Task planning template

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Summary

The task planning file is a simple text file that has been used by CERN's Open Hardware team to organise the workload of its different members, be it engineers, technicians or students. This lightweight approach has been adopted since early 2013 as a result of trial and error of different other planning techniques.

Basically, it is a simple task list used to prioritise work for each team member. Over the course of a week, only two to three assignments are planned to be worked on. This allows for any unforeseen and background tasks.

There is a working method associated with this task planning file. As the list of activities is discussed with the supervisor (who organises the planning and one-to-one meetings each Friday), it gives an ease of mind to the team members because the priorities of all are agreed upon. This agreement is reinforced further as the list is also discussed between the supervisor and the leader higher up in the hierarchy, usually on the Monday morning after. Knowing that everyone agrees on the work to do results in less stress and diminishes the feeling of being overwhelmed by the workload.

In a short team meeting on Monday, the individual task lists are handed out. This informs everyone of what is happening that week. It also allows members who are working together to organise their time better. This meeting should reinforce the team spirit too.

The process requires an individual meeting of 15-30 minutes per team member to discuss the past week and to set up the tasks for the following week. The meeting with the team usually lasts no longer than 15 minutes.

Instructions for use of the "task planning template"

Task list

- 1 page per person.
- Tasks in bold: to do in the current week.
  - <u>Should be feasible to do in a week, maximum 2 or 3 tasks</u>.
  - If assignments are too complex, split them into simpler ones.
  - Leave room for unforeseen tasks or complications.
- Tasks not in bold: do not work on these. Not at all.
  - Keep total list shorter than 15-20 items.
- "Background tasks" shows the continuous tasks. Estimate the percentage of working time.
- "Done" shows the tasks that were completed in the previous week.
- On Friday check the list, decide on tasks for the following week.
  - Copy the file with a new name (e.g., with the date of Monday).
  - Move completed tasks to the section 'Done'. Review priorities.
- If you are supervising a team:
  - Review the task lists on Friday with each team member (15-30 minutes).
  - Check the planned tasks of everyone with your own supervisor (15 minutes).
  - Hand out each person's copy and briefly discuss the respective tasks in a team meeting (e.g., on Monday morning). This takes just 15 minutes and makes the whole team understand the priorities.
  - The team members will feel more positive as they know that what they work on is the most important and urgent (as it is decided together with the supervisors): it is acceptable not to start on the other tasks, which gives peace of mind. It is also more motivating to know that the supervisors know what everyone is doing and what their expectations of everybody are.
- If you manage your task list yourself:
  - Check the task list with your supervisor (e.g., on Friday).
    - Check whether priorities are correctly set.
    - Resist adding more tasks in bold (i.e. to do the coming week). Seriously!
    - If you really must add tasks, assess and discuss the following week if the extra tasks really were completed. If they were not, discuss the reasons in order to improve the planning capabilities of both you and your supervisor.
- Stay consistent and realistic by promising only 2 to 3 tasks

Removed or cancelled tasks

- You may find out that some tasks stay too long on the list of a team member. At a certain point they may not be required or are not feasible anymore. Add these to the "Removed or cancelled tasks" list to keep track of them and the decision taken.
- This list may help to show unrealistic expectations or may show an overload in certain areas.

Main tasks

- There may be moments in the year where a global planning with major milestones or projects are decided. You may want to keep track of them in the same file.

Tasks

John D.

1. **Management meeting: prepare presentation on 26 November**
2. **LIST debug reported problem of losing triggers**
3. **WR: WRPC release 3.0 (first patch PPSI bug that regressed functionality)**
4. Prepare visit Berlin (study network protocols)
5. WRS: discuss with Klaus about tools for management. Install instructions.
6. uTCA Workshop 8-10 December
7. WRS: test input capture range: 100 ppm fails.
8. WRS: follow-up all Issues
9. Switch control port network test
10. Spec-init: golden gateware, write introduction on wiki

Background tasks (15%)
1. WR support
2. Institute X WR weekly phone call
3. Company Y weekly phone call

Done
1. **WRPC Release test, debug PPSI**

John D.

Removed or cancelled tasks

2015

1. ~~Write SystemVerilog code for testing switch~~ (John D., will not have time. Stopped 9/1/15)
2. ~~Study eradication Respital modules~~ (J's request May 2013, stopped 12/1/15)
3. ~~Respital 10 MHz distribution. Check need for sine output (Brad –,~~ stopped 12/1/15)
4. ~~TDC: give MTF data to EDMS team. Check with Erica for conv-ttl-blo~~ (Mary, 22/5/15, too long on list, no time, makes that no production/calibration data is in the database)

Main tasks for 2015
in order of priority

WorldFIP Bus Arbitrator

1. Why: long-term requirement for main fieldbus used in LHC
2. Who: Claire
3. When: May 2015: proto HW — July 2015: firmware — Dec 2015: driver ready — Sept.2016: ported to SVEC7
4. How: FMC Mezzanine, Firmware, PTS, driver.

Distributed Direct Digital Synthesis over White Rabbit (D3S)

1. Why: long-term, simplifies installation of clock distribution. Replacement of BST.
2. Who: Specification: Keith — Design: Keith
3. When:
4. How: FMC DAC 600M 12b 1cha DDS (January 2015 proto at CERN), Firmware development