

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: **Run a quick 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

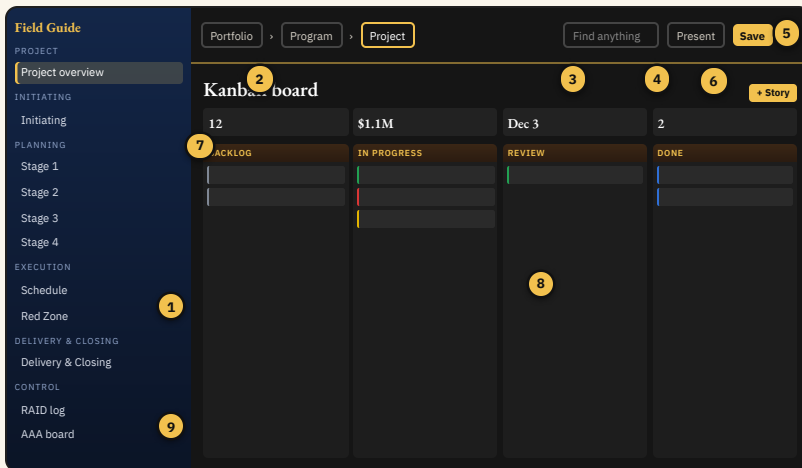
Programs and portfolio

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

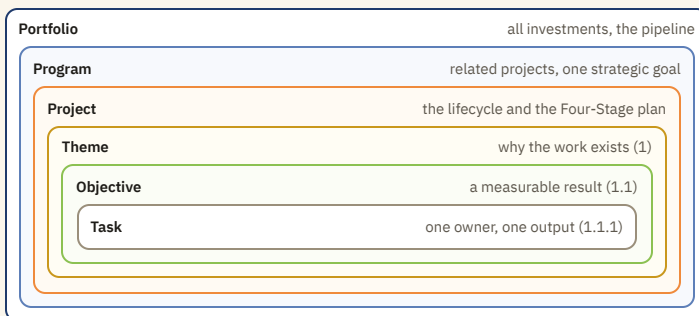
2 The screen at a glance

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

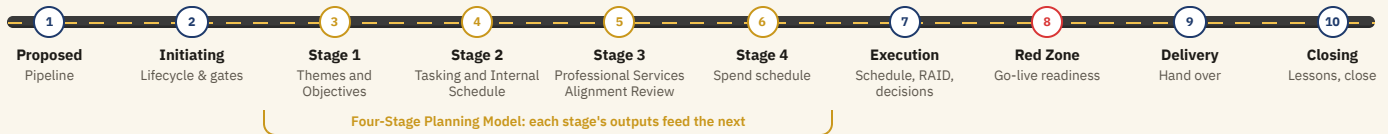
A task always belongs to an objective, and an objective to a theme. In Scrum and Kanban a theme is an epic, an objective is a story (the card on the board) and a task is the work inside it.

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

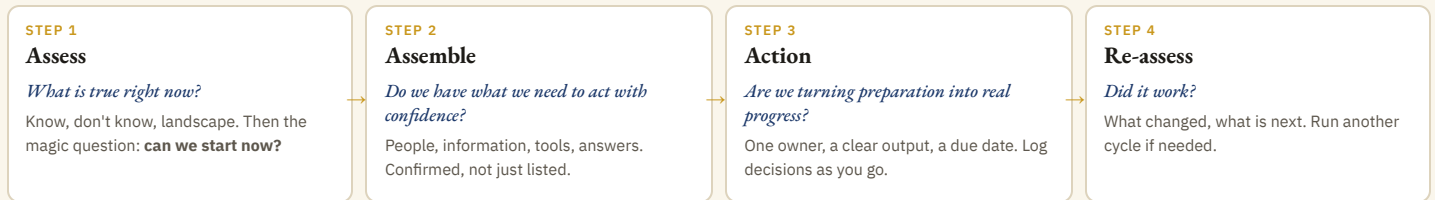
Projects travel left to right along the book's lifecycle. The sidebar items match each step.



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 life cycle 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.



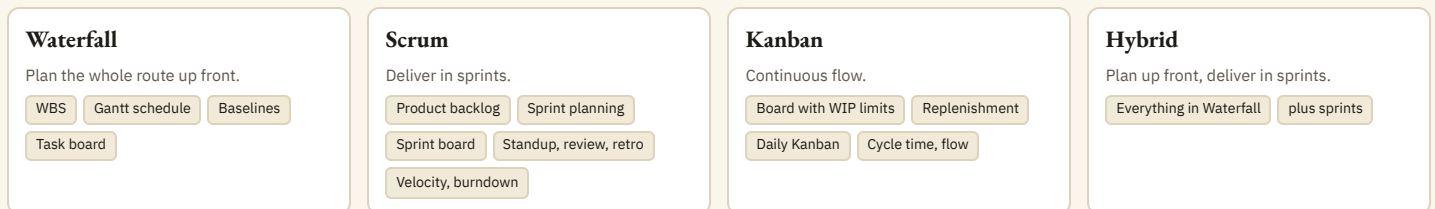
Each "no, we can't start!" reason is tagged **Assemble**, **Clarify** or **Remove** and flows forward on its own. The **Facilitate** button goes full screen for a meeting; the timer keeps you to the timebox. **Build a plan** turns the session into project tasks.

6 Colors mean status, nothing else

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

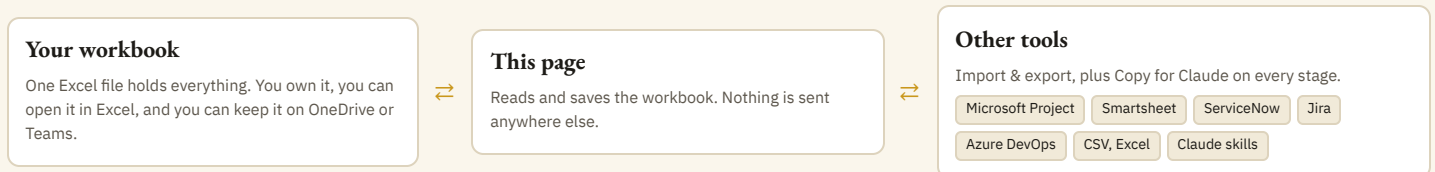


7 Pick a delivery method per project



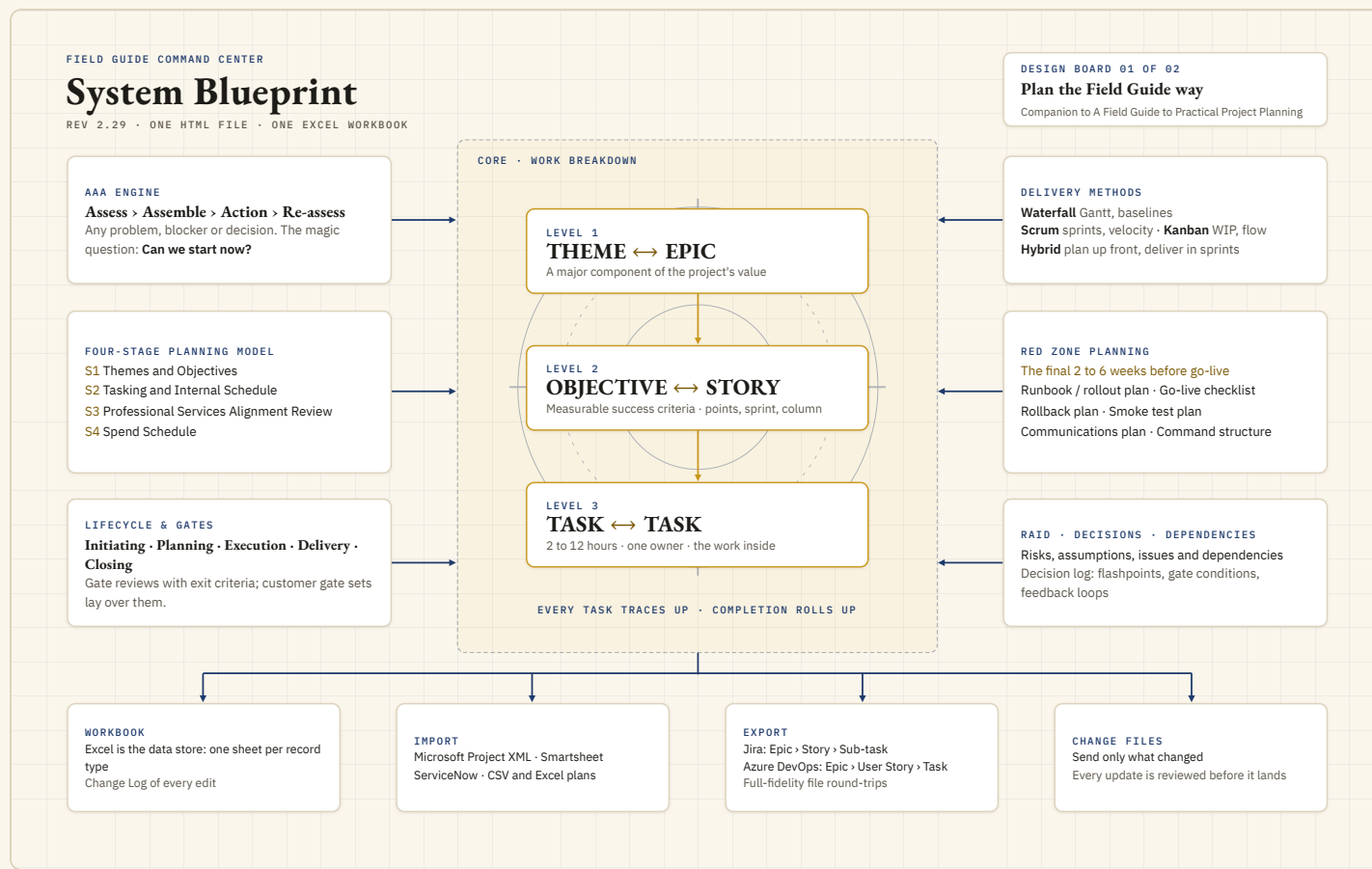
Pick the method in **Team & ways of working** inside any project. The Four-Stage plan stays the same; only the delivery tools change. **Customize columns** on a sprint or Kanban board shapes its columns; Restore defaults brings the method's back.

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