

Design and Structure the Work Plan

To create and manage the work plan, go to **Proposal > Work Plan > WP Structure** during the proposal writing and to **DoW > Work Plan > WP Structure** during the implementation phase.


Here, you can structure the work plan into 3 levels at maximum, sub-projects, work packages and tasks. For each activity you can define the title and the lead contractor. At the task level - the lowest level - you define plan start and end.


All users can see the activities - e.g Sub-Projects, WPs and tasks in the work plan. However, only the users with *Coordinator Rights* can create and edit all items, while users with *Contractor Rights* can create new activities under parent activities and edit only those activities (incl. sub-level activities) that their contractor is leading.

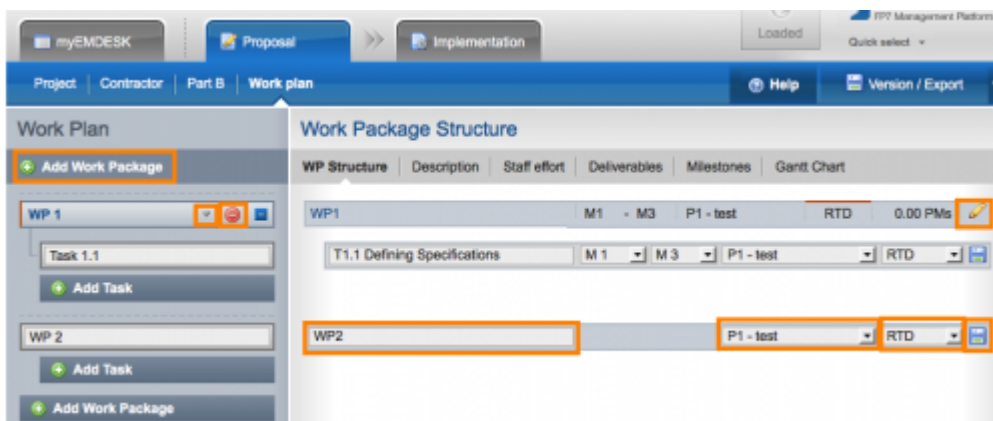
Optionally you may *classify activities into types* e.g. IA, RIA, RTD, MGNT, etc. (in FP7 known as activity types). Activity types are labels that help you structure your work plan and budget. You can use one or more labels. The activities e.g. work packages are colour coded to indicate activity types. [Learn more on how to use activity types here.](#)


Manage Work Package (WP)


To **create** a work package, click on **Add Work Package** at the top of the left panel. A work package is created and added to the end of the work package list on the right.

Click the  icon on the work package to edit its properties:

1. The *work package ID* is auto-numbered, however, you may change it to an individual ID per each work package
2. Enter the *work package title*
3. Select the *Leading Contractor* (all users assigned to the leading contractor have edit access to the work package and sub-level tasks)
4. Optionally, you may classify the work package to another *activity type*
5. Then click on  to save




To **delete** a work package, click the  icon on a work package item. Note that all information associated with the work package will be deleted irreversibly e.g. work packages properties, sub-level tasks, cost entries, person-months, deliverables and milestones. When deleting a work package during implementation phase, also all reporting data on the work package and associated tasks will be deleted.

To **move** or **change** the order of the work packages, click the  icon in the list on the left to move items either upwards or downwards.


Note that the plan start and end of a work package is auto-set to the plan start month of the earliest beginning sub-level task and the end month of the latest ending sub-level task.


To **stop** a work package from running during implementation, simply adjust the plan end month of all sub-level tasks to a month in the past.



Manage Tasks

To **add** a task to a work package, click the  button. A task is created and added to the end of the tasks of this work package.

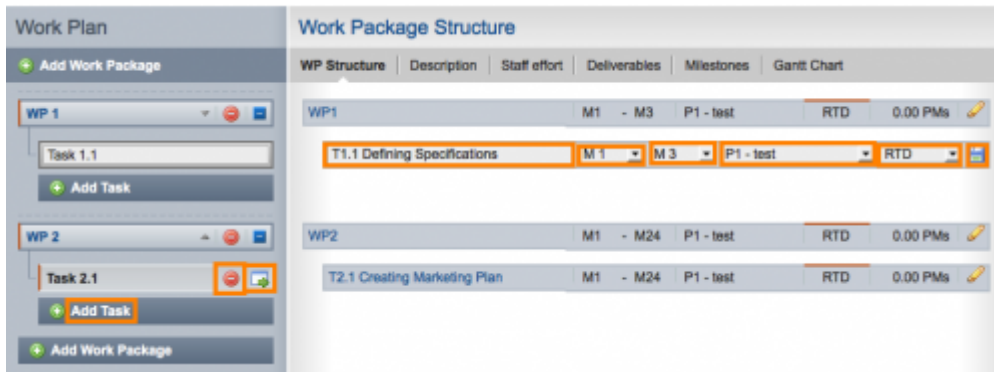
Click the  icon on the task to edit its properties:

1. The task *ID* is auto-numbered, however, you may change it to an individual ID per each task
2. Enter the task *title*
3. Define the plan start and end
4. Select the *Leading Contractor* (all users assigned to the leading contractor have edit access to this tasks)
5. Optionally, you may classify the task to another *activity type*
6. Then click on  to save

To **delete** a task, click the  icon on a task item. Note that all information associated with the task will be deleted irreversibly e.g. task properties and person-months. When deleting a task during implementation phase, also all reporting data on the task will be deleted.

To **move** or **change** the order of the task, click the  icon in the list on the left to move items either upwards or downwards within the work package. To **move** the task to another work package, click the  icon on the task. A dialog box will appear: Select the new work package and confirm.


To **stop** a task from running during implementation, simply adjust the plan end month of task to a month in the past.



Working with Sub Projects

EMDESK allows you to group your work packages into sub projects.

To **add** a Sub-Project, click on the dotted line between the work packages to group the work packages below the line into a Sub-Project.




To **delete** a Sub-Project, click on the  button. Unlike the connection between work packages and tasks, deleting a Sub-Project does not affect any other elements and simply ungroups the work packages.

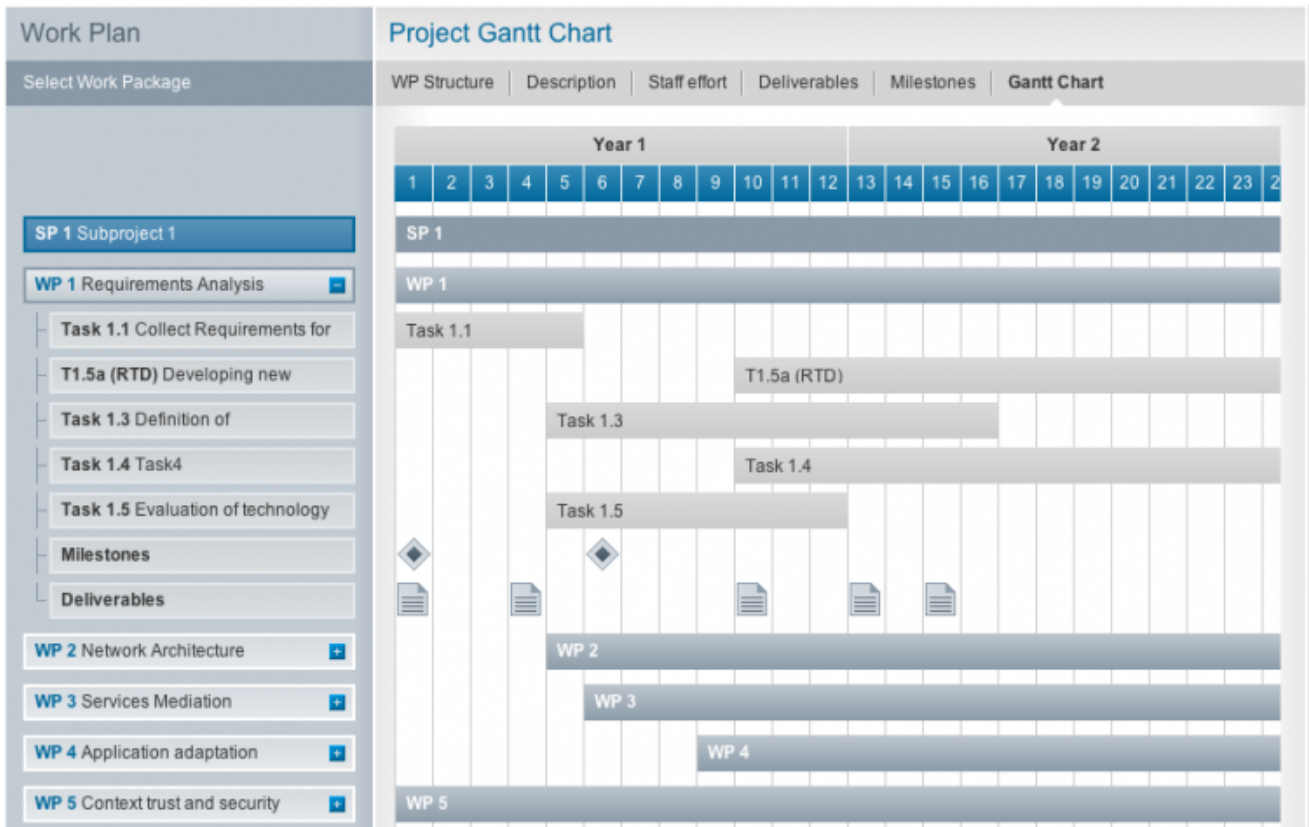
Note that the plan start and end of a sub-project is auto-set to the plan start month of the earliest beginning sub-level work package and the end month of the latest ending sub-level work package.

Gantt Chart

On **Proposal > Work Plan > Gantt Chart** during proposal writing or **DoW > Work Plan > Gantt Chart** once the project is in Implementation mode, you can view the project plan and timing in a Gantt chart.

The timeline provides you with a graphical overview of the *Work Packages, Tasks, Deliverables/Work Documents* and *Milestones* with their timings along the project duration.

Click on the  to expand a Work Package and to view sub-level Tasks, Deliverables/Work Documents and Milestones. For further information on a *Milestone or Deliverable*, please click on the  or  buttons within the chart.



This entry was posted on Thursday, January 1st, 2015 at 12:59 pm and is filed under [Setup and Manage the Work Plan](#)

You can follow any responses to this entry through the [Comments \(RSS\)](#) feed. Both comments and pings are currently closed.