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.**

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

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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.

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7. 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.

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- 8. 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**.
- 9. 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!

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10. 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.**
- 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.

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	Memorial Day	R&D	27 May 2024	27 May 2024	Off	Ĵ								
	Juneteenth	R&D	19 Jun 2024	19 Jun 2024	Off	Ĵ								
	Independence Day	R&D	04 Jul 2024	04 Jul 2024	Off	Ĵ								
	Labor Day	R&D	02 Sep 2024	02 Sep 2024	Off	Ĵ								

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.

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

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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.

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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.

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	Working Days	·			02 Jan 2024
	Work*	Per day	4:00	Calend	lar
	Per resource	Total	8:00	Res	ource 👻

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.

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	Working Days	Per day	4:00
		Total	8:00

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

This completes this exercise.