





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 **knowledge workers** those people that actually work on the projects in their company.

This guide is intended to quickly introduce new knowledge workers to the essential concepts of Splitvice.

Executing work

When the strategy has been defined and the work manager has defined all the work packages to be executed, all there is to do is execute the work.

Knowledge workers will execute work items and report progress back in the work mode of Splitvice. Work log information entered at these levels is consolidated and integrated in the strategy level. Each of the knowledge workers can at any time see his own up-to-date tasklist with a clear indication on the priority of the task, that is set in accordance with the strategy and the importance of the project.

A knowledge worker can visualize his work items either in a list or in a (customized) kanban board.



If you plan to work also on the administrative, strategic or work management level of Splitvice, make sure you read those training guides first.

Topics covered in this guide

Work mode

- Projects and operations (you can skip this if you read the Strategy or the work management guide)
- Viewing and managing work items
- Creating additional child work items
- Creating and view Kanban boards
- Logging work



Throughout this presentation, when we use the term task, we refer to a work item. These terms are used both for the same concept of an item that a knowledge worker must do

Projects and operations

(skip this section if you read the strategy guide or the work management guide)

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. Each project has a start date, an end date and a goal.
- 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.

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

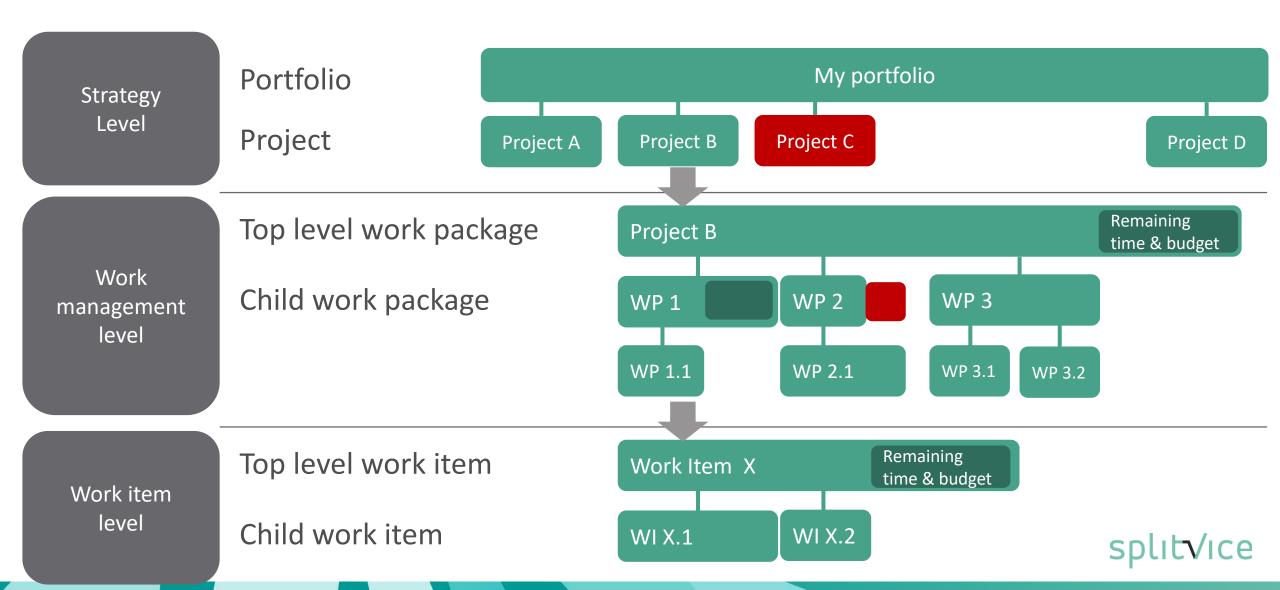
- Defined on a work management level because they primarily exist to make sure the time spent on them is taken into account
- Knowledge workers will create the work items for a specific operation whenever they do that kind of work. This way they can also log work for operations.

Work items

Work items

- Whenever in Splitvice a project work package is activated (or started) and a role or knowledge worker is assigned, a corresponding work item for this work package is created
- A work item always has a certain workflow it must follow. There is a default predefined workflow called 'Splitvice' that is no more than start -> doing -> done.
- Since the knowledge worker might want to refine the work further, he can create additional child work items for the top level work item (that corresponds with a work package).
- Child work items will "take away" budget and timing from their parent work items. The remainder will be stored in the parent work item. This way a knowledge worker can bring more clarity in a task on a level where the work manager might not be involved anymore

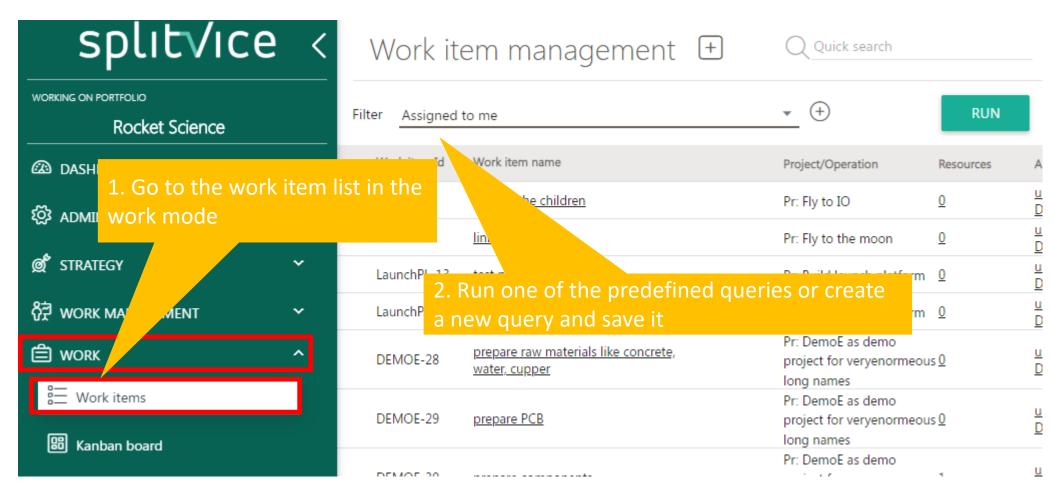
Work item concept and relations



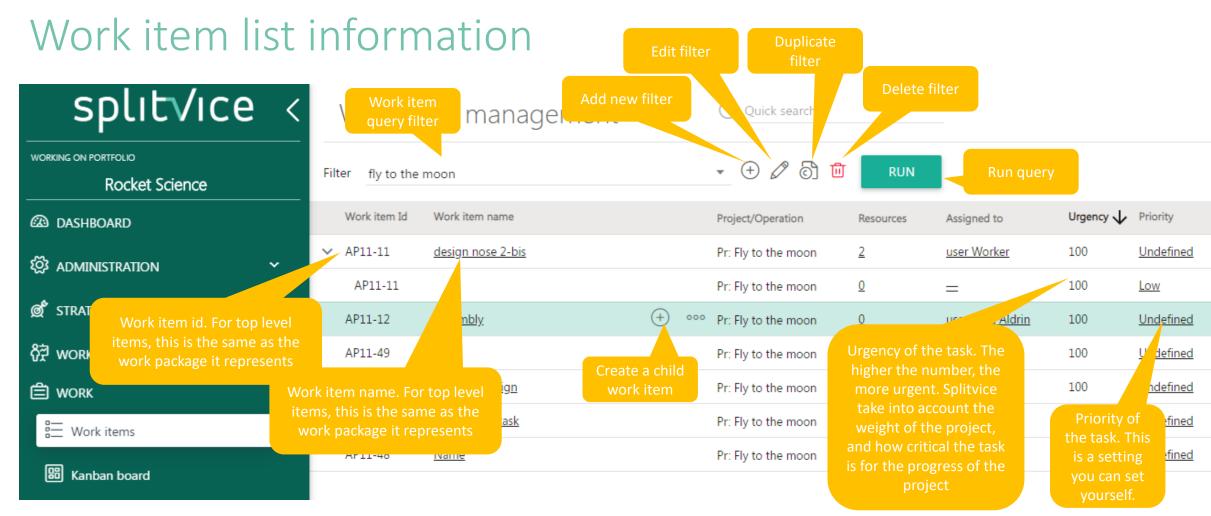
Managing work items

- Work items can be viewed in the work item list or on a Kanban board.
- Work items can be defined in tree ways
 - Whenever a work package is started, a corresponding work item is created automatically
 - Whenever a knowledge worker decides to create a child work item
 - When a knowledge workers needs to execute work that is related to an operation, he will create a new work item for this operation in the work item overview

Work item list









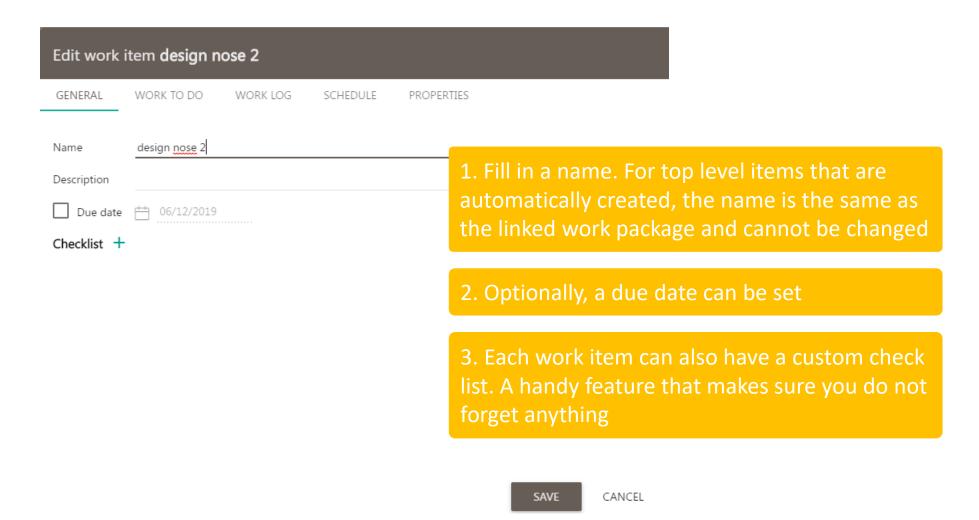
Urgency is calculated in the context of a portfolio and related to the critical path of the different projects. Priority is an indication of the work manager within a certain project.

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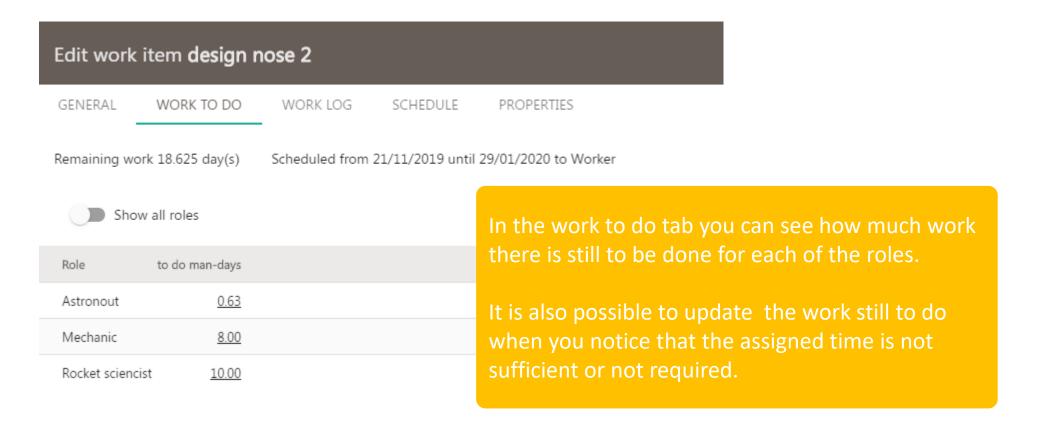
Work item properties

- Click on a work item to open the work item details
- Properties are split in to three parts
 - The general properties, such as the name of a work item
 - The work that is still to do for this work item
 - The work that has been done and logged for the work item

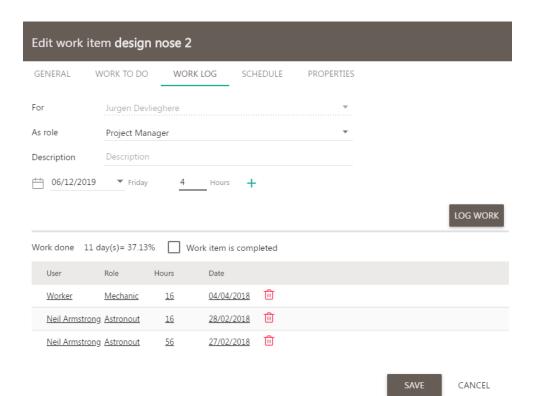
General work item properties



Work item work to do



Work item work log

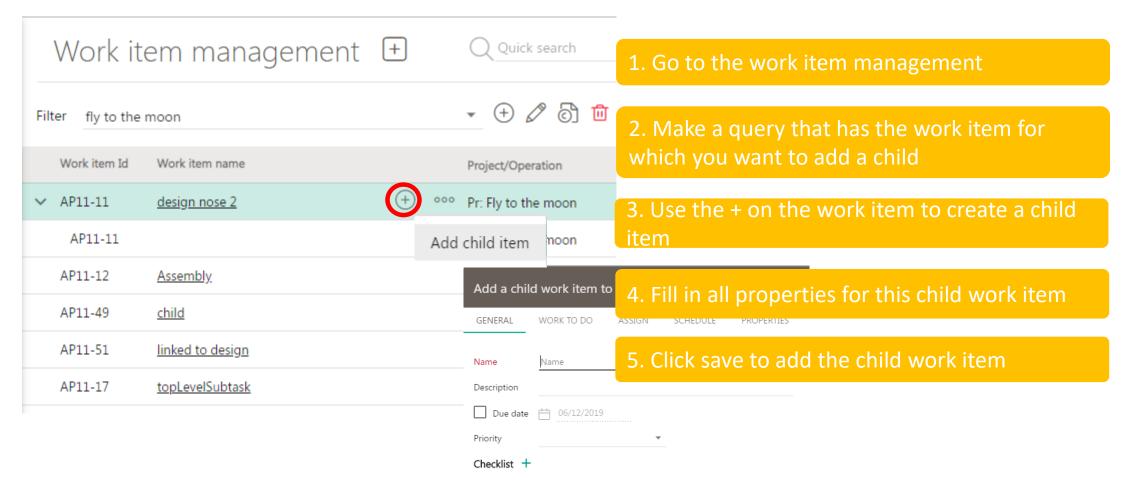


In the work log tab, a knowledge worker can enter time for this work item, for a specific role he played in this. Logging work will decrement the work to do



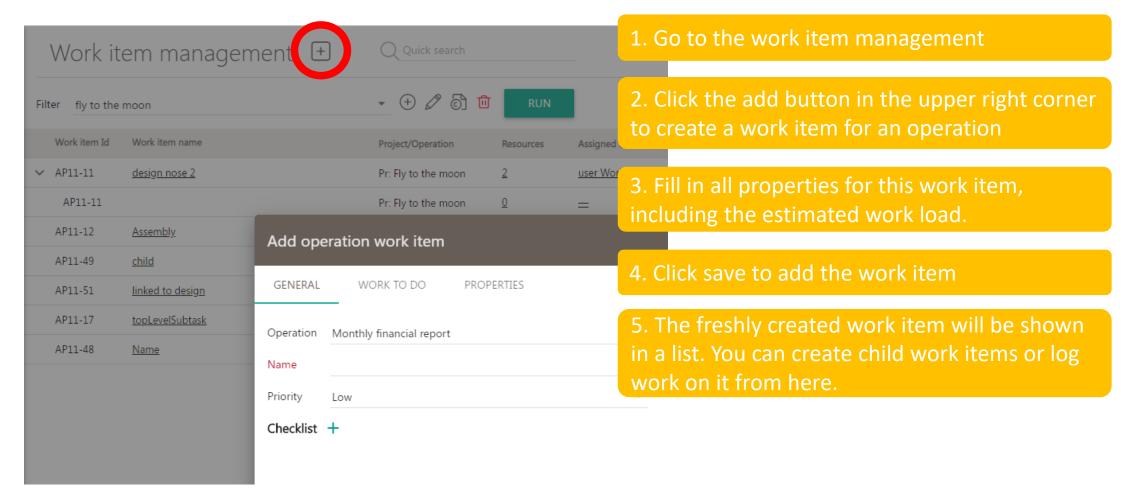
Work can also be logged for a role which was not foreseen. This will obviously not decrement any work to do, but will be visible in the work done.

Creating child work items

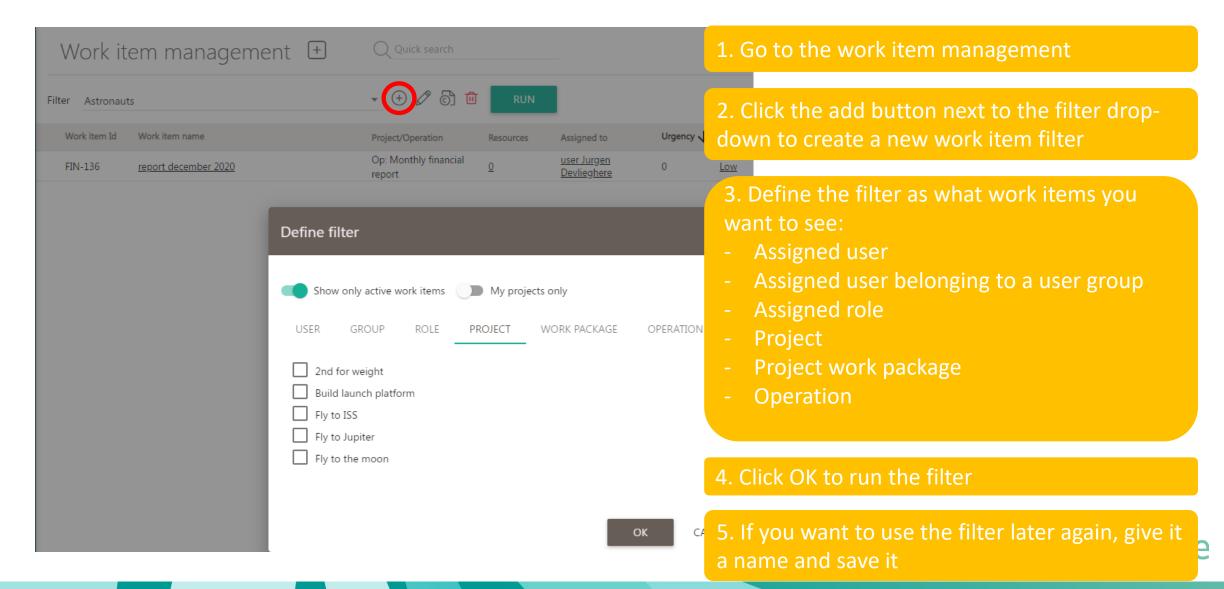




Creating work items for operations



Work item queries





Creating work items

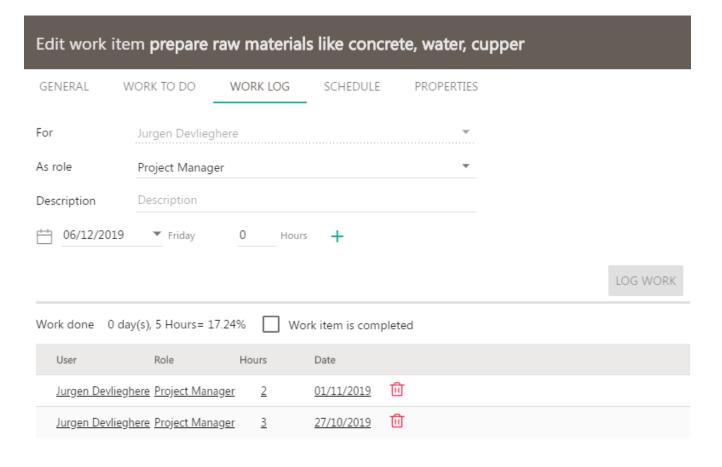
- Go to the work mode
- For the work packages that were started, view the properties of the corresponding work items
- Create one or more child work items
- Create a work item for an operation you defined
- Create a custom filter for your project and save it as "My Project work items"

Logging work to measure progress

Logging work and timesheets

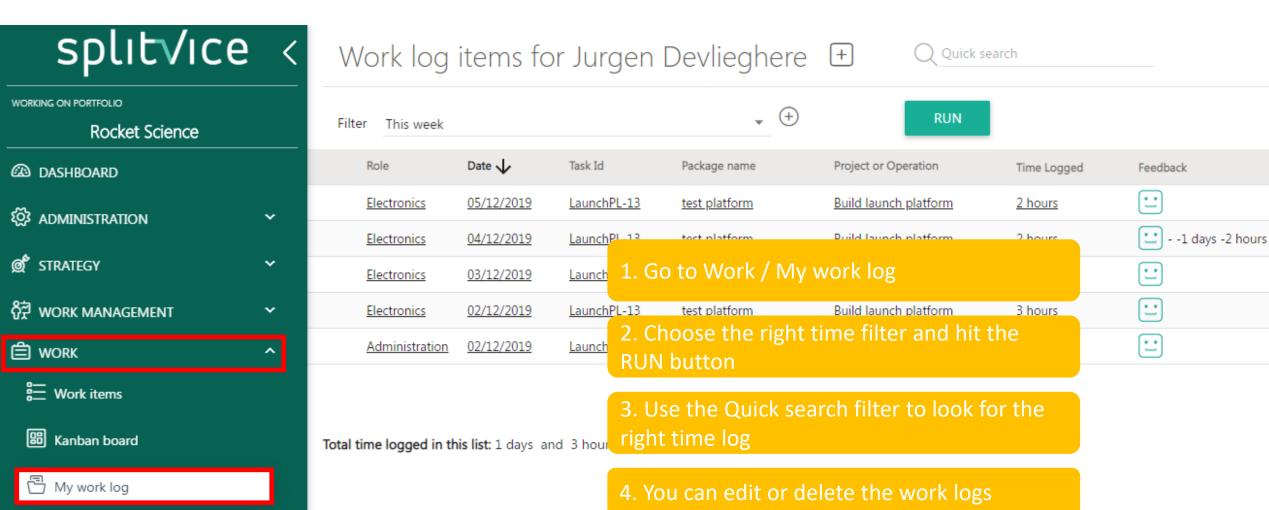
- Work can be logged on a project work package, but it's better if everybody logs work on the work items. This holds for project work items and operation work items.
- When work is logged, it's also possible to revisit the work to be done.
- The quickest way to work log regularly is using timesheets

Log work in a work item



- 1. Open work item from the work item list or from the Kanban board
- 2. Under Work log, you can log work for yourself. If you have multiple roles, make sure you choose the right role.
- 3. The work to do in the tab 'Work to do' will be automatically diminished. If it does not match your expectations any more, you can adjust this.
- 4. If you made a mistake in previous logs, you can edit them.

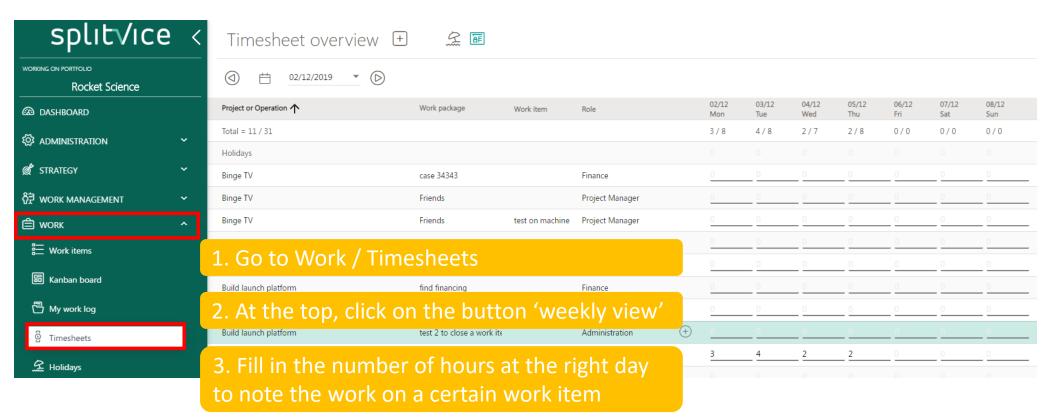
Viewing and editing your work log



5. Beneath the logs the total is displayed

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Timesheets



- 4. If the work item or work package is not listed, use the [+] next to the title 'Timesheet overview'
- 5. If you don't log time for a while on something, it will disappear from the list

Visualizing work items using Kanban

Kanban introduction

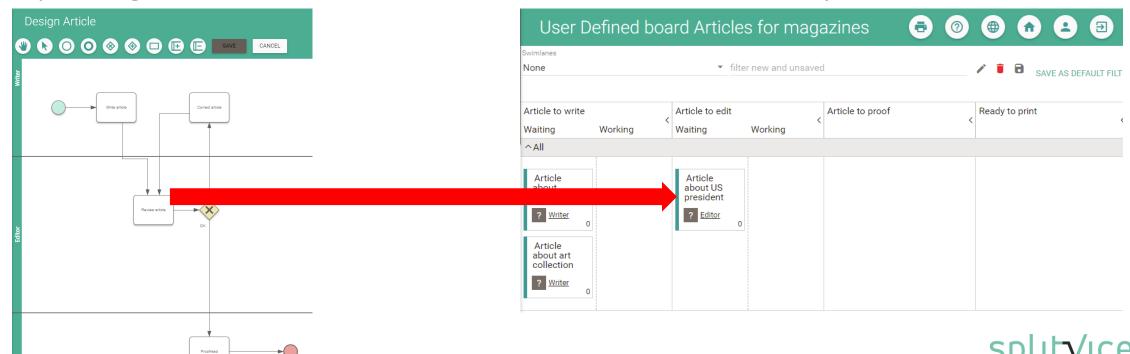
- Kanban is a great way of visual management. It's widely used in software and other development, but originally comes from production sites.
- The biggest benefits of Kanban are:
 - It makes very clear where bottlenecks arise.
 - It avoids working on too many things simultaneously, reducing switch time and helping throughput.
 - It avoids working on things where there is no time to complete it. This is "avoiding waste".
- Kanban is often used with paper post-it notes. While this has advantages, the biggest disadvantage is it's difficult to have several views (e.g. several Kanban boards) on the same work items.
- Kanban is closely linked to workflow, where work flows from left to right. In Splitvice, Kanban is built on top of workflows.





Workflows as base for Kanban

- Splitvice support workflows for work items and lets you graphically design them
- A Kanban board has columns. Each column contains states of the workflows.
- Depending on the state in the workflow, the work item shows up in the Kanban column

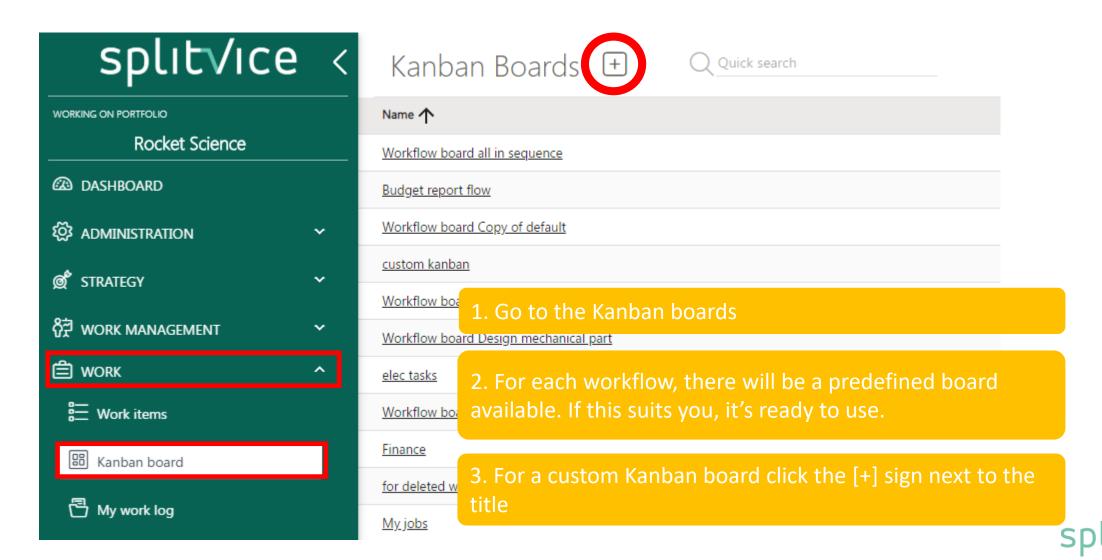


Define a Kanban board

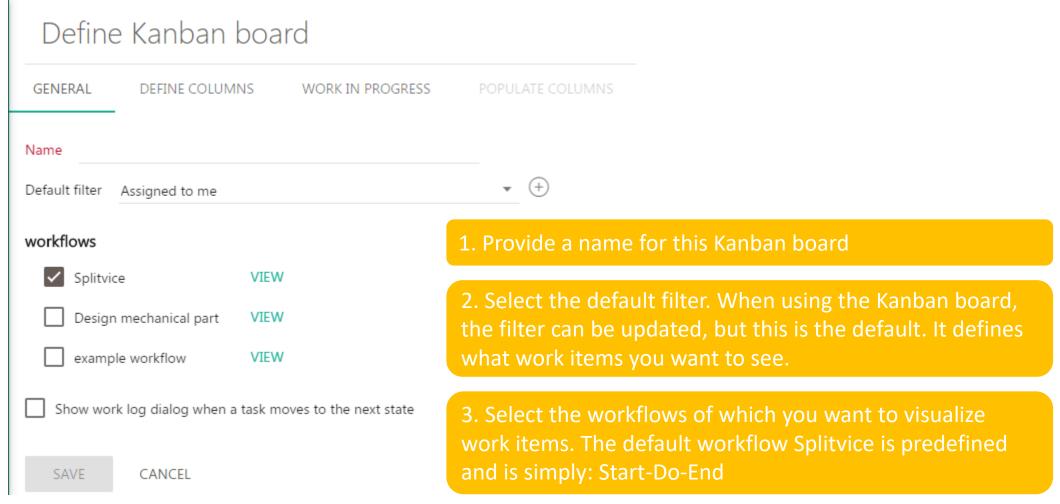
To define a Kanban board, you need to do these 4 steps

- 1. Start the creation of a new Kanban board
- 2. Fill in basic data like the name and the workflows the board uses
- 3. Create the columns and set them in the right order from left to right
- 4. Populate the columns with the states of the workflows.

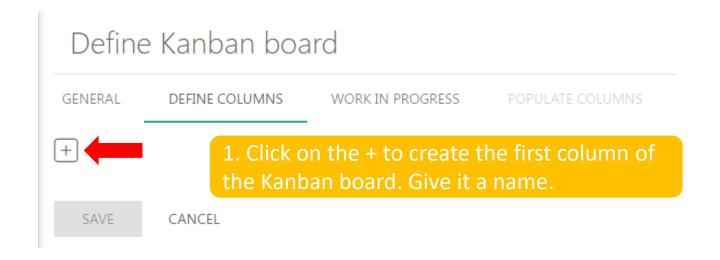
Step 1 of 4 to define a Kanban board

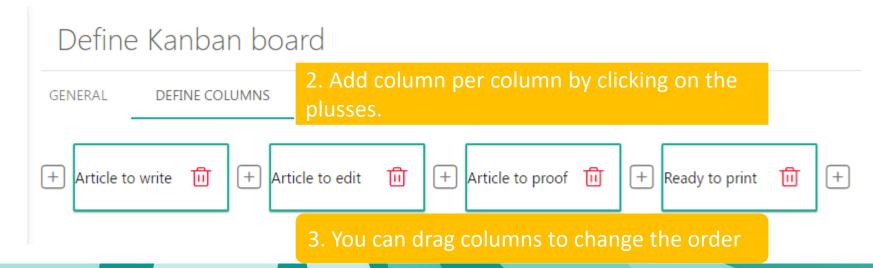


Step 2 of 4 to define a Kanban board

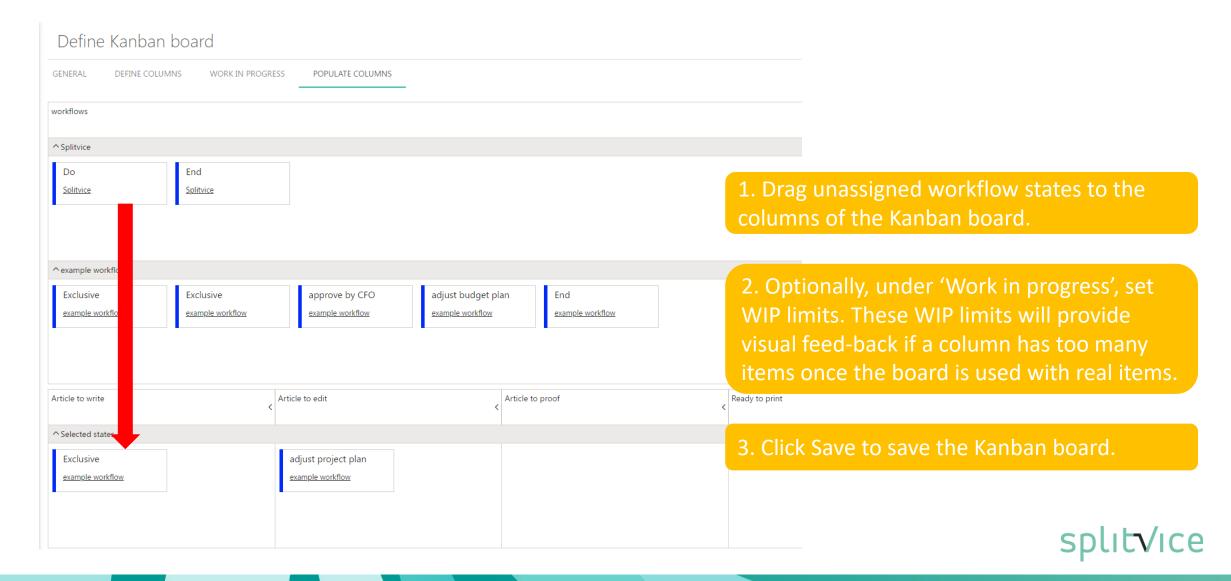


Step 3 of 4 to define a Kanban board

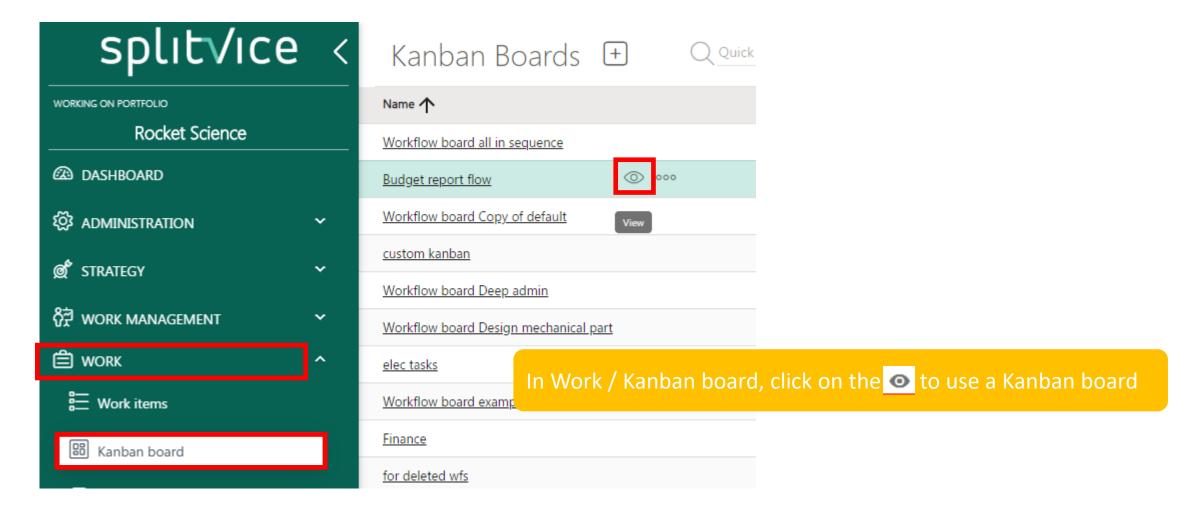


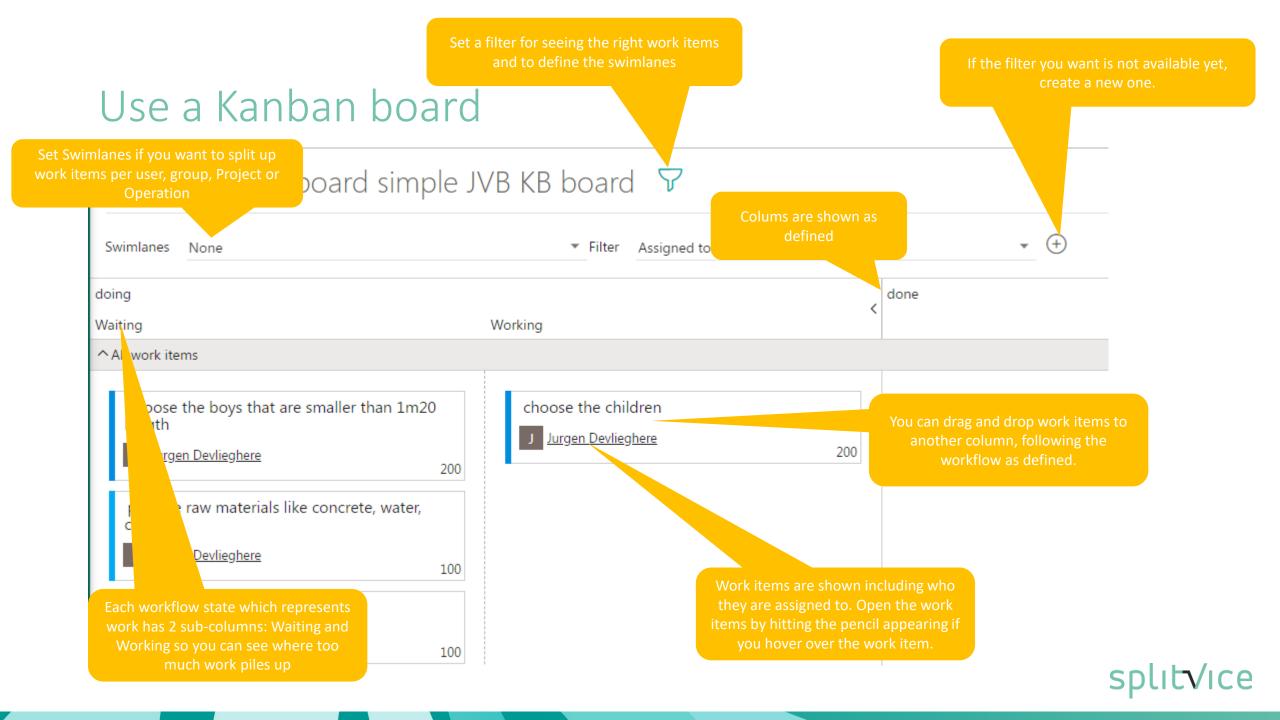


Step 4 of 4 to define a Kanban board



Use a Kanban board: start

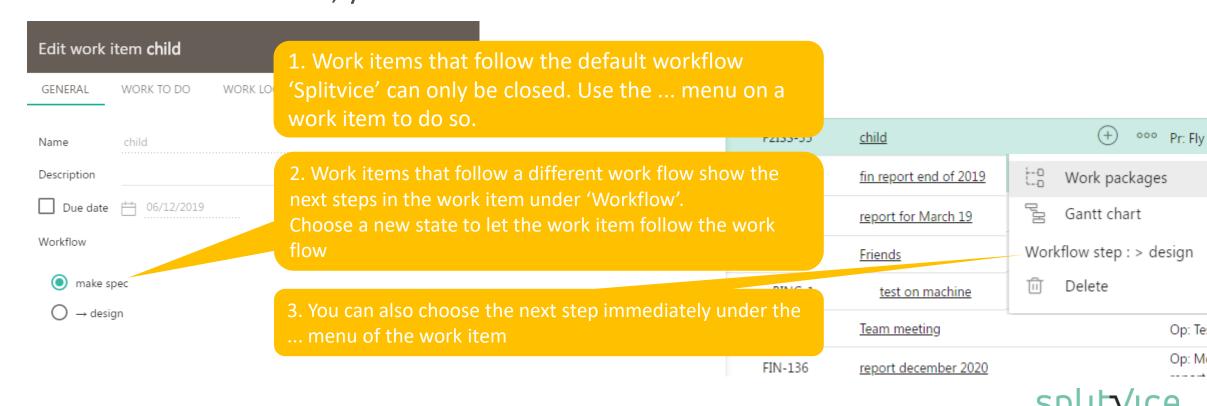




Follow the flow: move the work item through the workflow

Moving the work item through the workflow

- In the Kanban board, you can drag items according to the workflow.
- In the work item itself, you edit the workflow state of the work item



You are up and running!

As soon as all knowledge workers are creating and handling the different work items, information will start flowing through all levels.

Splitvice will create more transparency and will provide realistic timelines so everybody can strive for the same goal: projects that are simply well done.





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Contact us for more information: http://splitvice.com support@splitvice.com