EMDESK

HOW TO SET YOUR PROJECT WORKSPACE ON EMDESK

THIS IS OUR HANDY GETTING STARTED GUIDE TO MAKE YOUR FIRST STEPS WITH EMDESK AS EASY AS POSSIBLE.

By now you have already created your account and your first workspace on EMDESK (if not, sign up here).
So, let's set up your project workspace by taking the following steps.

1 Build your project team / consortium

Start with adding participants into the workspace and building your project team. This is managed in the "Participants" section. By moving participants, you can map your team into any desired structure, from the organisational level down to affiliates, teams, and staff. With the help of a participants' financial profile, define their personnel and indirect cost rates.

2 Create the project work plan

Afterwards, create your work breakdown structure by adding activities and events into the "Workplan" section (or import it directly into EMDESK). If needed, adjust the work plan levels in the Customization settings. Organise tasks in work packages, assign them to project participants, estimate how long they'll take. As your project progresses, you can report the status of activities and events.

3 Design budget and report expenses

Now, you can create the budget for your project in the "Resources" section. Organise finances into cost categories, assign them to project participants and activities. If your project has already started, then you can also report expenses in the "Resources" section. Subsequently, various reports of the "Analytics" section will allow you to compare the project costs against the planned budget

After filling in all your information, the Gantt chart is automatically generated allowing you to see everything at a glance and enjoy a detailed overview of your project schedule.

What is a workspace?

It is a space on EMDESK where you can plan and manage your project, as well as collaborate with other team members. You can select a project workspace template from our collection or use a blank one and customise it.

Managing several large projects? Create them in separate project workspaces with our Team Plan.

What is considered as a user?

A user is an actual person that actively works in a project workspace on EMDESK. Users can work on behalf of selected or all participants and have access according to their defined access rights.

As soon as you've created your project workspace, you are able to invite other users to work together on the project set up. Alternatively, you can add users at a later time.

How can I communicate with others?

You can open discussions on any item in your project workspace, whether it's an activity, participant, or budget item. For that, make a comment in the "Conversation" tab in the sidebar and directly mention a user, tag an item, or link a document. In addition, you can arrange a video call with any user or group on EMDESK.

Where do I store our documents?

In the "Documents" section, you can store and organise all your project documents in folders with secure file sharing and versioning. It's a central searchable document hub that you can control access to by setting up permissions and access rights for other users.

How can I get support?

First, you can find numerous help articles and video tutorials in our extensive Help Centre. You can also contact us at any time via the chat icon located both in the EMDESK app and on the EMDESK website or send us an email at support@emdesk.com.