Playbook for [Company]

This Playbook provides guidelines for using LiquidPlanner, a collaborative project management tool that tells us what we're working on, when work will start and finish, and how change effects those plans. As we enter and update projects, LiquidPlanner’s scheduling engine continuously forecasts the schedule and balances workload based on our priorities, availability, and the hours we expect to spend doing our work.

Our goals for using LiquidPlanner

The Playbook outlines our roles and responsibilities as we strive to achieve the goals outlined below.

* List three to four business goals.
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Our LiquidPlanner Champions
As you get to know LiquidPlanner, you may have questions about how we use it within our organization. Please reach out to these LiquidPlanner Champions when you need help:

* List two to three Workspace Managers and their contact information
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LiquidPlanner Basics

Start with these resources to learn about LiquidPlanner.

[Welcome to LiquidPlanner Classic](https://www.liquidplanner.com/support/articles/welcome-liquidplanner) - Pay special attention to the 3 key factors powering the LiquidPlanner Scheduling Engine: Priority, Effort, Resource Availability.

[Workspace Tour](https://www.liquidplanner.com/support/articles/workspace-tour) – provides an overview of the app’s navigation and menus.

You’ll find links to other support articles and videos throughout this document.

Set Up Your Profile & Availability in LiquidPlanner

When you [login](https://app.liquidplanner.com/login) for the first time, please open the user menu in the upper right corner of the workspace to set up your profile and notification settings.

1. Go to [My Profile](https://www.liquidplanner.com/support/articles/your-personal-profile-settings) and upload a profile image.
2. Make sure your username is in the preferred format: [provide the example here]
3. Update your [Availability](https://www.liquidplanner.com/support/articles/availability). In general, team member availability will be set to X hours per day.
4. Review your [Personal Notification](https://www.liquidplanner.com/support/articles/your-personal-notification-settings/) settings to stay up-to-date on new work and recent changes.

Roles & Responsibilities

The [People](https://www.liquidplanner.com/support/articles/member-access-levels-and-privileges) tab in LiquidPlanner shows everyone’s member type and access level. There are 4 member access levels – Administrator, Manager, Full Member and Restricted Member. Each has different responsibilities in our workspace, as shown below.

 [Designate who is responsible for each action by entering an “X” in the cell. Add more rows as needed.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Workspace Responsibility | Administrator | Manager | Full Member | Restricted Member |
| Add and Move Packages |  |  |  |  |
| Create new Projects and Sub-Folders |  |  |  |  |
| Re-prioritize Projects and Sub-Folders |  |  |  |  |
| Add new Tasks |  |  |  |  |
| Re-prioritize Tasks |  |  |  |  |
| Re-estimate Tasks when scope changes |  |  |  |  |
| Set Deadline Dates on Projects, Sub-Folders and Tasks |  |  |  |  |

Project Workflow

When a new project is initiated, there is a specific workflow to create, review, approve, schedule and close out a project.

**New projects in LiquidPlanner will be created by:**

**This is our intake and workflow process for new projects in LiquidPlanner:**

* Location where new work is added.
* Person or team who reviews new projects.
* How people know whether the project is ready to work.
* How projects will be assigned.
* What happens if the project is not approved.
* What to expect if the project goes on hold or is delayed.

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

* Client?
* Deadline Date?
* Max Effort?
* Project Description?
* Custom Fields?
* Tags?
* Links?
* Documents?
* Activities?

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

* If the Project Owner isn’t marking projects done, explain who has that responsibility and why
* Update custom fields?
* Add or remove Tags?
* Confirm time has been logged?
* Add comments?
* Resolve outstanding issues?

Managing and Updating Your Tasks

Everyone will be assigned tasks in LiquidPlanner. It’s your responsibility to keep task information up-to-date. Updating your work provides real time visibility into your task status for Project Managers and the rest of the team. It also provides other managers and executives insight into the status of projects as a whole.

**View Your Task Priorities from the My Work Tab**

LiquidPlanner lists your tasks in start date order on the [My Work](https://www.liquidplanner.com/support/articles/the-my-work-tab/) tab. If you notice that the order of your assigned tasks in LiquidPlanner do not reflect your actual priorities, you can . . . [Insert instructions here]

**Review and Update Task Estimates**

Keeping task estimates up-to-date in LiquidPlanner is the key to maintaining an accurate schedule. If you are reviewing a [task estimate](https://www.liquidplanner.com/support/articles/estimating-in-ranges) and notice that it needs to be updated because the scope has increased or decreased, you can . . . [Insert instructions here]

**Posting Updates to Your Tasks**

As you work through your tasks, the following [Edit Panel](https://www.liquidplanner.com/support/articles/the-edit-panel) fields should be updated, as necessary, to ensure relevant task information is visible to all team members collaborating on the project with you.

* Task description?
* Post comments?
* Add Checklists and check off items?
* Update notes?
* Post documents?
* Add Links or URLS?
* Update Custom Field Values?
* Add or remove Tags?
* Mark the task “done” when complete or notify someone?

Our Package Structure

### Packages have two different functions: to **organize** projects or to **prioritize** work by creating priority overrides. Our Package structure looks like this:

### [Paste a screenshot of your workspace package structure here]

### The following information describes what each package represents in our workspace:

### [Edit package names and descriptions below based on your workspace setup]

|  |  |
| --- | --- |
| Package Name | Purpose of the Package |
| Inbox | *We will use the Inbox to review new project or task requests submitted to our organization. All items in the Inbox are On Hold. We will review the priority of the request and schedule it accordingly.*  |
| Events | *The Events package will contain items that are used to block availability for Full-Day Events such as PTO, Company Holidays and other time off. We also will Partial-Day Events for…*  |
| ASAP | *Explain your team business rules for using the ASAP package to prioritize work.* |
| Active projects | *Explain your team business rules for classifying Active Projects and prioritizing them in this package.*  |
| Pending projects | *Explain your team business rules for classifying a project as a Pending Project.* |
|  | *If you have more packages in your workspace, use extra rows to provide additional information.*  |

Tracking Time

LiquidPlanner depends on regular time tracking updates from team members in order to maintain an updated schedule based on the real-time status of your work. There are several ways to track time in LiquidPlanner, please take a look at the [Time Tracking](https://www.liquidplanner.com/support/articles/logging-progress/) article to learn about applying time to tasks, entering it into timesheets and using timers.

**Please follow these guidelines for tracking time on your tasks:**

* How often to track time (e.g.15 or 30 minute increments, hourly, daily)
* Expectation for submitting Timesheets, and when to get them in
* Guidance for [Using Timers](https://www.liquidplanner.com/support/articles/using-timers)

Ongoing Tasks [Remove this section if you won’t be using Ongoing Tasks]

We’ll use [Ongoing Tasks](https://www.liquidplanner.com/support/articles/modeling-ongoing-tasks) to track some of our work. They are located in [Package Name]. You may also [pin tasks](https://www.liquidplanner.com/support/articles/pin-tasks-timesheets) to your Timesheet for easy access.

* List Ongoing Tasks.
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Using Events for Holidays, Vacations and Time Out-of-Office

LiquidPlanner has [Full and Partial-Day Events](https://www.liquidplanner.com/support/articles/events) to block out your schedule when you are not available due to meetings or time off.

**Full-Day Events** are used to capture vacations, company holidays or other types of planned leave.

**Partial-Day Events** are used for meetings and capturing time off for part of the day. They can also be set to recur weekly or every other week.

Events are very helpful for long term planning because they prevent work from being scheduled when you are away. Please add events to the workspace as soon as you know about them so we can see how the schedule is affected and plan accordingly.