

Exercise – Ongoing Tasks

1. Open a Chrome or Edge browser and enter the following:
<https://training3.playbookteam.com>
2. Sign in Playbook as Mary. Username = **Mary**, password = **PlayBook2021**
3. Ensure **all projects** are selected, then click **Ok**.

The screenshot shows the 'Game Plan' window with the 'Calendar' tab selected. The 'Projects' tab is highlighted with a red box. Below it, the 'Resources' tab is checked. The 'Lifecycles' section shows 'Active x' selected. The 'Projects in my group' dropdown is open, showing a list of projects: 'XP 2000', 'Sustaining Engineering', and 'Misc. Other', all of which are checked. A red box highlights the entire 'Projects in my group' list. The 'Ok' button is visible at the bottom right.

- If necessary, drag the horizontal, blue bar to resize the Game Plan so you can see all three projects:

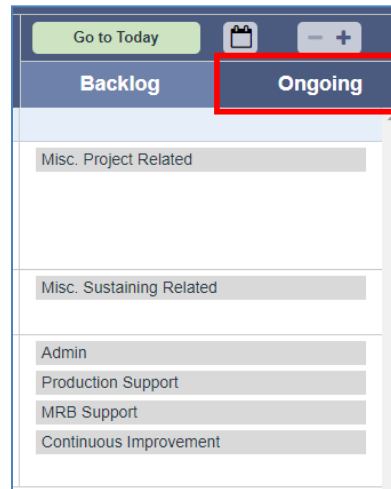
XP 2000, Sustaining Engineering, and Misc. Other.

The screenshot shows the Playbook interface for Mary. The top navigation bar includes 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'. The 'Game Plan' section displays a calendar view for Mary with tasks for 'XP 2000', 'Sustaining Engineering', and 'Misc. Other'. A red box highlights the 'XP 2000' project, and another red box highlights the 'Sustaining Engineering' project. A red arrow points to a blue bar at the bottom of the calendar view with the text 'Drag to resize the Game Plan split-window'. The bottom section shows a Gantt chart for the 'Sustaining Engineering' project.

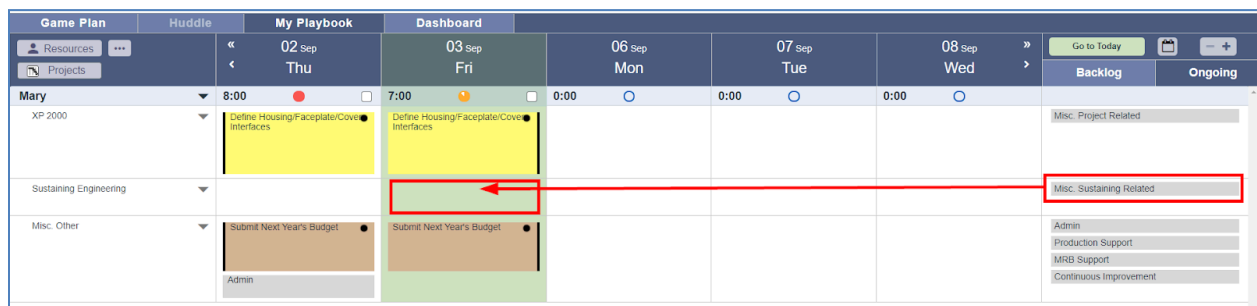
- Today Mary's Whole Day Total currently shows 7:00 hours of active work (she's probably overloaded).

The screenshot shows the Playbook interface for Mary. The top navigation bar includes 'Game Plan', 'Huddle', 'My Playbook', and 'Dashboard'. The 'Game Plan' section displays a calendar view for Mary with tasks for 'XP 2000', 'Sustaining Engineering', and 'Misc. Other'. A red box highlights the 'XP 2000' project, and another red box highlights the 'Sustaining Engineering' project. The bottom section shows a Gantt chart for the 'Sustaining Engineering' project.

- Mary wants to clearly show how all her time is utilized, so she is using Ongoing tasks to account for the rest of her time. In the backlog, click **Ongoing**.
- Notice the Ongoing tasks: **Misc. Project Related**, **Misc. Sustaining Related**, **Admin**, **Production Support**, **MRB Support**, and **Continuous Improvement**. Note: Ongoing tasks are completely customizable to suit the needs of your organization.



- Mary attended the Sustaining Engineering weekly meeting today, so she uses an Ongoing task to account for her time. Drag the Ongoing task, **Misc. Sustaining Related** to **today**.



9. Using the time bar, resize the Ongoing task to **1:00 hr**. Mary's Whole Day Total is now 8:00 hours. Ongoing tasks default to zero hours so don't forget to resize them. Segment times can be displayed using the **"Other"** filter (☰).

Game Plan	Huddle	My Playbook	Dashboard
<div>Resources</div> <div>Projects</div>	<div>« 02 Sep Thu</div> <div>8:00</div>	<div>03 Sep Fri</div> <div>8:00</div>	
Mary			
XP 2000	Define Housing/Faceplate/Cover Interfaces 4:00	Define Housing/Faceplate/Cover Interfaces 4:00	Define Housing/Faceplate/Cover Interfaces 4:00
Sustaining Engineering			Misc. Sustaining Related 1:00
Misc. Other	Submit Next Year's Budget 3:00 Admin 1:00	Submit Next Year's Budget 3:00	Submit Next Year's Budget 3:00

10. During today's Sustaining Engineering meeting, Mary was asked to attend another meeting tomorrow (sound familiar?). Right-click on today's Ongoing task, **Misc. Sustaining Related**, click **Add Days > 1** then **resize tomorrow's copy to 1:00 hr**. Notice: it consumes one hour of her day tomorrow in both her utilization dial and Whole Day Total.

Game Plan	Huddle	My Playbook	Dashboard	
<div>Resources</div> <div>Projects</div>	<div>« 02 Sep Thu</div> <div>8:00</div>	<div>03 Sep Fri</div> <div>8:00</div>	<div>06 Sep Mon</div> <div>1:00</div>	
Mary				
XP 2000	Define Housing/Faceplate/Cover Interfaces 4:00	Define Housing/Faceplate/Cover Interfaces 4:00		
Sustaining Engineering		Misc. Sustaining Related 1:00	Misc. Sustaining Related 1:00	
Misc. Other	Submit Next Year's Budget 3:00 Admin 1:00	Submit Next Year's Budget 3:00		

11. Mary also has 2 hours of miscellaneous meetings related to project XP 2000 scheduled for tomorrow, so she uses the XP 2000 Ongoing task, **Misc. Project Related**, to account for her time. Drag the Ongoing task, **Misc. Project Related** to **tomorrow**, then **resize it to 2:00 hrs.**

Game Plan	Huddle	My Playbook	Dashboard	
<div>Resources</div> <div>Projects</div>	<div>« 02 Sep</div> <div>< Thu</div>	<div>03 Sep</div> <div>Fri</div>	<div>06 Sep</div> <div>Mon</div>	
Mary	8:00	8:00	3:00	
XP 2000	Define Housing/Faceplate/Cove Interfaces 4:00	Define Housing/Faceplate/Cove Interfaces 4:00	Misc. Project Related 2:00	
Sustaining Engineering		Misc. Sustaining Related 1:00	Misc. Sustaining Related 1:00	
Misc. Other	Submit Next Year's Budget 3:00 Admin 1:00	Submit Next Year's Budget 3:00		

12. Sign Mary out of Playbook then click **Discard**.

This completes this exercise.