

## Exercise – Meeting Tasks & Shared Tasks

In this exercise you will learn the difference between Meeting and Shared tasks.

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**, only project **XP 2000** is active, and **Bob and John** are the only resources showing in the Calendar.

The screenshot displays the Playbook software interface. At the top, the navigation bar includes 'Game Plan', 'Huddle', 'Resources', and 'Projects'. A red box highlights the text 'Bob and John' in the top navigation bar. Below this, the calendar view shows tasks for two resources: Bob B and John J. Bob B's tasks include 'Design Prototype Backpanel PCBA' on Thursday and Friday. John J's tasks include 'Acquire parts, kit, kit' and 'Layout Prototype Pwr Board PCBA' on Thursday, Friday, and Saturday. A red box highlights 'John J' in the calendar grid, and red arrows point from the 'Bob and John' box to their names. Below the calendar, the project name 'XP 2000 [Mary M]' is visible, along with a Gantt chart showing task dependencies and durations across weeks 51 to 6.

4. In John’s calendar, click **Layout Prototype Pwr Board PCBA**. You can now see it and its successors in the Game Plan pane below.
5. The direct successor is a Meeting task, **Review/approve Pwr Board Schematic**, as indicated by the *meeting icon* to the left of the title. Can you also see it in the backlog?

The screenshot displays a project management interface for 'Project Name: XP 2000 [Mary M]'. The top section is a calendar view showing tasks for Bob B and John J from January 11th to 17th. Bob B's tasks include 'Design Prototype Backpanel PCBA' on Jan 11 and 12. John J's tasks include 'Acquire parts, kit...' and 'Layout Prototype Pwr Board PCBA' on Jan 11 and 12. The 'Layout Prototype Pwr Board PCBA' tasks for John J are highlighted with a red box. Below the calendar is a Gantt chart for the same project, showing a task hierarchy. A red box labeled 'Meeting icon' points to the 'Review/approve Pwr Board Schematic [Bob,John,Mary]' task, which is a direct successor to the 'Layout Prototype Pwr Board PCBA' task. The Gantt chart shows the task duration from Jan 11 to Jan 12, with a meeting icon on the left side of the task bar.

- In John's calendar, right-click on **Layout Prototype Pwr Board PCBA** then click **Mark Completed**. The Meeting task **Review/approve Pwr Board Schematic** is now queued, ready to be worked on, as indicated by the filled dot.

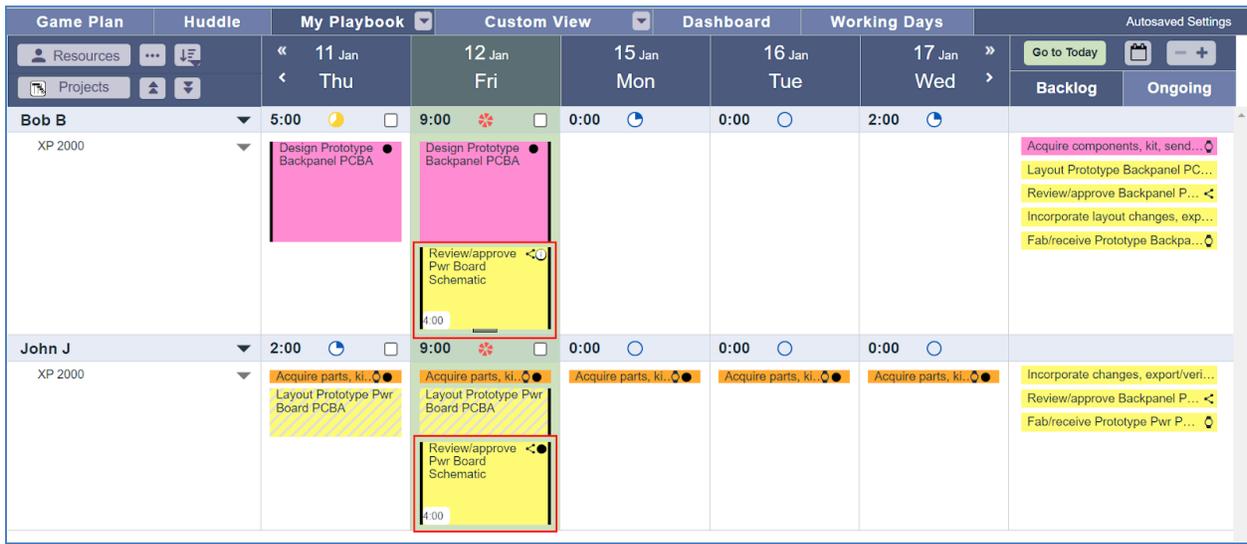
Note: there is a copy of the Meeting task in Bob and John's backlogs.

The screenshot displays the Projectwork interface. At the top, there are navigation tabs: Game Plan, Huddle, My Playbook, Custom View, Dashboard, and Working Days. Below these are filters for Resources and Projects. The main calendar view shows tasks for Bob B and John J. Bob's tasks include 'Design Prototype Backpanel PCBA' on Jan 11 and 12. John's tasks include 'Acquire parts, kit...' and 'Layout Prototype Pwr Board PCBA'. A 'Filled Dot' callout points to a task in Bob's backlog. Below the calendar is a Gantt chart for 'Project Name: XP 2000 [Mary M]' showing task dependencies and completion status.

- Pull Bob's copy of the Meeting task from his backlog to today.** What happens to John's copy of the Meeting task?

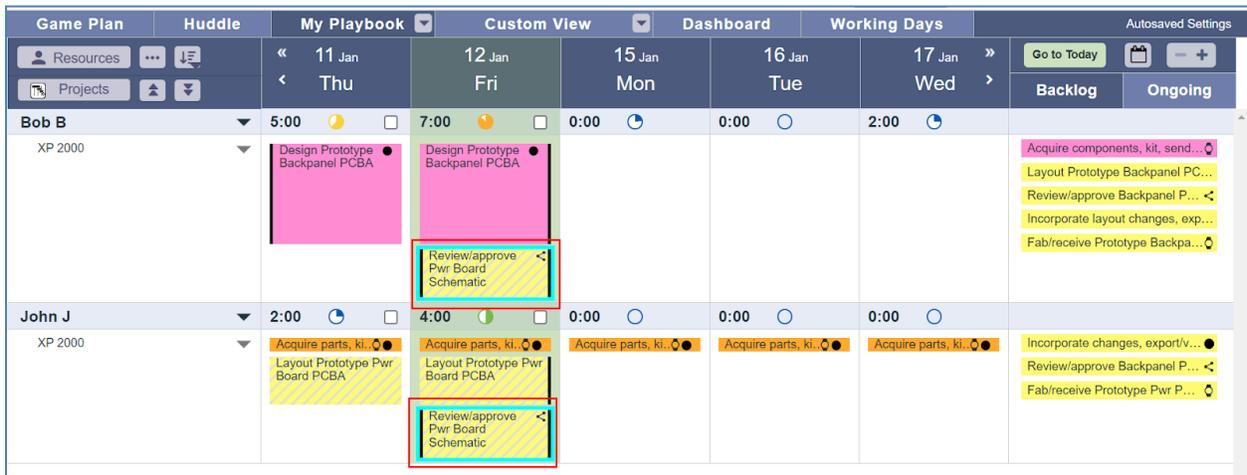
The screenshot displays the Projectwork interface after the task has been moved. The 'Review/approve Pwr Board Schematic' task is now highlighted in yellow in both Bob B and John J's calendars, indicating it is now 'Today' for both users. The Gantt chart below the calendar shows the task's position in the project timeline.

8. **Resize Bob's Meeting task to 4 hrs.** What happens to John's Meeting task?



9. **Resize John's Meeting task to 2 hrs.** What happens to Bob's Meeting task?

10. **Mark John's Meeting task completed.** What happens to Bob's Meeting task?



11. Each person assigned to a Meeting task gets the same amount of time on the same day and, if one person changes their Meeting task, it updates everyone else's copy.

12. Right-click on **John's Review/approve Pwr Board Schematic** then click **Unmark Completed**.

13. **Drag John's Meeting task back to the backlog.** What happens to Bob's Meeting task?

14. Convert a Meeting task to a Shared task. In the Game Plan pane below, right-click on **Review/approve Pwr Board Schematic** then click **Task Properties**.
15. Change the Task Type from **Meeting** to **Work** then click **OK**. This creates a Shared task, that is, a Work task with multiple assigned resources. In this example, Bob, John and Mary.

**Task Properties**

**Title\*** Review/approve Pwr Board Schematic

**Type\*** Work

**Resources** Bob x John x Mary x

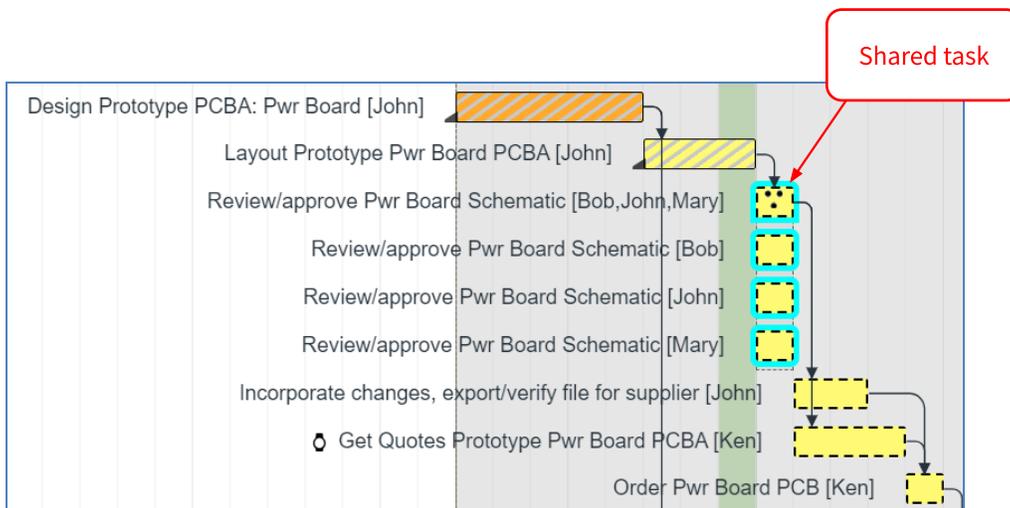
**Duration\*** 1 weekdays

**Start on** 19 Aug 2021

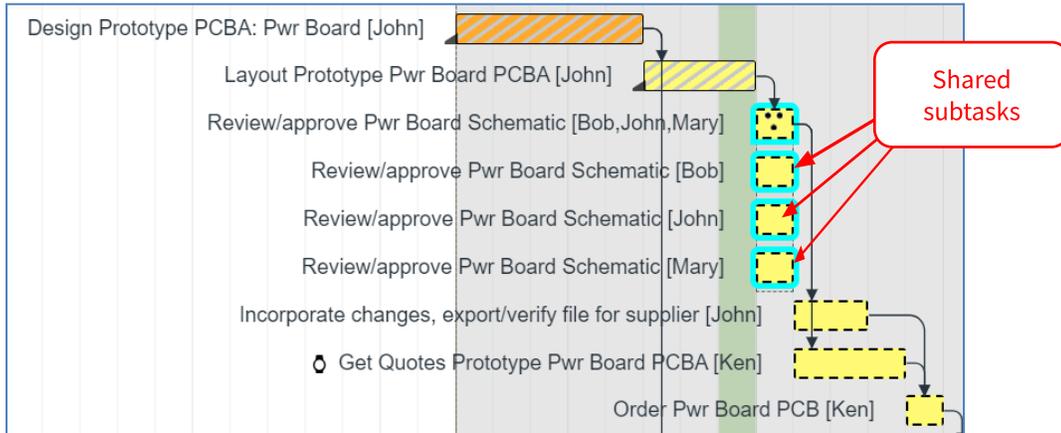
**Work\*** Per day 2:00  
Total 2:00

**Description (Definition of done)** Description

16. The Shared task looks like a summary task and has a **Shared task icon** (three dots in a triangular pattern).



17. When the Shared task is expanded, you see the Shared subtasks, one for each assigned resource.



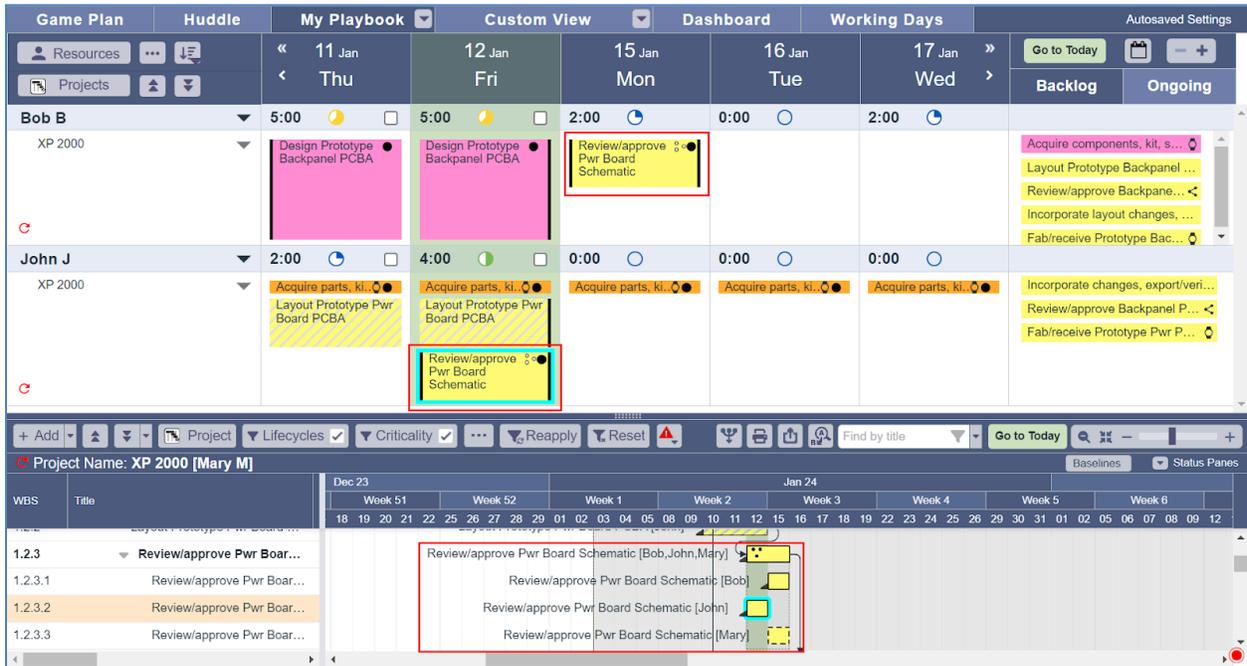
18. Notice there is a copy of the Shared task in John and Bob's backlogs Note: there is also a copy in Mary's backlog, but you do not see her currently in this view.

Game Plan	Huddle	My Playbook	Custom View	Dashboard	Working Days	Autosaved Settings
Resources	Projects	« 11 Jan Thu	12 Jan Fri	15 Jan Mon	16 Jan Tue	17 Jan Wed
		5:00	5:00	0:00	0:00	2:00
<b>Bob B</b>	XP 2000	Design Prototype Backpanel PCBA	Design Prototype Backpanel PCBA			Review/approve Pwr Bo... Acquire components, kit, s... Layout Prototype Backpanel... Review/approve Backpane... Incorporate layout changes, ...
<b>John J</b>	XP 2000	Acquire parts, ki... Layout Prototype Pwr Board PCBA	Acquire parts, ki... Layout Prototype Pwr Board PCBA	Acquire parts, ki... Acquire parts, ki... Acquire parts, ki... Acquire parts, ki...	Acquire parts, ki... Acquire parts, ki...	Review/approve Pwr Bo... Incorporate changes, export/... Review/approve Backpane...

19. **Pull Bob's Shared task from his backlog and place it on tomorrow.** Is John's Shared task also Active tomorrow or is it still in his backlog?

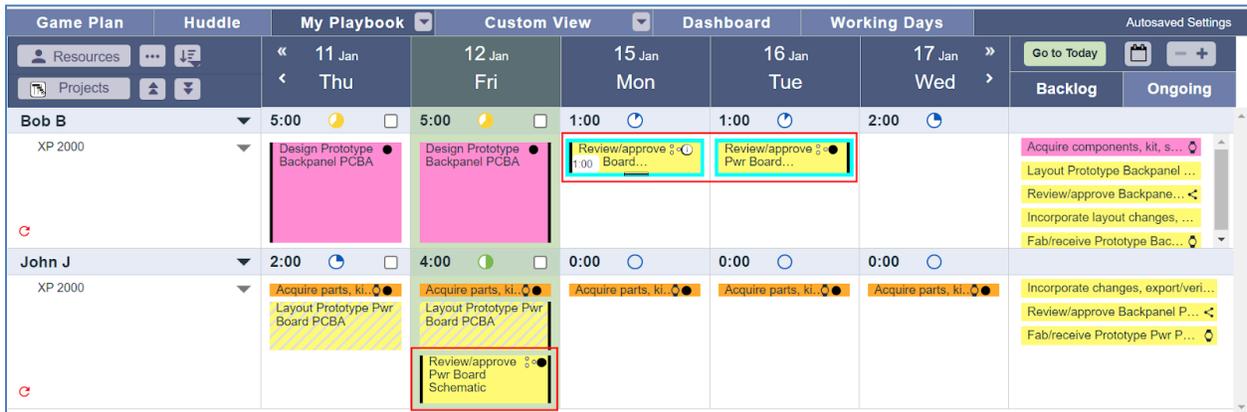
Game Plan	Huddle	My Playbook	Custom View	Dashboard	Working Days	Autosaved Settings
Resources	Projects	« 11 Jan Thu	12 Jan Fri	15 Jan Mon	16 Jan Tue	17 Jan Wed
		5:00	5:00	2:00	0:00	2:00
<b>Bob B</b>	XP 2000	Design Prototype Backpanel PCBA	Design Prototype Backpanel PCBA	Review/approve Pwr Board Schematic		Acquire components, kit, s... Layout Prototype Backpanel... Review/approve Backpane... Incorporate layout changes, ... Fab/receive Prototype Bac...
<b>John J</b>	XP 2000	Acquire parts, ki... Layout Prototype Pwr Board PCBA	Acquire parts, ki... Layout Prototype Pwr Board PCBA	Acquire parts, ki... Acquire parts, ki... Acquire parts, ki... Acquire parts, ki...	Acquire parts, ki... Acquire parts, ki...	Review/approve Pwr Bo... Incorporate changes, export/... Review/approve Backpane...

20. **Pull John's Shared task from his backlog and place it on today.** In the Game Plan pane below, what do you notice about Bob and John's Shared tasks?



21. The Shared task is now 2-days long because John's is on today, Bob's is on tomorrow, and Mary has not yet started hers, hence, her Shared task is Planned, in her backlog.

22. **Resize Bob's Shared task to 1:00 hr** then **Add Days > 1** to extend its duration another day. It is now a 2-day task for a total of 2:00 hrs.



23. Shared tasks are flexible, allowing each person to spend a different amount of time on different days.
24. By default, each person's copy of the Shared task has the same Hours of Work and Duration, but each person can and should change their copy based on their estimated level of effort.
25. **Right-click on John's Shared task then Mark Completed.** John's portion of the effort is completed, but Bob and Mary still have work to do.

The screenshot displays a project management interface for 'XP 2000'. The top section is a task board showing tasks assigned to 'Bob B' and 'John J' across a calendar view from Jan 11 to Jan 17. Bob B's tasks include 'Design Prototype Backpanel PCBA' (5:00-5:00 on Thu and Fri) and 'Review/approve Pwr Board...' (1:00-1:00 on Mon and Tue). John J's tasks include 'Acquire parts, ki...' (2:00-4:00 on Thu and Fri), 'Layout Prototype Pwr Board PCBA' (4:00-0:00 on Fri and Mon), and 'Review/approve Pwr Board Schematic' (0:00-0:00 on Mon). The Gantt chart below shows the timeline of these tasks, with 'Review/approve Pwr Board Schematic' highlighted in yellow and a red box around it. The Gantt chart shows the task starting on Jan 11 and ending on Jan 12, with a sub-task 'Review/approve Pwr Board Schematic [Bob,John,Mary]' also highlighted in yellow.

26. Once all assigned resources have marked their copy of the Shared task completed, the Shared task will automatically be marked completed and the successor flagged as queued, ready to be worked on.
27. Sign Bob out of Playbook then **Discard**.

***This completes this exercise.***