INTRO TO WORK PLANNING IN MIRADI 4.4

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Overview of Work Plan – Allocating a Team’s “Time & Treasure”

Work Plan View is designed to help a team efficiently implement their project's strategies and monitoring plan. It assumes that the most valuable resource that a project has is the time of its team members. It also assumes that a project team will want to start with high-level planning for the life of the project and then add more detailed planning in the short-term.

The main Work Plan Tree shows the project’s actions (strategies, activities, tasks) organized by Results Chain. Project teams can plan at a high level (life of project) or in increasing detail (by year, month or quarter). Projects can track status of implementation and flag actions requiring management intervention.

Timeframe specifies when actions will be implemented. Work assignments detail who on the project team is involved in the action and allocation of their effort. Expenses track other costs which when combined with team salaries, provide budgets.
Key Work Plan Controls

The following diagram explains key controls used to configure work plan view:

- **Settings Tab**: Specifies the overall project and work plan dates and fiscal year.
- **People Tab**: Use to add or edit team members working on project actions.
- **Diagrams**: These buttons control which diagrams are displayed in the tree.
- **Create Menu**: Use to add new rows to the work plan tree (strategies can only be added in diagram).
- **Customize Table Menu**: Control which rows and columns are displayed in the tree.
- **Menu Commands**: Use mouse right-click to access menu commands for a row.
High-Level Work Planning

The following step-by-step instructions assume that you have a Miradi project with at least one yellow strategy hexagon on a results chain diagram:

1. Select the Work Plan view and using the controls described on Page 2:
   (a) Set work plan dates
   (b) Make sure key people working on this strategy are listed on People tab, and
   (c) Display the diagram to focus on

2. Start with “high-level” planning for the overall strategy

3. Click on the timeframe widget to set the overall strategy timeframe – in this case by specific year

4. Click on the who widget to assign the strategy to specific people – this creates work assignment rows

5. You can then enter high-level work effort estimates (usually person-days) for the strategy

Quick Tip
Throughout the work plan, blue text means you can directly edit the information in the cell, whereas black text is a rolled up value that cannot be directly edited. To edit these rolled up values, you need to find the lower level entry either vertically or horizontally.
Detailed Work Planning

If desired, you can “expand” the tree vertically to plan activities or even specific tasks:

1. Use these +/- controls to expand or collapse rows

2. These rows show timeframe and work effort at the activity level

3. These rows show timeframe and work effort at the task level

4. Vertically, Miradi will NOT automatically delete higher level estimates (here 50 & 75 days); user needs to manually delete these estimates to avoid double counting!!

You can also “expand” the tree horizontally to plan by year, quarter or even month:

1. Use these +/- controls to expand or collapse columns

2. These columns show planning by quarter – which is often useful for the coming year

3. These columns show planning by year – which is often useful for future years

4. Horizontally, Miradi WILL automatically replace higher level estimates with lower level roll-ups
Adding Financial Information

In addition to work effort, Miradi can also be used to develop forward looking financial budgets:

1. In the Customize Table Menu, click on Projected Expenses (both row and column) and Budget Totals

2. Use the Create Button or the Mouse Right-click Menu to Create Projected Expense for a selected action row

3. Use the Financial Settings Tab to specify the currency for the project

4. You can then add non-salary expenses for any action row / time period

5. If you specify the Work Unit Rate of each team member (on the lower panel of the People tab) Miradi will calculate row Budget Totals (Hint: If salaries are confidential, use the “average rate” for the position)

6. If you specify Accounting Codes or Funding Sources for your project using the tabs, you can then tag these on the lower panel to a given work assignment or expense row
Work Planning for Monitoring

Project teams need to assign “time and treasure” not just to actions, but also monitoring work. Starting with Miradi Version 4.4, you can now create purple monitoring activities associated with indicators that can be assigned to team members and have expenses:

1. For a given Results Chain in Diagram View, double-click on an indicator to see its details.

2. Use the <Choose and Create Activities Button> to get the dialogue box on the right.

3. Here you can where you can either link an existing monitoring activity or create a new monitoring activity associated with the selected indicator.

4. If desired, you can directly set the timeframe and/or assign people to the monitoring activity using these side tabs.

5. You can also create and edit monitoring activities on a strategy’s <Activities Tab>; click this box to turn a yellow activity into a purple monitoring activity.

6. Use these buttons to show or hide monitoring activities on the diagram; it is not always necessary to show them.
Analyzing & Using Work Plan Data

Once you have entered assignments and expenses into Work Plan, Miradi offers powerful tools to analyze and make use of this information to adaptively manage your project:

1. Progress reports provide updates on the status of actions and flag those needing management attention.
2. Progress reports can be created at intervals for each strategy, activity or task.

Quick Tip

Additional guidance is available at Miradi.org for converting monitoring work plan information entered in Miradi 4.3 or earlier into Miradi 4.4’s format.
3. The *People Tab* allows a manager to see how much time has been allocated to each team member in each time period and balance if needed – in this case Elena has over 282 work days in 2016!!

Similar analyses can be done for accounting codes and funding sources.

4. You can also use the `<Filter by People>` control in the main work plan tree to show only specific people – but don’t forget to turn this filter off when done!!

5. All tables in Work Plan, such as the following list of expenditures by accounting code, can be exported using the `<File/Export File As…>` menu command to MS Excel or in format that can be used by other financial systems.

Have questions not answered here?
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