEEK 20	SEP	21	WEE	1/ 20	anec		lispiay ii		WEEK 42	WEEK A		WEEK
WDS	IASK IIILE		START	18 19 20 23	24 25 26 2	WEEK 35 27 30 31 01 02 03 06	07 08 09 1	10 13 14 15	16 17 20 21 22 23	24 27 28	9 30 01	the	Gan	ne Plan		5 26 27 28 29 01	02 03 0	• 4 05 08 0	09 10
1.3.1	 Injection Mold 	led Face	Sep 17,			Inje	ction Molded Fa	aceplate (Mary)	▼		L					1			^
1.3.1.1	Develop FEA	model	Sep 17,				Develop FE	A model [Mary]	2										
1.3.1.2	Run/Revise FB	EA model	Sep 17,				Run/Revise FE	A model [Mary]											
1.3.1.3	Validate/correl	late FEA r	Sep 22,				Validate/o	correlate FEA re	esults (Mary) 😕 🚬										1.4
1.3.1.4	Document/Dis	tribute FE	Sep 23,				Documer	nt/Distribute FEA	A Results [Mary] 🛛 💈	h /									ž
1.3.1.5	Define Housin	g/Facepla	Sep 24,				Define Housing	g/Faceplate/Cov	ver Interfaces [Mary]		F I								dba
1.3.1.6	Finalize Facep	olate Desi	Sep 29,					Finalize Fac	ceplate Design & Draw	ing (Mary)	<u>.</u>								L P
1.3.1.7	Release Face	plate Dra	Sep 30,						Release Faceplate D	Drawing [Mary]									
1.3.1.8	Order Facepla	te Prototy	Sep 30,						Order Faceplate P	rototype [Ken]	<u>-</u>								
1.3.1.9	Lead Time for	Faceplat	Oct 1, 20					0.6	ead Time for Faceplat	e Prototype (Ma	ry]								
1.3.1.10	Receive & Ins	pect Face	Oct 15, 2								Recei	ve & Inspect Fac	eplates (Mary						
100				4					· · · · · · · · · · · · · · · · · · ·										,0

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.

	Playbook					Welcome Bob					1		1	⊇ ≡
G	ame Plan Hud	ldle	My Playb	ook	Dashboard				_					
R	esources		24 sep		27 sep	28 sep		29 sep		0 Sep	» Go to 1	loday		- +
	Projects		Fri		Mon	Tue		Wed		Thu	Bacl	klog	0	ngoing
Mary		▼ 4:0	0 🕕		7:00 🔒	0:00 〇	4:00	0	0:00	0				*
XP 2	000	•			Define Housing/Faceplate/Cove Interfaces	•	Define Ho Interfaces	using/Faceplate/Cove			Review/app Finalize Fa	prove Pwr B ceplate Des	oard Schemi ign & Drawin	atic 🤜 🇴
											Release H	ousing Draw	ing	
Sust	aining Engineering	•									Shutdown	RM400 Line	and Restart	RD350
Misc	Other	▼ Su	bmit Next Year's Budg	et •	Submit Next Year's Budget	•					Complete F	Performance	Appraisals	•
											Completers	submit Lean	NPD Imptov	vement o
		Adi	min											
+ Add		Lifecycles	Criticality	/	C Reapply Reset					Find tasks by t	tie 🝸 🛛 Go to Tor	lav Q	ť –	+
Proi	act Name: XP 2000													
			AUG			SEP 21								
WBS	TASK TITLE	STAF	RT WEEK 33 18 19 20 23 2	WEEK 34 4 25 26 2	WEEK 35 WEEK 3 27 30 31 01 02 03 06 07 08 0	36 WEEK 37 09 10 13 14 15 16 17 20	WEEK 38 WEEK 21 22 23 24 27 28 29	39 WEFK 40 30 01 04 05 06 07 04	WEEK 41 8 11 12 13 14	WEEK 42 5 18 19 20 21	WEEK 43 22 25 26 27 28	29 01 02	EEK 44 03 04 05	WEEK 08 09 10
1.3.1	 Injection Molded Fa 	ce Sep	17,		Injection Molde	ed Faceplate (Mary)								-
1.3.1.1	Develop FEA model	Sep	17,		Develo	p FEA model [Mary]								
1.3.1.2	Run/Revise FEA mo	del Sep	17,		Run/Revis	e FEA model [Mary] 두	2							
1.3.1.3	Validate/correlate FE	Ar Sep	22,		Valid	late/correlate FEA results [Mary]	· 🖄							
1.3.1.4	Document/Distribute	FE Sep	23,		Docu	ument/Distribute FEA Results [M	tary] 😕 🚽							*
1.3.1.5	Define Housing/Face	pla Sep	27.		Define	e Housing/Faceplate/Cover Inter	faces (Mary)	n						bad
1.3.1.6	Finalize Faceplate D	esi Sep	30,			Finalize Faceplate (Design & Drawing (Mary)							660
1317														1.1
	Release Faceplate L	ra Oct	1, 20			Relea	se Faceplate Drawing [Mary]	Tataan						
1.3.1.8	Order Faceplate Pro	toty Oct	1, 20			Relea:	se Faceplate Drawing [Mary] er Faceplate Prototype [Ken]	1. 						- 1
1.3.1.8	Order Faceplate Pro	ira Oct toty Oct lat Oct	1, 20 1, 20 4, 20			Relea: Orde	se Faceplate Drawing [Mary] er Faceplate Prototype [Ken] le for Faceplate Prototype [M							1
1.3.1.8 1.3.1.9 1.3.1.10	Criter Faceplate D Order Faceplate Pro Lead Time for Facep Receive & Inspect Fa	inta Oct loty Oct lat Oct ace Oct	1, 20 1, 20 4, 20 18, 2			Relea: Ord C Lead Tim	se Faceplate Drawing [Mary] er Faceplate Prototype [Ken] ie for Faceplate Prototype [M	lary]	Faceplates [Mary]					

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?



 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*.

	Out-of-Date Warning Icon					Wizard					
Ν	ary M 👻	8:00		3:00			0:	:00 🔘	0:00	0	
A	XP 2000 💌	Define	•		- +						Finalize Faceplate De
1	Calendar Row Warnings										ΘX
	▲ ₹ 🦷			Find							
	 ① Active Out of Date Task (1) 										▲
F	Define Housing/Faceplate/Cover Interf [Mary]	aces	End: 24 Se	p 2023	∕ €	Mark Completed		Extend to End Tod	ay	Move to Star	t Today
w										Ok	Cancel

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

Mary M ▼ A XP 2000 ▼ Calendar Row Warnings ★ ↓ ↓₹	Task Properties	•	Mark Completed	0:00	Finalize Faceplate D
					■ ^ *
Define Housing/Faceplate/Cover Interfaces [Mary]	End: 24 Sep 2023	/ 순 🗳	Mark Completed	Extend to End Today	Move to Start Today
v		\prec			Ok Cancel
	Helpers				

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.

,					I		
Mary M 🔻 8:00 📢	Select All	0:0	0 🔿	0:00	0:00	Select All	
A XP 2000							b
Calendar Row Warnings		\neg				7	ΞX
	Find						
		i i					^
Define Housing/Faceplate/Cover Interfaces [Mary]	End: 24 Sep 2023	< 🗋 Mark	Completed	Exten	d to End Today] Move to Start Today	* *
w		Soloct All				OkC	ancel
		Select All					

44. Completed tasks are crosshatched at 45 degrees.

Mary M	•	8:00	3:00	
XP 2000	•	Define Housing/Faceplate/C over Interfaces		

- 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.