## A picture containing text, blackboard  Description automatically generated­

## This is a sample LiquidPlanner Playbook. Your Playbook will look different based on your unique workspace structure, workflows, and business rules.

## Before creating your own Playbook, be sure to read this Academy lesson for Playbook content recommendations: [Create Your User Guide](https://next.liquidplanner.com/academy/3#courseId=3&trackId=7&lessonId=12)

## Playbook for Acme, Inc.

This Playbook will provide guidelines on how to use LiquidPlanner. We're implementing LiquidPlanner to help us address the goals outlined below. In order to achieve these goals, each person needs to understand their individual roles and responsibilities in our Workspace.

Our goals for using LiquidPlanner

* GOAL 1: We want to address issues where our projects are understaffed or resources are overbooked. By using resource workload data, we are targeting a 50% reduction in deadline delays because of resource issues.
* GOAL 2: For projects kicked off in Q1 2022 and later, we are targeting no more than a 15% variance in project estimates from the actual work done at the end of a project.
* GOAL 3: We want to consolidate our project update tools from 3 different software tools into 1 tool, thereby reducing expenditures and time team members spend updating multiple sources.

Your LiquidPlanner Champions at Acme Inc.

As you are getting to know LiquidPlanner, you may have specific questions about how we use LiquidPlanner within our organization. If you have questions, contact these internal LiquidPlanner Champions.

* Jane Murphy, janemurphy@acme.com
* John Smith, johnsmith@acme.com (Org Admin)
* Sarah Jones, sarahjones@acme.com

New User Checklist

Here is a checklist of items to complete when you first log into LiquidPlanner:

* Set your daily Working Times within Availability on the My Work tab.Accurate availability is crucial for accurate scheduling.
	+ Your daily availability should represent only the number of hours you have for your assigned tasks in LiquidPlanner. Reduce availability to account for average hours spent each day on work that is not represented as a task in LiquidPlanner, such as lunch, meetings, email, etc.
	+ Once set, do not make changes to your availability without manager approval.
	+ Availability changes for PTO and holidays will be captured independently as Events. (See details in the *Events* section below.)
* Go to *your Profile within My Work* to upload your avatar photo and confirm that the other settings in your profile are accurate.
* IF APPLICABLE: Enable Slack Notifications within the Administration hub to be quickly notified of updates on your items.
* Go through these Academy lessons for a high-level overview of LiquidPlanner:
	+ [Welcome to LiquidPlanner](https://next.liquidplanner.com/academy/5#courseId=5&trackId=12&lessonId=49)
	+ [Views for Insights](https://next.liquidplanner.com/academy/3#courseId=3&trackId=18&lessonId=4)
	+ [Your Timesheet](https://next.liquidplanner.com/academy/3#courseId=3&trackId=9&lessonId=35)
	+ [Tracking & Estimating](https://next.liquidplanner.com/academy/3#courseId=3&trackId=9&lessonId=24)
* Read the rest of this Playbook in full, and let your manager know if you have any questions.

Roles & Responsibilities

Access & Rights

* Org Admins & Workspace Managers: Invite members, manage settings, and access all Projects.
* Project Manager Role: Create and manage Projects and Packages.
* Project Editor Role: Create and manage Tasks and Assignments.
* Project Observer Role: Read-only access.

Our Package Structure

Our projects are strategically prioritized within Packages. Work is scheduled by default in the order in which it is listed.

### Our champions are the only users who should create or move Packages.

### Project Managers may prioritize the projects within the packages.

### When projects are sharing resources, changing the priority of one project will affect the dates for the other projects as well. Project Managers should therefore communicate their intention to reprioritize a project before doing so.

Here is our current Package Structure:

###

### Here is a description of what each package represents in our workspace:

|  |  |
| --- | --- |
| **Package Name** | **Purpose** |
| High Priority Projects | These are strategic client projects with hard near-term deadlines.  |
| Medium Priority Projects | These are projects with later or more flexible deadlines.  |
| Low Priority Projects | These are projects that can be worked on as time allows and generally don’t have a fixed deadline.  |
| Misc. Unscheduled Work | This is where we capture work that we don’t have to schedule but still want to track time against. Ongoing/overhead tasks (administrative work, meetings, etc.) are shared by everyone.  |

Project Workflow

**When a new project is initiated**, we have a specific workflow to create, review, approve, schedule and close out a project. (Project requests will continue to be submitted and approved in our Sharepoint folder according to established procedures.)

**When a project request is approved**, the project will be created in LiquidPlanner by Project Managers or Team Leads only. New projects will live in the Pending projects collection while they are being built out. A new project can be created from scratch or by pulling in a project template.

When a new project is created, the following fields need to be filled in on the Project Edit Panel:

* Custom Field 1: Client
* Custom Field 2: Program
* Custom Field 3: Division
* Target Finish
* Project Description

**When a new project is ready to go live**, it will be moved to the appropriate package in the Scheduled (active) project collection. If tasks are assigned to you in the project, you will start seeing them in your My Work views.

**When a project is finished**, the Project Owner needs to follow this process before marking the Project folder Done:

* Review all tasks to ensure that time has been tracked to each task and that all of them are marked done.
* If a task had no time logged, the project manager should check with the task owner to determine why and update as necessary.
* Add project wrap-up notes in the project’s Notes field.
* Once the wrap-up reporting is completed, set the Project status to Done and move the project to the Archived project collection.

Managing and Updating Your Tasks

Everyone will be assigned tasks in LiquidPlanner, and it is your responsibility to keep your task information up to date. As you make updates to your tasks, this provides the project team and executives with real time visibility to task and project statuses.

**View Your Task Priorities from My Work**

LiquidPlanner will list your assigned tasks in the My Work views.

* Toggle the **Workload** view to *In Order* to see your tasks listed in expected start date order.
	+ You should be working your tasks in this top-down order.
	+ If you notice that the order of your assigned tasks does not reflect your actual priorities, check with your manager and have them re-prioritize work as needed.
	+ If you see risk alerts on your tasks, check with your manager for guidance.
* Use the **Board** view to see your tasks grouped into columns by Task Status. Easily change the status of a task by dragging and dropping it into a different column.
* Use the **Timesheet** view to see and track time to the tasks that you are expected to be working on during the current time period. (See *Log Progress to your Tasks* below for details.)

**Review and Update Task Estimates**

Keeping task estimates up to date in LiquidPlanner is the key to maintaining an accurate schedule. Any time you notice that a task estimate is no longer accurate due to a scope increase or decrease, you must adjust the remaining effort to accurately reflect the number of hours remaining for the task.

**Log Progress to Your Tasks**

LiquidPlanner depends on regular time tracking updates from team members to maintain an updated schedule based on real-time work being done. Here are some guidelines for tracking time on your tasks:

* Log your progress at least once a day, to the nearest quarter-hour increment.
* Progress can be logged on your timesheet or in the task Edit Panel.
* Associate a Cost Code to each time entry to classify those hours by work type: Billable Client Work, Non-Billable Client Work, Internal Work. This enables us to measure a project’s total hours by work type.
* Timesheet notes are optional but encouraged if it would add valuable insight to our time tracking analysis.
* Pin ongoing/overhead tasks to your timesheet so that they will appear on all timesheets even though they are not getting scheduled. There is a Pin button at the top right of each task’s edit panel.
* At the end of the week, review your timesheet to be sure that you have accounted for all hours for the week. The time tracking data will be utilized in reports and dashboards to view progress on tasks and projects.

**Maintain Accurate Task Statuses**

As work progresses on a task, be sure to update the Task Status so that we can easily see where that task stands. Managers will monitor for tasks in the *Stuck* status. If you set a task to *Stuck*, be sure to add an explanation in the task’s Notes field.

**Add Notes and Links as Necessary**

All information that is relevant to a task should live with the task so that it is visible to all team members collaborating on the project with you. These fields are in the task’s Edit Panel.

* In the **Notes** tab you can enter formatted text, tables, images, etc.
* The **Links** field is located within the Edit Panel’s Properties tab.

**Mark Your Assignments and Tasks Done**

Marking your work done is important for an accurate schedule forecast.

* If yours is the only assignment on the task, simply set the Task Status to Done. This will mark your assignment Done as well.
* If there is still another active assignment on the task, mark just your assignment done. The last assignee finished is the one to set the task status to Done.

Events

It’s important to tell LiquidPlanner when you will be away and therefore should not have any work scheduled for you. We do this by creating **Events.**

* PTO requests and approvals will continue to be processed via our HR site, according to established procedures. Once approved, go to *My Work >Availability>Personal Time off* and create an Event to document the days and type of time off.
* John Smith (workspace owner) is the only person who should create Events in the *Everyone Time* off tab. These events prevent work from being scheduled for *anybody* during those days. You will see that he has already created events for our Holidays.

Thank you for adhering to these guidelines! Please speak with your manager if you have any questions or feedback about the content in this Playbook.

Happy Planning!