

D11.2 – Set up of the project management collaborative tool

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RE	Restricted to a group specified by the consortium (incl. Commission Services)	
CO	Confidential, only for the members of the consortium (incl. Commission Services)	

Document Log

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1 Executive Summary

Deliverable 11.2 is a report on the intelWATT's project management collaborative tool, identified as the most efficient work management solution for collaboration adopted for use by the project consortium for reporting and track keeping of the technical progress, use of resources and expenditures incurred in its framework.

Therefore, the main content of this document focuses on the description of the project collaborative web platform in terms of design, structure and contents.

2 Introduction

This deliverable provides a formal reference to the online collaboration platform adopted for the management and interaction among the partners of the intelWATT project.

After a benchmark on management collaborative tool(s) and in accordance with the project Coordinator, WG acquired EMDESK licence as proved to be one of the best solutions in management of research projects.

This approach will help the coordinator and the project manager in monitoring the status of the activities and resource use. It will be continuously updated and it will become the foundation of the activities related to WP11 as well as the management of the project.

Main Objectives

The adoption of a project management collaborative tool aims at improving coordination planning and organizing project activities, monitoring work progress, formalising the executive reporting, managing and control resources and encourage the collaboration among the partners.

Effective collaboration and communication among the partners, results to an efficient workflow which is an important key of success for the management of the intelWATT project.

The aim of D11.2 is to present the EMDESK platform to the consortium and in particular to support intelWATT partners in its use and familiarisation.

3 EMDESK: project management collaborative tool

The intelWATT project management collaborative tool has been set-up on the ©EMDESK Platform.

The collaborative platform is accessible:

- from the Project website: <https://www.intelwatt.eu/>, (Figure 3.1) and
- directly from the following link: <https://app.emdesk.com/> (Figure 3.2)

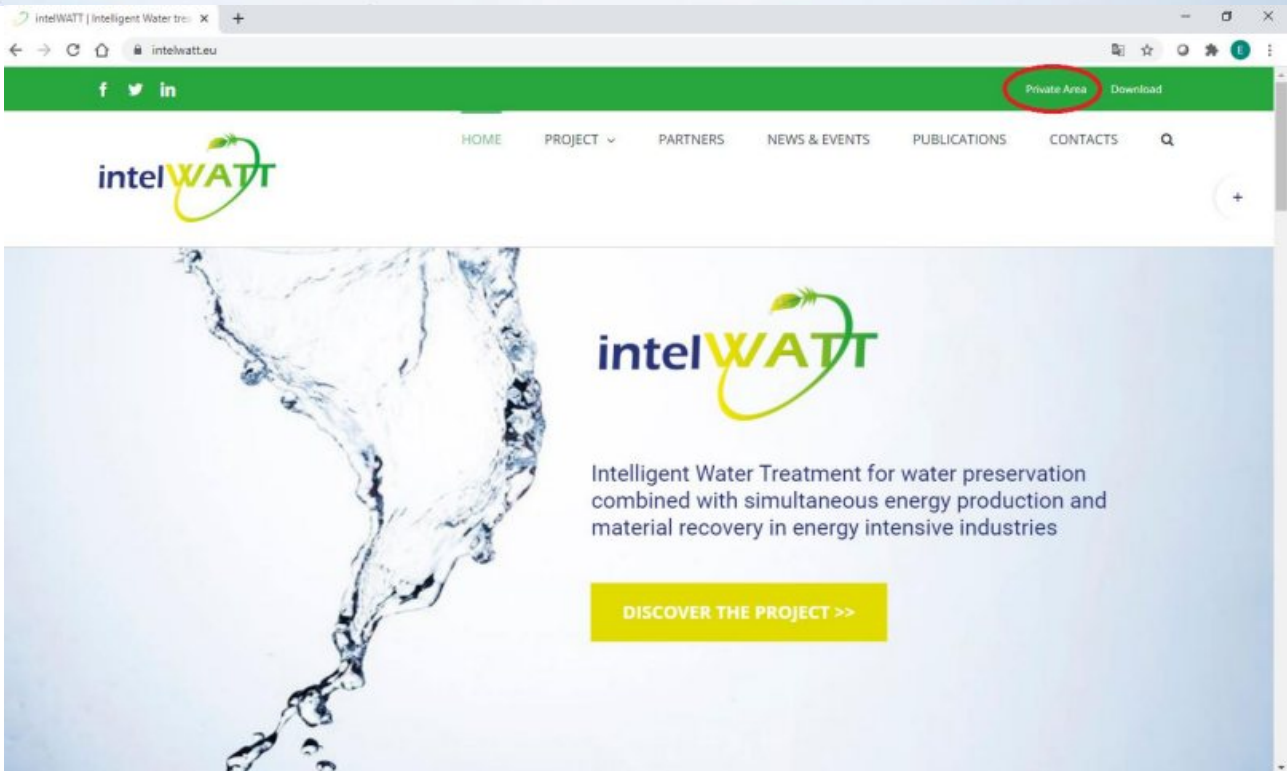


Figure 3.1 - Login to intelWATT collaborative tool from the project website

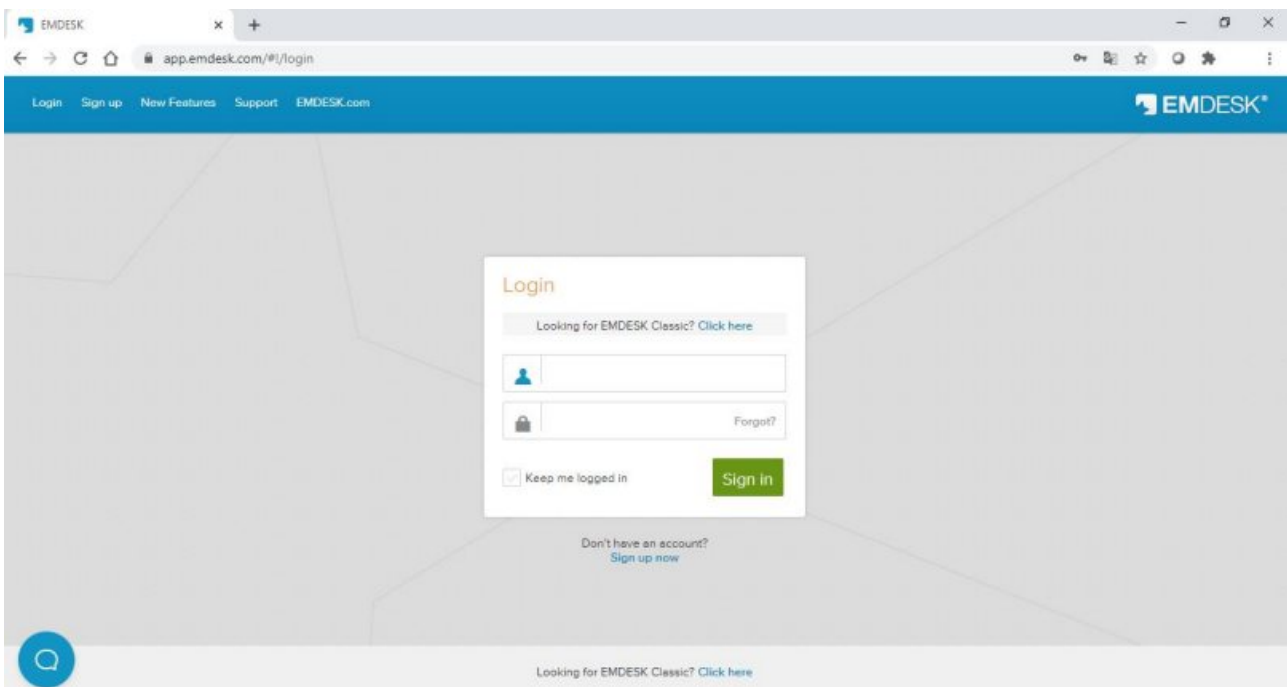


Figure 3.2 - Login to intelWATT collaborative tool from EMDESK platform

Access is controlled via a username and password, following the policy roles and access rights proposed by the platform.



3.1 Roles and Access Right

EMDESK platform identifies three different roles with defined set of access rights to be distributed among partners:

- Admin: Full access to the project and responsible for the technical administration of the project. For intelWATT project, Warrant Hub spa (WG) is Admin, as task leader of Task 11.3: The strategic management of the project
- Manager: Almost full access to the project, but no access to 'Subscription'. For intelWATT project, the Manager profile has been assigned to the Project Coordinator, Andreas SAPALIDIS.
- Regular User: Any user that has restricted read access to technical settings and general project information. The defined set of access rights must be defined and determine what the user can read, edit and manage. For intelWATT project, regular users with different level of access have been assigned to all partners. In particular, all partners identified two main regular user: one technical and one administrative.

3.2 Dashboard

After logging into EMDESK the Dashboard page appears.

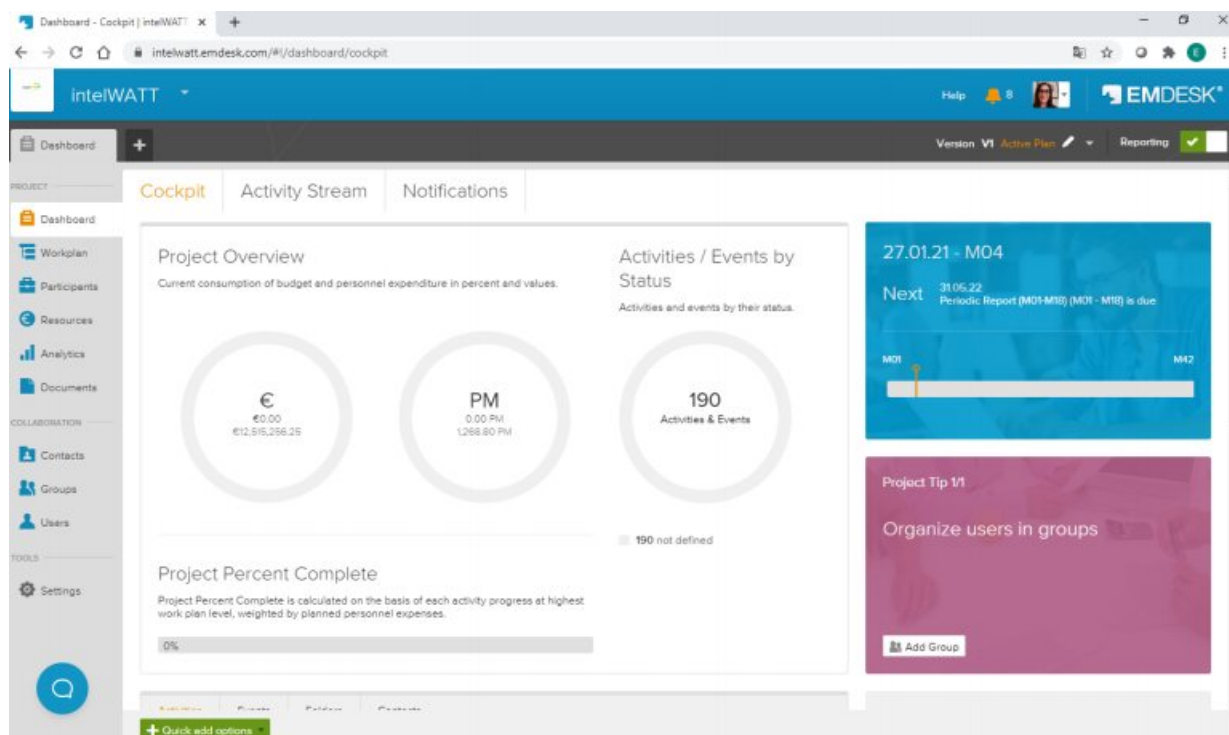


Figure 3.3 - intelWATT dashboard

In the left side there is the main menu with the main working areas in which the platform is organised.

In the right top of the page, at the white rectangle, it is possible to find user profile information. Each user has been invited to add his/her photo to customise the collaborative tool.

The dashboard is organised in three different sub-pages: Cockpit, activity stream and notification.

3.2.1 Cockpit

The first section is the Cockpit in which the coordinator and the partners have an overview of the project. In particular, it is possible to see project status (activities/events by status), the progress and completion (project percentage complete) the overall consumption, favourite work item, recent activities and updates.

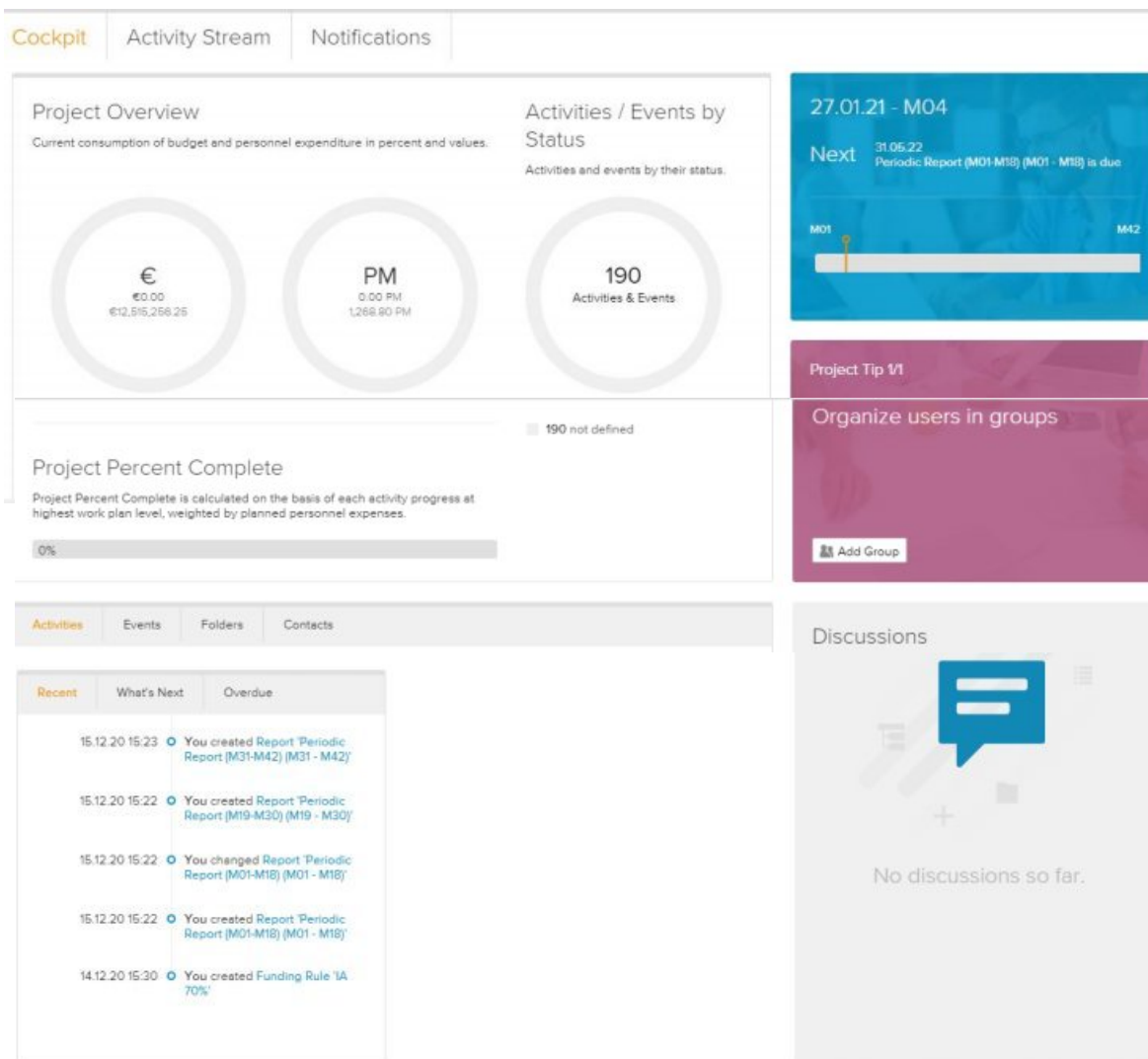


Figure 3.4 - intelWATT Cockpit Cockpit screenshot

First explain the dashboard the cockpit section will be the first to appear the cockpit section is where the user will be able to get an overview of the project here users can see the project status progress and completion the overall consumption your favourite work item is an activities and updates what's next or overdue about followed elements or certain users some of these views could be restricted depending on the user's permission in the project but of course if you are the project manager you will be able to see everything with total access activity stream is an audit trail that provides accurate.

3.2.2 Activity Stream

The activity stream is a simple function that gives transparency because helps partners giving them an overview of the updates and changes that have been made by users in the project.

The control of updates it is also possible in the sidebar.

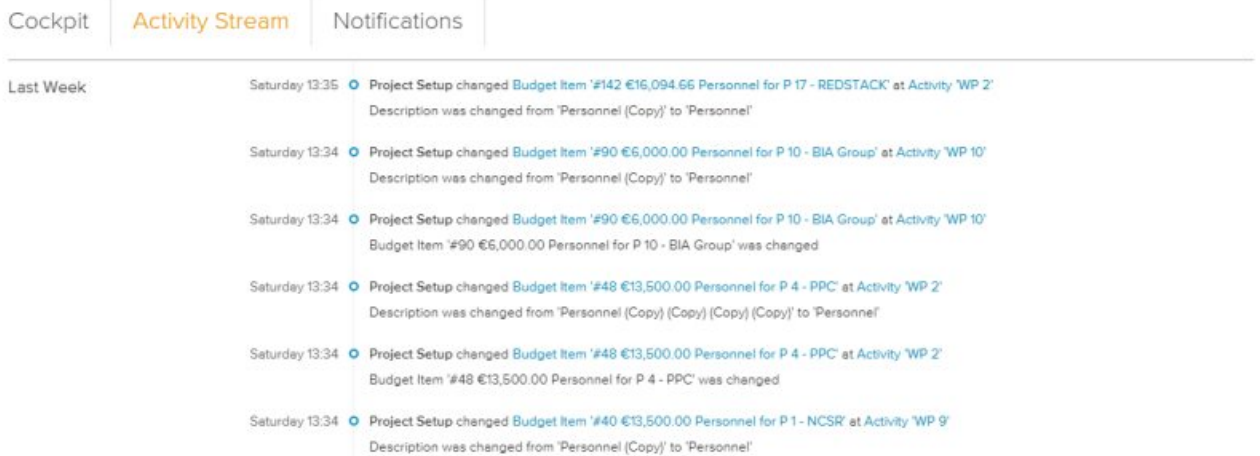


Figure 3.5 – Activity stream screenshot

3.2.3 Notifications

The notification section Centre shows each project members messages and alerts. The notification that each user receive are strictly connected to the activities in which they are involved. These notifications can be showed in the Bell icon at the top while working in the project but also by email report.



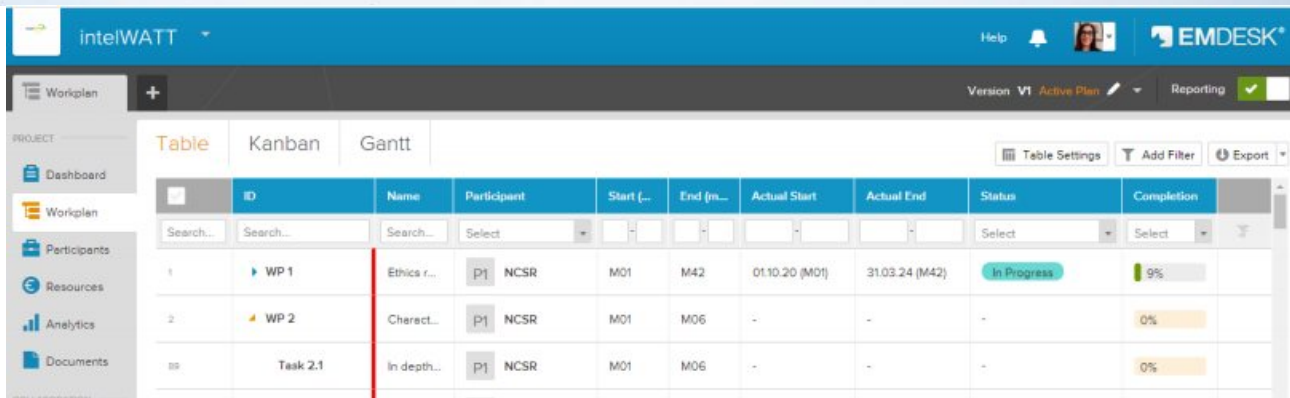
Figure 3.6 – Notification centre

3.2.4 Workplan

The Workplan is the project planning, monitoring and implementation tool with which you can create the project time plan (work breakdown structure), manage and carry out the scheduled activities and events (e.g. deliverables, milestones). These activities and events can be mapped into a hierarchical structure that is in work package, tasks and subtasks. The workplan offers different views that is: table, Kanban and Gantt so the users can have an overview of the planned work and progress, as they prefer.

3.2.4.1 Table

The table view is similar a spreadsheet list in which all activities events and the properties are listed in columns and rows. The column shows all the information about them (i.e. identifier name, timing, budget, costs, status) are customizable to user preference and the data can be filtered and each view can be saved in a tab or exported in Excel or CSV file



ID	Name	Participant	Start (...)	End (m...)	Actual Start	Actual End	Status	Completion
1	WP 1 Ethics r...	P1 NCSR	M01	M42	01.10.20 (M01)	31.03.24 (M42)	In Progress	9%
2	WP 2 Charact...	P1 NCSR	M01	M06	-	-	-	0%
3	Task 2.1 In depth...	P1 NCSR	M01	M06	-	-	-	0%

Figure 3.7 – Table view

3.2.4.2 Kanban

The Kanban view is a visual workflow management instrument for carrying out activities and achieving events. Activities and events are organised into cards organised in different columns based on their status that represent the different stages (in progress, not started, on track, in progress, requested inputs, paused)

To check details in cards hover over the bottom edge of the card and click the activities or events to open it in its sidebar (central working instrument).

3.2.4.3 Gantt

Gantt view shows the Work Breakdown Structure (WBS) as view project timeline highlighting milestones, deliverables and dependency between them. Each activities is designed with a bar indicating timing, progress and deviations. Also deliverables and milestones will be presented s package or diamonds icons.

- The left column is the Work Breakdown Structure with a collapsible view of all activities, events, and their details, e.g. ID, title.
- The right column shows the project timeline as a graphical display of the work plan.
- The two sides are separated by a sliding bar that can be dragged left or right to increase the view of either side.
- “Today” is marked by a vertical orange line in the timeline.
- Hover over any bar, event, or report icon to get a popup card with further details.
- Clicking on any bar or icon will open the sidebar for that item.
- Similar to the Table and Kaban views, you can click Add Activity or Add Event at the page bottom to add new activities or events.

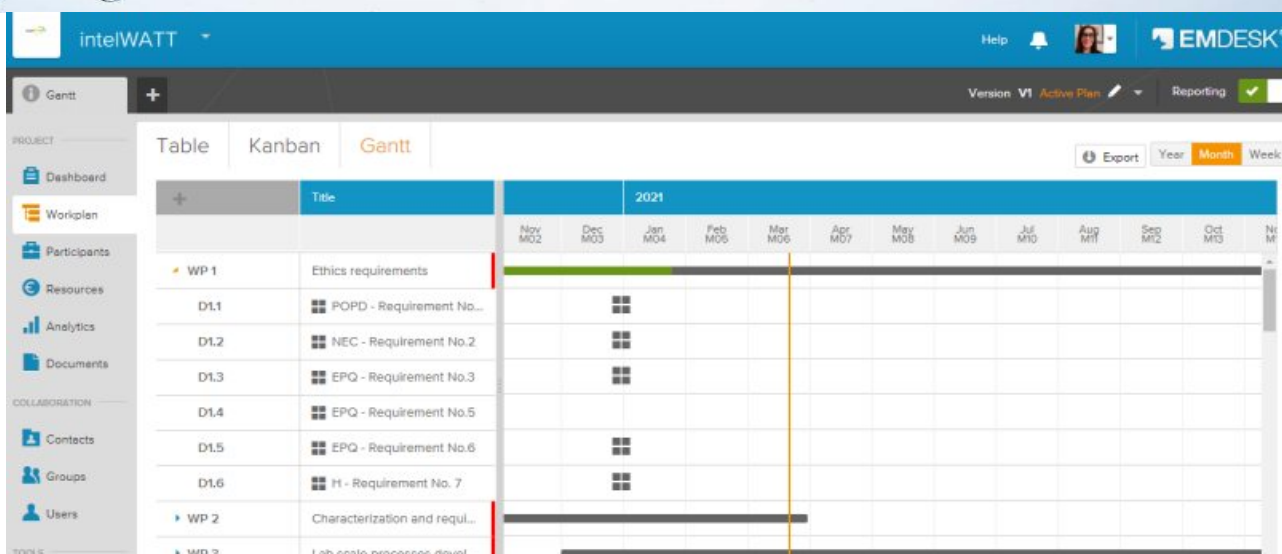


Figure 3.8 – Gantt view

Hovering over an activity or event presents further details on the status. It is possible to click in a bar or icon to get more information in the sidebar.

3.2.5 Reporting

EMDESK allows the creation and updates of reports. Reporting periods help to analyze data and to control and steer reporting process for defined time periods. Once you create reporting periods, they are displayed in other areas as options or filter. As soon as the report is created to update a reporting period the user must

- Click Settings and then click General.
- In 'Reports' section click on the report or click Edit icon in the end of the report row, this will open a sidebar.



Figure 3.9 – Reporting

3.2.6 Sidebar

The sidebar is the central working instrument. The sidebar has different tabs:

1. “Edit tab” (pencil icon) allows you to edit contents that is to update the activity or item details (title word description timing another plan properties). Once the information is final, project managers can clickable at each element then it is locked, and no further changes are possible this allows you to approve item by item.
It is possible to mark the item as one of your favourites clicking in the star icon so you may stay notified about the changes, updates and comments.
2. “updates tab” shows the progress on the activity or event, the consumption in effort and cost, the current and the history of the status updates reported in chronological order. To report a new order you click this tab and enter the new status and completion and click save update. It is possible to prove it market as “finalised” to lock the entry.

3. “activity stream tab” shows the history of all actions made by users concerning this element (i.e. changes, expenses).
4. “document tab” allows to share documents related to element with other project members involving this item. It is possible to upload a new document or an existing one from the repository.
5. “discussions tab” allows to start discussions and about the item with users. It is possible to include users or groups by mentioning them or to tag other projects items like work packages, tasks, expenses or documents. Users and mentioned team members now get notified by an in app notification and if enabled an email to their inbox with a link bringing them directly here the tagged items are linked directly to the entry .
6. “access tab” is only available to the administrators and managers here you can manage followers and other users access rights level.
7. “full screen mode” to look at the budget and expenses for this activity you may also access the overall budget and expenses in the resources section.

3.2.7 Participants

Participants presents the structure your consortium, and map organisational structure, teams to individuals with financial profiles.

Participants has a similar structure of the “work plan section”, infact, there are tabs at the top of the sidebar. The main tabs are:

- Update tab that allows to update participants details (i.e. name, description...)
- documents tab (as already presented in the work plan)
- discussion tab (as already presented in the work plan)
- financial profile tab to be used to manage personnel and indirect cost rates. It is possible define different personal cost rates for the participants or it could just be one average cost rate or specific rates for each collaborator. Based on these rates, each partner is able to budget or record personal efforts and costs

3.2.8 Resources

You can define different personal cost rates for the participants it could just be one average cost rate or specific rates for each collaborator based on these rates you will be able to budget or record personal efforts and costs click add participant the sidebar appears enter the details and click save participants the resources section is where it is possible to manage the budget of the whole project, and everyone reports and updates the efforts and expenses.

3.2.9 Budget

To create a budget, it is necessary to click the button “add budget” so the sidebar will be pulled up where you want enter the details in the new budget entry.

To create a personnel budget, first it is needed to select the activity for which the budget is planned for, the participant for which provides the resources.

The participants that have a “user profile” are able to plan budgets only for their participants in order to preserve privacy issues but the coordinator is able to look at all budgets.

3.2.9.1 Budget creation

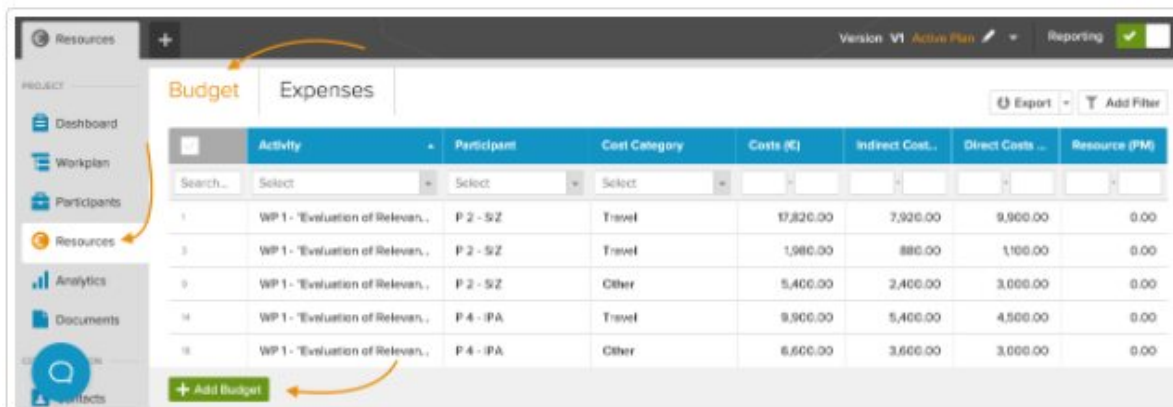
To create budget, you must have the access rights to manage resources and at least the access rights to read one more activities and participants in order to assign entries to them, and the current plan version must be in Edit mode

It is possible to create a personnel budget or items budget

3.2.9.2 Budget personnel creation

To create rate-based personnel budget, the steps are:

1. First go to the Resources section and click on the Budget tab. Select +Add Budget at the bottom left, as shown below



	Activity	Participant	Cost Category	Costs (€)	Indirect Cost.	Direct Costs	Resource (PM)
1	WP1 - 'Evaluation of Relevan.	P 2 - SZ	Travel	17,820.00	7,920.00	9,900.00	0.00
2	WP1 - 'Evaluation of Relevan.	P 2 - SZ	Travel	1,980.00	880.00	1,100.00	0.00
3	WP1 - 'Evaluation of Relevan.	P 2 - SZ	Other	5,400.00	2,400.00	3,000.00	0.00
4	WP1 - 'Evaluation of Relevan.	P 4 - IPA	Travel	9,900.00	5,400.00	4,500.00	0.00
5	WP1 - 'Evaluation of Relevan.	P 4 - IPA	Other	6,600.00	3,600.00	3,000.00	0.00

Figure 3.10 – Budget view

2. A sidebar will appear once you have selected +Add Budget. Select the Activity, select a Participant, then select a Cost Category of the type of personnel, and finally select the Cost Rate. Once you have selected a cost rate, another input field 'PM' appears right from the 'Cost' field at the top of the sidebar.

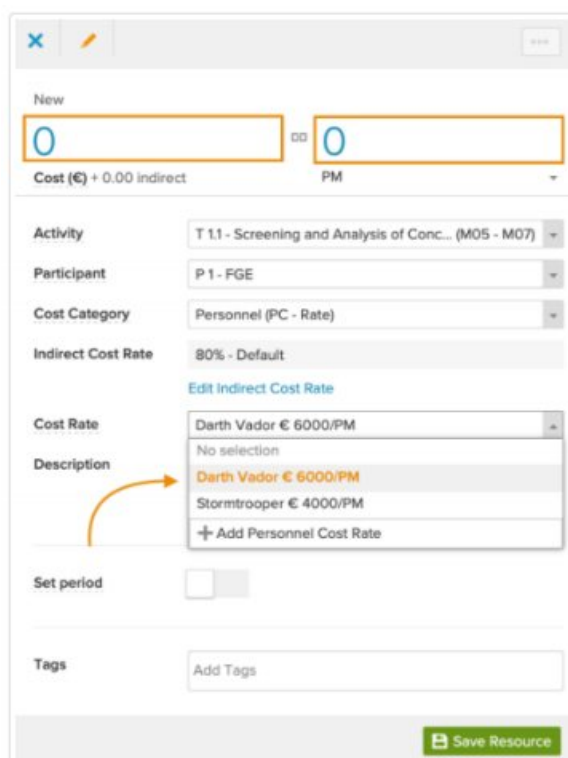


Figure 3.11 – Budget sidebar – costs/PM

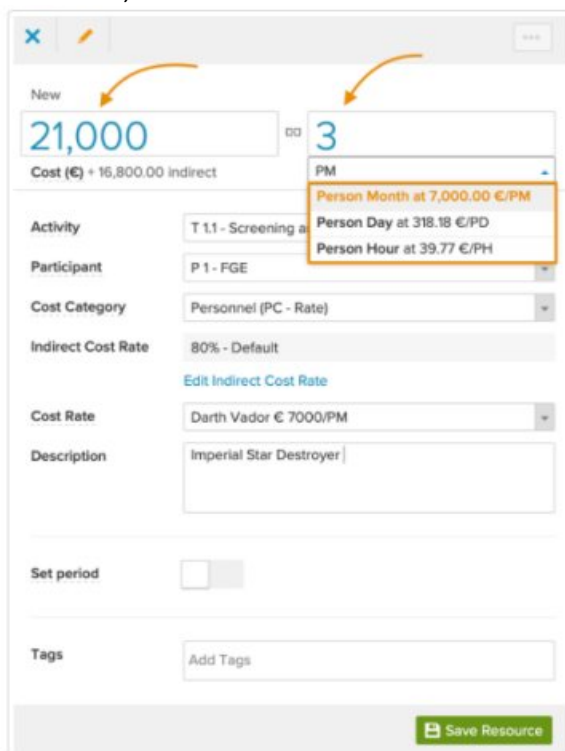
- Activity - Select the activity e.g. work package or task the budget is scheduled for (only one activity can be selected; budget on several activities must be split in several budget entries)
 - Participant - Select the participant the budget is planned for
 - Cost Category - Select a Personnel costs category (type 'Rate')
- Cost categories can be customised and configured under Settings > Customization.

There are 2 types of cost categories:

- a) fix amounts (Fix) and rate-based amounts (Rate) costs.
 - b) Rate-based are e.g. personnel costs and depend on the quantity and rate, whereas the fixed amounts costs are fix costs for good or services.
- Indirect Cost Rate - Once both, cost category and participant are selected, the indirect cost rate is auto-selected. Indirect Cost Rate depends on the selected cost category and participant (managed in the Financial Profile of the participant).
 - Cost Rate: Select the correct rate. Depending on whether a cost category of the type Rate is selected, the rates in the Participant's Financial Profile are made available for selection.

If this sign comes up in the Cost Rate section, then this means that the participant that you have chosen does not have a cost rate created. Click the 'create a cost rate', to create a cost rate for the participant. (see Create and Manage Personnel Cost Rates) The current plan version must be selected and active.

- Description - Enter a budget description
 - Set Period - Define a fixed time range within the activity duration in which the budget is planned; by default the budget is assumed to be spent evenly over the activity duration (optional)
 - Tags (optional): Classify and label the budget with tags
3. You will then be able to enter the budget's amount by either adjusting the Cost (€) or the Time Effort (Person Month). The unit can also be changed from Person-month to Person Day or Person Hour by clicking the arrow next to PM at the top. Remember to enter a Description, as this is mandatory. Once you have finished, click Save Resource.



The screenshot shows a 'New Resource' form with the following fields and values:

- Cost (€):** 21,000 (Total cost: 16,800.00 Indirect)
- Time Effort:** 3 (Unit: PM)
- Activity:** T 1.1 - Screening a
- Participant:** P 1 - FGE
- Cost Category:** Personnel (PC - Rate)
- Indirect Cost Rate:** 80% - Default
- Cost Rate:** Darth Vader € 7000/PM
- Description:** Imperial Star Destroyer
- Set period:**
- Tags:** Add Tags

A dropdown menu for the unit is open, showing the following options:

- Person Month at 7,000.00 €/PM
- Person Day at 318.18 €/PD
- Person Hour at 39.77 €/PH

Figure 3.12 – Budget sidebar – costs/PM filled

4. Person Month - The metric for the time (effort) that the key personnel of an organisation devotes to a specific project in a monthly rate
5. Person Day - The metric for the time (effort) that the key personnel of an organisation devotes to a specific project in a daily rate
6. Person Hour - The metric for the time (effort) that the key personnel of an organisation devotes to a specific project in a hourly rate

3.2.9.3 Budget items creation

EMDESK allows to plan personnel budget without effort (not rate-based personnel budget), creating a new cost category e.g. Personnel Costs with the typ Fix

To create a budget entry, you need to follow these steps:

1. First go to the Resources section and click on the Budget tab, then click the +Add Budget in order to fill in the sidebar that will appear (see Figure 3.10).
2. In the dedicated sidebar entry the following information
 - Cost (€): Enter the amount of planned costs
 - Activity: Select the activity for which you plan the budget
 - Participant: Select the participant where the costs will be incurred
 - Cost Category: Select a cost category of the typ Fix
 - Indirect Cost Rate: Once both, cost category and participant are selected, the indirect cost rate is auto-selected.
 - Description: Enter a short description regarding the budget
 - Set Period: Define a fixed time range within the activity duration in which the budget is planned; by default the budget is assumed to be spent evenly over the activity duration (optional)
 - Tags (optional): Classify and label the budget with tags
3. Check the data insert and save

Activity, participant and cost category must be defined for each budget item, otherwise the budget item is considered as unassigned. Unassigned entries are listed in a separated table under Work plan > Table and are not accounted in the budget.

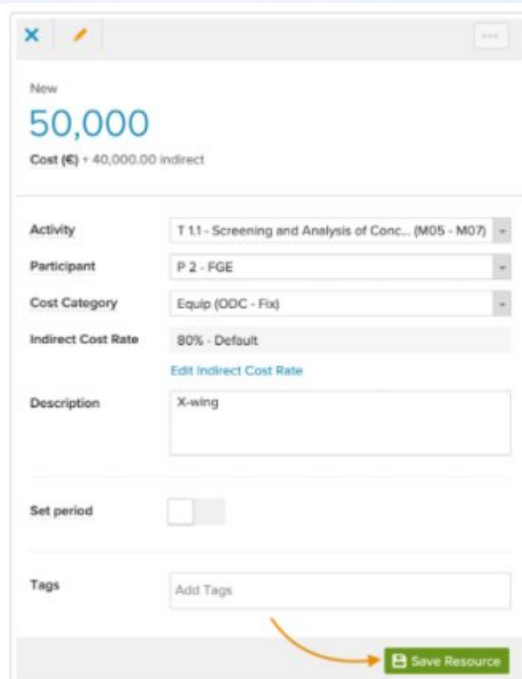


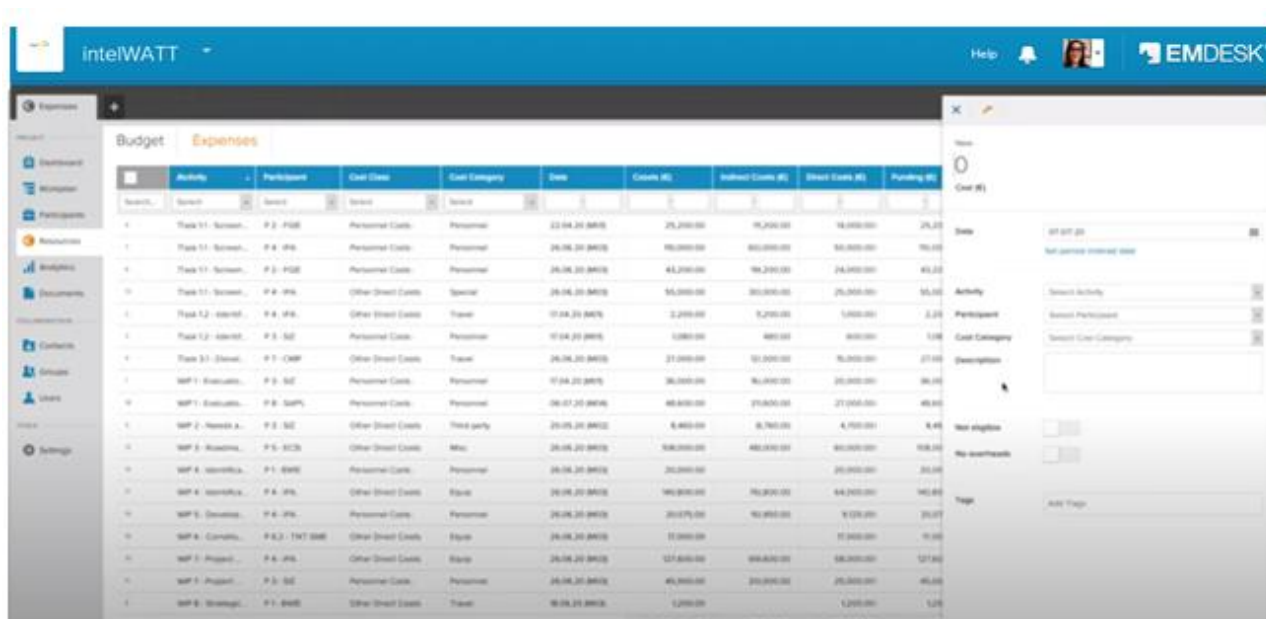
Figure 3.13– Budget item - sidebar

3.2.10 Expenses

Expenses are tied to a specific period or current state.

To record an expense the following steps must be followed:

- Click the expense button so sidebar comes up
- enter the expense details



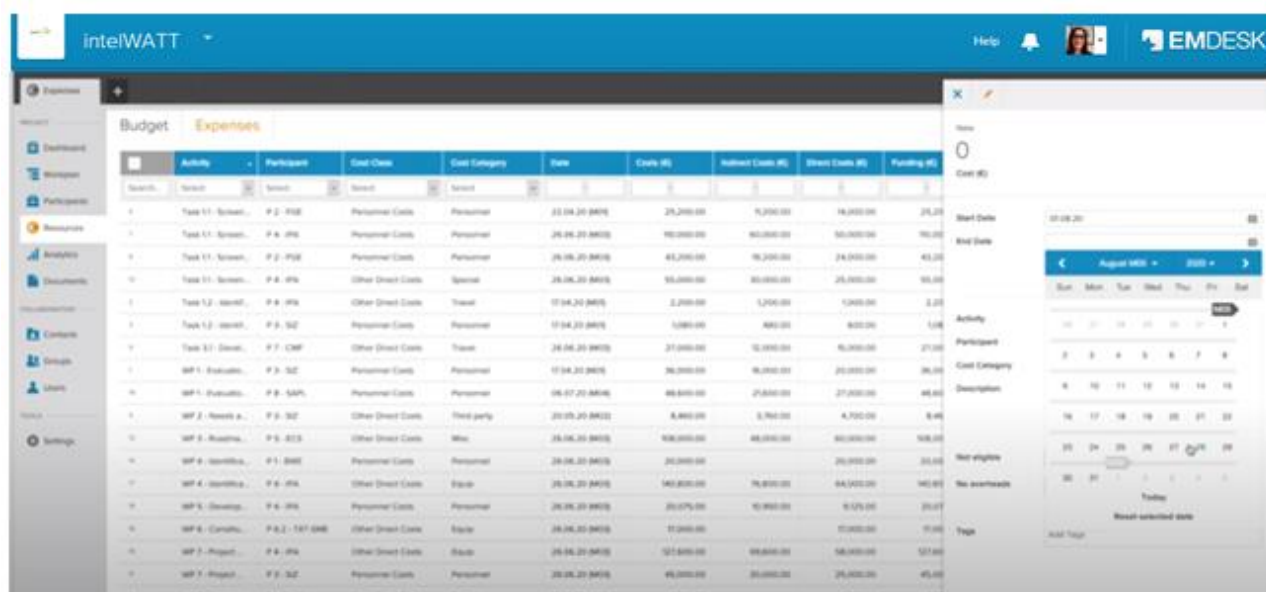
	Activity	Participant	Cost Class	Cost Category	Date	Costs (€)	Indirect Costs (€)	Direct Costs (€)	Funding (€)
1	Task 11 - Screen...	P 2 - FGE	Personnel Costs	Personnel	22.04.20.0000	25,200.00	16,200.00	16,200.00	25,20
1	Task 11 - Screen...	P 4 - FGE	Personnel Costs	Personnel	26.04.20.0000	16,000.00	10,400.00	16,000.00	16,00
1	Task 11 - Screen...	P 3 - FGE	Personnel Costs	Personnel	26.04.20.0000	41,200.00	26,730.00	24,000.00	41,20
1	Task 11 - Screen...	P 4 - FGE	Other Direct Costs	Special	26.04.20.0000	55,000.00	36,300.00	26,200.00	55,00
1	Task 12 - Identif...	P 4 - FGE	Other Direct Costs	Travel	01.04.20.0000	2,200.00	1,430.00	1,000.00	2,20
1	Task 12 - Identif...	P 3 - SD	Personnel Costs	Personnel	01.04.20.0000	1,000.00	660.00	600.00	1,00
1	Task 11 - Identif...	P 1 - ODP	Other Direct Costs	Travel	26.04.20.0000	21,000.00	13,650.00	16,000.00	21,00
1	WP 1 - Evaluation...	P 3 - SD	Personnel Costs	Personnel	01.04.20.0000	30,000.00	19,500.00	20,000.00	30,00
1	WP 1 - Evaluation...	P 4 - SD%	Personnel Costs	Personnel	26.07.20.0000	48,000.00	31,200.00	21,000.00	48,00
1	WP 2 - Needs a...	P 3 - SD	Other Direct Costs	Third party	26.04.20.0000	8,400.00	5,460.00	4,500.00	8,40
1	WP 4 - Results...	P 3 - SD%	Other Direct Costs	Misc	26.04.20.0000	58,000.00	37,800.00	44,000.00	58,00
1	WP 4 - Identifica...	P 1 - BWS	Personnel Costs	Personnel	26.04.20.0000	20,000.00	13,000.00	20,000.00	20,00
1	WP 4 - Identifica...	P 4 - FGE	Other Direct Costs	Equip	26.04.20.0000	160,000.00	104,000.00	84,000.00	160,00
1	WP 5 - Overview...	P 4 - FGE	Personnel Costs	Personnel	26.04.20.0000	20,075.00	13,049.00	9,124.00	20,07
1	WP 6 - Conclude...	P 3.2 - TWI S&B	Other Direct Costs	Equip	26.04.20.0000	11,000.00	7,150.00	7,000.00	11,00
1	WP 7 - Project...	P 4 - FGE	Other Direct Costs	Equip	26.04.20.0000	121,600.00	78,840.00	58,000.00	121,60
1	WP 7 - Project...	P 3 - SD	Personnel Costs	Personnel	26.04.20.0000	45,000.00	29,250.00	25,000.00	45,00
1	WP 8 - Strategy...	P 1 - BWS	Other Direct Costs	Travel	01.04.20.0000	1,000.00	650.00	1,000.00	1,00

Figure 3.14– Expense – enter cost

To record a personal effort/cost

- Set a reporting date (i.e an invoice date or the date of the payroll).
It is possible to report individual amounts as an aggregated collective amount that has arisen in a specific period (i.e personnel effort for this month)
- select activity for which the expense was incurred
- select the participant which provides the resources (users could only see their own organisation acronym but the coordinator will have a whole overview of all partners)
- select the cost category “personnel”
- the indirect cost rate is set again automatically
- pick the cost rate so effort field appears
- enter the effort (Cost based on the rate is calculated calculated amount which would again update the effort)
- enter short description
- save “resource expenses”

The expense table view offers the possibility to use the table header philtres also to export the view



Activity	Participant	Cost Class	Cost Category	Date	Costs (€)	Indirect Costs (€)	Direct Costs (€)	Funding (€)
Task 1.1 - Screen	P.2 - P12	Personnel Costs	Personnel	22.09.20.2415	25,200.00	6,200.00	19,000.00	25.20
Task 1.1 - Screen	P.4 - P16	Personnel Costs	Personnel	25.09.20.2415	90,000.00	60,000.00	30,000.00	90.00
Task 1.1 - Screen	P.2 - P12	Personnel Costs	Personnel	26.09.20.2415	41,200.00	16,200.00	25,000.00	41.20
Task 1.1 - Screen	P.4 - P16	Other Direct Costs	Special	26.09.20.2415	55,000.00	55,000.00	0.00	55.00
Task 1.2 - Meeti	P.4 - P16	Other Direct Costs	Travel	17.04.20.2415	2,200.00	1,200.00	1,000.00	2.20
Task 1.2 - Meeti	P.4 - S2	Personnel Costs	Personnel	17.04.20.2415	1,000.00	800.00	200.00	1.00
Task 1.2 - Meeti	P.7 - CNP	Other Direct Costs	Travel	24.04.20.2415	27,000.00	12,000.00	15,000.00	27.00
WP 1 - Evaluat	P.3 - S2	Personnel Costs	Personnel	17.04.20.2415	36,000.00	16,000.00	20,000.00	36.00
WP 1 - Evaluat	P.4 - S4P	Personnel Costs	Personnel	04.07.20.2416	48,800.00	27,800.00	21,000.00	48.80
WP 2 - Resou	P.3 - S2	Other Direct Costs	Third party	20.05.20.2415	8,800.00	5,700.00	3,100.00	8.80
WP 3 - Resou	P.5 - B13	Other Direct Costs	Misc	26.04.20.2415	58,000.00	48,000.00	10,000.00	58.00
WP 4 - Identif	P.1 - B40	Personnel Costs	Personnel	26.04.20.2415	20,000.00	0.00	20,000.00	20.00
WP 4 - Identif	P.4 - P16	Other Direct Costs	Travel	26.04.20.2415	140,800.00	76,800.00	64,000.00	140.80
WP 5 - Develop	P.4 - P16	Personnel Costs	Personnel	26.04.20.2415	20,070.00	0.00	20,070.00	20.07
WP 6 - Condit	P.3.2 - 147.048	Other Direct Costs	Travel	26.04.20.2415	0.00	0.00	0.00	0.00
WP 7 - Project	P.4 - P16	Other Direct Costs	Travel	26.04.20.2415	121,800.00	68,800.00	53,000.00	121.80
WP 7 - Project	P.3 - S2	Personnel Costs	Personnel	26.04.20.2415	46,000.00	30,000.00	16,000.00	46.00
WP 8 - Resour	P.1 - B40	Other Direct Costs	Travel	16.04.20.2415	1,000.00	0.00	1,000.00	1.00

Figure 3.15– Expense – enter PM per period



Figure 3.16– Expense – Personnel – costs/effort

3.2.11 Pinning Tabs

All of the views in EMDESK can be pinned to personalised tab, saving your preferred view with all selected columns and philtres to your account

3.2.12 Analytics

In analytics EMDESK offers the possibility to generate different prepared reports based on our current project data and status.

For example, the reports on the participants and cost category presents data from planning and reporting sections and summarises it with tables and charts showing budgets and expenses of cost and effort.

3.2.13 Documents

Document folder is the place where to store and share project documents and organise them in folders. It is possible to follow any changes, discussion.

Documents can be uploaded and sorted by dropping them into the folder. New version of the documents are tracked and can be restored.

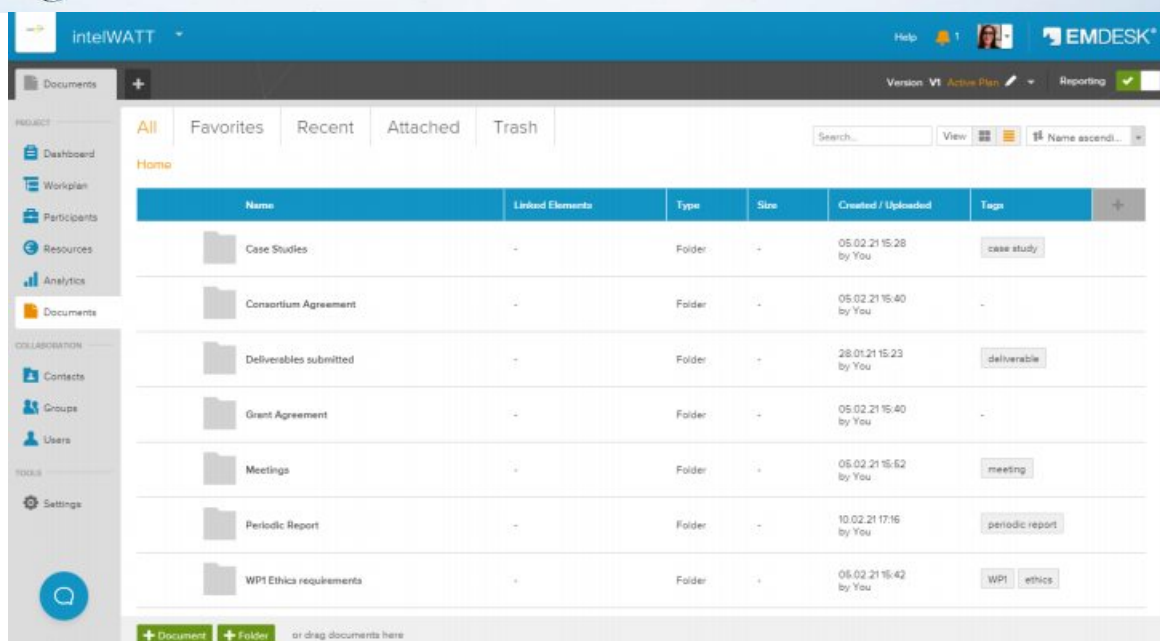


Figure 3.17– Documents

3.2.14 Contacts

In Contacts section all project members with their contact information are shown. Each user can personalise is information reported.

3.2.15 Users & Access Rights

In the user section administrators and managers manage the project users and their access rights in the project

The admin or the manager will invite users and set for them precise access rights in the project.

It is possible to create “groups” and manage their access at group level.

3.2.16 Groups

With 'Groups' you can pool selected users into groups and organize many users' responsibilities and involvements in a project. 'Groups' enables to manage many users at the same time for two main purposes:

- Facilitating communications: Create distribution lists to broadcast information to many users at once, for example in conversations, comments or through mail.
- Managing access rights: Define different access rights for many users in different groups.

'Groups' is useful because groups often remain throughout project run-time, but their members change as users come in or out of the project. By using 'Groups', you can add new or remove users easily. New users to the group will inherit all the responsibilities and involvements.

For a groups you can able the mailing list feature. A mailing list is a group of email addresses of users to whom you can send emails to from your mail client using the group email address.

3.2.17 Communication: discussion

EMDESK offers the possibility to have different channel to communicate with the partners involved in the project.

The 'Discussion' tab is located at the top of the element sidebar. It allows users to read and post comments on an element. All comments appear in chronological order with the newest at the bottom. In addition, all comments across the work space are shown in chronological order in the 'Discussion' widget on the dashboard.

The discussion option is available for the following element types:

- Activities
- Events
- Participants
- Budget

4 Conclusions

Providing all these functionalities, intelWATT collaborative space can properly support the consortium in the implementation of the project and in the monitoring of its progress.

5 References

All the information related to EMDESK are official information that can be verified.

[1] [EMDESK Demo – A Full Walkthrough / Product Tour](#)

[2] <https://help.emdesk.com/>