ACTIVITY GUIDE

teamwork.

Get Started: Resource Management

Some of the things we'll cover:

- Long term planning (the scheduler)
- Short term planning (the workload)

Activity

1

What you'll do:

- Identify need: the scheduler
- Add projects to the scheduler
- Create a filtered view

Step 1: Identify need

The scheduler is meant for high-level future planning. Think of it like 'penciling something in' on your planner. You want it written down so that you don't book anything on top of it, but you don't have all the details yet (and you don't need them).

Example use cases:

Large future event	Your boss tells you that you'll be hosting a customer conference in Q2. You create a project that starts in Q1 and goes through Q2. Now you can see it on the scheduler and be aware of it as more requests come in.
Potential future projects	You're a law firm and one of your clients anticipates 10 patent cases at the end of the year. You launch 10 projects based on your patent case template and schedule them all for Q2. Everyone in your firm can now be aware of this potential need.
High-level future planning	It's the end of the year and you're doing high-level planning for next year. You create a project for each of the initiatives you want to take on and you tentatively schedule them (and then reprioritize when you realize you can't do everything you want).

Knowing that the scheduler is for high-level future planning (and with the above examples in mind):

Is the scheduler something that you or your team could currently benefit from?

Yes

Continue to the next step in this guide.

No

Not everything is for every team! You can:

- Skip to pg 8 on this guide if you're using the guide on its own.
- Return to, and continue with, the guided training video to learn about granular planning options.

Step 2: Add projects

1. Make sure any projects already in Teamwork have start and end dates added.
2. Add any upcoming projects (that you know of) to Teamwork. You can either use a template or you can create a very basic project with just a title and start and end dates.
3. Create a project for any new or potential projects as you learn about them.

The goal is to see items on the scheduler and plan for and around them. You don't need to have all of the details at this point, you'll get into more granular planning later.

Step-by-step instructions:
Create a project

Tip!

You’ll see all projects that you have access to on the Scheduler, but you might not need to see all of those projects at once. Use filters to see just the projects you need. For example, you can filter to see only projects where you’re the owner or use tags to filter projects by another attribute.

Step-by-step instructions:
Use filters

Step 3: Talk to your team

Now that you know how to use the scheduler and have started adding projects, it's time to get your team involved.

If using the scheduler is new to your team, make sure to explain why you'll start using it, how they can use it, and what's expected of them. For example, now they might need to add projects as they hear about them and/or add dates to projects.

Amazing!

You identified need and added data so that you could start using the scheduler.

Next:

- Continue with Activity 2 on the next page if you're using this guide on its own or...
- Return to the guided learning video

Activity

2

What you'll do:

- Identify need: the workload
- Create filters
- Add data
- Begin using the workload

Step 1: Identify need

The workload is for granular, in-the-weeds, planning. You'll use the workload to see exactly who is working on what, if someone is over or under capacity, and to make informed decisions about how to distribute (or redistribute) work.

Example use cases:

Project management	You're a project manager, responsible for planning all upcoming work and figuring out what can be done and by whom. You use the workload to understand how much work each of your team members has and where more help might be needed.
Team visibility	Each team member manages their own workload, but adds effort and dates to all of their tasks so that the team lead can see where effort is going.

Knowing that the workload is for granular planning (and with the above examples in mind):

Is the workload something that you or your team could currently benefit from?

Yes

Continue to the next step in this guide.

No

Not everything is for every team! You can:

- Skip to pg 16 on this guide if you're using the guide on its own.
- Return to, and continue with, the guided training video to learn about granular planning options.

Step 2: Create filters

By default, the workload shows everything you have access to which meets the view's criteria. But, just because the view shows everything, doesn't mean you need to see everything. Therefore, the first step is to think about what you do need to see.

- Do you need to see certain team members or certain projects?
- Do you need to see all team members and projects that you're the owner of?
- Do you need to see all projects with a certain tag?

Once you know what you need, create a filtered list based on that criteria. You can create multiple filters, so start by thinking about what you need to see and then keep going from there.

Step-by-step instructions:
Use filters

Tip!

If you only need to see certain people on the workload, then you can either filter by: a) individually selecting all the users you need to see or b) adding all users to a team and then filtering for that team.

Learn more about:

Teams

Step 3: Add data

Tasks only show up on the workload if they have: an assignee, start/end dates, and effort. It’s time to ensure that all necessary data is in place.

You can start by adding the data you know to tasks. For example, assign yourself to any tasks that you're working on. Once you've updated tasks you’ll probably need your team’s help. You’ll need them to add the correct dates and effort to any work they're assigned to.

Tip!
You can also unplanned tasks to quickly get tasks on the

Data best practices

There are a couple of different ways to approach getting data added.

You can:

- Have one person in charge of adding all necessary information (if you have templates, add the details to templates).
- Add the information as a team during your team meetings or during sprint reviews.
- Make each assignee responsible for adding the necessary details to their tasks. If you do this then add a safeguard (like a weekly review) to make sure this is actually being done.

Step 4: Use the workload

If all the data is there, the next part is really easy...you can start using the workload! Filter for the tasks you need and then begin using the workload in the way you identified would be valuable for your team.

You’ll easily see who is over capacity and can begin moving things around or scheduling new projects.

Reminder

We talked about adding data in the last step, but data hygiene is an ongoing process. You’ll need to add tasks, dates, and effort as new work comes up in order to keep using the workload.

Learn more about:

The workload planner

Great job!

The workload is a powerful tool to help with resource management and you've set yourself up to use it on your upcoming projects.

Next:

- Continue with Activity 3 on the next page if you're using this guide on its own or...
- Return to the guided learning video

Activity

3

What you'll do:

- Identify need: the portfolio view
- Create a portfolio
- Share and begin using the portfolio
- Use the chart view

Step 1: Identify need

Hopefully you're getting used to this by now! Just like with the previous two activities, the first step is to decide whether or not the portfolio view would be helpful.

Example use cases:

Project management	A recruiting firm works out of projects, they keep projects up-to-date and use the portfolio view during team meetings to review where everyones projects are, address roadblocks, or provide clarity.
Visibility	Executives and clients are constanlty asking for visibility on where projects are at. Department heads use the portfolio to report up to the CMO and individual contributors are able to see where various projects are and provide quick answers to customers.

With that in mind, would the portfolio be helpful for you or your team?

Yes

Continue to the next step in this guide.

No

Not everything is for every team! You can:

- Return to the Academy and choose another course to continue with.
- Return to, and continue with, the guided training video to learn about granular planning options.

Step 2: Create a portfolio

Time to create a portfolio view for all of the projects you need to see.

What to do

Decide what you want to see	Begin thinking of all the projects you want, or need, to see on the portfolio. If you're using categories and tags it'll be a lot easier to quickly find the projects you need, but you'll also be able to search for any project by name.
Decide columns (e.g. statuses)	We recommend using board columns to track projects through different statuses. Use the internal vernacular your team actually uses to name your columns. This will make it much easier for your team to read the board and understand where things are at.

Step-by-step instructions

Create a portfolio

Step 5: Put the portfolio into practice

Now is the easiest part, you're all set to begin putting the portfolio into practice! If you're using the view as a team, make sure to explain to your team what the view is and how they can use it.

Tip!

Turn on the 'Board' column in the 'All Projects' view. This allows you to see what board column projects are in. Share the portfolio with whoever needs to see it.

Step 6: Use the chart

You've done this a few times, so you know the drill.

1. Identify need. Will the chart help you or your team? If your team works on projects it would be a helpful way to track timelines at a high level. Just like with the portfolio, the chart can also help keep execs and clients up-to-date.
2. Add data. The chart is really easy to use, as long as projects have start and end dates you'll see them on the chart.
3. Filter. There is one chart per subscription, so filters are especially important on this view. Think about what type of projects you need to see and then create a filter for those projects.
4. Begin using the chart!

Step-by-step instructions

Use the chart

Incredible!

You've done a lot of set up that will not only impact the way you can manage resources but (hopefully) improce the visibility your entire team has around how projects are going.

Next:

- Return to the guided learning video or...
- Check out our Academy for more resources and keep: getting.things.done.