

Find your way around the Command Center

Three roads in, one screen layout, and the same five colors everywhere. Start with the road you need; you can ignore the rest until you want it.

1 Pick your road

You only ever need the part of the tool that matches what you are doing today.

ROAD 1 · FIVE MINUTES TO AN HOUR

Solve one problem

A blocker, a decision, a messy meeting. No project needed.

- 1 Welcome screen: **Standalone AAA**
- 2 Name the problem and what "good" looks like
- 3 Walk the four steps across the top
- 4 Done? Close it. Bigger than you thought?
Build a plan

ROAD 2 · ONE OR TWO PROJECTS

Run a project

Plan it the Field Guide way, then deliver it.

- 1 **Start my first project** and name it
- 2 Initiating: charter, stakeholders, authorization
- 3 Stage 1 to Stage 4 in the sidebar, in order
- 4 Execution, Red Zone, then Delivery and Closing

ROAD 3 · MANY PROJECTS

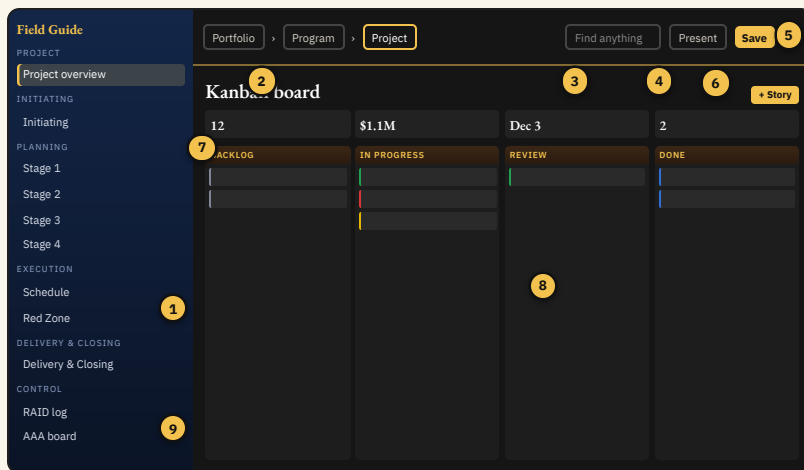
Programs and portfolio

See everything roll up, then drill down.

- 1 **Choose your setup**, then **Program** or **Portfolio**
- 2 Add programs, then projects inside them
- 3 Dashboards and boards roll status up
- 4 Click any card to drill down to it

2 The screen at a glance

Every page has the same layout, so once you know one you know them all.



1 Sidebar

Everything for where you are now. It changes as you move from portfolio to program to project.

2 Where you are

Click a level to go back up, or use the lists to jump sideways.

3 Find anything

Ctrl+K searches projects, tasks, risks, decisions and people.

4 Present

Hides dollar amounts for screen sharing.

5 Save

The dot shows saved or saving. Ctrl+S saves now.

6 Main action

The gold button top right is the next thing to do on that page.

7 Key numbers

Tiles at the top of dashboards. Many are clickable.

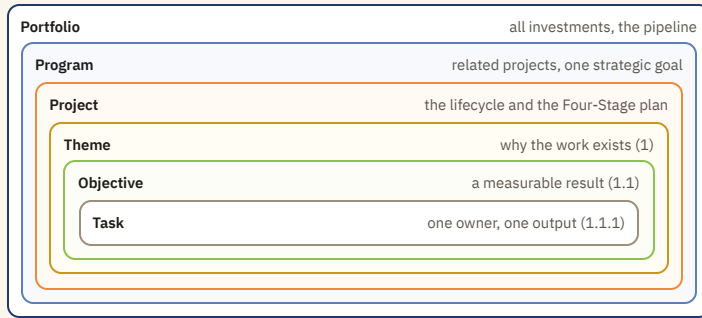
8 Boards

Drag a card to move it. The color stripe is its status; ☒ 2/5 is its checklist, click it to tick items.

9 Help and feedback

This guide, the quick start, and a Send feedback link at the bottom of the sidebar.

3 How everything fits together



Drill down, roll up

Click a program card to open the program; click a project to open the project; click a task to edit it. Status rolls back up the same way, so a red task shows on its project, program and portfolio.

Only the layers you need

Projects mode hides programs and the portfolio. **Program mode** hides the portfolio. Change it any time in **Settings**; nothing is deleted.

Every task traces up

A task always belongs to an objective, and an objective to a theme. In Scrum and Kanban a theme is an epic, an objective is a story (the card on the board) and a task is the work inside it.

Standalone Four-Stage Planning

For when you want help planning, then run the project in another tool. Start from **Standalone Four-Stage Planning** on the welcome screen and work the stages on the Four-Stage Planning track. Choose Scrum and you plan a release: stories placed into sprints. **Intake workbook** collects the charter, people, themes and objectives in one Excel file, and **Bring it back** reads it in. Skip Stage 3 or Stage 4 if you do not need them. **Keep running it here** opens the whole app.

Standalone Red Zone

For a go-live or event when your plan lives in another tool. Start from **Standalone Red Zone** on the welcome screen. Six steps: bring in your plans, confirm the go-live, send the prep guide, run the session, make the go / no-go call, and export. **Tasks for your tool** sends only the Red Zone work, so add that file to the plan you already have. **Keep running it here** opens the whole app.

Communication plan

Start one from **Standalone communication plan** on the welcome screen, or on any project, program or the portfolio under Stakeholders & status. **Export plan** shows what is about to go out: edit a line, add one, or tick Leave out for this export only. It exports to formatted Excel, Word, PDF or your company's template. **Import plan** reads a Word or Excel plan and shows every change first.

Charter and close form

Fill the charter on **Initiating**, then export it to Word or PDF, copy it for email, or pour it into your company's own template with placeholders such as {{charter.case}}. **Import charter** reads a Word or Excel charter back in. When work ends, **Generate close form** on Delivery & Closing drafts the notice with suggested recipients, a scorecard and your links; you send it from your own email. Programs and the portfolio get a rolled-up version.

Workshop boards

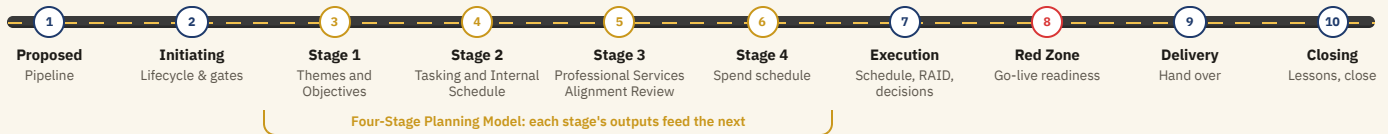
Stages 2 and 3 share one board of the same tasks and dates. The bar above the board sets where the lanes start, how long each runs and how many there are, and they wrap into rows. Stage 2 builds the plan. Stage 3 walks it with your providers: filter by provider and put money on the work. **Start review** flags what moves, what is new and what is removed, and **Finish review** writes one summary to Plan changes from the review.

RAID and decisions

RAID log: Risks, Assumptions, Issues and Dependencies. The D is what you need from other projects, programs, providers and teams, and what they need from you. **Decision log:** decisions, flashpoints, gates and feedback loops.

4 A project's journey

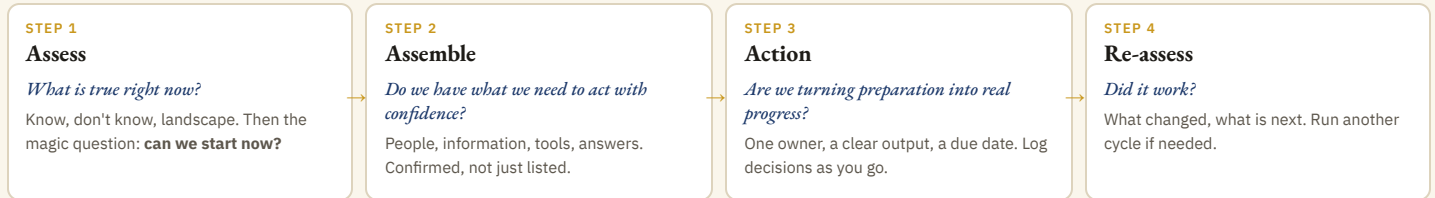
Projects travel left to right along the book's lifecycle. The sidebar items match each step.



Moving a project forward opens a short gate review of the exit criteria. Moving it back logs a feedback loop so you remember why. The Red Zone opens six weeks before go-live. **Edit stages** tailors the lifecycle: rename stages, reword exit criteria, hide the ones you skip, add your own; Restore defaults brings the book's back. Programs or projects with a different lifecycle get a named lifecycle from Settings.

5 AAA: the engine behind every stage

Open the AAA board from the sidebar at any level, or start one on its own from the welcome screen.



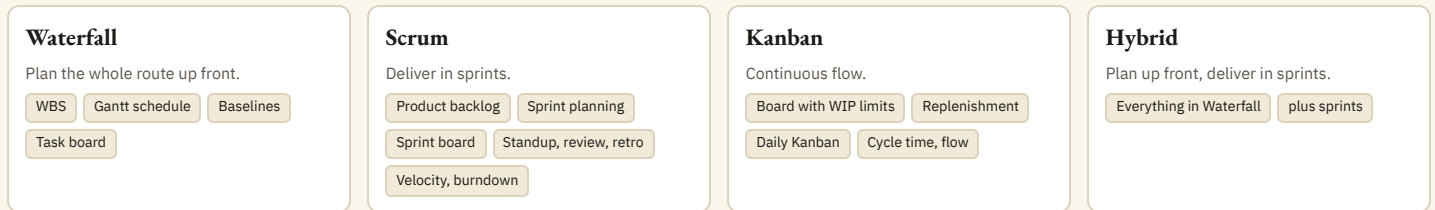
Each "no, we can't start!" reason is tagged **Assemble**, **Clarify** or **Remove** and flows forward on its own. The **Facilitate** button goes full screen for a meeting; the timer keeps you to the timebox. **Build a plan** turns the session into project tasks.

6 Colors mean status, nothing else

They roll up from task to project to program to portfolio.

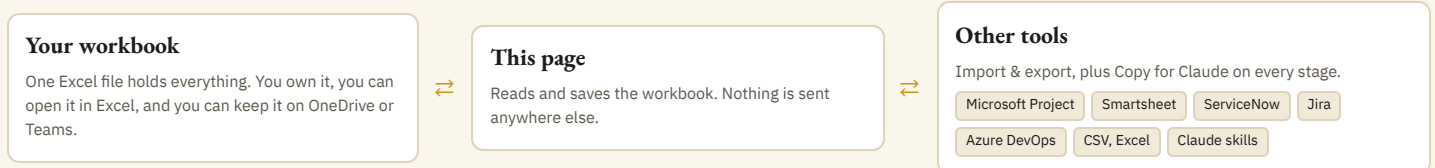


7 Pick a delivery method per project



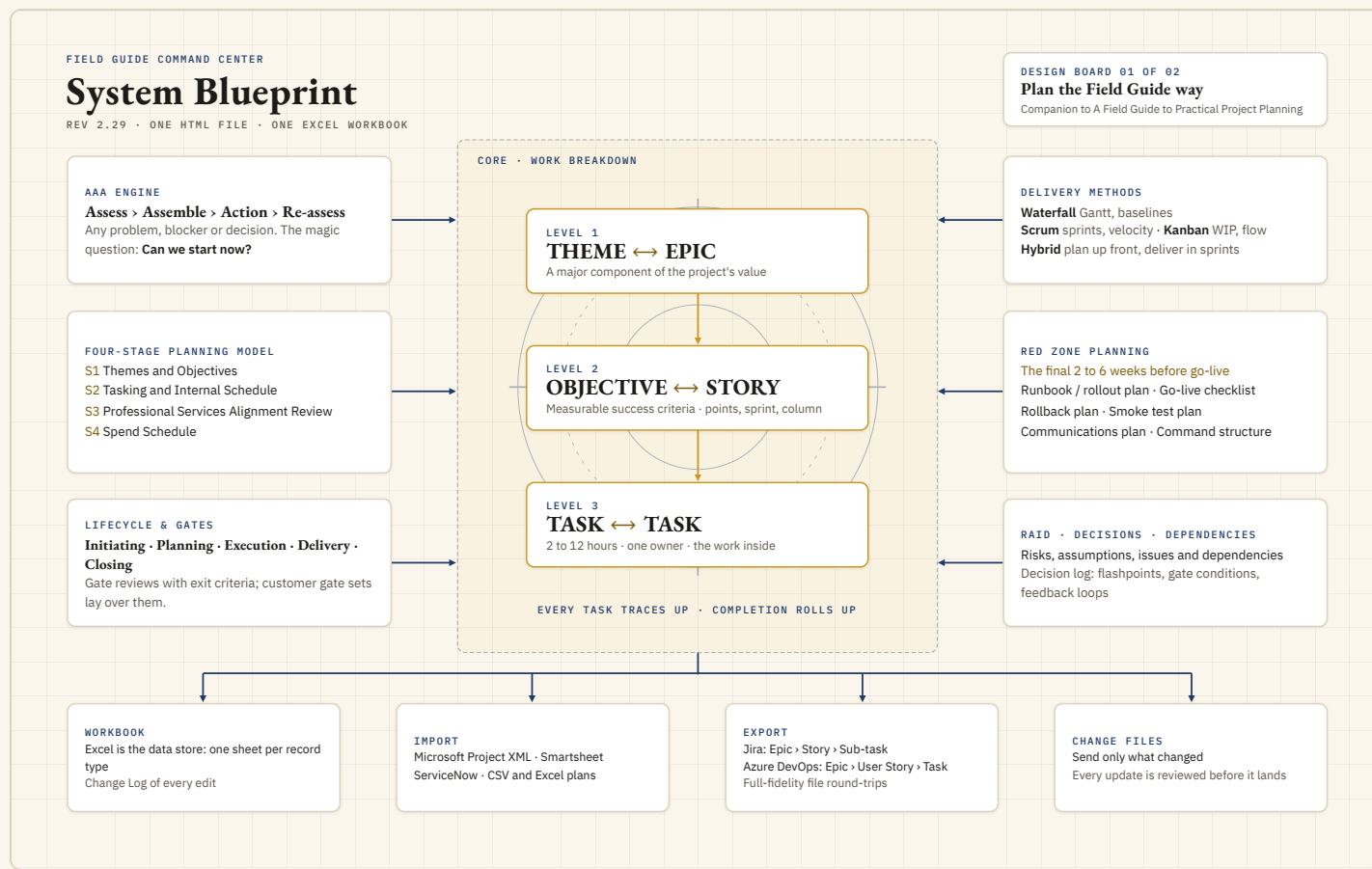
Pick the method in **Team & ways of working** inside any project. The Four-Stage plan stays the same; only the delivery tools change. **Customize columns** on a sprint or Kanban board shapes its columns; Restore defaults brings the method's back.

8 Where your data lives and goes



9 Design board: the system

The Theme, Objective, Task core with the planning modules around it, and the workbook and file exchange below.



10 Design board: agile delivery

In Scrum, Kanban and Hybrid a theme is an epic, an objective is the story on the board, and a task is the work inside it.

FIELD GUIDE COMMAND CENTER

Story-Level Agile Engine

REV 2.29 · SCRUM · KANBAN · HYBRID

DESIGN BOARD 02 OF 02

The story is the unit of delivery

Source: Tech PMO Work Breakdown Framework

THE MAPPING

TRADITIONAL

SCRUM · KANBAN

Project > **Project**
Theme > **Epic**
Objective > **Story**
Task > **Task**

Only the labels change. The discipline of clear decomposition and measurable completion does not.

is the card

2.6 Alert when a top-20 account changes risk band

8

Luis Ortega · Story

2 Self-service insight

1/4 Done checklist

2d

1 OF 2 TASKS DONE

2.6.1 Build and peer review

2.6.2 Test and show the product owner

+ Task

Block

In Progress

POINTS · TYPE · OWNER

Live on the story: Story, Bug, Spike or Chore

SPRINT · BOARD COLUMN

The story is what the team pulls and moves

TASKS INSIDE

2 to 12 hours each; tick them on the card, or + Task

DEFINITION OF DONE

The story's own checklist, asked about before Done

THE BOARD · EVERY COLUMN HAS A TYPE

BACKLOG

Backlog · options, ranked

TO DO

Committed · in the sprint

IN PROGRESS

Active · work under way

REVIEW

Active · acceptance check

DONE

Done · story complete

RULE · TASK STARTED

A story still in Backlog or To Do moves to work under way.

RULE · LAST TASK DONE

Offers to move the story to Done, then asks about its open checklist steps.

RULE · STORY MOVED TO DONE

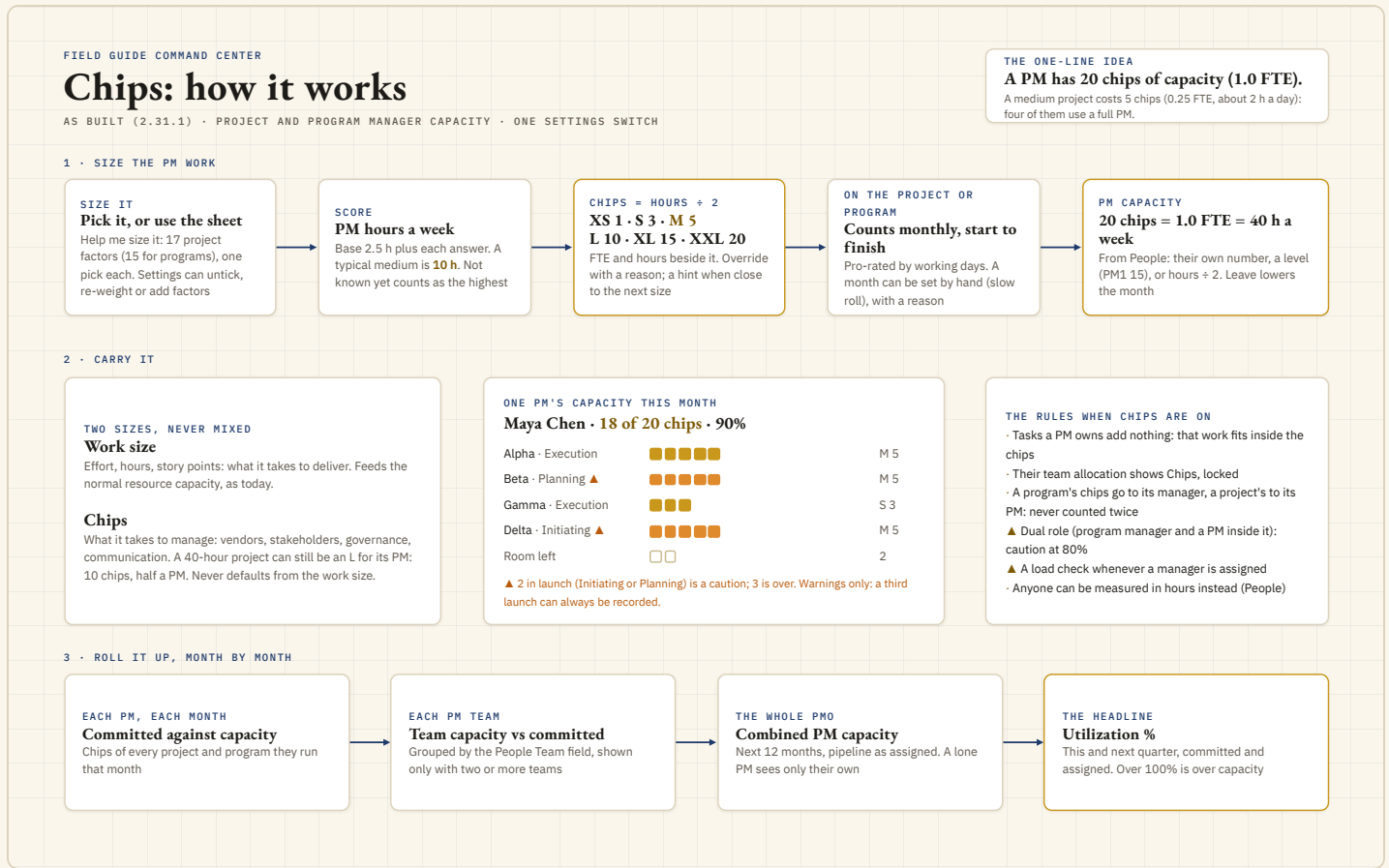
Offers to finish its open tasks. Cancel leaves the story where it was.

UPGRADE · OLDER WORKBOOKS

Points add up · the sprint with most open tasks · the column where the work stands · closed sprints keep their velocity

11 Design board: chips, how it works

Optional PM capacity: each project and program gets a PM size in chips; 20 chips is one full-time PM.



12 Design board: the chips gauges

The Chips tab on the Capacity page. Illustrative numbers.

FIELD GUIDE COMMAND CENTER

Chips: the gauges

AS BUILT (2.31.1) · ILLUSTRATIVE NUMBERS · CAPACITY PAGE, CHIPS TAB

96%

This quarter, committed · 104% assigned

82%

Next quarter, committed · 95% assigned

15

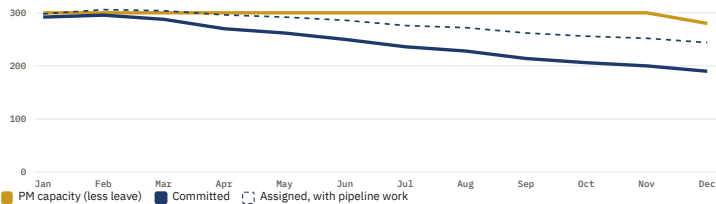
Project and program managers

1

Over capacity this month (a warning, never a block)

Combined PM capacity · chips by month

Only with two or more PMs



HOW TO READ IT

PM capacity is what the PMs can carry; **committed** is what they carry

20 chips = 1.0 FTE = 40 h a week. Utilization is the headline.

TEAM · PLATFORM

7 PMs · 140 chips (7 FTE)

This quarter 96%

TEAM · BUSINESS PORTFOLIO

5 PMs · 100 chips (5 FTE)

This quarter 96%

TEAM · ENTERPRISE APPS

3 PMs · 60 chips (3 FTE)

Shown with two or more teams

EVERY PM, MONTH BY MONTH Committed chips

Click a row for the breakdown

MANAGER	CAP	JAN	FEB	MAR	APR	MAY	JUN
Maya Chen · Platform	20	18 ▲2	20 ▲	20	15	15	10
Ken Adebayo · Platform	20	20.5 ▲3	17 ▲2	18	18	13	13
Hannah Brooks · Business	20	15	15 ▲	20 ▲	20	20	15
Luis Ortega · part-time	15	10	13 ▲	15	15	10	10
Darius Webb dual role	20	14	16	17	17	15	10

under 80% 80 to 100% dual role at 80% or more over capacity ▲2 caution ▲3 over: in launch
Darius runs a program and a project inside it, so his caution starts at 80%. A lone PM sees only their own chart and breakdown.

BREAKDOWN · KEN ADEBAYO Editable by month

PROJECT OR PROGRAM	JAN	FEB	MAR
Alpha · M 5	5	5	5
Beta · L 10	10	4	10
Gamma · S 3, ends Feb	3	3	–
Delta · M 5, starts 15 Jan	2.5	5	3
Echo · S 3 · pipeline	3	3	3
Leave (working days, from the Calendar)	+	5	+
Capacity (20 chips, less leave)	20	15.2	20
Committed / assigned	20.5 / 23.5	17 / 20	18 / 21

Pro-rated by working days; leave lowers February. Orange is set by hand (a slow roll) with a reason; the calculated figure stays in the hover.

13 Design board: focused tracks

Standalone Four-Stage Planning and Standalone Red Zone, for people who run their projects in another tool.

DESIGN BOARD • FOCUSED TRACKS

Two short roads, for when the plan lives somewhere else

WELCOME SCREEN

Standalone Four-Stage Planning

- 1 Set up: charter and people, typed or from the intake workbook
- 2 Stage 1: themes and objectives
- 3 Stage 2: tasks, or a release plan on Scrum
- 4 Decide if you need Stages 3 and 4
- 5 Stage 3 with your providers
- 6 Stage 4 spend schedule
- 7 Export to your tool, with a plan book

CORE • ONE SMALL REAL PROJECT

Same data, same pages

Not a separate tool. Each step opens the page the full app uses.

A shorter sidebar

Only what this job needs. Skipped stages leave it.

Steps that warn, never block

See what is missing, then decide for yourself.

Saved in your own workbook

Stop any time. It reopens on the track.

WELCOME SCREEN

Standalone Red Zone

- 1 Bring in your overall plan
- 2 Bring in a go-live or event plan, if you have one
- 3 Confirm the go-live
- 4 Send the prep guide
- 5 Run the session
- 6 Make the go / no-go call
- 7 Export the Red Zone plan and its tasks

OUT • WHERE IT GOES NEXT

Stage packs

One workbook for each stage: board, timeline, every table.

A provider copy

The whole plan's dates, and only their scope and money.

Plan book

The whole plan as one Word or PDF document.

Your tool

Microsoft Project, Smartsheet, ServiceNow, Jira, Azure.

Keep running it here

The full sidebar opens. Nothing to convert.

14 Where do I go?

Find what you want to do. Each line gives the path through the sidebar.

Get started

Start my first project	Welcome screen › Start my first project
Try it with sample data	Welcome screen › Explore the sample portfolio
Work one problem without a project	Welcome screen › Standalone AAA
Build only a communication plan	Welcome screen › Standalone communication plan
Plan a go-live when the plan lives in another tool	Welcome screen › Standalone Red Zone
Plan here, then run it in another tool	Welcome screen › Standalone Four-Stage Planning
Print the whole plan as one document	Tools › Import & export › Plan book
Collect the charter and people in one spreadsheet	Four-Stage Planning track › Intake workbook
Add a project	Portfolio sidebar › Dashboard › + Project
Open my workbook	Welcome screen › Open workbook

Initiating

Write the project charter	Initiating › Initiating › Project charter and Charter details
Export the charter to Word, PDF or email	Initiating › Initiating › Export charter
Import a charter from Word or Excel	Initiating › Initiating › Import charter
List my stakeholders	Initiating › Initiating › Stakeholder register
Move a project to its next stage	Project › Lifecycle & gates

Planning

Set themes and objectives	Planning › Stage 1: Themes and Objectives
Build the task list	Planning › Stage 2: Tasking and Internal Schedule › WBS & task register
Run the Stage 2 workshop on a board	Planning › Stage 2: Tasking and Internal Schedule › Workshop board
Set the board lanes, dates or weekends	Planning › Stage 2: Tasking and Internal Schedule › Workshop board › The bar above the board
Link tasks that depend on each other	Planning › Stage 2: Tasking and Internal Schedule › Task dependencies
Check my WBS quality	Planning › Stage 2: Tasking and Internal Schedule › WBS quality checklist
Review the plan with providers	Planning › Stage 3: Professional Services Alignment Review › Workshop board
Record what a provider review changed	Planning › Stage 3: Professional Services Alignment Review › Workshop board › Start review, then Finish review
Align provider outputs and billing	Planning › Stage 3: Professional Services Alignment Review › Provider alignment matrix
Export the RACI matrix	Project › RACI matrix › Export
Print or send a gate review record	Project › Lifecycle & gates › Gate record
Plan a Scrum release: stories into sprints	Planning › Stage 2: Tasking and Internal Schedule › Release board
Send a stage to someone without the app	Planning › Stage 2: Tasking and Internal Schedule › Import / export, Stage pack (Excel)
Send a provider their own copy of the plan	Planning › Stage 3: Professional Services Alignment Review › Import / export, Who is this for
Build the spend schedule	Planning › Stage 4: Spend Schedule

Running the work

See or edit the schedule	Execution › Schedule
Move tasks across a board	Execution › Task board
Manage the backlog	Execution › Product backlog › Scrum, Kanban or Hybrid projects
Plan a sprint	Execution › Sprint planning › Scrum or Hybrid projects
Work the sprint board	Execution › Sprint board › Scrum or Hybrid projects
Work the Kanban board	Execution › Kanban board › Kanban projects
Log a risk, assumption or issue	Control › RAID log
Log a decision	Control › Decision log
Work a problem with AAA	Control › AAA board
See what is due on checklists	Control › Checklists
Prepare for go-live	Execution › Red Zone

People and capacity

Add or edit a person	Portfolio sidebar, Workbook › People
Put people on a project	Project › Team & ways of working
See who is over capacity	Tools › Capacity
Switch capacity between FTE, % and hours	Tools › Capacity › The unit switch in the toolbar
Size and plan PM workload in chips	Tools › Capacity › Chips
Say who is responsible for what	Project › RACI matrix
Change how a project is run	Project › Team & ways of working › Delivery method

Communication

Generate a communication plan	Control › Stakeholders & status › Communication plan
Export the communication plan	Control › Stakeholders & status › Communication plan › Export plan
Import a communication plan	Control › Stakeholders & status › Communication plan › Import plan
Write a status report	Control › Stakeholders & status › Executive status
Profile my stakeholders	Control › Stakeholders & status › Stakeholder profiles
Find an earlier status report	Control › Stakeholders & status › History

Closing

Record results against objectives	Delivery & Closing › Delivery & Closing › Outputs validated against Stage 1 objectives
Capture lessons learned	Delivery & Closing › Delivery & Closing › Lessons learned
Send a project close form	Delivery & Closing › Delivery & Closing › Generate close form
Send a program or portfolio close form	Program or portfolio sidebar › Close form › Generate close form

Money, health and files

See budget against actuals	Tools › Financials
Check how healthy a plan is	Tools › Planning health check
Export a plan to another tool	Tools › Import & export
Import a plan from another tool	Tools › Import & export
Fill my company template	Tools › Import & export › Company templates
Change theme, lifecycle or workspace mode	Portfolio sidebar, Workbook › Settings