Work managers Training Guide

Work management

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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 work managers those people that manage work done by other people.
This guide is intended to quickly introduce new work managers to the essential concepts of Splitvice and will learn them to better control work throughout the entire enterprise.

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Managing work

When projects are defined, the strategy has been decided and the priorities are set, it is time for the "work manager" to start.

Work managers can be project managers, team leaders, department heads, … anyone who **defines** and **distributes** work in your company. They will usually find themselves in the "work management" mode of Splitvice

Knowledge workers on the other hand will execute work items and report progress back in the work mode of Splitvice.

Information entered at these levels is consolidated and integrated in the strategy level

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Topics covered in this guide

Work management mode

- Projects and operations (you can skip this if you read the Strategy guide)

- Defining and managing work with project work packages

- Workflows

- Reporting on projects

- Logging work

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Projects and operations

(skip this section if you read the strategy guide)

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Projects vs. Operations

Every company can basically split its daily activities in two categories:

- Projects, which are the activities you do to create a certain product (a building, a machine, a web application, …). This can be related to one customer order, or could be a generic product. Any project has a start and an end date.

- Operations, which are activities you do on a regular interval and are not directly related to an on-going project. E.g. a weekly administrative task you have to do or a monthly personel meeting. Operations are recurring, but the resources they consume can vary. For example, the first 3 months after a product is released, their might be a lot of service calls. Occasional service work on a finished project is also part of operations.

When you start with Splitvice you can start with only a few projects and operations for a limited set of people and gradually introduce the tool in your enterprise. But you get the most from Splitvice if for the group involved, all work is managed.

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Projects vs. Operations

Projects

- Defined on a strategy level because you can decide to do or to not do them (e.g. ROI not sufficient, not enough resources, etc…)

- Work and expenses (budgets) are defined and must be closely monitored

- Priority between projects, timing and budget can change depending on the business

Operations

- Defined on a work management level because they primarily exist to make sure the time spent on them is taken into account

- Knowledge workers will create the work items for a specific operation whenever they do that kind of work. This way they can also log work for operations.

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Project work

- Each project requires a certain amount of work and money which you can define in the project properties. This is the work and cost seen from a "high level"

- Typically, this is the "first estimate". You get this when you sell a project from the offer that was made to the customer, or, you get this from an initial study regarding a new product you will be making

- Later on, you can further refine this work to do in different work packages

- These initial estimations are already useful to see the impact of this new project on your complete portfolio

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Creating projects

1. Go to the project overview in the Work management menu

2. Click the + button next to the title to add a project

If your administrator disabled it, you will not be able to add a project. In any way, a new project is not yet active in the portfolio. This must be done on the strategic level.

Creating projects – General project properties

Add a new project

GENERAL   WORK TO DO   BUDGET   USER ACCESS   INTER-PROJECT   WORKFLOWS   PROPERTIES

Name	Name
Abbreviation	Abbreviation
Description	Description
Select a color	
Value	0 €
Default priority for WPs	Medium
☐ Project manager	Jurgen Devlieghere
☐ Deadline	📅 06/12/2019
☐ Project is part of operation	Operation
☐ Will be executed in all the non-active scenarios?	
☐ Start date of Gantt chart if project is not active	📅 06/12/2019

SAVE   CANCEL

1. Enter a unique name for the project

2. Come up with a unique abbreviation
Abbreviations should be a few characters long and help to create unique IDs for the work related to this project so you can easily spot it between the work of other projects

3. Choose a unique color
This color will be used in the Gantt chart, in the reporting and dashboards of Splitvice to uniquely identify your project

4. Set the project manager for this project
This will help the project manager to quicly view only 'his/her' projects

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Creating projects – Work to do

Add a new project ☰

| GENERAL | WORK TO DO | BUDGET | USER ACCESS | INTER-PROJECT |

Originally estimated duration: working day(s)
Remaining duration: 0.0 working day(s)
Total duration: 0.0 working day(s)

Remaining work in work item(s): 0.0 man-days

Role	to do man-days	Max FTE
Administration	0.00	0.00
Astronout	0.00	0.00
CEO	0.00	0.00
Deep admin	0.00	0.00
Electronics	0.00	0.00

1. If you have already a very rough estimation of the work involved with a project, follow these steps.

2. For each of the roles involved in the project, enter the number of working days (man days) you estimate are needed for the completion of the project

3. In maximum role load, define how many people it makes sense to work in parallel on this role work

4. Provider other costs you expect in the budget tab

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Creating projects – User access

Add a new project

GENERAL   WORK TO DO   BUDGET   **USER ACCESS**

☐ Limit visibility to:

☐ Burt Spencer
☐ Buzz Aldrin
☐ Denis A.
☐ Fran VH
☐ Harry Streets

1. Depending on the project, you might want certain people to see or to not see the project. This depends a lot on how your company works. Setting user access can be done because of practical reasons, or because of "privacy".

2. Click Save to add the project

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Managing projects

The ... menu allows e.g. to copy and delete projects

The filter icon allows to see e.g. inactive projects

Quickly find a project typing some characters
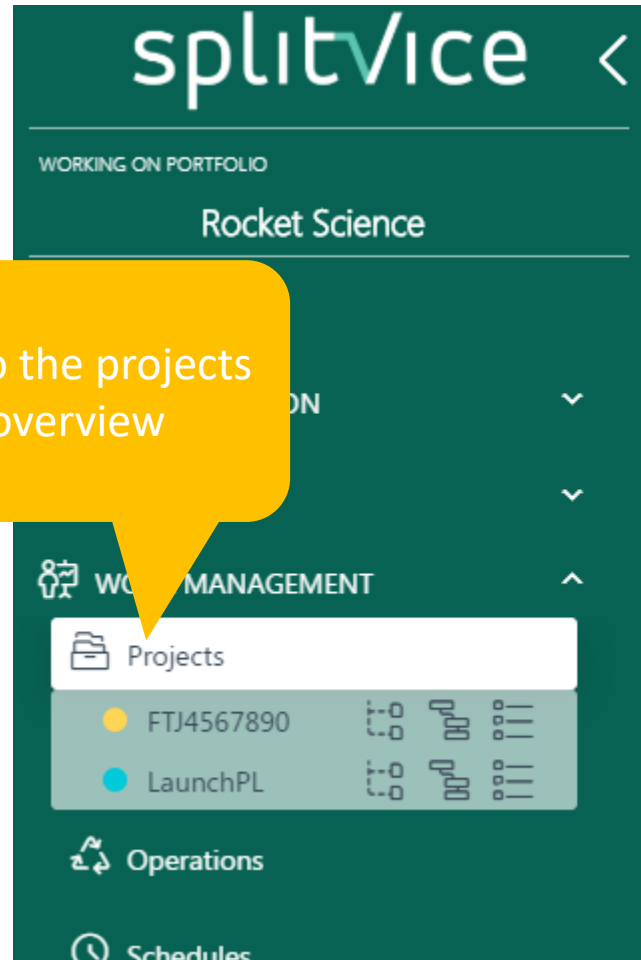
Go to the projects overview

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WORKING ON PORTFOLIO

Rocket Science

ON ˅

˅

WORK MANAGEMENT ˄

📁 Projects

🟡 FTJ4567890

🔵 LaunchPL

♻ Operations

🕑 Schedules

Ro...jects ⊞ ▽ ▥ ↻ Quick search

Name	Abbreviation	↓ Weight	Project manager
⭐ Fly to Jupiter 🖉 ▤ ⦁⦁⦁	🟡 FTJ4567890	125	Johny Raven
☆ Fly to the moon		100	
☆ Fly to ISS		100	
⭐ Build launch platform		100	Jurgen Devlieghere
☆ 2nd for weight		12	

Copy

Delete

View baselines

Work items

Risks

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Managing projects: tips

In 'configure columns, you can change what a click on the project name will do

Tag up to 3 projects as your favorites. This adds them to the quick access menu

Quickly see the active work items of a project

Creating projects – General settings

- Go to the Work management / project overview screen.

- Click the [+] button to create a project.

- Pay attention for the abbreviation you choose. It must be clear yet short. We advise two or three letters. Abbreviations allow to quickly see to which project a work item belongs since task ID's are based upon this

- Choose a specific color for your project. Splitvice will use this color whenever there is a graphical reference to this project, for example in reporting charts, but also in the Kanban boards. By using the same color everywhere, it will be visually very easy to see to which project something belongs

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Creating projects – Work to do

- Enter the work to be done for this project.

- This will of course be very high level, mostly based on your initial estimates

- On the budget tab, specify the necessary budgets for this project

- These time and budget estimations will be used for the top level work package of your project

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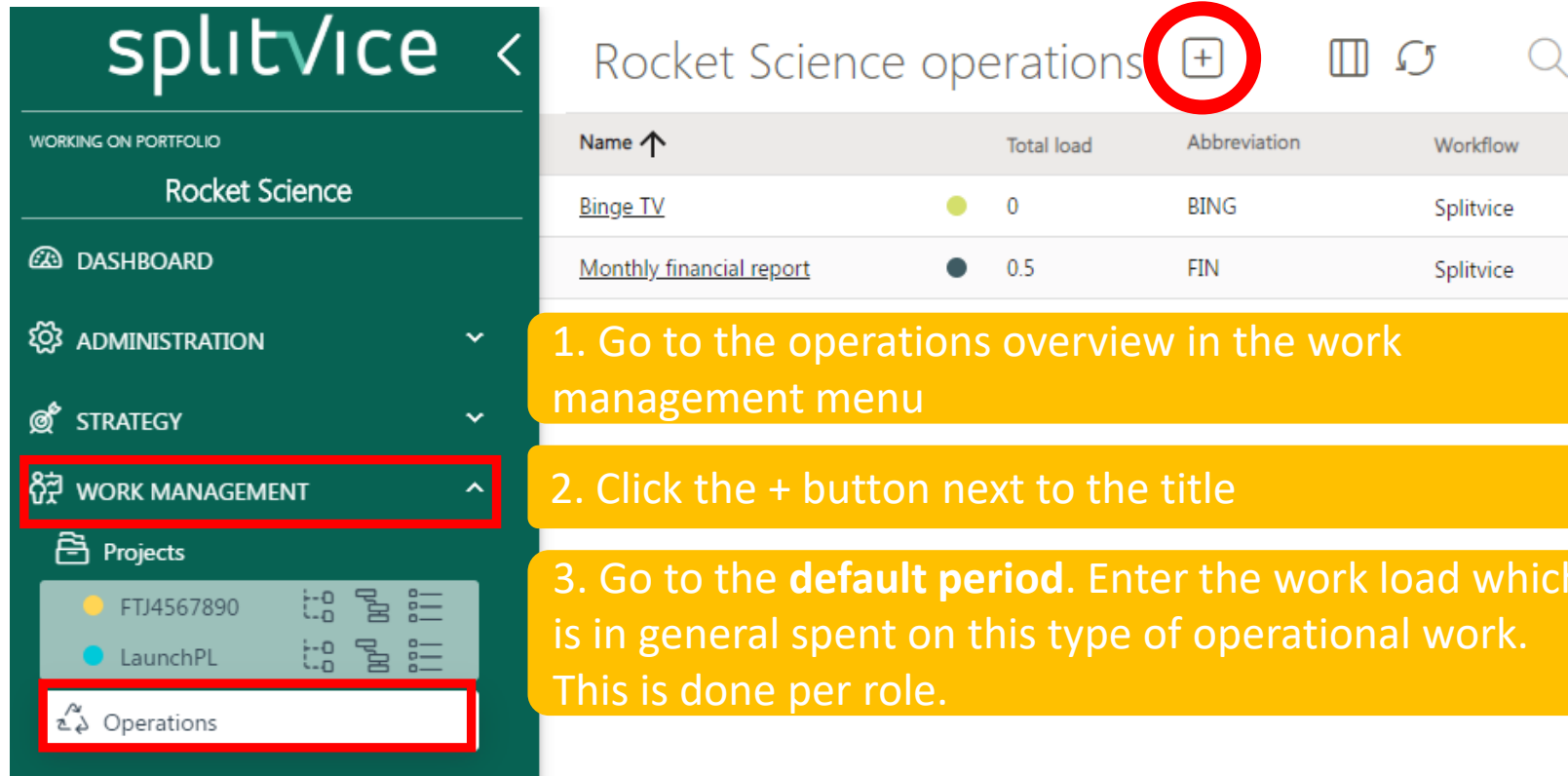
Creating projects – User access

- Depending on the size and/or the policies within your company, either all people will be able to see all projects, or, you want to limit the access to certain projects

- By default, a project is visible to everybody

- If you want to limit visibility, you can select this option in the user access pane of the project property pages and define who has access.

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Creating operations

1. Go to the operations overview in the work management menu

2. Click the + button next to the title

3. Go to the **default period**. Enter the work load which is in general spent on this type of operational work. This is done per role.

Defining operations is simple, and the work that will be assigned to it is estimated in periods. This allows to take into account seasonalities

Managing operations

Rocket Science operations ⊞ ▥ ↻ 🔍 Quick search

Name ↑		Total load	Abbreviation	Workflow	Documentation
Binge TV	⋯	📋 Copy	BING	Splitvice	
Monthly financial report		🗑 Delete	FIN	Splitvice	
TestOperation1		● 0.5	TO1	Splitvice	

The … menu allows to copy and delete projects

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Creating operations

Practice

- Go to the work management / operations overview screen

- Define one or more operations that are typical for your company. Think about which tasks your employees do on a regular basis but that are not directly related to a project

- Go to the Periods of the operation. You will see the 'default' period. Edit it to specify the load of the operations on the different roles.

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Project work packages

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Work packages

- Splitvice uses the concept of work packages to further refine a project and divide the work into smaller manageable pieces (we use work packages similar as they are defined in the PMBOK)

- These pieces can be again refined and thus form a tree, typically known as the **work breakdown structure** or WBS.

- At the top of the work packages tree or WBS is one single work package that represents the complete project. The timing and budgets you entered when creating the project are actually stored in this top level work package.

- Child work packages will "take away" budget, resources and costs from their parent package. The remainder remains stored in the parent package. This way you can further refine the WBS and detect any budget surplus or shortage.

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Work packages concept and relations

Strategy Level	
	Portfolio
	Project

My portfolio

Project A · Project B · Project C · Project D

Work management level	
	Top level work package
	Child work package

Project B — Remaining time & budget

WP 1 · WP 2 · WP 3

WP 1.1 · WP 2.1 · WP 3.1 · WP 3.2

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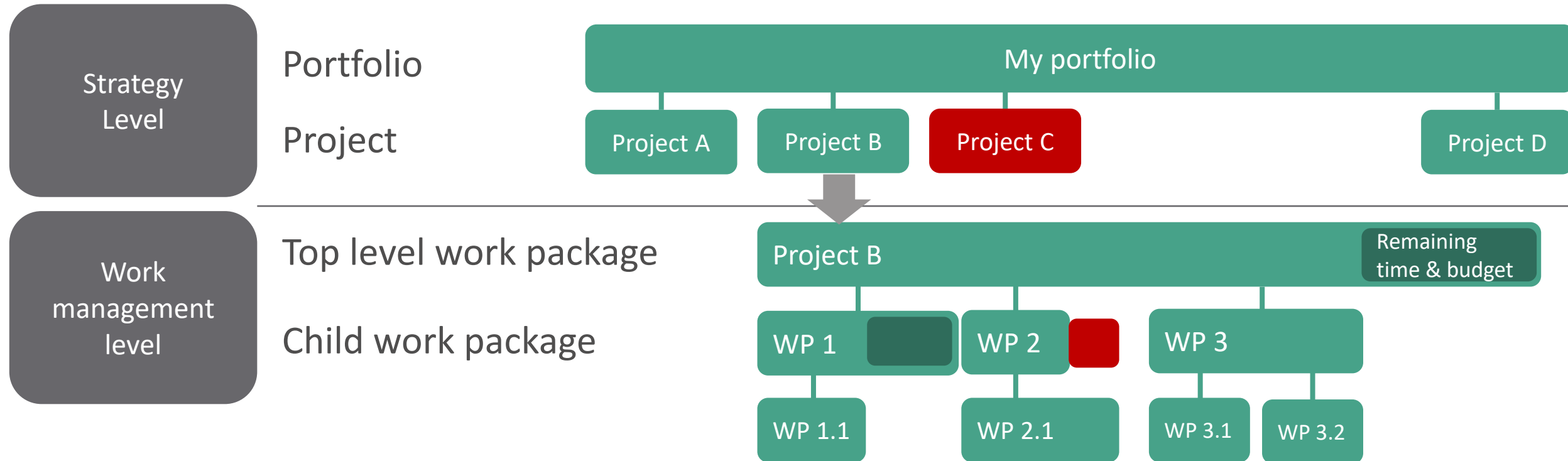
Defining work packages

- Work packages can be defined and viewed in two ways

  - As a tree list of work packages. Useful to quickly define the WBS

  - As a Gantt chart

    - A Gantt chart can be viewed "in the ideal world" (with no constraints). Useful for viewing dependencies

    - A Gantt chart can be viewed "in portfolio context" (taking into account resource constraints of the portfolio). Useful for viewing the time constraints

- You can switch from the work package tree to the Gantt chart as you want. They are just 2 views on the same project.

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Defining work packages

Go to the projects list

Use the icons next to the name to go the tree WBS or Gantt WBS

If there is a pencil here, click on the name of the project to go the the WBS

Work packages tree list

Switch to Gantt view

Reorder list

Define dependencies

Set explicit due date

Top level work package

Child work package

Unique package ID based on project abbreviation

Create child work package or new work package

Edit / delete / duplicate / copy / paste work package

WBS order number

Build launch platform work packages

	Package Id	Package name	MD to do	Constant load	Complete	Budget	Duration	Dependencies	Status	Due date
	LaunchPL-1	Build launch platform	0.38		12%	0	0.4			
1	LaunchPL-14	find financing	6.75		31%	0	13.5		Keynes	
2	LaunchPL-24	varia work	44.25		13%	0	0.1			
3	LaunchPL-13	test platform	7.25		31%	0	7.3		Jurgen Devlieghere	
	LaunchPL-16	electronic a...	8.75		13%	0	8.8		Jurgen Devlieghere	
	LaunchPL-17	2nd round of financing	5.00		0%	0	5.0		Keynes	
6	LaunchPL-15	certify platform	3.38		33%	0	3.4			
7	LaunchPL-7	Build custom tr...	8.00		0%	0	5.0			
7.1	LaunchPL-8	Design fr...	20.00		0%	0	20.0		Administration	
7.2	LaunchPL-10	Assemble...	15.00		0%	0	10.0 LaunchPL-8 ...	Administration	
7.3	LaunchPL-11	test truck	5.00		0%	0	5.0 LaunchPL-10	Administration	

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Work packages Gantt chart

Show/hide slack time

Recalculate Gantt

Switch to tree view

Jump to project work items

Zoom in/out on Gantt

Build launch platform Gantt Chart

Switch to portfolio timing

Top level work package

Create child work package

Unique package ID based on project abbreviation

Critical path marked in red

Click to edit work package

Delete / duplicate / copy/ paste work package

Package Id		Package name	Add		tion	Complete	Statu	November 2019			December 2019					
								#46, Nov	#47, Nov	#48, Nov	#49, Dec	#50, Dec	#51, Dec	#52, Dec	#01, Dec	#02, Ja
⊟ 🗁 LaunchPL-1		Build launch platform	⊕	∘∘	2019-12-06	60	12%				Today	Build launch platform				
🗋 LaunchPL-14		find financing	⊕	∘∘∘	2019-07-02	177	31%	⛹								
🗋 LaunchPL-24		varia work	⊕	∘∘∘	2019-11-25	28	13%			varia work						
🗋 LaunchPL-13	▼	test platform	⊕	∘∘∘	2019-07-02	169	31%	⛹								
🗋 LaunchPL-16	▼	electronic alarm	⊕	∘∘∘	2019-06-19	183	13%	⛹								
🗋 Launch		of financi	⊕	∘∘∘	019-06-14	182	0%	⛹								
🗋 LaunchPL-15		certify platform	⊕	∘∘∘	-22	173	33%	▷								
⊟ 🗁 LaunchPL-7		Build custom truck	⊕									Build custom truck				
🗋 LaunchPL-8	▼	Design frame	⊕					⛹				Design frame				

Portfolio timing shows the timing in the active scenario, taking into account the priorities between all the projects. In contrast, single project timing only takes into account this single project. This is ideal for seeing/drawing dependencies.

Slack time allows you to see how critical the timing of this work package is for the total timing of a project. Work packages on the critical path don't have slack time. Slack time is not available in portfolio timing.

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Work package properties

- A work package has en extensive list of properties

  - A package represents work or a milestone

  - A package defines how much work there is to do

  - All project work logged in Splitvice is attached to a certain work package

  - The budget assigned to this package

  - The expenses made for this work package

- A work manager must configure these properties and gradually define all the work packages top-down

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Work package general properties

Add work package

GENERAL   WORK TO DO   CONSTANT LOAD   RESOURCES   BUDGET   EXPENSES

Name	Name
Description	Description
☐ Milestone	
Task duration	Effort driven ▼
Priority	Medium ▼
☐ Work package started at	📅
☐ Date ended	📅

1. Fill in a name and description

2. Indicate whether this work package is a milestone or not. This cannot be changed later.

3. Choose what defines the work duration:
- Effort driven: a certain amount of work
- Fixed duration: a certain amount of time

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Work package work to do

Add work package

GENERAL   **WORK TO DO**   CONSTANT LOAD   RESOURCES   BUDGET   EXPENSES   PROPERTIES

Originally estimated duration: 0.0 working day(s)
Remaining duration: 0.0 working day(s)
Total duration: 0.0 working day(s)

Remaining work in work package: 0.0 man-days

Show all roles

For each of the roles, define the **man days** to be done and the maximum amount of people which makes sense for this role to work in parallel.

Role	to do man-days	Max FTE
Administration	0.00	0.00
Astronout	0.00	0.00
CEO	0.00	0.00
Deep admin	0.00	0.00
Electronics	0.00	0.00
Finance	0.00	0.00

SAVE   CANCEL

Work package constant load

Add work package

GENERAL   WORK TO DO   CONSTANT LOAD   RESOURCES   BUDG

Role	Role load (FTE)
Administration	0.00
Astronout	0.00
CEO	0.00
Deep admin	0.00
Electronics	0.00
Finance	0.00

Time driven work packages often still imply a certain load, e.g. to monitor the progress. This is filled in in FTE's, so 1 means 1 person full-time.
For effort driven work packages, this still can make sense to add e.g. The work of a project manager as constant load.

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Work package work log

Edit summary work package **varia work**

GENERAL   WORK TO DO   CONSTANT LOAD   RESOURCES   WORK LOG   BUDGET   EXPENSES

For: Jurgen Devlieghere

As role: Project Manager

Description: Description

06/12/2019   Friday   0   Hours   +

User	Role	Hours

No data to display

1. The work log tab shows all the work that has been logged for this work package (this is of course not when adding a new work package)

2. Additionally, as a work manager, you can log additional work that has been done for this task. For example, if not all of your employees use Splitvice already, you could enter the work done your self to measure project progress

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Work package budget

Edit work package **Mower design**

GENERAL | WORK TO DO | WORK LOG | BUDGET | EXPENSES

Cost type	Budget in work package (€)	budget in children	total budget
Cost of people	0.00	0.00	0.00
Unspecific expenses			

1. For each of the cost types you have defined in the configuration, you can set a certain budget

2. As information, a parent work package will show the budget of the child work packages as well

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Work package expenses

Edit work package **Mower design**

GENERAL   WORK TO DO   WORK LOG   BUDGET   EXPENSES   +

1. The expenses tab allows you to declare all expenses related to this specific work package. Expenses are costs actually made or foreseen (versus budget which is a certain limit agreed upon)

2. You can have different types of expenses, as defined in the administration section. You also have a 'unspecified' type if none of the defined types match the expense.

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Work break-down (WBS) : create a child work package

Build launch platform work packages

	Package Id	Package name	MD to do	Co
∨	LaunchPL-1	⬚7 Build launch platform	0.38	
1	LaunchPL-14	📄 find financing	6.75	
＞ 2	LaunchPL-24	⊞ varia work	44.25	
3	LaunchPL-13	📄 test platform	8.00	
4	LaunchPL-16	📄 electronic alarm	8.75	
5	LaunchPL-17	📄 2nd round of financing ⊕ ○○○	5.00	
6	LaunchPL-15	📄 certify platform		
＞ 7	LaunchPL-7	⊞ Build custom truck		

Create child work package

Create work package here

Create linked work package

Break work into children.

Create a sibling that is depending on this work package.

IMPORTANT: when creating a work package that contains work, this will always be taken away from the work foreseen in the parent!

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Creating work packages

- Go to the work management mode

- Go to the project overview and open the work package list for a project that was created.

- Create one or more child packages below the top level work packages to define your project in more detail

  - Make sure to assign the right roles

  - Make sure to set the necessary work to be done for that work package

- Build up a tree of work packages with the knowledge you have at this point. Don't worry, you can always refine the WBS later on when you have additional details

- Go to the Gantt view to see the timing and critical path

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Check role work to do for work packages

Go to the work package tree, Configure columns

Show Work to do for roles

Choose roles

For each role, a column is shown.

You can directly edit!

...platform work packages

	Package Id	Package name	MD to do	Complete	Duration	Dependencies	Work: **Electronics**	Work: **Mechanic**	Status
∨	LaunchPL-1	Build launch platform	0.38	9%	0.4		0.00	0.00	
1	LaunchPL-14	find financing	6.75	31%	13.5		0.00	0.00	Key
> 2	LaunchPL-24	varia work	44.25	100%	0.1		7.00	0.00	
3	LaunchPL-1	test platform	8.00	24%	8.0		8.00	0.00	Jur
4		electronic alarm							
5	LaunchPL-1	2nd round of financing							Key
6	LaunchPL-15								
7	LaunchPL-7	Build custom truck							

Configure columns

Not shown		Shown columns
Expenses		MD to do
OPEX expenses	>	Complete
CAPEX expenses		Duration
OPEX buffer	<	Dependencies
CAPEX buffer		**Work to do for roles**
MD total for roles		
MD done for roles		

Roles   Electronics, Mechanic

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Work package dependencies

Often a work package builds upon the result of an earlier work package: it's dependent.
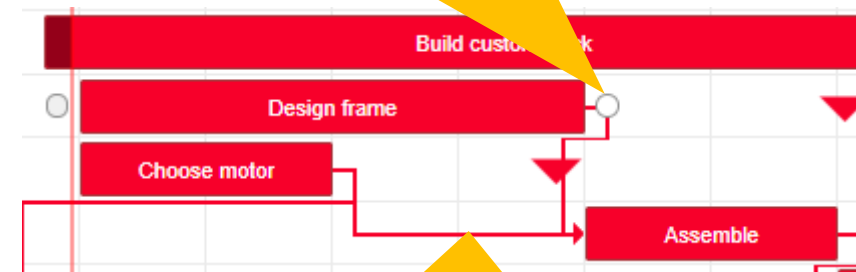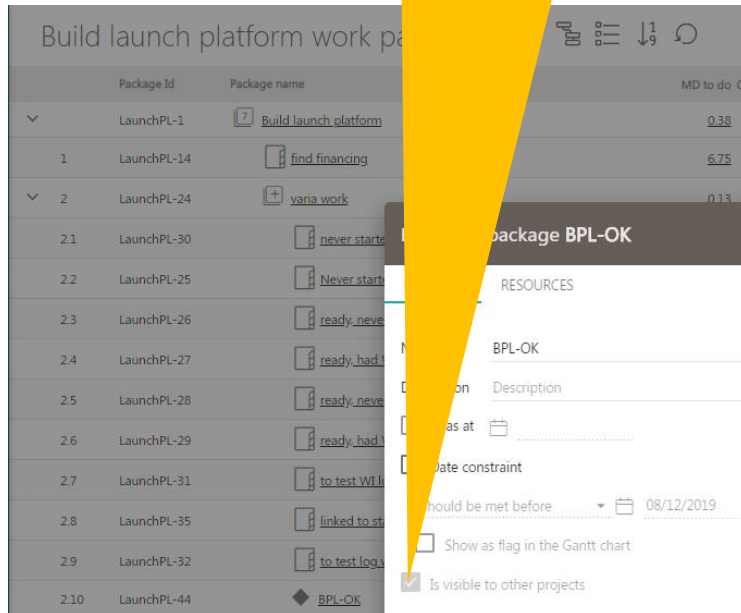
Inter-project dependencies

Dependencies between projects can be configured on milestones in **3** steps.
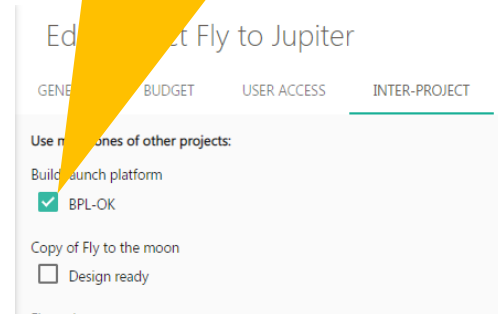
1. Set the dependant milestone as visible to other projects

2. Edit the depending project / INTER-PROJECT and check the milestone

3. In the depending project, the external milestone appears on top of the work package tree / Gantt chart. Use it just like an internal milestone.

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From work package to work items

- A work package is part of a project work package tree.
- A work item is a concrete piece of work that can be assigned to a person.

Click the play to make a work item out of the work package

Work items can be assigned to a person / role

		Package Id	Package name	MD to do	Complete	Duration		ies	Status
∨		LaunchPL-1	Build launch platform	0.38	10%	0.4			
	1	LaunchPL-14	find financing	6.75	31%	13.5			Keynes
∨	2	LaunchPL-24	varia work	0.13	13%	0.1			
	2.1	LaunchPL-30	never started but work logged	5.50	0%	5.0			▷
	2.2	LaunchPL-25	Never started	0.00	100%	0.0			▷

Build launch platform work packages

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Scheduling

What is scheduling?

- Scheduling is the task of distributing work to people.

- Work that can be executed is described in a work item.

  - A work item is launched from a project by hitting the 'play button' in the project tree

  - A work item for an operation is launched in the work item list, by hitting the '+' button

- To see launched work items assignment, you can create a **schedule**. Schedules can be created in work management / schedules
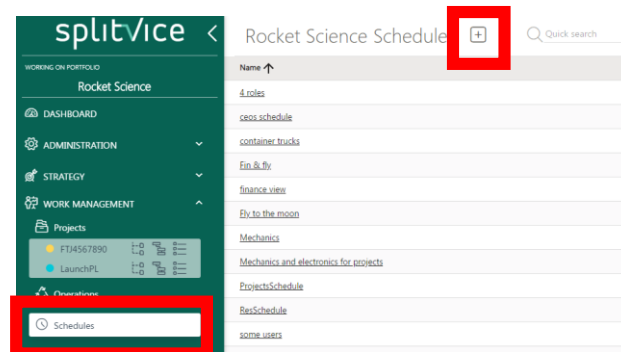
How to define a schedule

- A simple schedule shows all active work items for roles or specific users.

- Basic settings are name and timespan

- Which roles / users is defined in a filter. You need to name and save the filter.

Edit Schedule Mechanics

- ⦿ User schedule
- ○ Project and operations schedule
- ○ Resource schedule

Name   Mechanics

Timespan   4   week(s)

Users   Mechanics   ▼   ⊕ ✎ ⎘ 🗑

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Working with a schedule

- In the timeline, work items are scheduled according to their urgency. The urgency is calculated by Splitvice and follows the weight of the project and the critical path.

- You can drag work items to another user to reassign.

- Work items that are assigned to a role are scheduled after those assigned to a person.
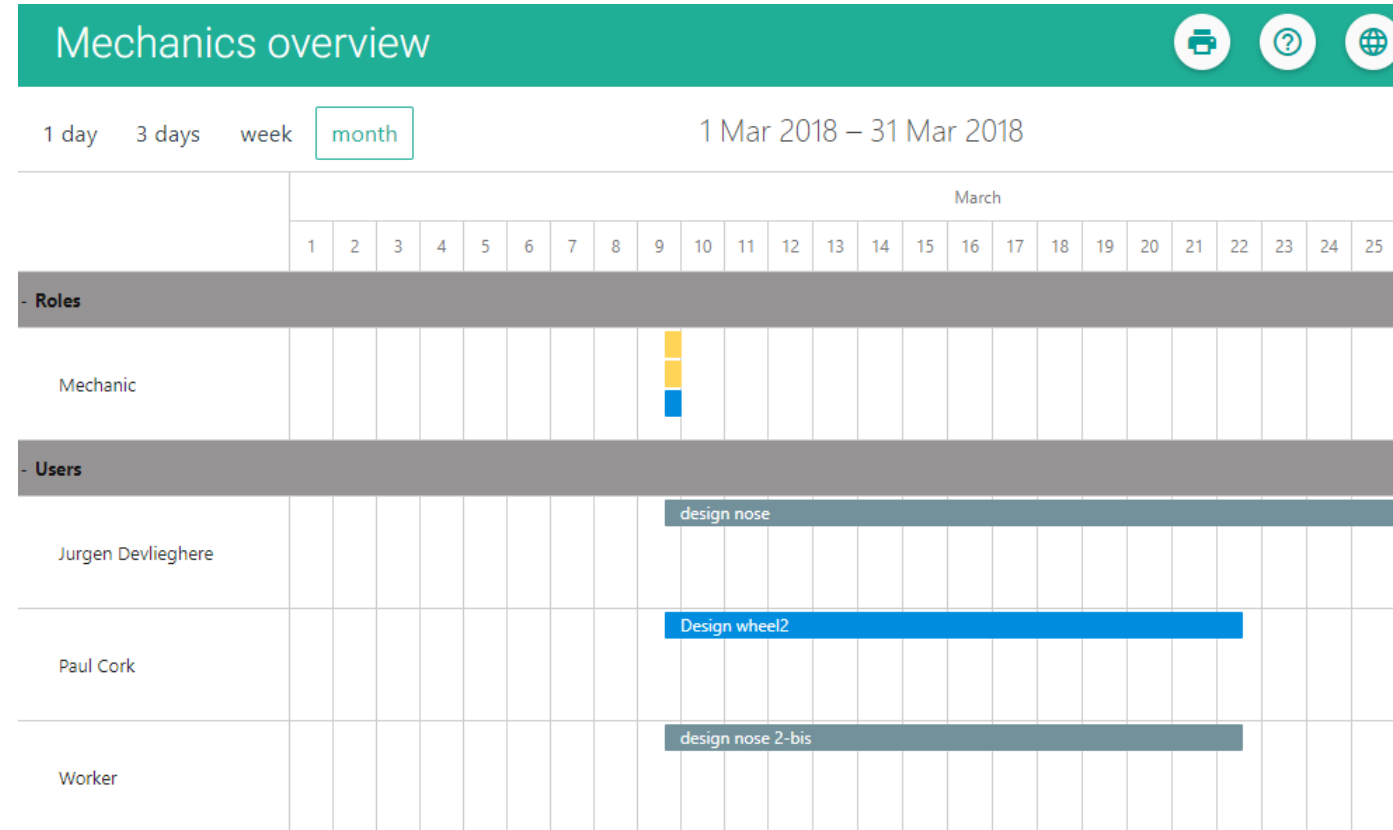
Work items with multiple roles

- If a work item requires work from multiple roles, the person assigned to it probably cannot do both.

- In that case, the work item is split. The names of the subsequent parts of the work items start with … .

- To speed up those subsequent parts, create child work items and assign them to people.
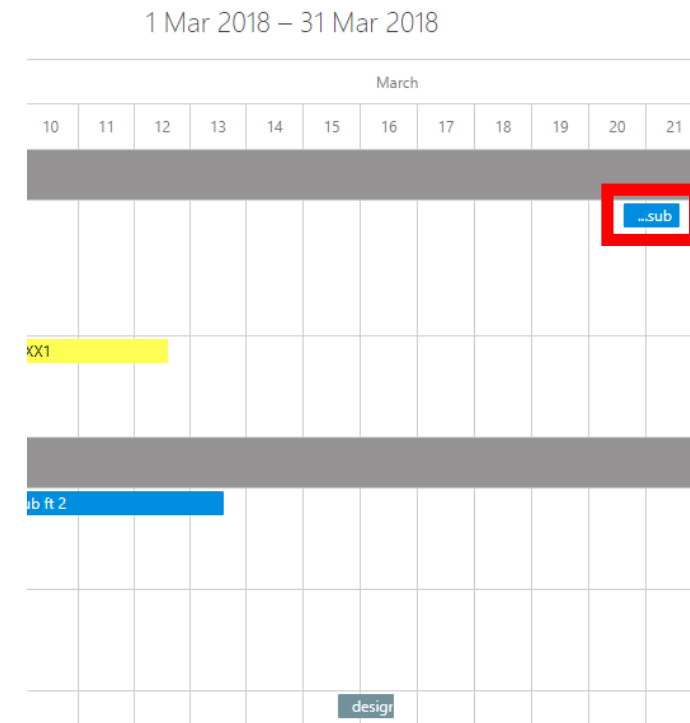
Workflows

Workflows

- Most of the work we do follows a certain workflow: first do this, then do that, if this happens, the next person can continue work on that work item.

- Defining workflows makes sure people know which steps must be taken to complete a certain task in the right way

- Workflows form the basis for defining the work in your company and often help to optimize and automate processes.

- Splitvice supports definition of custom/specific workflows, using the BPMN 2.0 standard. You can make as many workflows as you wish and assign them to a certain task when needed. Note this is already an advanced feature and only to be implemented once Splitvice is well established in the company,

- For operations, since they describe a recurring type of work, a default workflow can be set.

Though BPMN v2.0 is supported, this is not the full BPMN specification but only those items that make sense in the context of Splitvice and work management.

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Creating a workflow

1. Go to the workflow overview in the work management mode

2. Click the + button next to the title

Creating a workflow

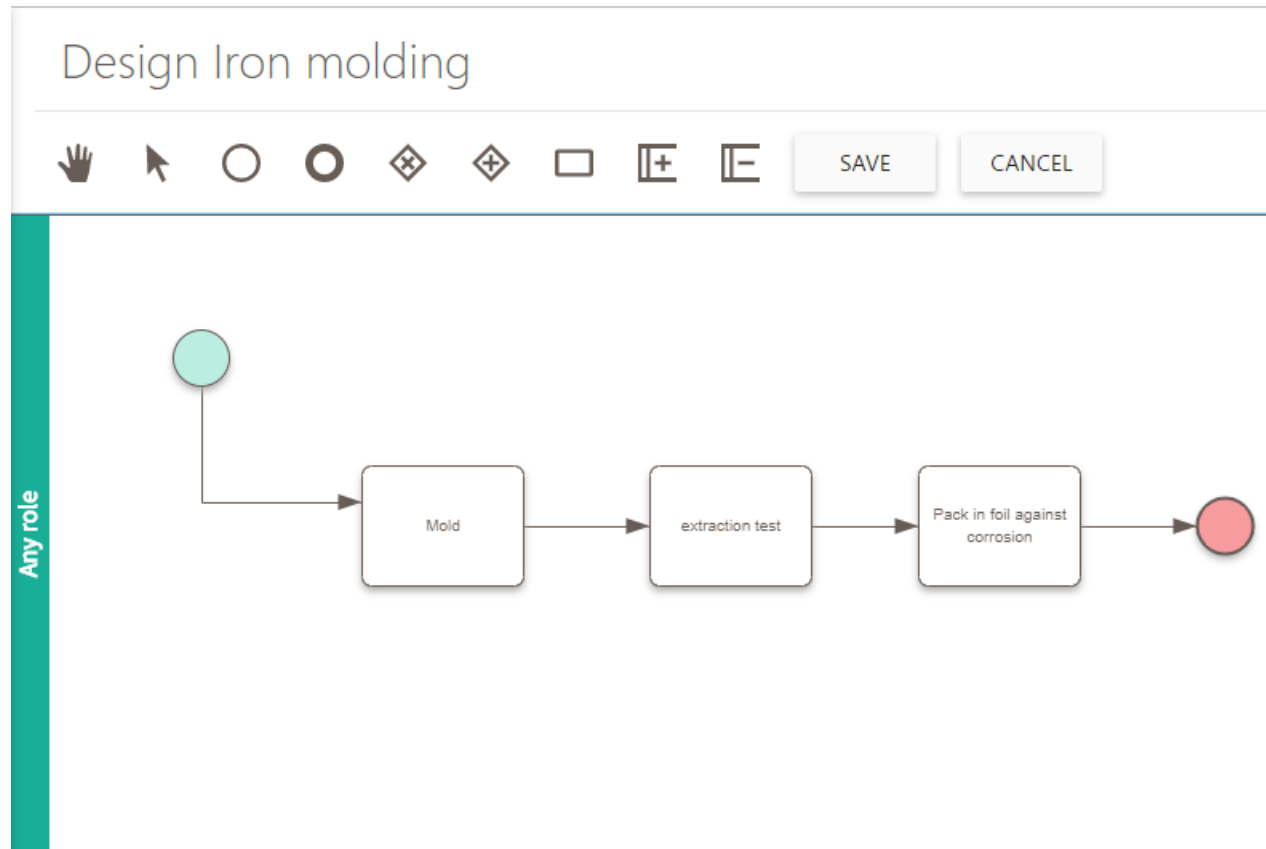Add a new workflow

GENERAL

Name   Iron molding

Description

SAVE   CANCEL

1. Enter a descriptive name for the workflow

2. Click the save button. You will immediatly enter the design of this workflow

splitvice

# Designing a workflow

1. Use the icons on top to drag and drop certain flow elements

2. The swim lanes of the BPMN flow are the roles that are defined in your portfolio. Add role swimlanes as required by this workflow

2. Add the necessary tasks and gateways for the right roles, or, choose the "any role" swimlane if it can be done by multiple roles

4. Click save to store the changes to your workflow

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Managing workflows

Click on the name to edit the properties (name or description)

Click here to edit the flow graphically

Use the … menu to copy or delete

Rocket Science workflows

Quick search

Name

Description

Splitvice

all in sequence — all in sequenceall in sequenceall in sequenceall in sequenceall in sequenceall i

Copy of default

Deep admin

Copy

Delete

Design mechanical part

example workflow

Iron melding

new — new

new tested — Descr for new

orflow

Split fin task

splitvice

Reporting on projects & work packages

splitvice

Project reporting

- Splitvice has a specific set of reports for the work manager to track progress.

- Following reports are available

  - Work logs: show the work logged as individual items.

  - Project performance: based on the progress, show how well my project is doing. This includes cost versus budgets, earned value and comparison to baselines.

  - Top level work packages: show the **cost** of each top level work package.

  - Timesheets: what time has been logged by certain people

  - Holidays

- Each type of report has its own set of parameters

- Report definitions can be saved so you can generate them on regular basis

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Adding a report

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WORKING ON PORTFOLIO

Rocket Science

- DASHBOARD
- ADMINISTRATION
- STRATEGY
- WORK MANAGEMENT
  - Projects
    - FTJ4567890
    - LaunchPL
  - Operations
  - Schedules
  - Workflows
  - Reports

Rocket Science reports ⊞ ▯▯ 🔍 Quick search

Name ↑	Type
Fly to Jupiter	Project performance
Fly to the moon people cost	Project performance
holidays this month	Holidays
IO v...	
jup	
Timesheets Team moon	Timesheets
XYZ	
XYZ report-bis	Project performance

1. Go to the reports overview in the work management mode

2. Click the + button next to the title

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Adding a report general properties

Add a new report

GENERAL   PARAMETERS

Name

Type   Project performance

Description

SAVE   GENERATE   CANCEL

1. Enter a meaningful name if you want to save the report. A report name is not mandatory in case you only want to generate a report without saving it for later use

2. Select the type of report you want to generate

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Adding a report parameters

splitvice

Add a new report

GENERAL **PARAMETERS**

Project
X-Mower

All costs

☐ Show budget of top-level work packages

SAVE GENERATE CANCEL

WORKING ON PORTFOLIO
FutureX

MODE
Work management

- PROJECTS
- OPERATIONS
- WORKFLOWS
- REPORTS
- WORK LOG

1. The set of parameters is dependent on the type

2. Enter all the parameters

3. Click save or generate. You can save the report after you have generated it. This way, you can first tune the parameters to fit the report you want

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Work logs report

- Work logs can be filtered per project / operation / user or group

- They can optionally be grouped per user

- The result is a list of logged work.

- The list can be exported to Excel.

GENERAL	PARAMETERS	FILTER	GROUPING
USER	GROUP	ROLE	PROJECT	OPERATION

- ☐ 2nd for weight
- ☐ Antwerpen leefbaar
- ☐ Black hole
- ☐ Booming stereo

User	Role	Date	Task Id	Package name	Project or Operation	Time Logged	Feedback
Jurgen Devlieghere	Finance	07/11/2019	FTJ4567890-38	screen buyer	Fly to Jupiter	8 hours	🙂
Jurgen Devlieghere	Project Manager	01/11/2019	F2ISS-35	child	Fly to ISS	7 hours	🙂
Igor.P	Administration	03/12/2019	AP11-130	cert2	Fly to the moon	2 hours	🙂
Igor.P	Administration	22/11/2019	AP11-124	certain	Fly to the moon	8 hours	🙂

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Project performance report

- Different metrics can be shown for a specific project: man days, cost, people cost and earned value of budget.

- The graph shows both the past and the projected future.

- If there are baselines for this project, they can be shown in the same graph.
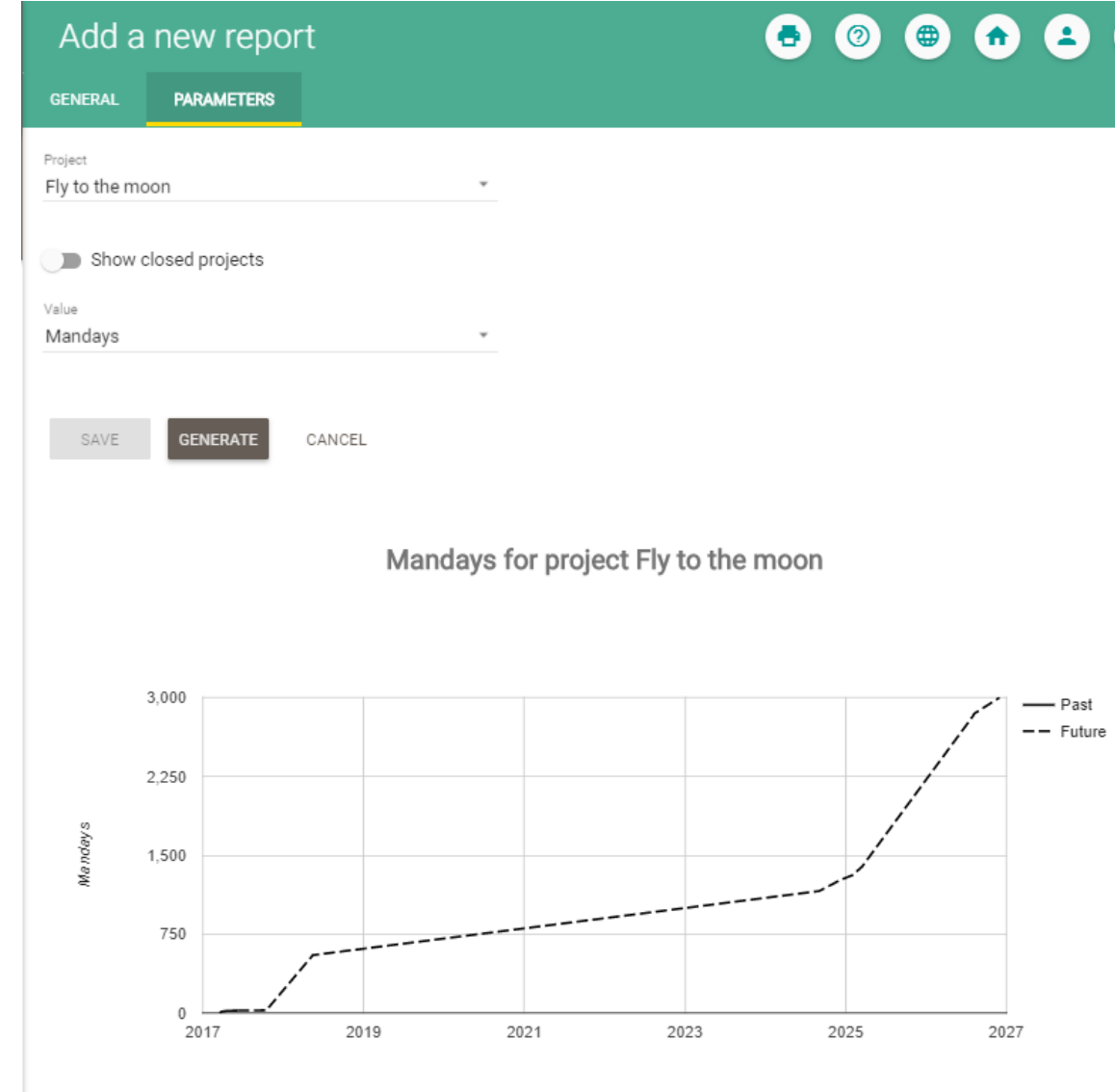
Earned value, some background

Earned value is one of the graphs that can be generated in the project performance report. Splitvice allows for 2 types of variants of earned value.

- Earned value can be shown in 2 ways

  - As %. This means at the end of the project, earned value will be 100%. A value of 30% means 30% of the total work for the project is completed.

  - As value. This means the value of the budget in man months. If the budget for the man months of the project is 100.000 euro, halfway the earned value will be 50.000 euro.

- Earned value of the past is always shown in 2 variants

  - Actual earned value. This shows the earned value of the past with all data known today. So, if today's estimate of the total work is double as the estimate of yesterday, the earned value of yesterday will be half of the value which was shown yesterday. The graph will always go up.

  - Historical earned value. This shows the earned value of the past with the data known in the past. So, if today's estimate of the total work is double as the estimate of yesterday, the earned value of yesterday remains the same, but the graph will drop dramatically from yesterday to today.

  Having the 2 variants of earned value together is useful to see when estimations were adjusted.

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Top level work packages report

- This report shows the project costs per top level work package. This makes typically sense if you have a gated process where budgets and approvals are done in different stages of the project.

- This makes extra sense if you also defined budgets per top level work package.

- You can look at people cost, but also at other costs. You can choose whether CAPEX is included or not

- The different types of expenses are shown in different colors.
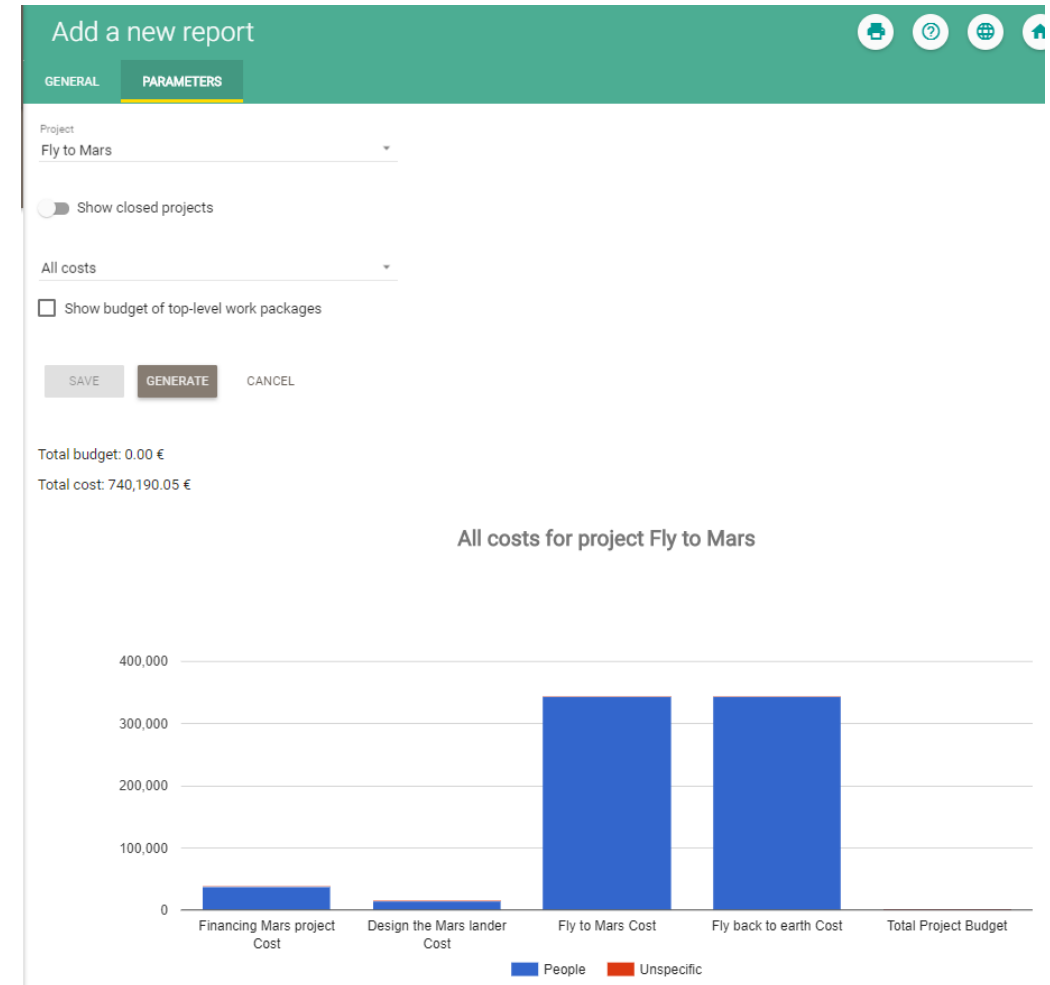
Timesheets report

Add a new report

GENERAL **PARAMETERS**

Timesheet for Last month ▾

○ For users ▾
● For user groups Team Moon ▾
● Group by user first
○ Group by date first

SAVE GENERATE CANCEL

Timesheet overview

User ↑	Date	Work item Id	Name	Description	Project or Operation	Hours logged
› Buzz Aldrin						0/ 149
⌄ Igor.P						
	Fri 01/11/2019					0/ 5
	› Mon 04/11/2019					8 / 8
	› Tue 05/11/2019					16 / 7
	› Wed 06/11/2019					13 / 4

This report allows to quickly view if people filled in their timesheets

Choose the users or the user group and the period

Get a break-down that shows in 1 glance who logged how much

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Holidays report

Add a new report

GENERAL   PARAMETERS

Holidays for   This month

○ For users
◉ For user groups   Team Moon

SAVE   GENERATE   CANCEL

Holidays

User	Name	date	
∨ Buzz Aldrin			
	with name	26/12/2019 (Whole day)	Until 27/12/2019 (Whole day)
			Total: **5**

This report allows to quickly view what holidays people have
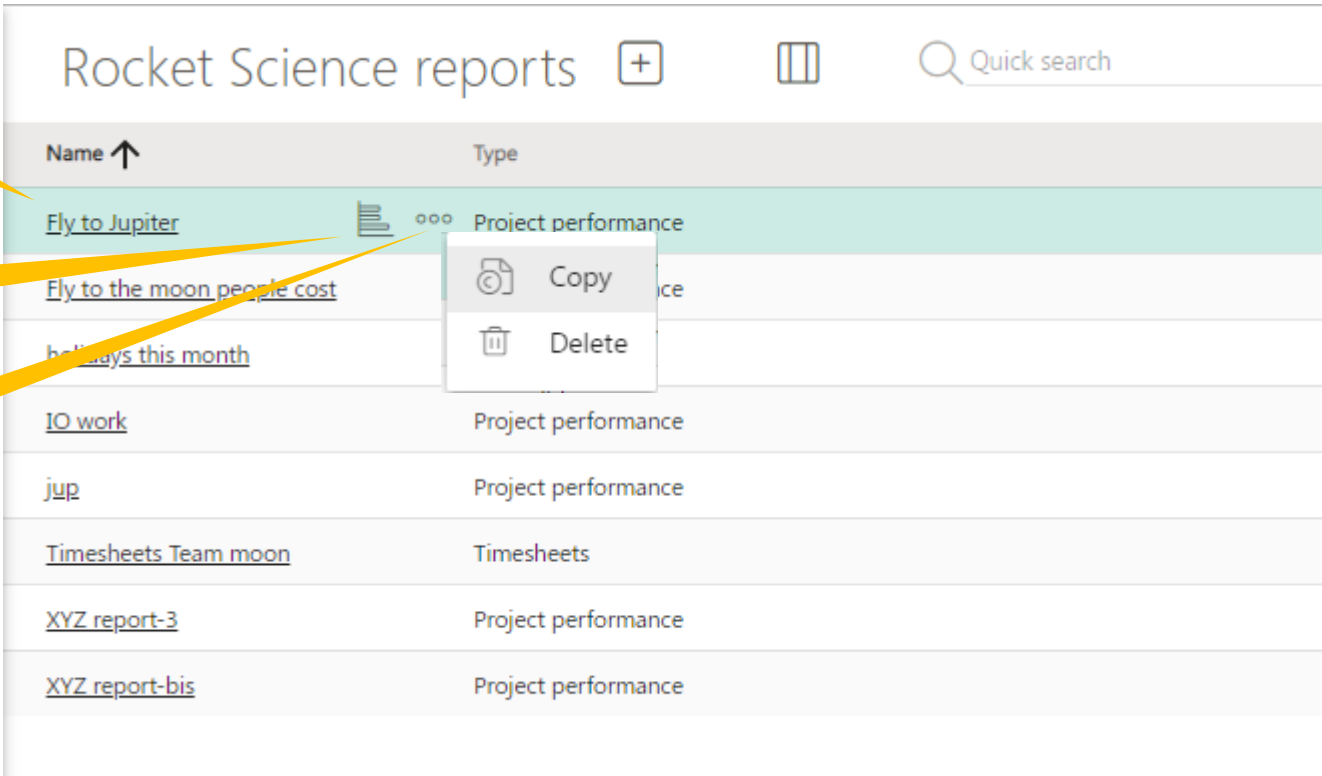
Choose the users or the user group and the period

Get a break-down that shows in 1 glance who has what holidays

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Managing reports

Click on the name to edit report definition

Run directly the report

Use the … menu to copy or delete the report

Rocket Science reports   [+]   [columns]   🔍 Quick search

Name ↑	Type
Fly to Jupiter	Project performance
Fly to the moon people cost	...ce
holidays this month	
IO work	Project performance
jup	Project performance
Timesheets Team moon	Timesheets
XYZ report-3	Project performance
XYZ report-bis	Project performance

Copy

Delete

splitvice

In addition: man-days report
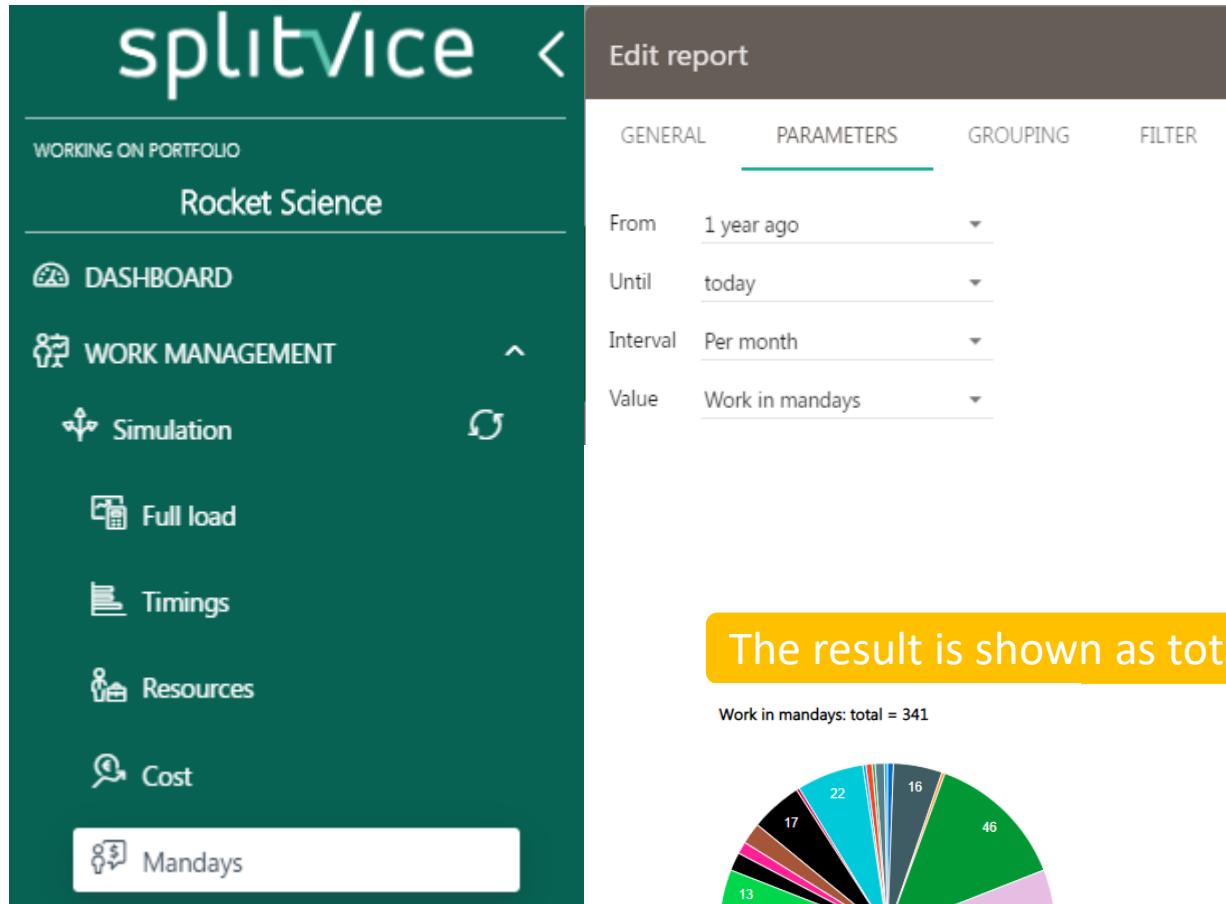
The most flexible report on work is the mandays report

It handles both past work and predicted work

You can filter on projects / user groups / roles / custom properties

You group on projects & operations or on custom properties

The result is shown as total in a pie-chart and as time evolution in a bar chart
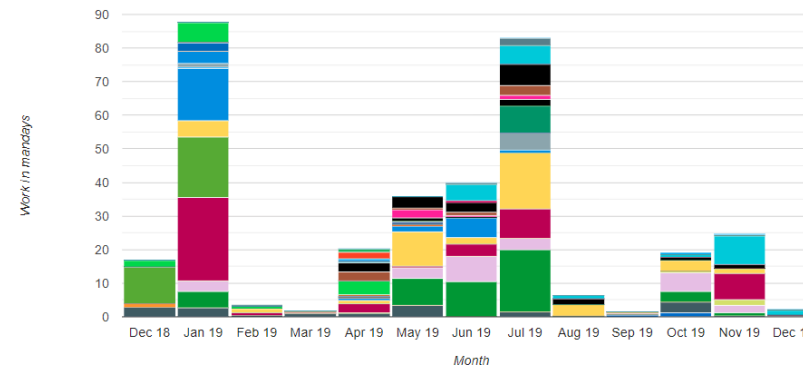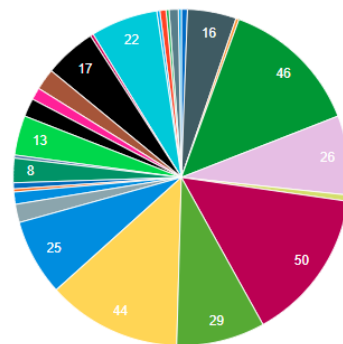
Reviewing the work log

Work log management

- The work log of your project can be filled in two ways:

  - Either by a knowledge worker filling in his work log using the knowledge worker tools

  - By a work manager that inputted the work done using the work package property interface OR using the work log management window

- The work log overview allows you to query all the logged work, no matter the origin, for one or more projects or operations

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Work log overview window

1. The work log overview shows the work log items that match the selected filter

2. Use the quick search to find a specific item in the list that is shown

3. Use the add button in the upper right corner to add additional work log items for a project or operation

4. You can edit a work log by clicking on one of the properties and you can delete it using the ... menu

Work log filter definition

1. Click the + button next to the filter dropdown to create a new filter

2. Define the filter date, this can be a dynamic period, such as today, yesterday, … or choose a fixed interval to query on

3. Select on which objects you want to filter. If you don't provide any selection for a certain object, no filter is applied to that object

4. Click OK to go back to the query window. You can now run the query again with this new filter.

5. Click the save button then to store this filter with a specific name so you can reuse it later on

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Finally...

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Dashboard
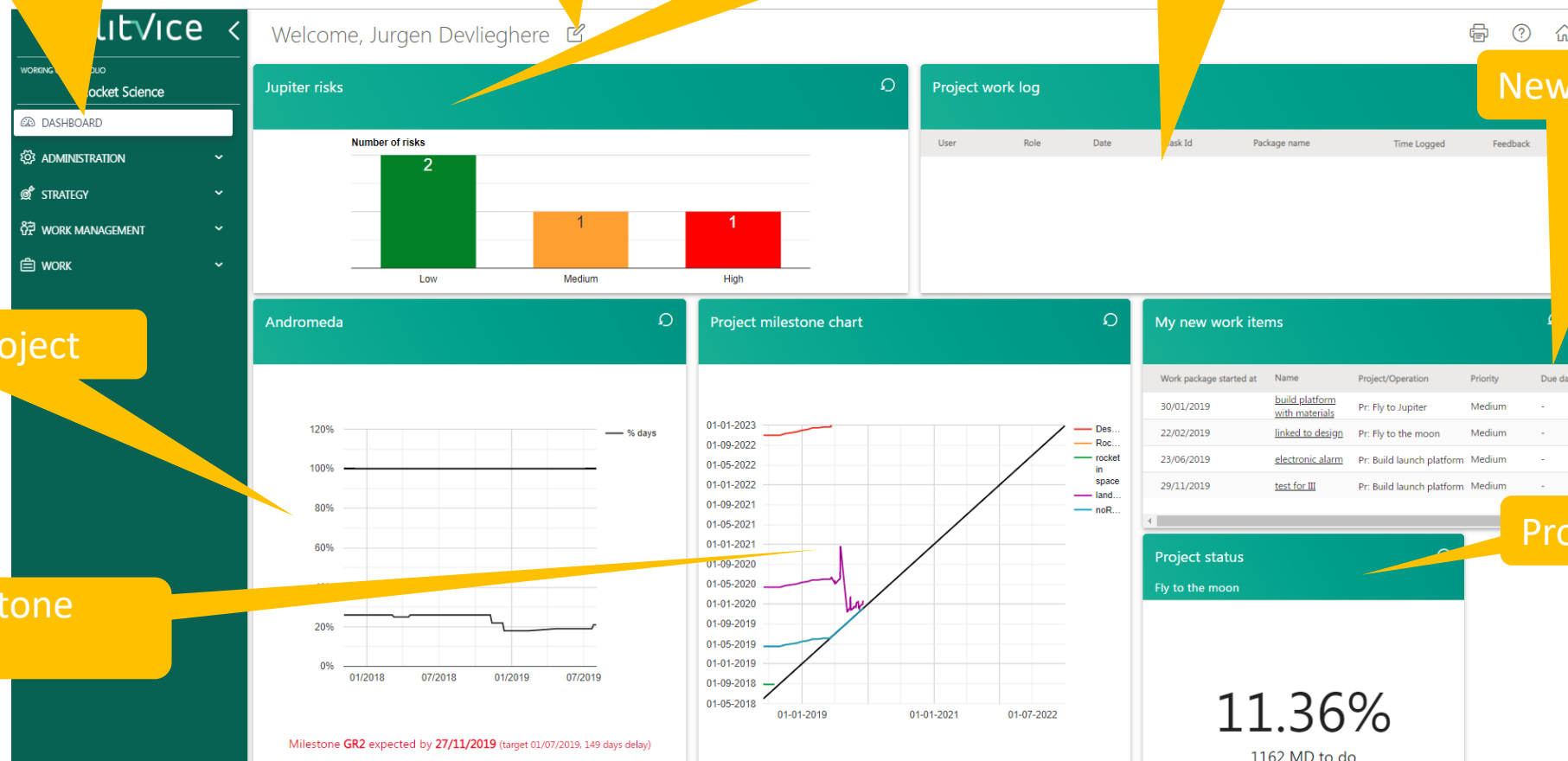
The work is defined and the plan is laid out!

Once the work has been defined, people can start executing the tasks at hand. Based on the portfolio strategy in combination with the defined work, every knowledge worker knows exactly which tasks must be executed and can visualize the work.

Of course, work managers and strategists are able to see and monitor progress so they can intervene when necessary.

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Find additional learnings in these <u>movies</u>

Contact us for more information:
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support@splitvice.com

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