

Introducing  
ConceptDraw PROJECT

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# What is ConceptDraw PROJECT?

ConceptDraw PROJECT is a full-featured project management solution that keeps you on top of your data through project dashboards. Project dashboards display all key performance indicators on one screen so you can take immediate action whenever necessary.

ConceptDraw PROJECT contains an extensive tool set to help project managers. The rich data visualization capability that is provided by ConceptDraw PROducts builds project dashboards, one-click reports, multi-project views, Gantt charts, and resource views. The rich visual data presentation supports important project management tasks such as critical planning and change management.

## Visualize Project Data

With ConceptDraw PROJECT, you always have current status available through project dashboards, one click reports, and multi-project views and also Gantt charts and resource views. Your teams and stakeholders are always current and you have the information you need to take action quickly.

The project dashboard:

- **Consolidates project data onto one screen**  
See all of your key performance indicators on one screen.
- **Updates data dynamically**  
Monitor status based on the most current project data.
- **Represents data visually**  
Understand your current status from the dashboard, recognize changes to project status as it occurs, and see when critical performance limits are exceeded.
- **Helps you take the right action**  
Instantly recognize what action you need to take now.

ConceptDraw PROJECT enables you to generate reports with one click. you do not need to configure settings, walk through dialogs, or click through wizards. Sharing reports is simple because you can output them to HTML, Microsoft Excel, Microsoft Project, or RTF. By integrating with ConceptDraw OFFICE and ConceptDraw Solution Park add-ons, you can extend your reporting capability with numerous resource, schedule, and task reports.

Because your project data is accessible through traditional formats such as Gantt charts and resource views, you can engage in in-depth planning and analysis. Expand your

diagramming and chart functionality through ConceptDraw Solution Park add-ons and integration with ConceptDraw OFFICE.

## **Plan Projects and Manage Change**

ConceptDraw PROJECT provides all the tools necessary to plan and manage projects. you can create tasks, assign resources, and load resource costs. By creating a subproject, you can analyze the impact of a change request before approving the change to the project baseline.

## **Track Project Documentation and Knowledge**

ConceptDraw PROJECT allows you to track the completeness of your project documentation by tracing tasks back to requirements documents or identifying tasks that have no documentation. Team members know where to get the highest priority and current specifications so they are able to learn more about their current tasks. Project managers are assured of project quality because their teams are using the proper documents. Portfolio managers and executives know if documents are missing so they can be proactive in resolving.

The Project Knowledge Dashboard in ConceptDraw PROJECT enables you to manage status and the quality of project input.

## **ConceptDraw PROJECT Supported by ConceptDraw OFFICE**

When you use ConceptDraw PROJECT with ConceptDraw OFFICE, you benefit from more dashboards that display key performance indicators for your project methodology. With ConceptDraw MINDMAP you can: leverage brainstorming, presentation, and reporting functionality. Project used in conjunction with ConceptDraw PRO one is able to generate charts, network diagrams, work breakdown structures, and other diagrams.

## **ConceptDraw PROJECT Supported by ConceptDraw Solution Park**

CS Odessa ConceptDraw Solution Park offers a variety of project management add-ons that you can download to ConceptDraw PROJECT and ConceptDraw OFFICE.

Tool Box Solutions offer an array of enhanced functionality to support project managers, such as planning, team management, and project documentation management. These add-ons will support any project management methodology.

Methodology solutions support specific methodologies, such as Agile project management. A separate methodology solution for neutral project management is also available.

# What Are the Benefits of ConceptDraw PROJECT?

An extensive number of reports in ConceptDraw PROJECT give you the tools to evaluate your planning. ConceptDraw PROJECT reports permit you to adjust to your project's environment. ConceptDraw MINDMAP provides self-explanatory visual clarity at project meetings. Visual communication improves meeting content and ensures more effective planning and control because of dashboards, mind map reports, and knowledge metrics.

## Reporting for Planning

Planning becomes more effective because of reports. Resource assignment and usage, task scheduling, milestones and project events, cost of resources, and budget are some of the reports that assist the planning process. The planning of each project has its own unique challenges. ConceptDraw PROJECT includes many reports to give you the flexibility you require in the planning process.

## Reporting for Changes

Generating effective reports is critical to managing change. One set lets you understand the change, the other lets you adapt to the situation. Because milestones are always impacted by changes they must be constantly reviewed. Excellent support for this reviewing process is available in the following reports: Milestone, Phase tracking, Critical task tracking, Multi-project resource usage, and many completion metrics reports.

In ConceptDraw PROJECT many reports reflect the high-level impact on your project and let you adapt to the situation.

## Reporting for Meetings

Meetings that effectively communicate lead to project success and its strong visual reports are important to communicate quickly to participants. ConceptDraw PROJECT provides visual clarity of reports by using mind maps viewed in ConceptDraw MINDMAP. Clarity is provided by reviewing the project dashboards before any meeting. Dashboards display key performance indicators of single or multiple projects. Meeting communication is effective because of the visual aids — mind maps and dashboards.

# Strengths of ConceptDraw PROJECT

ConceptDraw PROJECT delivers the full set of features you need to successfully plan and execute a project, including task and resource management, reporting, and change control.

The Project Knowledge Dashboard gives an instant accounting of how your project tasks trace back to requirements documents. As a result, you know the current status of work completed for the project budget and you can analyze the quality of the project input.

The Project Knowledge Dashboard communicates the percentage of tasks that trace back to requirements documents, the number of tasks that trace back to each requirements document, and the name and location of each requirements document.

The integration of ConceptDraw PROJECT with ConceptDraw OFFICE helps improve project management by leveraging the power of mind mapping and data visualization.

ConceptDraw Solution Park also provides you with numerous project management-related add-ons.

## Why does the Project Knowledge Dashboard Matter?

The simple metrics in the Project Knowledge Dashboard impacts every project stakeholder, because it relates to gaps that can occur in a project in knowledge acumination. It demonstrates importance of documentation, specification readiness, completeness of documentation, and potential success metrics.

## Individual Contributors

The Project Knowledge Dashboard makes it possible for individual contributors to know the specifications for assigned tasks, locate requirements documents through hyperlinks, work from the latest document version, and identify which documents critically impact their current work. The Project Knowledge Dashboard makes it easy to recognize changes and remain productive.

## Project Managers

The Project Knowledge Dashboard makes it possible for project managers to access specifications while creating status reports, assigning resources, resolving technical issues, and managing variances from the project plan. As a result, project risk is low because everyone is working from the same specifications. During planning, project managers can also quickly determine if any requirements documents are missing.

## Program and Senior Managers

The Project Knowledge Dashboard makes it possible for program and senior managers to instantly determine whether a project has sufficient documentation to succeed, identify which portions of projects require more documentation, and recognize project risks because of incomplete documentation. The Project Knowledge Dashboard makes it possible for these stakeholders to manage portfolios quickly and precisely.

## All Stakeholders

Combined with the project status dashboards, the Project Knowledge Dashboard provides all stakeholders with a quick overview of how the project is progressing.

## What Are the Strengths of the Integration of ConceptDraw PROJECT with ConceptDraw OFFICE?

ConceptDraw OFFICE integrates ConceptDraw PROJECT with ConceptDraw MINDMAP and ConceptDraw PRO into a compelling project management suite. By leveraging the mind mapping functionality of ConceptDraw MINDMAP and the diagramming tools of ConceptDraw PRO, you can now visually communicate and manage project data and project documents.

The ConceptDraw MINDMAP integration with ConceptDraw PROJECT enables you to:

- **Leverage the input, output, and presentation functionality of ConceptDraw MINDMAP**
- **Use brainstorming to easily define requirements and generate action plans**
- **Display and manage task data in both ConceptDraw MINDMAP and ConceptDraw PROJECT**
- **Generate visual reports in formats you can easily share with teams**
- **Create appropriate presentations for specific stakeholders**
- **Lead effective team meetings**
- **The ConceptDraw PRO integration with ConceptDraw PROJECT enables you to:**
  - **Display project metrics in visual form**
  - **Create Work Breakdown Structures that integrate with ConceptDraw PROJECT**
  - **Produce network diagrams**

# ConceptDraw Solution Park Support for Project Management

ConceptDraw Solution Park improves your project management activity with Tool Box Solutions and Methodology Solutions. Tool Box Solutions enhance your daily project management activities regardless of your project methodology. Methodology Solutions help with your specific project management practices.

The following Tool Box Solutions are available:

- **PM Response**  
Plan how to respond to issues and events that impact the project
- **PM Teams**  
Prepare org charts, roles and responsibility matrices, team directories, and calendars
- **PM Docs**  
Organize and create project documentation
- **PM Presentations**  
Deliver presentations that use all project data, including dashboards, Gantt charts, resource views, reports, and diagrams
- **PM Meetings**  
Prepare project meetings quickly, keep meetings on track, organize team brainstorming, record brainstorming results, and provide meeting results output
- **PM Planning**  
Extend your planning and reporting capability, prepare a wide range of project reports, and improve project communications
- **PM Dashboards**  
Extend the number of dashboards
- **Personal Time Management**  
Improve personal performance

Methodology Solutions include:

- **PM Agile**  
Supports Agile methods including user stories, iteration planning, burndown charts, backlogs, and velocity
- **PM Made Easy**  
Supports neutral methodology project management

ConceptDraw PROJECT provides the tools you need to deliver superior project results because of its core project management functionality, dashboards, integration with ConceptDraw OFFICE, and the project management ConceptDraw Solution Park add-ons.

# ConceptDraw PROJECT at a Glance

# What is a Dashboard?

A dashboard is a user interface designed to make it easy to monitor performance and business processes. By consolidating data and representing it graphically, managers, executives, team members, and other stakeholders can accurately gauge organizational performance and take instant, informed action.

## Primary Dashboard Characteristics

In ConceptDraw Office release 2.0, the following dashboard characteristics are supported:

### **A dashboard consolidates all information onto one screen**

A dashboard must consolidate all information onto one screen without scrolling or clicking to view the content. If the dashboard does not meet this requirement, it is not a dashboard. However, a product can support more than one dashboard. Because of this fact grouping information together onto a single dashboard might be useful. For printing purposes, all data represented on a dashboard must print on one page.

### **A dashboard represents data visually**

Visualizing data and concepts either digitally or graphically are core values of ConceptDraw Office 2.0 and each of the products in this application suite.

Dashboard data must be:

- **Visually appealing**  
Data to must be appealing whether represented digitally or graphically.
- **Easily understood**  
Dashboards must represent easy to understand and contain rich data. When users become accustomed to a graphic, they must be able to instantly recognize change and interpret the data.
- **Ergonomic**  
Because users will see dashboards frequently and for long time periods, the design must aesthetically pleasing to the user.

### **Dashboards must be dynamically updated**

Unlike a traditional report, this is a specific moment in time summary because dashboards update dynamically to provide the most current available data.

## **Dashboards monitor performance and assist in taking action**

Because dashboards, easily communicate recognizable change based on dynamically updated data, dashboard users always know the current performance status.

Users must be able to recognize when limits are exceeded. For example, if the number of bugs on a software bug list exceeds a specific number, users instantly recognize this status. With this data, users know exactly what decisions they need to make and what actions to take.

## **Secondary Dashboard Characteristics**

Secondary dashboard characteristics are not currently supported in ConceptDraw Office 2.0. However, this support is planned for a future release.

### Dashboard Interactivity

Dashboard interactivity includes the ability to launch tools, generate reports, or drill down into data. All of these processes must launch with one click. As a result of this functionality, dashboards also support hyperlinks.

## **Collaborative Dashboards**

Collaborative dashboards consolidate and visualize data for teams and corporations. They are not configurable by an individual; instead they are defined by management and consultants. IT staff implement the dashboards. Collaborative dashboards must include the ability to define limits, such as over or under allocation. Collaborative dashboards can be viewed on a public display or as part of an individual's dashboards when using ConceptDraw Office.

## **Personal Dashboards**

Personal dashboards allow users to monitor data related to their work. A user can view a personal, collaborative, or predefined dashboard when using ConceptDraw Office. Users must be able to customize their dashboards, including defining personal limits.

## Alarms

Dashboards must generate alarms when thresholds are exceeded. Examples include:

- **Late tasks**
- **Broken processes**
- **Something not updated**

## Customizable Content Display

Users must be able to customize content display, including what data goes onto a dashboard and where. Users must be able to configure personal dashboards. Note: Only users with proper privileges can configure collaborative dashboards.

## Display Options

Because of the difference between personal and collaborative dashboards, many display options must be available. The display for each option must be appropriate and must meet the definition of a dashboard.

- **Mobile**  
Portrait or horizontal display, iPods, iPads, mobile phones
- **External Displays**  
Display a dashboard remotely, such as in a conference room or corporate lobby
- **Rotating Dashboards**  
Display multiple dashboards on one display by rotating different dashboards
- **Multiple Dashboards**  
Display multiple dashboards simultaneously, such as in a control room, to enable instant availability of all dashboard data
- **Touch Screen Support**  
Enable the ability to interact with the dashboard through a touch screen
- **Multiple Locations**  
Display a dashboard to multiple displays simultaneously
- **Display/Edit Simultaneously**  
Support the ability to edit content on one screen while displaying a dashboard on another

## Tertiary Dashboard Characteristics

Tools to Customize

- **Create Alarms**
- **Create Custom Dashboards**
- **Define Dashboard Content**

# Using Micro Reports

Micro reports are tactical communication tools that send status for specific project elements. Keep messages succinct for quick communication capability. Micro reports are quick to generate and quick to understand. They are great to foster understanding. Micro reports are great tools for individuals in a project because these micro reports can be understood in the context of the overall project.

## Facilitates Communication

### **One-To-One**

Micro reports are great discussion tools for one-on-one communication. They clearly identify status changes that must be addressed between project personnel. Micro reports are evidence for working through required changes. These reports can be generated by task, budget, or resource.

## Meeting Key Points

### **Identifies Latest Changes of Status**

Micro reports generated before key project meetings reflect status of current events, keeping everyone focused on the project timeline. Micro reports isolate metrics from the overall picture so the meeting can focus on problem solving instead of an overall project review. Meetings become more effective because of the specific communication abilities in ConceptDraw PROJECT.

## Project Manager to Team Summary

### **Tactical Approach to Current Tasks to Keep on Track**

This tactical approach to messaging your team on a daily basis can hugely impact project success and team efficiency.

# Manage Plans, Reports, and Changes

ConceptDraw PROJECT makes planning projects and managing change easy because of the project focused tools that manage every aspect you, the Project Manager encounters. ConceptDraw PROJECT builds on established project management methodologies while simplifying the process of managing project data, making effective responses, and working with project teams.

ConceptDraw PROJECT helps you manage all of your project variables from a single view.. you can quickly generate a broad range of One Click Reports for project variables such as resource usage, task planning by resource, and budgets. Display up-to-data status on dashboards to keep you current as the variables change.

ConceptDraw PROJECT is the complete solution to manage single or multiple projects and their associated resources with a very low cost of ownership.

## Planning and Initiating Projects with ConceptDraw PROJECT

To build a project schedule, use the Gantt chart portion of the product to assign your resources and develop your budget to fit your situation. In addition to the traditional project planning capability provided by ConceptDraw PROJECT, numerous innovative tools allow you to accelerate and improve the quality of your planning in many ways, including a full pallet of reports, the Project Dashboard, the Project Knowledge Dashboard and integrating it with ConceptDraw Office using InGyre2 technology, and ConceptDraw Solution Park add-ons.

During planning, you can quickly generate many One Click Reports to analyze your plans. For example, you can generate reports related to tasks that are on the critical path, resource allocation, and budget costs. These reports help you focus on particular parts of your plan and adjust them as necessary. you can also share these reports with stakeholders to engage in targeted discussions of specific issues, which speeds up planning and helps you make better informed decisions.

You can measure plan completeness with the Project Knowledge Dashboard, which identifies tasks that do not trace back to requirements documents. you know which tasks are undocumented, how many undocumented tasks you have, and what percentage of the project they comprise. Using this information, you can back fill information, improving plan completeness and project success.

The integration of ConceptDraw PROJECT, as part of ConceptDraw Office, allows you to seamlessly gather input from your project teams and input it into your project plan. ConceptDraw MINDMAP, an important component of ConceptDraw Office, gives

you the power to utilize brainstorming techniques with your team to define requirements. Planning proceeds faster and with better input than traditional methods.

ConceptDraw PRO, the visual communication component of ConceptDraw Office, supports rapid drawing of Work Breakdown Structures and other project diagrams. The smart draw capabilities of ConceptDraw PRO rapidly render meaningful visual project management content with a single click, resulting in better planning and data visualization so your team's performance will improve.

The ConceptDraw Solution Park includes a Project Tool Box Solution specifically for project planning in addition to other project management solutions. These solutions extend your planning and reporting capability, prepare a variety of project reports, and improve project communications. ConceptDraw Solution Park methodology solutions support specific project management approaches, such as Agile development.

When planning, you can generate and print reports as part of your project documents, including schedule and milestone data, budget data, and resource plans. Because these documents are generated from a common data source, you can update them quickly as the project evolves. The ease of generating reports, gathering input, and collaborating with teams means that your project plans are carefully considered and vetted before you begin project execution.

## **Generating Reports and Managing Change with ConceptDraw PROJECT**

When your plans are complete, ConceptDraw PROJECT helps you share status and manage project changes quickly with One Click Reports and the Project Dashboard.

One Click Reports make it easy to quickly identify and correct issues before they spin out of control. For example, you can generate a One Click Report that lists all of your overdue tasks. Other One Click Reports include tasks on the critical path, future tasks, and overdue milestones. you can share these reports to focus on critical activities during stakeholder meetings or one-on-one meetings.

Because the Project Dashboard consolidates current information onto one screen, you have a powerful, visual view of project status, enabling you to identify issues immediately and take corrective action.

When considering project change requests, you can model their impact by creating a subproject in the Multi-Project view. By exploring your options with accurate data, you can make informed decisions and demonstrate your logic with project stakeholders.

ConceptDraw Solution Park has specific Tool Box Solutions to support project change management, including additional dashboards, response planning, and project presentation solutions.

One Click Reports, the Project Dashboard, and Tool Box Solutions help you get control over your project without much document maintenance because you manage your project data from one source, saving you time and increasing success.

## **Project Communications and Meeting Management**

In addition to careful planning and tracking project status, another important project success factor is how effectively you manage communications and meetings.

Throughout the project, you can generate One Click Reports to focus stakeholder attention on specific issues. For example, the Overdue Task Report helps you identify work that is behind schedule. The task owner can explain the cause of the delay and the team can collectively respond. Using the Project Knowledge Dashboard, you can analyze the task's requirements. Was the requirement more complex than anticipated? Is a different skill needed to complete the task? Does the scope need to be reduced? The product's reporting and dashboard features facilitate this analytical process and help to ensure that the team reaches the best possible solutions.

Reporting the outcome of this discussion is just as important as the actual result. Stakeholders must be quickly informed of changes that have been made, why they were made, and the impact to the project. Because you can manage all of this data from one source, updating your project baseline is simple. you can then email the meeting notes and updated project to your stakeholders to keep them informed and current.

ConceptDraw PROJECT can manage any project because of its range of capabilities that track progress and ferret out project anomalies before they become project disasters. By extending its support of project management methodologies with powerful discovery tools such as One Click Reports, Project Dashboards, ConceptDraw OFFICE INGYRE2 integration, and ConceptDraw Solution Park add-ons; ConceptDraw PROJECT provides you with all ingredients to manage your project for success.

# Keeping Ownership on Planning

The role of the project manager is to make changes, track changes, and authorize changes to their projects. The best project managers keep everything in their head or organize in their own project paperwork. They have a clear vision of how to ensure the project's successful completion. That is why they are capable of planning work and making decisions to change priorities. This explains the accepted best practice that only the project manager changes or updates project paperwork. The project paperwork reflects their vision of the necessary steps to successfully complete the project.

## Best Practice

Although team members must be able to access the information needed to do their job, giving team members write permission to a project manager's file invites anarchy and disaster. Changes to a project file must be orderly and must have approval of the project's manager. The best way to accomplish this with ConceptDraw PROJECT is to have team members use the micro reports to request specific changes. Micro reports support the project manager, to keeping the vision consistent about the steps necessary to successfully finish the project.

With ConceptDraw PROJECT, successful project managers share the project file with all team members to keep them on track. Team members monitor their progress and report back to the project manager using micro reports. The project manager then updates the master file depending on assessment of the input received, and then periodically redistributes the updated files to project team members. By following this process, the reliability of the data on which decisions are made by management is of the highest quality, making for better decisions. Good decisions result in successful project completion.

## Requirements

Nevertheless, whatever tool a project manager uses online, desktop, or server-based; giving access to others to edit project data must be avoided, because this destroys the synchronization of the project vision. This requirement is an important guideline for selecting the project management tools you use in your organization for planning. Keeping project paperwork is not collaborative; it is the professional responsibility of the project manager who has ownership of making planning decisions. Always have a realistic view of the actual project management requirements.

# Project Knowledge Dashboard

The Project Knowledge consists of a few items to describe the status of the documentation. This dashboard relates to preparing meeting agenda for project readiness, personal understanding of project documents, and knowledge distribution among your team related to document usage.

This functionality is a great planning tool for project managers, giving insight into project documentation and how it is distributed and used in the project management processes. Because the reports are on the dashboard, assessments can be made simply and corrective action can be taken immediately. Any changes in the project environment related to project preparedness are immediately visible.

Combining the typical planning tool with the knowledge dashboard give you x-ray vision into documents that relate to your ongoing project plan. The knowledge dashboard combined with traditional project management tools give project managers the ability to identify potential documentation shortfalls before they impact the progress of the project..

Tracking documentation status is not a complex process. If you do tracking regularly and watch the progress on the dashboard, at the end of the project you receive a comprehensive set of the documentation which covers everything from the just completed process for future projects..

To keep project accumulated knowledge inside the organization is an important competitive goal because the knowledge that has been accumulated throughout the project life cycle is an important competitive asset that can be leveraged for future projects ConceptDraw PROJECT allows people to do their work by simply hyperlinking developed documentation to the appropriate task. The incentive to follow the hyperlinking procedure is for all team members to have a dashboard view of the project knowledge readiness. This dashboard is a visual indicator of potential documentation gaps in the project, which then leads to corrective action. This accumulation of documentation over the life of the project is a very tactical approach that requires no additional work by the team and the resulting outcome has a strategic impact for future projects. .

## Prepare Meeting Agenda

Project Readiness - When preparing for project meetings, it is important to have a view of the overall readiness of your project. Documentation is the key component of this readiness and it is impossible to assess the readiness of documentation using traditional project management tools. ConceptDraw PROJECT shows a diagnostic dashboard about documentation readiness for use during a meeting to better understand the overall readiness state of the project management team.

How Knowledge Dashboard Shows This- Use this visual tool to describe any requirement for documents that might need to be developed in the future. The dashboard compares how many documents are ready to how many documents must be developed. If the ratio exceeds the acceptable limit for a future task, a status indicator identifies the documentation shortcoming.

The visual presentation of these metrics, a unique tool in ConceptDraw PROJECT, provides project managers with critical information on project preparedness.

## **Personal Understanding**

What Documents Are Priority 1?- Individuals benefit from their own dashboard that clearly presents to them the top priority documents that must be studied for successful task completion . This visual metric highlights the documents which have the largest amount of allocated hours for associated tasks. Increasing the understanding of top priority documents by each team member helps in their preparedness to undertake tasks. It provides an organization and individuals with a competitive tool that increases the probability of success.

Personal Docs/ Knowledge Dashboard- The personal docs/knowledge dashboard demonstrates to the individual how many hours of their future work correlate to specific documents.

## **Knowledge Distribution (Team Understanding)**

What Documents Have the Most Impact for the Entire Project Because of Hours – The Knowledge Distribution Dashboard element demonstrates which documents must be developed for the project. The representation of the developed documentation compared to undefined project documentation is a vital project metric that can be an early indicator of project success or failure; and until now this was not tracked because the tools to display this metric were not available.

Knowledge Distribution Dashboard- This dashboard demonstrates the ratio between developed documents and undefined documents in time increments so you can see readiness for approaching dates.