Champions Training Guide

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Administration

Splitvice offers you a new way of managing work on all levels of your company. Of course, an innovative solution to manage work requires a slightly different approach than what you are used to.

We call the **champions** those people that evangalize Splitvice in their company and set up the system to be used by all employees. This guide is intended to quickly introduce new Champions to the essential concepts of Splitvice and will learn them to better control work throughout the entire enterprise.

Being a champion…

- You set up the Splitvice environment for your company
- You help people in your company using Splitvice
- You are in direct contact with the Splitvice support people
- Splitvice trains and supports you in using Splitvice
- You provide feedback to Splitvice on how we can make your life easier

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A Splitvice portfolio has…

- A general administration section
  - Define users, roles, skills and other environment settings that apply for your portfolio
- Three levels of information that share all data
  - Strategy: Prediction of project timing & budget, what-if scenario's, compare scenario's
  - Work management: Planning, work break-down, critical path , throughput
  - Work: Task management & ownership, visual management, priority transparency, work breakdown, time registration

As a champion, your main task will be to set the administration of your Splitvice portfolio and to be the knowledge beacon for your colleagues

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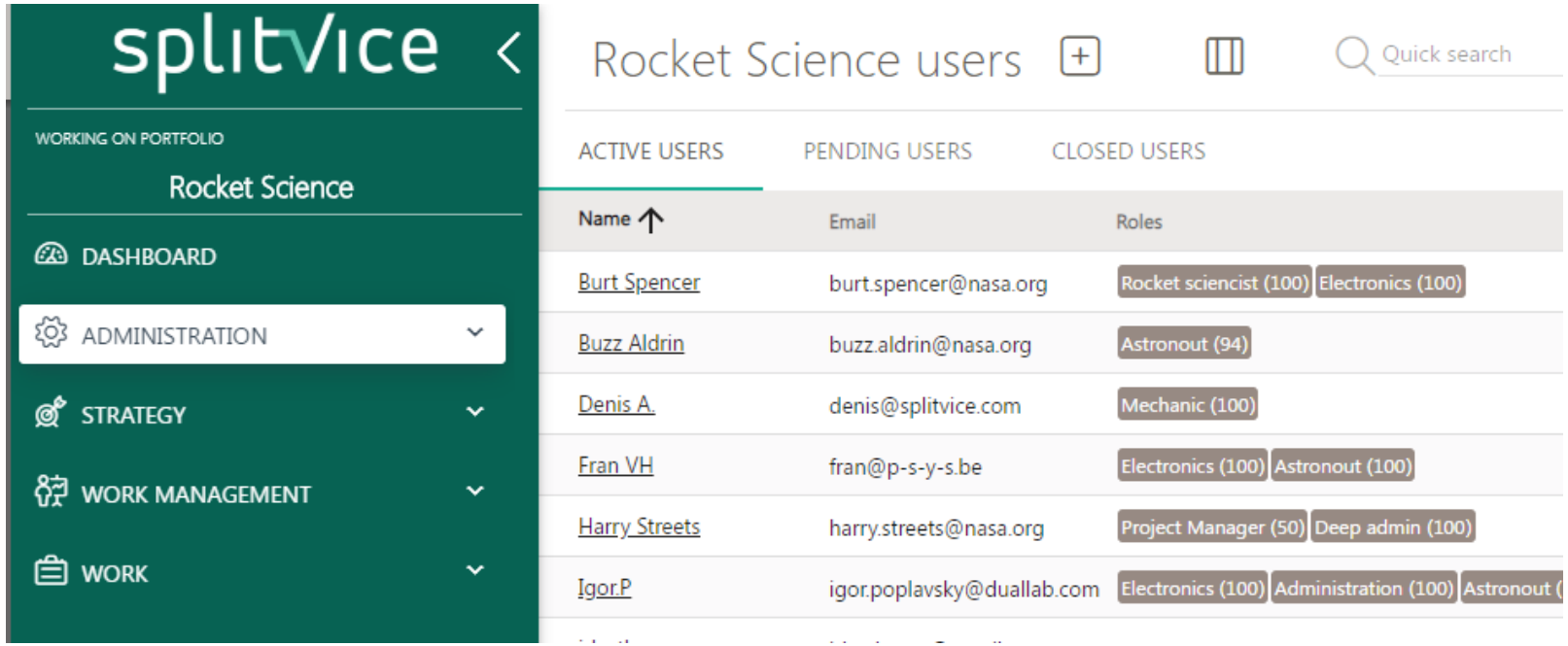
Switching between the different modes

- The four levels (administration, strategy, work management & work) are visible in the menu structure of the Splitvice web interface.



As a champion, you will see all levels, but other profiles will see only those modi where they have access to

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Portfolio management

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About portfolios

- You can create multiple portfolios if needed
- Different portfolios do NOT share data
- One user can work in different portfolios BUT user licensing is per portfolio!

In general, there is not often a need for multiple portfolios!

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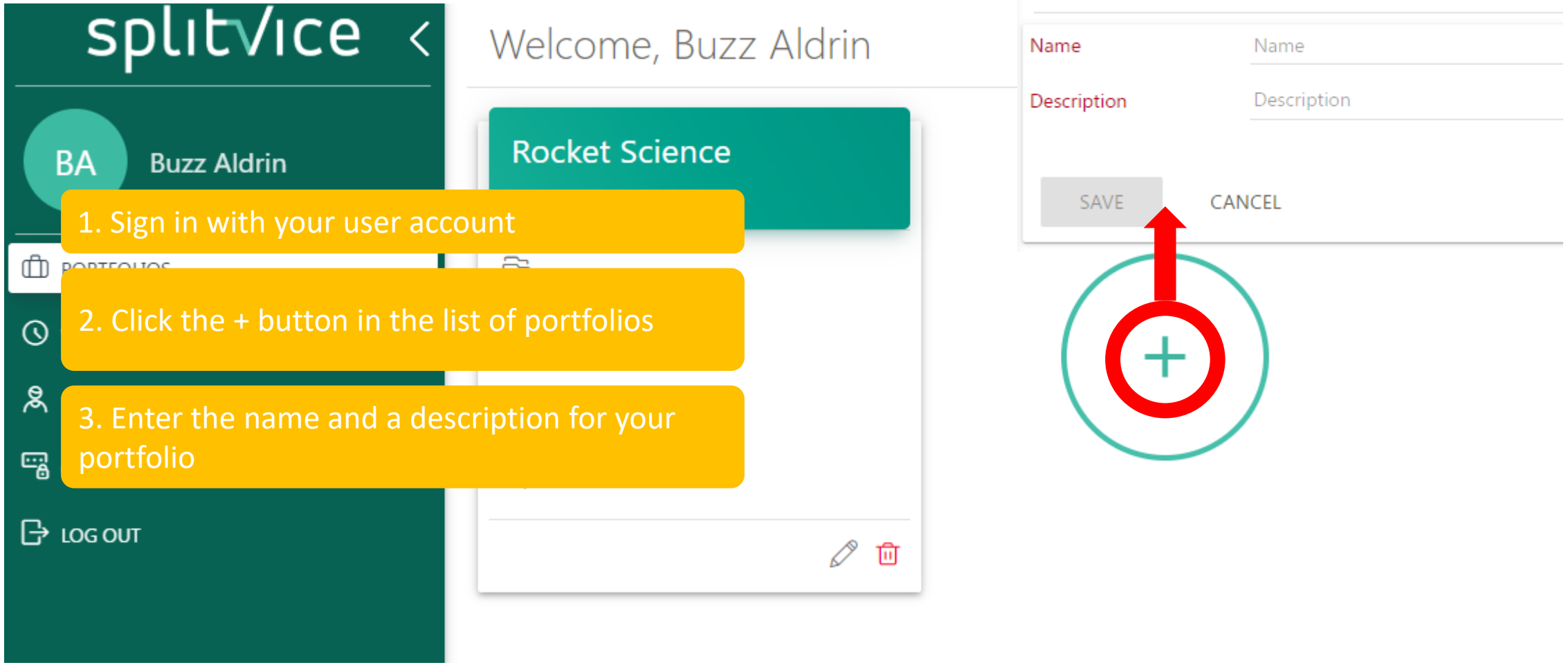
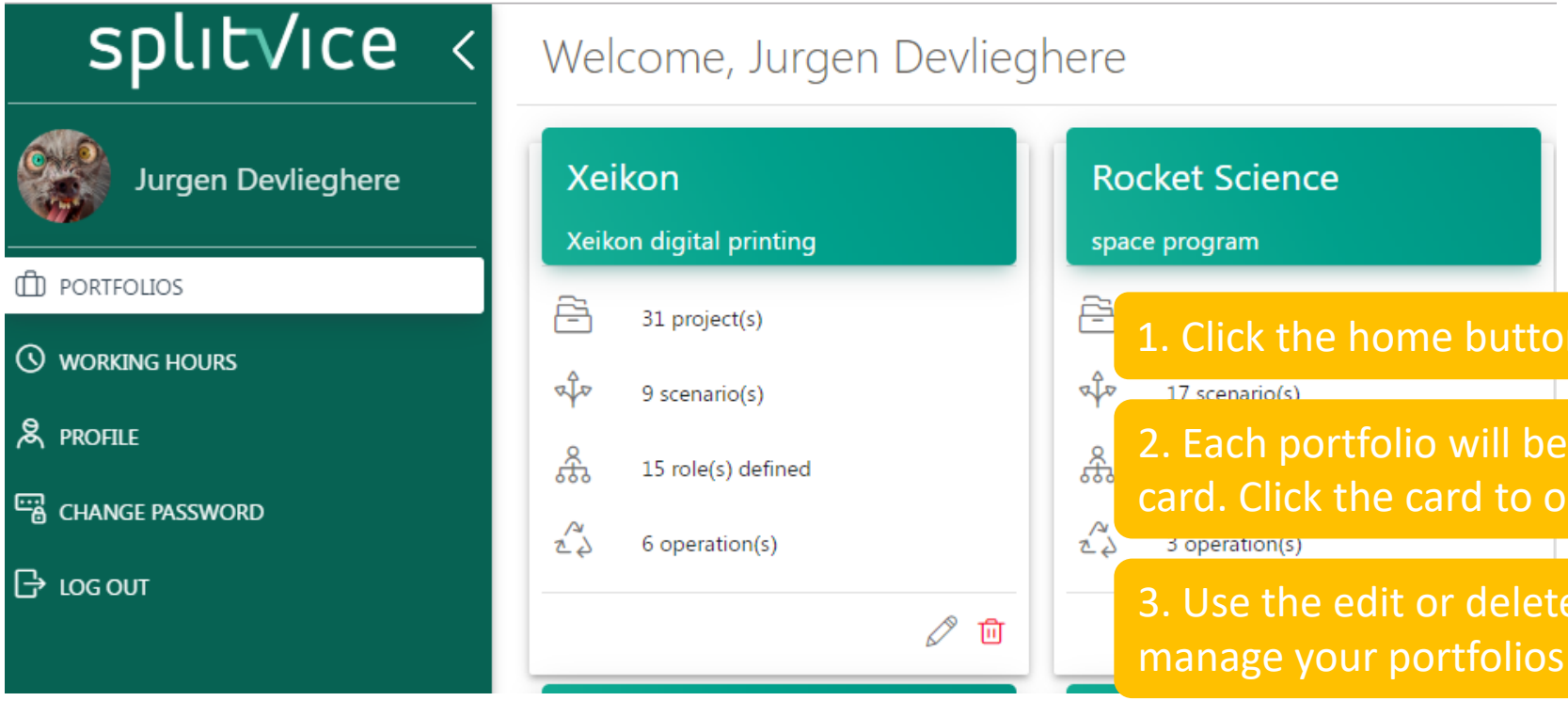
Creating a portfolio



Portfolio overview



1. Click the home button in the top toolbar

2. Each portfolio will be shown in a separate card. Click the card to open the portfolio

3. Use the edit or delete button on the card to manage your portfolios

If you have only one portfolio, it will be automatically opened when you log in and you won't see the portfolio overview as start page! However, the home button still gets you here.

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Creating a portfolio

Practice

- You can now create your first portfolio
- Login to splitvice and click the home screen. Then click the + button
- For most companies, one portfolio is sufficient and you won't often use a second portfolio
- Since you only need one portfolio most of the time, a good name for the portfolio of your company is the name of your company
- As long as you have only 1 portfolio, the portfolio is opened automatically after login. To create a second portfolio, click first the home button.
- Open the portfolio you created
- As you will notice, when you created the portfolio, your own user account will be automatically the first user in the portfolio. You will have the Champion profile by default

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Basic portfolio administration

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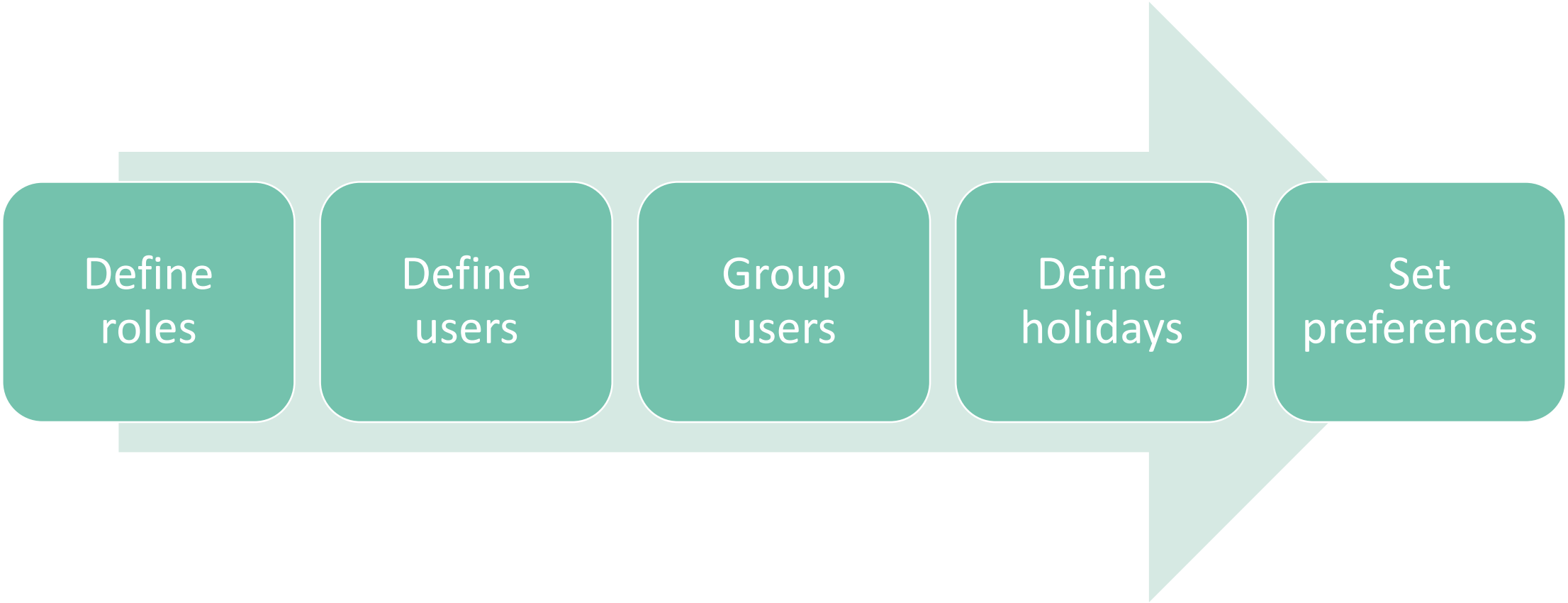
Basic administration steps



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What is a role?

- A role is a fundamental concept in Splitvice. It defines a certain type of work your knowledge workers execute. For example, an architect, a builder, an electrical engineer, a QA manager, a C++ programmer, a maintenance technician...
- A role can be assigned to one or more users. E.g. you can have multiple architects in your company
- A user can have different roles. E.g. an architect can also do a task as a builder

Roles enable Splitvice to calculate timing and cost of different scenarios without the need to assign the task to actual users. This is a very powerful feature.

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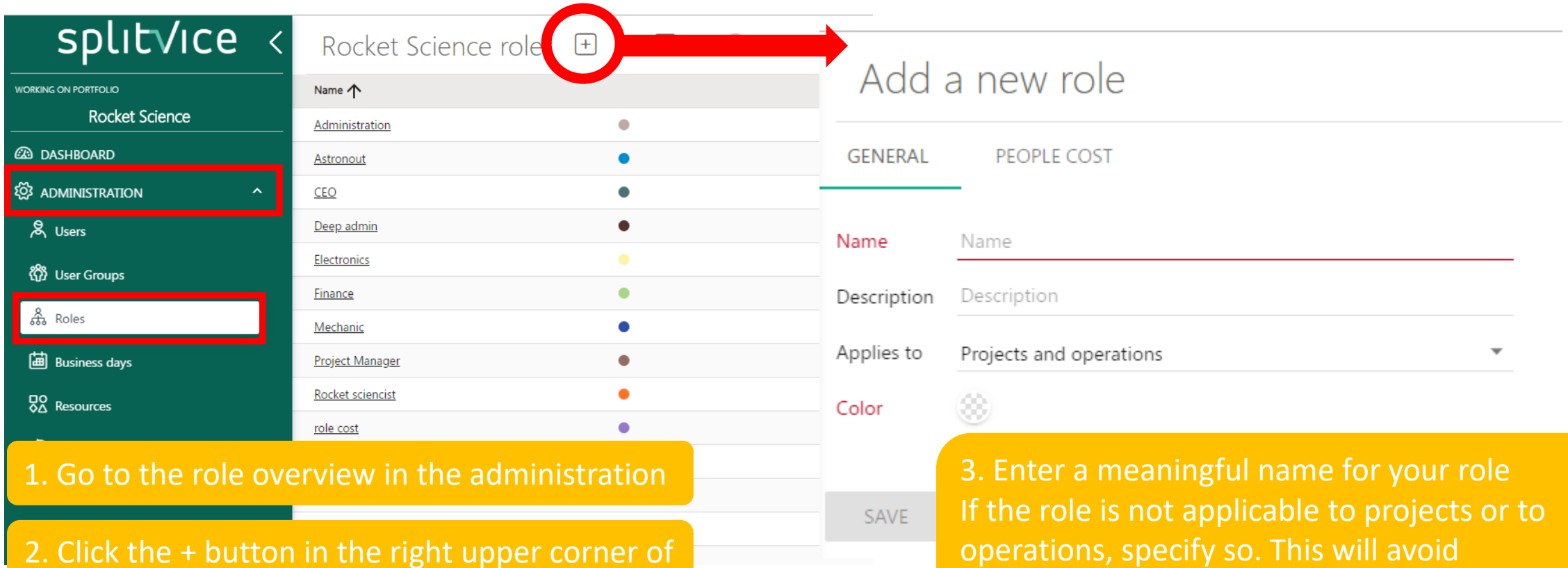
Creating roles



1. Go to the role overview in the administration

2. Click the + button in the right upper corner of the roles overview screen

3. Enter a meaningful name for your role
If the role is not applicable to projects or to operations, specify so. This will avoid unneccesary choices by other users.
Also choose a unique color that can be used in all the graphs.

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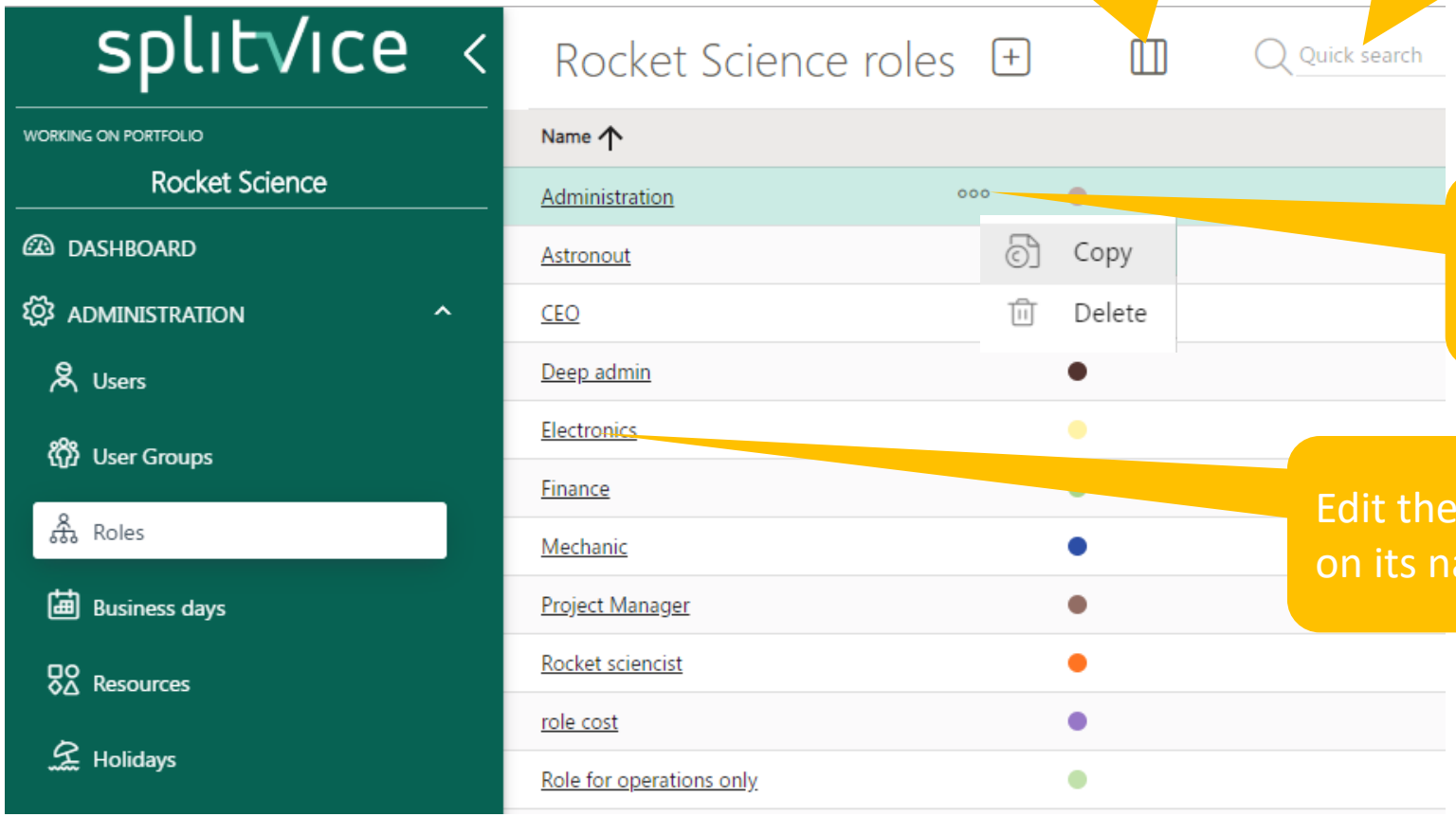
Managing roles

Define the columns in the list

Quickly find a role typing just some characters



Copy / delete through the … menu

Edit the role by clicking on its name

Creating roles

Practice

- Go to the Administration / roles overview screen
- Think about the job people do everyday in your company. For each type of work people execute, create a specific role in the role overview
- It is best to use a short yet correct name that is clear for everybody
- You can define many roles, so you can be very specific. For example, you can have mechanical maintenance engineer and electrical maintenance engineer
- Roles must be independent from the person that executes them, so always imagine you have multiple people executing that role, even if you have only one today

What is a user?

- A user represents one person in your organisation
- A user has one of four profiles:
  - Champion: empowered Splitvice user that acts as the Splitvice administrator for the company
  - Strategist: senior management that makes strategic decisions on the portfolio based on the vision of the company. They decide which projects to do, when, and what the priorities are based on the current status of all projects.
  - Work manager: project manager, team leader, head of department or similar function. People that decide on what work is to be done by whom and that create work packages
  - Knowledge worker: person that defines further and executes the task and reports progress

Profiles are hierarchical, and a higher profile can always do what a lower profile can, but not the other way around. Typically, you will have only a few champions and strategists, you will have several work managers and you will have a lot of knowledge workers

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What is a user?

- A user consumes one license based on the profile you assign
- A user has zero or more roles. It is important to assign the correct roles to the correct people. This way, Splitvice can correctly estimate which resources you will run short on in the future, or where you will have too much capacity.
- Users can be grouped in user groups, one user can belong to multiple groups. Groups area mainly used to simplify certain administrative tasks but are not essential.

When you create a new portfolio, your own user account is automatically assigned the champion role in that portfolio. You can modify your user settings to have certain roles and make yourself available in the portfolio to participate in the work.

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Adding a user

- Users can be added in two ways
  - By invitation: a mail will be sent to the user and the user has to create a new splitvice account and configure its own profile. As soon as he creates this account, he will join your portfolio with the assigned profile and roles. When he already has a Splitvice account, he will immediatly be added to your portfolio and we will notify him. Use invitation in case you want to add external people to your portfolio, or when you expect users already have an account.
  - By registration: when you register a new user in your portfolio, you will define his complete profile. Optionally you can send an email informing this user of this event. Use this way of adding users if you would like to be in control of all the accounts in your portfolio, or, when you want to add resources without the knowledge workers already involved.

Splitvice can already be used without all users participating themselves. This makes it easier to introduce Splitvice in the company without having to involve all users at the same time!

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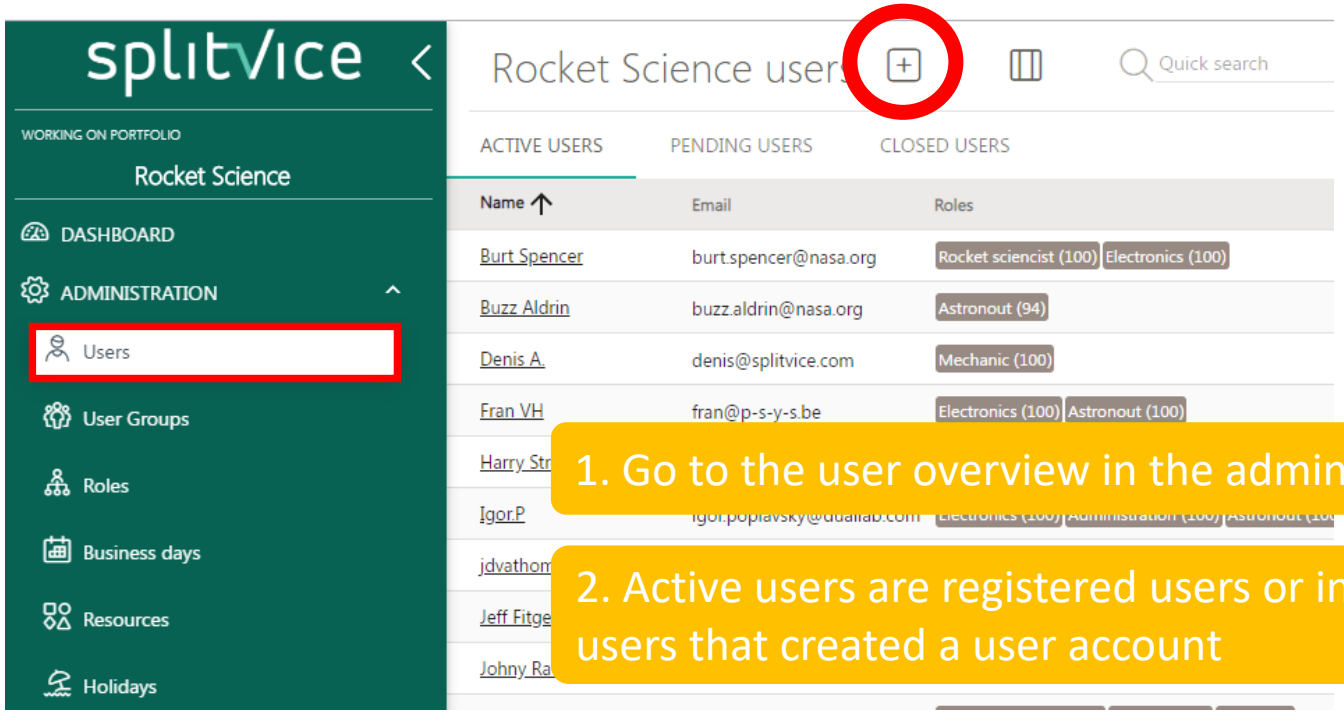
Adding a user



1. Go to the user overview in the administration

2. Active users are registered users or invited users that created a user account

3. Pending users are invited users that did not yet create a user account

4. To add a user, click the [+] button next to the title

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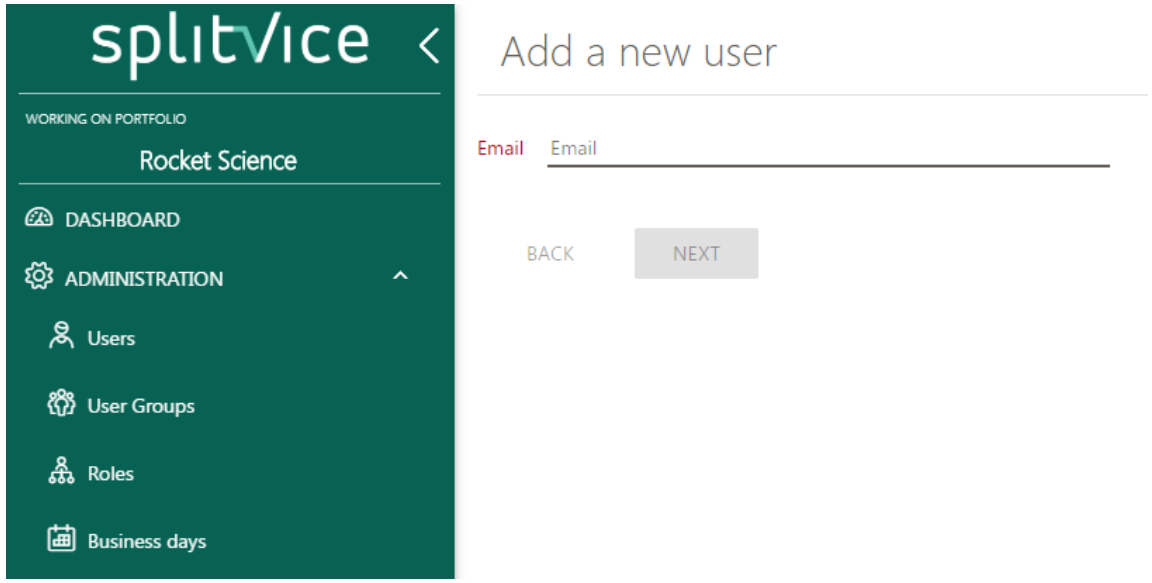
Inviting / register a user



1. First provide the user's email address.

2. If the user is unknown to Splitvice, you'll need to provide its name.

3. Select the profile for this user
Take into account your license here !

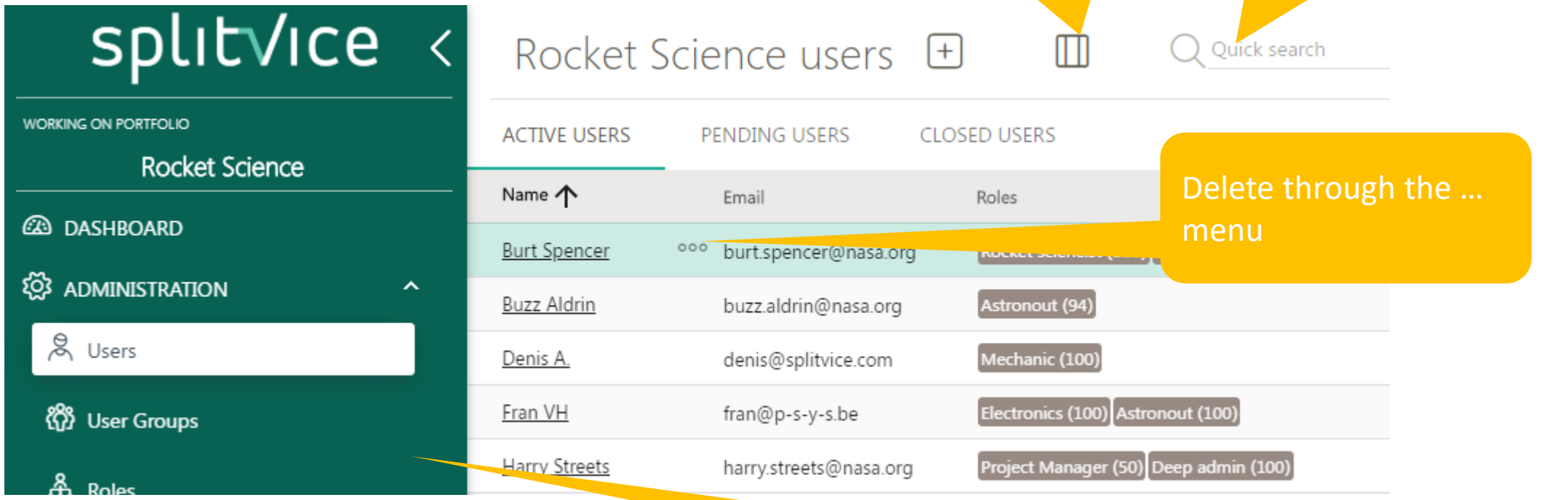
4. Choose if you want to invite the user (he will need to choose a password etc.) or if you want to register the user (then you can define the user without bothering him)

5. Select the roles you want to assign to this user

6. Confirm

Use invitation in case you want to add external people to your portfolio, or when you expect users already have an account

Managing users



Define the columns in the list

Quickly find a user typing just some characters

Delete through the … menu

Edit the user (e.g. his roles) by clicking on its name.
Also if a user leaves the company, set the end date here.

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Creating users

Practice

- Go to the users overview screen
- Start adding users. You can choose to invite them or to register them, and to send them an email or not
- Assign one or more of the roles you have defined before. People can have more than role
- Some people are expert in a certain task, others are just starting to learn the job. Adjust the score of the roles accordingly.
- A good rule of thumb is that a score of 100 is for people who are at a senior level in that particular role and you assign less if the person is more junior

Editing users

Practice

- When you edit a user, you might find that you cannot change all of his properties
- This is because user accounts in Splitvice are global and are not limited to your portfolio. After all, freelance workers or consultants can work for multiple companies
- As such, once a user has been invited or registered, he is the owner of his account and must change his personal settings himself, when he is logged in
- This means that deleting a user is actually not removing this user account, it only means that that user does not longer can access your portfolio
- You can change roles since those exist within your portfolio

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Basic administration done!

Once you are done configuring the users with their profiles and their roles, you already have sufficient data to move to the next level in Splitvice: Strategy.

On a strategic level, you decide which projects will be part of your portfolio, and, you define the importance of the project.

After you have defined the projects, you can define one or more scenarios and compare them, so you can pick the best best scenario for your company.

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Find additional learnings in these movies

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