

## Exercise – Queued Tasks, Resource Loading & Pull

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. Ensure you are in **My Playbook** and project **XP 2000** is active.
4. Bob's been working on **Design Prototype Backpanel PCBA**. Click on it to see it in the Game Plan pane, then right-click **Task Properties** to see its two successors.

### Task Properties

Basic

Summary & Status

**Links**

Change log

Predecessor Name	End date
Enter the Predecessor Title	

Successor Name	Start date
Enter the Successor Title	
  Layout Prototype Backpanel PCBA	 22 Mar 2022 
  Acquire components, kit, send to supplier: Backpanel	 22 Mar 2022 

- What is the criticality of these tasks?
  - What is the lifecycle of these tasks?
  - Where would find them – in the calendar or backlog?
5. Click **Cancel**.

- In Bob's backlog for project XP 2000, there are currently no tasks with a queue dot (filled dot), therefore none of them are ready to be started because they are waiting for one or more predecessors to be completed by Bob or someone else.

The screenshot displays the Playbook software interface. The top section shows a Gantt chart for Bob's tasks. The tasks are:

- Design Prototype Backpanel PCBA (Pink blocks, 5:00 on Fri and Mon)
- Determine Failure Mode of Bezel (Brown block, 2:00 on Thu)

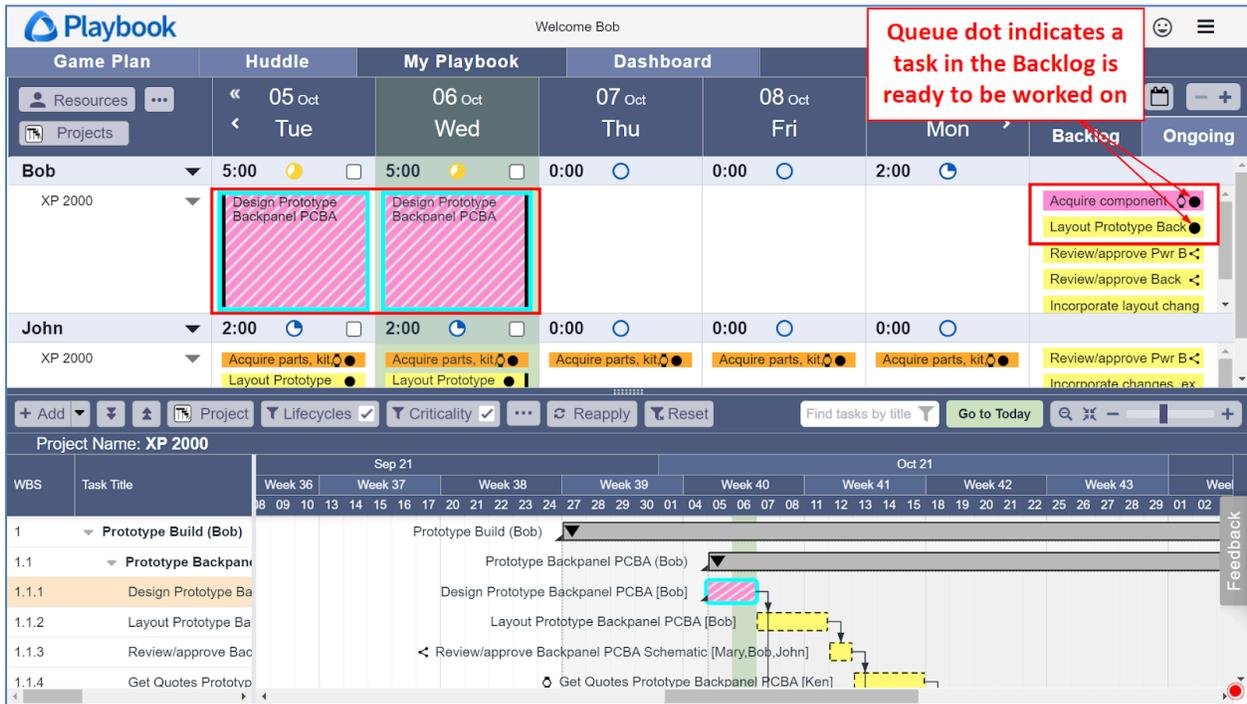
The bottom section shows a task backlog for project XP 2000. The tasks are:

- 1.1.1 Design Prototype Backpanel PCBA (Sep 24)
- 1.1.2 Layout Prototype Backpanel PCBA (Sep 28)
- 1.1.3 Review/approve Backpanel PCBA Schematic (Oct 1, 2)
- 1.1.4 Get Quotes Prototype Backpanel PCBA (Ken) (Oct 4, 2)
- 1.1.5 Incorporate layout changes, export/verify file for supplier (Bob) (Oct 4, 2)
- 1.1.6 Order Prototype Backpanel PCB (Ken) (Oct 7, 2)
- 1.1.7 Fab/receive Prototype Backpanel PCB (Bob) (Oct 8, 2)
- 1.1.8 Acquire components, kit, send to supplier (Bob) (Sep 28)
- 1.1.9 Assemble, ship/receive from supplier (Bob) (Nov 9, 2)

The Gantt chart shows the following dependencies:

- Design Prototype Backpanel PCBA (Bob) depends on Design Prototype Backpanel PCBA (Ken)
- Layout Prototype Backpanel PCBA (Bob) depends on Design Prototype Backpanel PCBA (Bob)
- Review/approve Backpanel PCBA Schematic (Mary, Bob, John) depends on Layout Prototype Backpanel PCBA (Bob)
- Get Quotes Prototype Backpanel PCBA (Ken) depends on Review/approve Backpanel PCBA Schematic (Mary, Bob, John)
- Incorporate layout changes, export/verify file for supplier (Bob) depends on Get Quotes Prototype Backpanel PCBA (Ken)
- Order Prototype Backpanel PCB (Ken) depends on Incorporate layout changes, export/verify file for supplier (Bob)
- Fab/receive Prototype Backpanel PCB (Bob) depends on Order Prototype Backpanel PCB (Ken)
- Acquire components, kit, send to supplier (Bob) depends on Fab/receive Prototype Backpanel PCB (Bob)
- Assemble, ship/receive from supplier (Bob) depends on Acquire components, kit, send to supplier (Bob)

7. Bob has completed the design of the **Backpanel PCBA**. He will let his teammates know of his progress then Playbook will mark its successors with a queue dot.
8. In the calendar right-click on **Design Prototype Backpanel PCBA** then click **Mark Completed**.
  - What is different about the task marked complete?
  - What is different about the two successors in his backlog?



9. At this point the clock starts ticking and Queue Time is increasing. To minimize Queue Time, we look for queued tasks in the Backlog and find ways to start working on them as soon as possible, especially critical path tasks. Sometimes we can find another resource who can do most if not all the task and hand it off to them.

*Extra! Extra! Read All About It!*

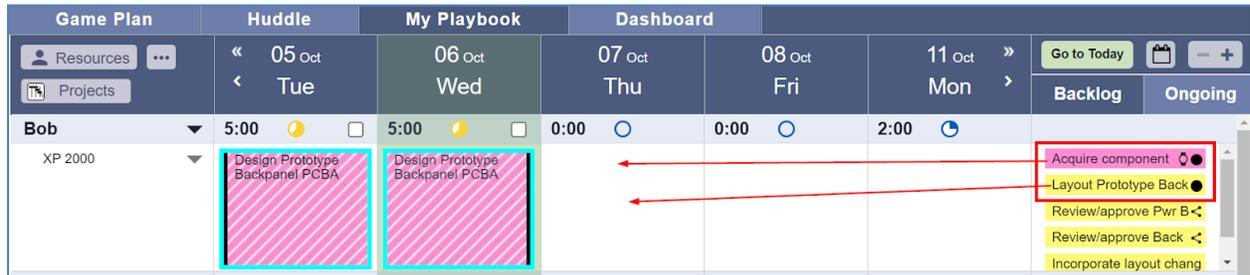
Marking a task completed as soon as you finish it is important because you may not be the resource assigned to the successor.

By marking it completed, the queue dot will appear on those tasks, letting the assigned resource know they are ready to be worked on.

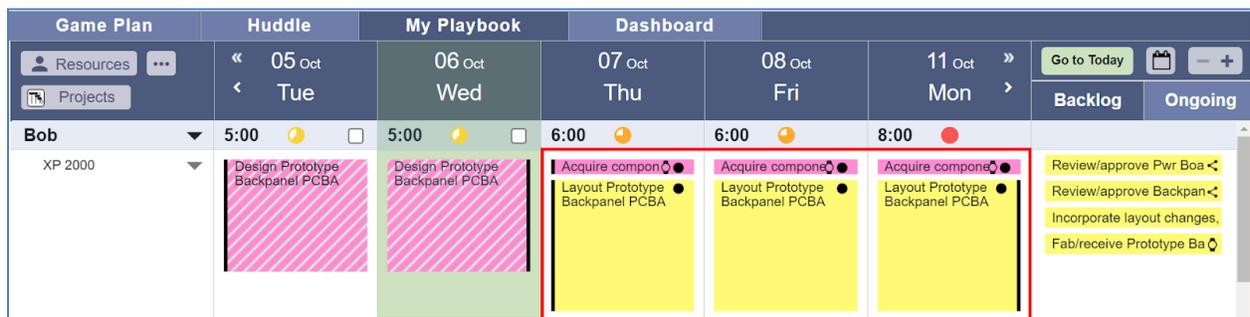
10. Hover over Bob's loading dials for the next couple of days and review the percentage and number of hours Bob's time is allocated across all projects. What does this mean?

- Since it is the end of the day, Bob **pulls**, one at a time, the critical, monitor task, **Acquire parts, kit, send to supplier: Backpanel** and **Layout Prototype Backpanel PCBA** from the Backlog to **tomorrow** to show that he plans to start actively working on them tomorrow.

### Before



### After



- Because the “**Acquire...**” task is a monitoring task, it has very little planned work each day, hence its vertical height is small, whereas the “**Layout...**” task is a Work task with 6 hours planned each day, hence its vertical height is much larger.
- How does Bob’s loading look for the next few days? Is he overloaded? Are his priorities clear, and correct?

*Extra! Extra! Read All About It!*

- Only make a task Active when you are  $\geq 80\%$  confident that you are ready to work on it or if it must happen on a specific date such as a meeting with a vendor or trade show, otherwise, leave tasks in the backlog until their predecessors have been marked complete and you have availability to focus on them.
- Limit your daily WIP - do not overload yourself. Ideally, at the beginning of each day, your utilization dial should be  $\leq 70\%$  (yellow). This allows for variability in the Hours of Work estimates and in your estimated Availability. Loading yourself to 100% only encourages multitasking and causes delays.
- If you complete a task and still have some time left in the day, pull the queued task with the least amount of slack from the backlog into today.

- Sign Bob out of Playbook then click **Discard**.

**This completes this exercise.**