

Exercise – Non-Working Days & Days Off

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 project **XP 2000** is selected, then click **Ok**.

My Playbook View Settings [Close] [Smiley]

Calendar Game Plan Res Load Automatically save settings

Projects

Lifecycles: Active x Show on startup

Projects assigned to selected resources

Search

R&D

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

4. Click on the **Working Days** tab.

Playbook Welcome Mary What's New 7

Game Plan Huddle My Playbook Custom View Dashboard Working Days

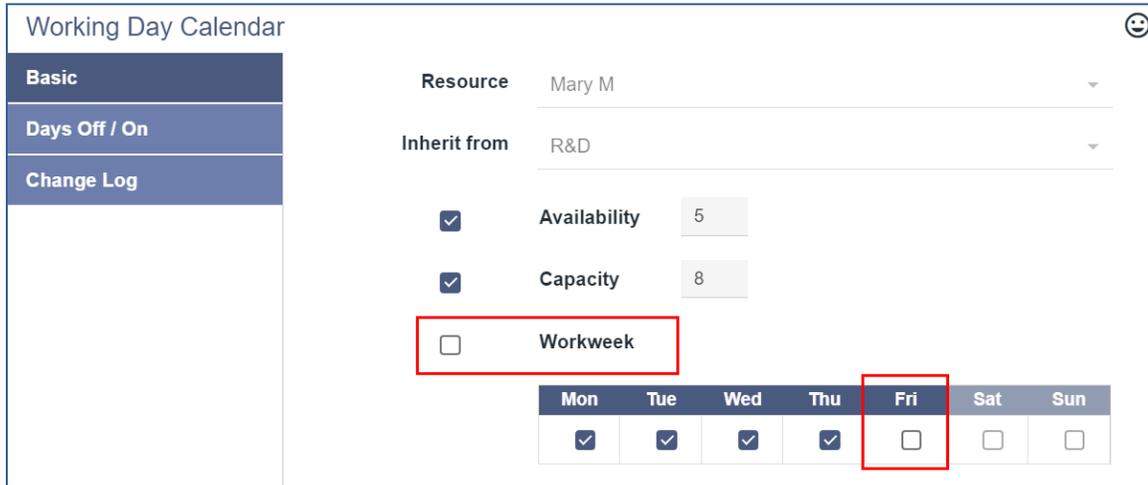
5. There are three types of calendars.

Calendar	Description	Typical Use Cases
Default	Site level, non-editable. Uses Weekdays only.	
Group	Non-Working Days and Days Off that are common to everyone in the group	Company holidays, Capacity and Availability values
Resource	Resource-specific Non-Working Days and Days Off. This includes Me, Other Users, and Non-User Resources in the filter.	Resource-specific time off and vacations

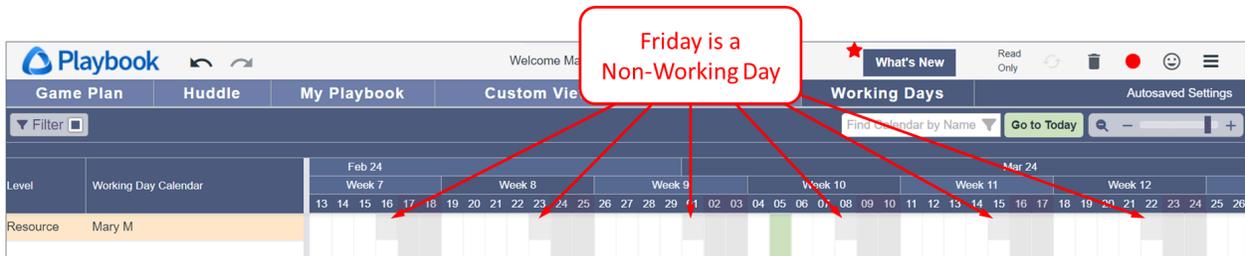
6. Right-click on **Mary's Resource calendar** then click **Calendar Properties**.



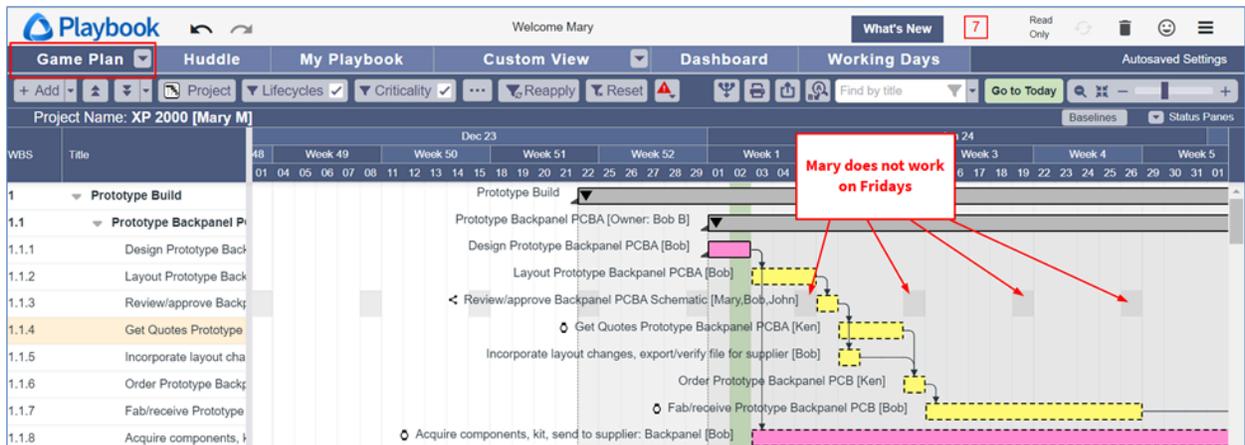
- Adjust her typical weekly working schedule to show that she doesn't work on Fridays. **Deselect *Inherited next to Workweek*** then **deselect *Friday***. This is called a Non-Working Day.



- Also, notice that her Capacity and Availability can be modified here, but only if they should be different from the inherited values. Doing so will modify them on the Admin page and vice-versa. Click **Ok**.
- Notice the gray background is displayed every Friday on Mary's calendar. If you hover over any Friday, the tooltip indicates this is a Non-Working Day. Note: the gray vertical bars indicate the weekend. You can't currently plan work on a weekend, but stay tuned – more enhancements are on the way!



- Click the **Game Plan** tab. The gray background is displayed every Friday on Mary's tasks.



11. Mary will be on vacation next Monday and she wants to make sure her teammates are aware that she will not be in the office.
12. Click on the **Working Days tab**. **Right-click on Mary's Resource calendar** then click **Calendar Properties**.
13. In the **Days Off tab**, click **Add** then enter **Vacation** for the Name, then **select next Monday** for the **From** and **To** dates. Note: your From/To dates will differ from what is shown below. Click **Ok**.
14. Note: Company holidays (listed below Mary's vacation) are inherited from the Group calendar (R&D in this example). These are typically managed by a Playbook Administrator.

Working Day Calendar

Calendar: Mary M (Level: 5 - Resource)

+ Add Inherited Before a week ago

Name	Inherited From	From	To	Off
Vacation		11 Mar 2024	11 Mar 2024	Off
Memorial Day	R&D	27 May 2024	27 May 2024	Off
Juneteenth	R&D	19 Jun 2024	19 Jun 2024	Off
Independence Day	R&D	04 Jul 2024	04 Jul 2024	Off
Labor Day	R&D	02 Sep 2024	02 Sep 2024	Off

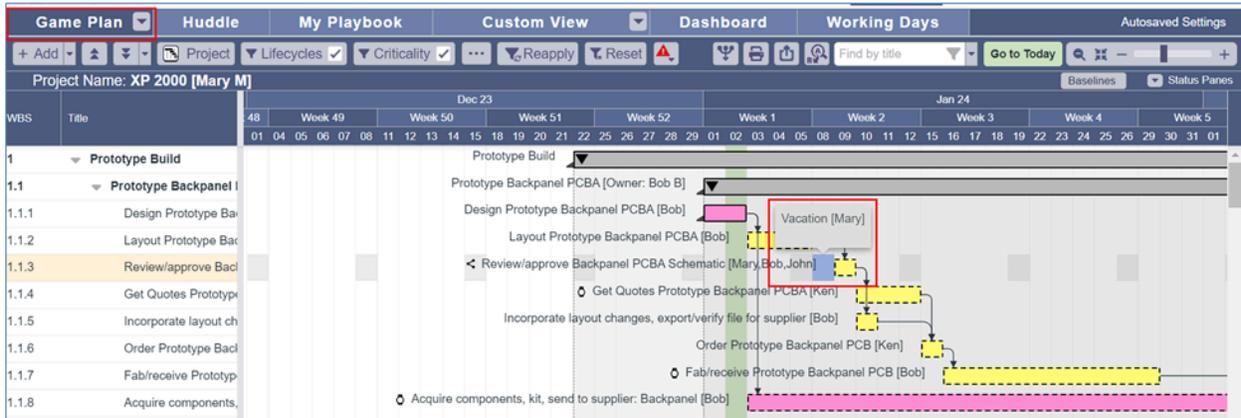
15. Notice a blue background is displayed next Monday on Mary's calendar. If you hover over the blue day, the tooltip indicates that Mary will be on vacation.

Game Plan Huddle My Playbook Custom View Dashboard Working Days

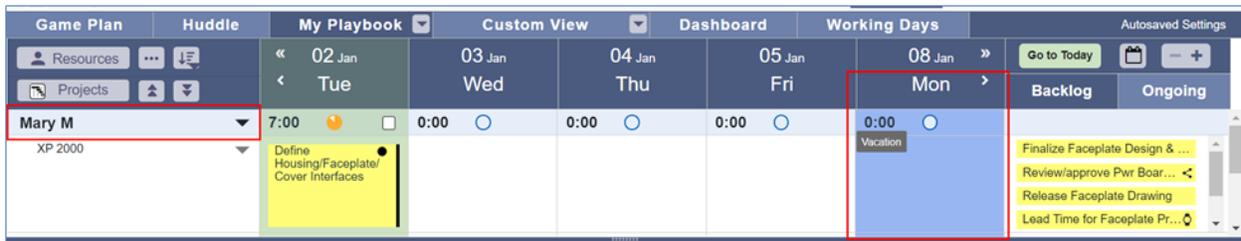
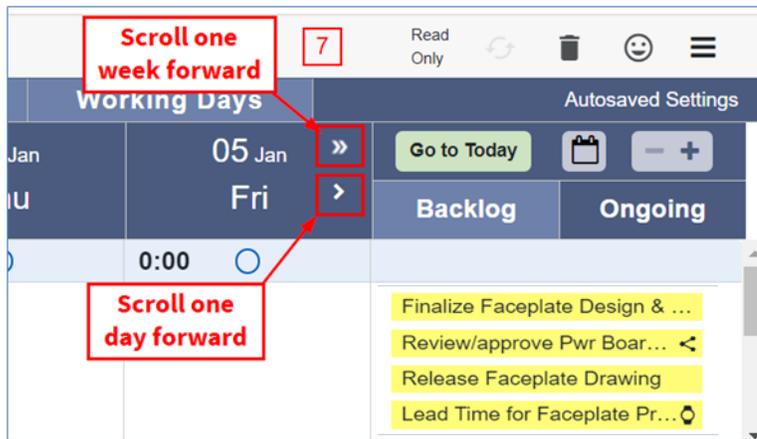
Filter Find Calendar by Name

Level	Working Day Calendar	Feb 24	Week 7	Week 8	Week 9	Week 10
Resource	Mary M		13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29	01 02 03 04 05 06 07 08 09		13

16. Click the **Game Plan** tab. The blue background is displayed on **next Monday** on Mary's tasks.



17. Click on the **My Playbook** tab and notice that next Monday has a blue background and an icon indicating that Mary will be on vacation. Note: you might have to scroll to the right to see next Monday.



18. There are two options when specifying a task's duration: **Working Days** and **Weekdays**.

Duration Option	Description	Typical Use Cases
Working Days	The duration is based only on Working Days and ignores Non-Working Days and Days Off.	Work, Meeting tasks
Weekdays	The duration is based on all weekdays, including Working and Non-Working Days and Days Off.	Monitor tasks

19. Work and Meeting tasks use the Working Days option by default, automatically moving around Non-Working Days and Days Off.

Task Properties

Title* Define Housing/Faceplate/Cover Interfaces

Type* Work

Resources Mary M (5) x

Duration* 2 Working Days

Work* Per day 4:00 Total 8:00

Calendar Resource

Earliest 01 Jan 2024 02 Jan 2024

20. Monitor tasks use the Weekdays option by default. The end date of a Monitor task therefore can land on a Non-Working Day or Day Off, however the start date of a Monitor task automatically moves around Non-Working Days and Days Off.

21. A task's duration option can be modified as necessary in Task Properties.

The screenshot shows the 'Task Properties' dialog box with a sidebar on the left containing 'Basic', 'Summary & Status', 'Links', and 'Change log'. The main area is divided into sections: 'Type*' (Work), 'Resources' (Mary M (5) x), and 'Duration*'. The 'Duration*' section is highlighted with a red box and shows a dropdown menu with 'Working Days' selected. Below the dropdown, the values are: 'Per day' 4:00 and 'Total' 8:00.

Type*	Work
Resources	Mary M (5) x
Duration*	2
Working Days	
Weekdays	
Working Days	Per day 4:00
Per resource	Total 8:00

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

This completes this exercise.