

# Getting Started with ConceptDraw PROJECT v7 for Windows

# Contents

- GETTING STARTED WITH CONCEPTDRAW PROJECT .....3**
- CREATING PROJECTS .....5**
- ASSIGNING RESOURCES .....7**
- SETTING THE CALENDAR .....9**
- MANAGING MULTIPLE PROJECTS .....11**
- PROJECT REPORTS .....12**
- PRESENTING YOUR PROJECT .....13**
- INTEGRATING WITH OTHER ConceptDraw Office APPLICATIONS .....14**
- WORKING WITH OTHER APPLICATIONS .....16**
- SOLUTION PARK .....16**
- VIDEO ROOM .....16**
- SAMPLES .....16**
- NO-CHARGE SUPPORT .....16**
- CROSS-PLATFORM LICENSING .....17**
- MULTI-DISPLAY SUPPORT .....17**
- WINDOWS 32-/64-BIT SUPPORT .....17**
- ABOUT CS ODESSA .....17**
- FREQUENTLY ASKED QUESTIONS .....18**
- TABLE OF FIGURES SUPPORT .....19**
- KEYBOARD SHORTCUTS .....20**

## GETTING STARTED WITH CONCEPTDRAW PROJECT

Thank you for your interest in ConceptDraw® PROJECT v7! To begin with, let's install the program on your system. To install the product, and activate your trial license:

1. Navigate your web browser to [www.ConceptDraw.com](http://www.ConceptDraw.com) and click Sign In.

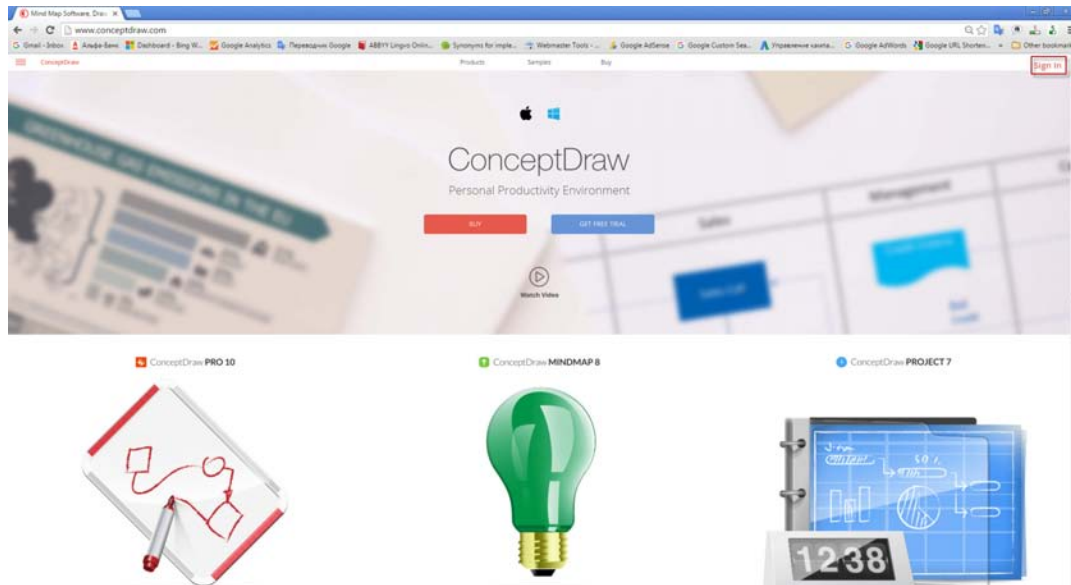


Figure 1: Creating a new account on ConceptDraw.com

2. Fill in the form with your information, and then click Submit.
3. Check your email for the message from [support@ConceptDraw.com](mailto:support@ConceptDraw.com) that contains your confirmation link. (Spam filters may catch this message. If you don't see the email within a few minutes, check your "Junk" or "Spam" folders.)
4. Follow the link to confirm your account, and then click "Download".

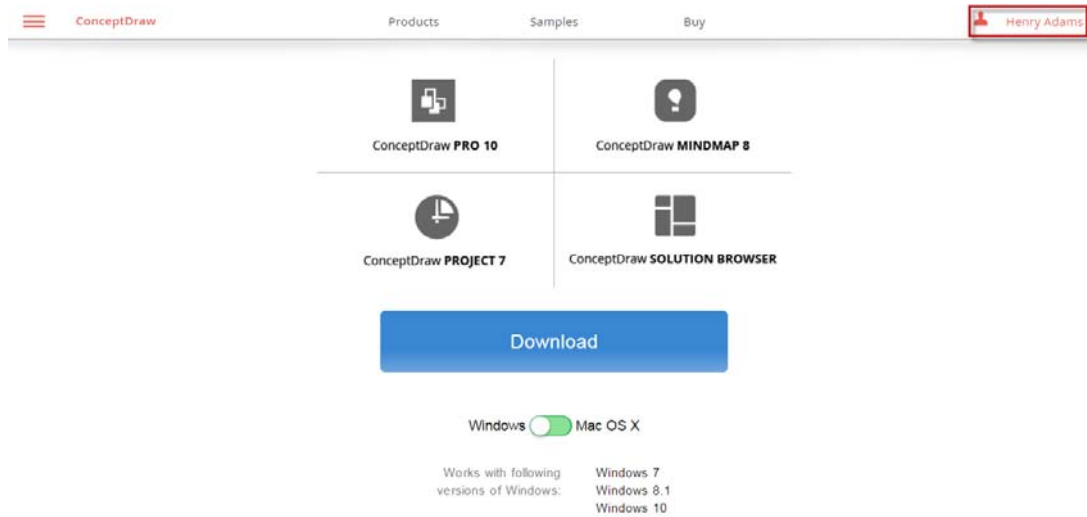


Figure 2: Downloading ConceptDraw Office Trial

5. Once the download is complete, run the installation file.
6. Follow all the on-screen instructions to complete the installation.
7. Once the installation is completed, ConceptDraw Solution Browser runs automatically. The trial licenses listed in your account will be delivered to your computer automatically through your internet connection.
8. Congratulations! Your FREE 21-day trial of ConceptDraw PROJECT has begun.

## CREATING PROJECTS

The default view for a new project is the Gantt Chart.

The left pane of this chart displays a list of Tasks. The right pane displays a calendar and timeline of those tasks.

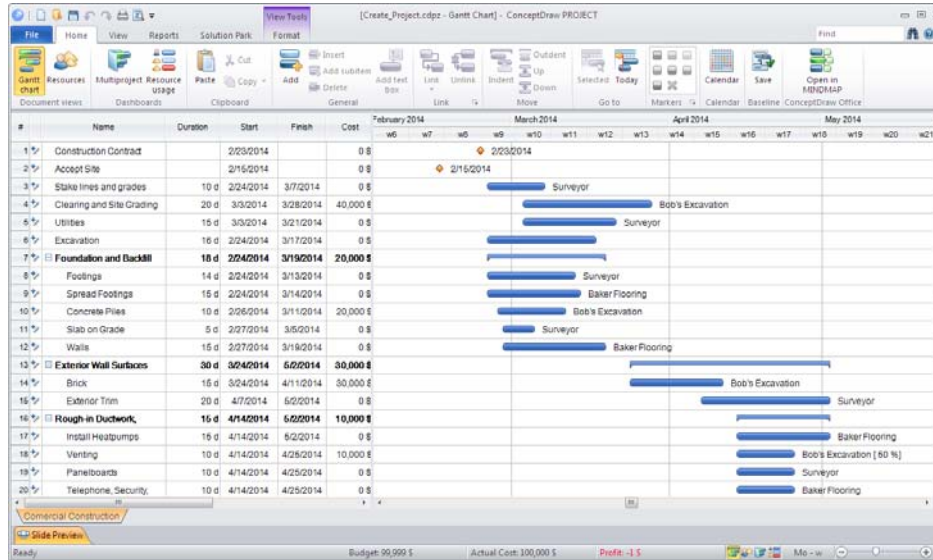




Figure 3: Gantt Chart


To begin managing a new project, you will need to define the individual Tasks that must be completed to deliver it. Click the Add button  on the Home toolbar to create a new Task.

Then name the Task, and assign its duration. You can do so by double-clicking on the fields in the left pane of the Gantt chart, and then typing on your keyboard.

Tasks are usually grouped into larger Phases. Use the Indent button  on the Home toolbar to subordinate a Task, thereby making the dominant item into a Phase. You cannot edit a Phase's duration. The duration of a Phase is determined by the duration of all the Tasks within it.

## Getting Started with ConceptDraw PROJECT v7 for Windows

Often, one Task must be completed before another can begin. To establish a relationship between Tasks, select two or more Tasks on the Gantt chart, and then click the Link

button  on the Home toolbar. Editing the duration of linked Tasks will automatically adjust their position on the Gantt chart.

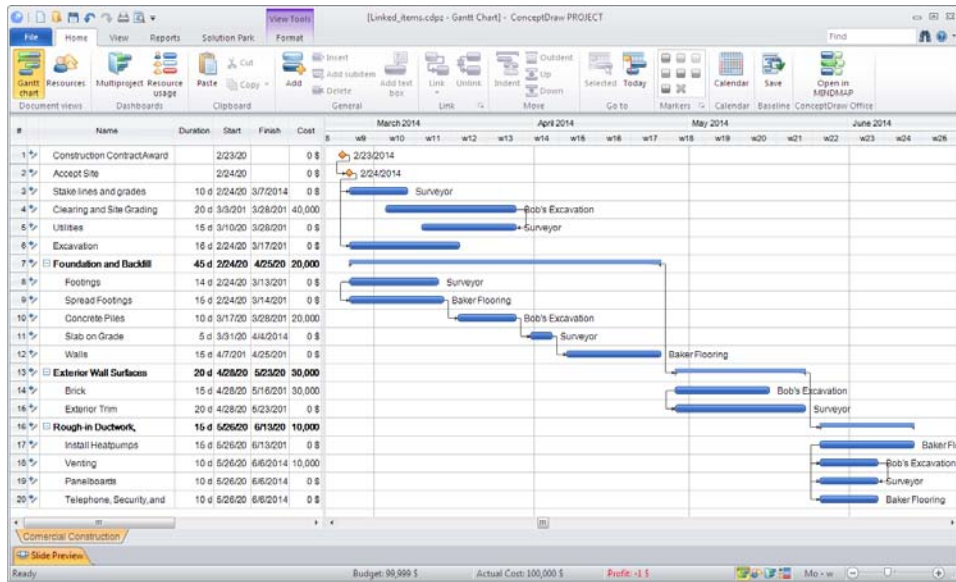


Figure 4: Linked Items on the Gantt Chart

## ASSIGNING RESOURCES

Once you have outlined the Tasks that comprise your project, the next step is to assign Resources to those Tasks.

Select a Task on the Gantt chart, and then select the Assign Resources tab in the Task Pane at the right edge of the window.  
Click the check box next to a Resource to assign it to the selected Task.

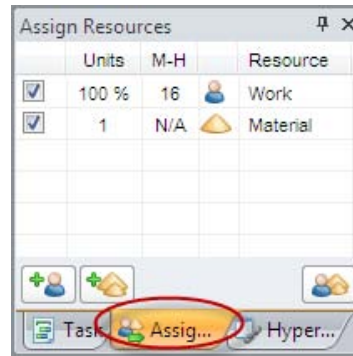


Figure 5: Assign Resources tab

There are five kinds of Resources: Work,; Material; Cost; Equipment and Company. Work resources are those with a cost over time. Other resource types have a fixed cost per unit.

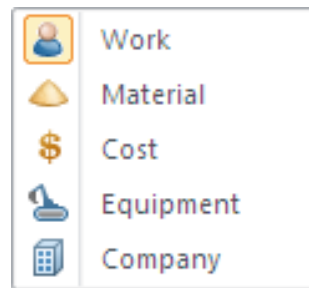


Figure 6: List of Resource Types

You can quickly add Resources to your project by clicking the buttons in the Assign Resources tab. For more detailed information on your project's Resources, click the Resources button on the Home toolbar to view the Resource Sheet.

#	Name	E-Mail	Type	Cost	Group	Calendar	Notes
1	James Smith	jsmith@company.org	Work	\$25/h	Engineering		
2	John Brown	lbrown@company.org	Equipment	\$20	Manufacturing		
3	Mary Williams	mwilliams@company.org	Work	\$30/h	Marketing		
4	Robert Moore	robert@company.org	Work	\$25/h	Sales		
5	Patricia Jones	patricia@company.org	Material	\$25	Product Support		
6	Linda Davis	ldavis@company.org	Work	\$20/h	Local Service		
7	Richard Miller	rmiller@company.org	Work	\$35/h	Product Manager		
8	Thomas Wilson	twilson@company.org	Work	\$25/h	Engineering		

Figure 7: Resource Sheet

## Getting Started with ConceptDraw PROJECT v7 for Windows

Once you have detailed and assigned your Resources, the Resource Usage View will tell you at a glance if your Work Resources (i.e., employees) are over taxed. This dashboard displays the amount of work assigned each day to each Work Resource. Overworked Resources appear as red bars on the timeline. Click the + next to each Resource to view the Tasks it is assigned to.

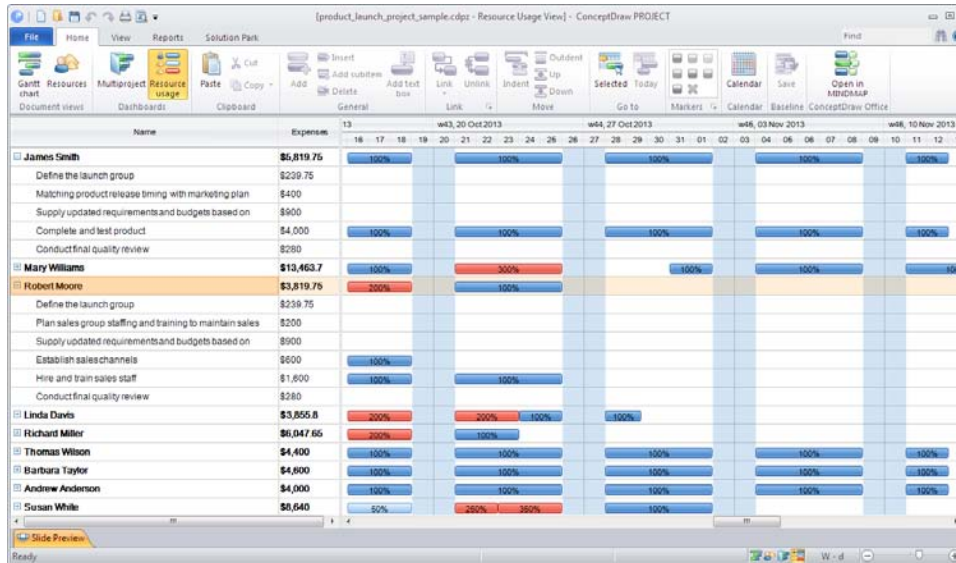



Figure 8: Resource Usage View



## SETTING THE CALENDAR

By default, ConceptDraw PROJECT assumes working hours are between 8am and 5pm, Monday through Friday. However, creating exceptions to this policy is easy.

---

Click Calendar button  on the Home toolbar. This will open the Document Properties window.

From the Calendar tab of this window, you can designate non-default working hours for specific days, as well as non-working days.

You can also select a specific Work Resource from the drop down menu above the calendar to change working hours and days for that resource only.

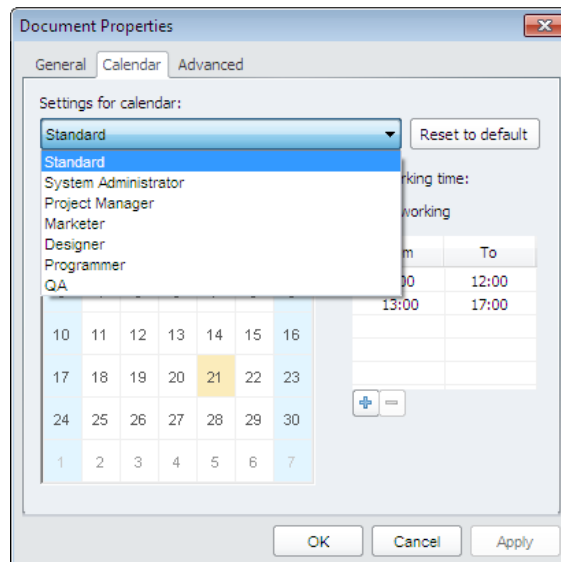


Figure 9: Calendar

## ADDING DETAILS

### HYPERLINK

To make referencing information outside the project file effortless, you can add Hyperlinks to a Task, Phase, Resource or Project.

Select the item in question, and then select the Hyperlinks tab in the pane at the right edge of the window.

The buttons at the bottom of the Hyperlinks pane allow you to quickly link to a website, a file or folder on your computer, an email address, or other object within your project file.

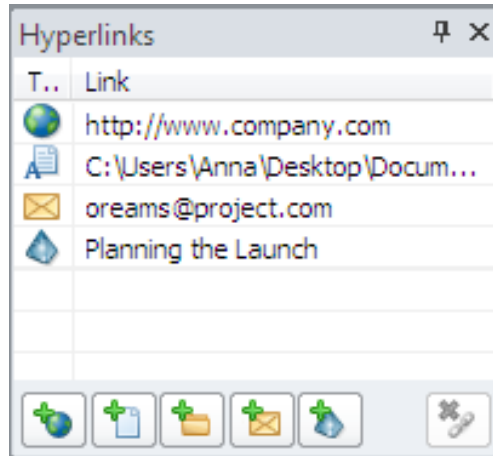


Figure 10: Hyperlink pane

### MILESTONE

You can set a Milestone in your Gantt chart by selecting a Task, and then clicking the “Milestone” checkbox in the Task pane. Milestones do not have duration, but they can be marked Completed by clicking the “Complete” checkbox.

You can also add Notes to a Task, Phase, Resource or Project by selecting the item, and then typing in the Notes tab (located in the floating pane below the Task pane).

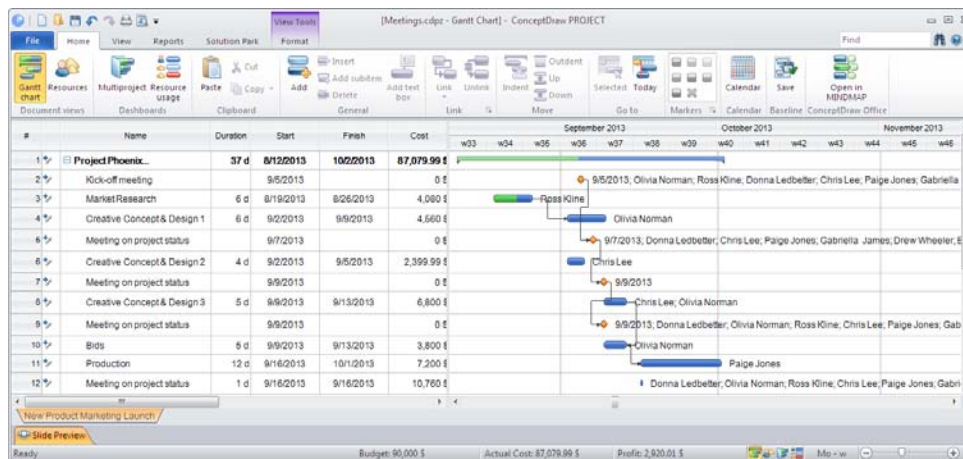


Figure 11: Milestone on the Gantt chart

## MANAGING MULTIPLE PROJECTS

ConceptDraw PROJECT allows you to manage multiple Projects in a single file.

Click Multiproject on the Home toolbar.

Multiproject view is similar to the Gantt chart, but the timeline is on a larger scale.

Most of the controls on the toolbar work similarly to the Gantt chart, such as Add (to create new Projects) and Link (to create relationships between Projects).

However, you cannot edit the duration of a Project in Multiproject View.

You must return to the Gantt chart and edit the timeline of the individual Project.

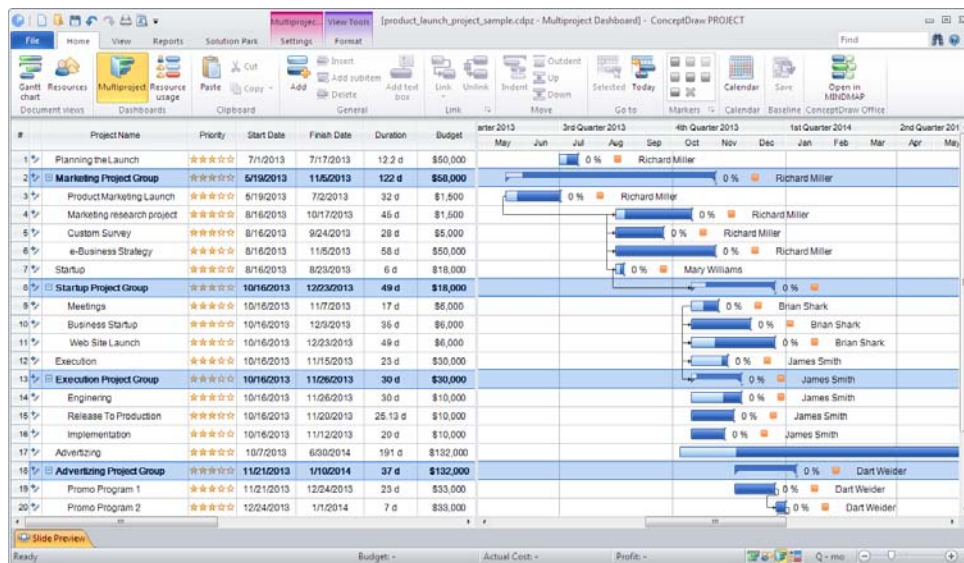



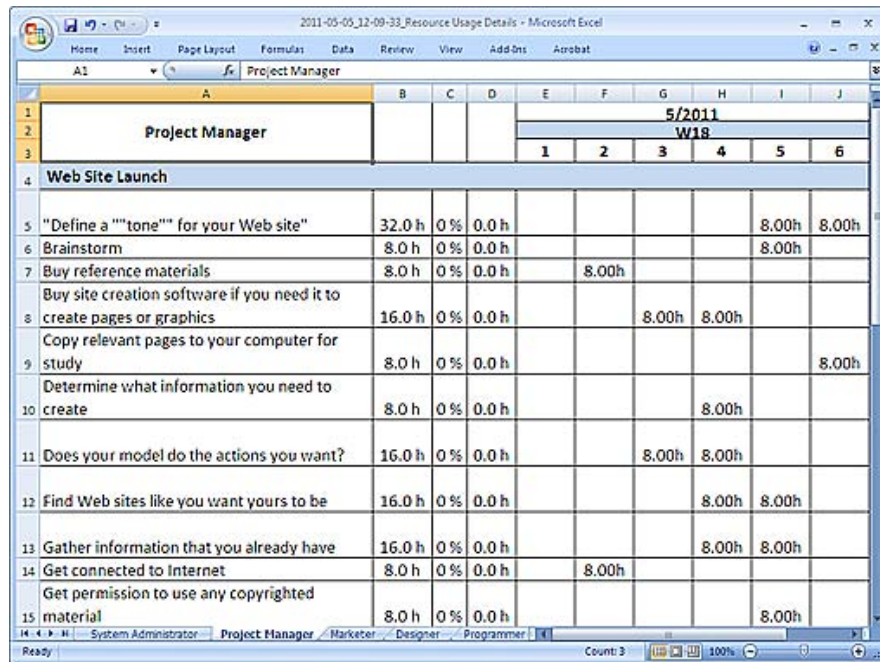
Figure 12: Multiproject View

PROJECT REPORTS

ConceptDraw PROJECT offers a variety of ways to report the status of your project.

---

These can be viewed by selecting the Reports tab on the ribbon. Clicking the Reports button  on this toolbar will open a submenu containing a vast array of choices for reporting on your project in spreadsheet (MS Excel®) format.



The screenshot shows a Microsoft Excel spreadsheet titled '2011-05-05\_12-09-33\_Resource Usage Details - Microsoft Excel'. The spreadsheet is for a project named 'Project Manager'. It displays a resource usage report for the week of 5/2011, specifically for week 18 (W18). The report is organized into columns for days of the week (1-6) and rows for tasks. The tasks listed include 'Web Site Launch' and various sub-tasks like 'Define a ""tone"" for your Web site', 'Brainstorm', 'Buy reference materials', etc. Each task row shows the total hours, percentage completion, and hours for each day of the week.


Project Manager		5/2011						
		W18						
		1	2	3	4	5	6	
<b>Web Site Launch</b>								
5	"Define a ""tone"" for your Web site"	32.0 h	0%	0.0 h			8.00h	8.00h
6	Brainstorm	8.0 h	0%	0.0 h			8.00h	
7	Buy reference materials	8.0 h	0%	0.0 h	8.00h			
8	Buy site creation software if you need it to create pages or graphics	16.0 h	0%	0.0 h		8.00h	8.00h	
9	Copy relevant pages to your computer for study	8.0 h	0%	0.0 h				8.00h
10	Determine what information you need to create	8.0 h	0%	0.0 h			8.00h	
11	Does your model do the actions you want?	16.0 h	0%	0.0 h		8.00h	8.00h	
12	Find Web sites like you want yours to be	16.0 h	0%	0.0 h			8.00h	8.00h
13	Gather information that you already have	16.0 h	0%	0.0 h			8.00h	8.00h
14	Get connected to Internet	8.0 h	0%	0.0 h	8.00h			
15	Get permission to use any copyrighted material	8.0 h	0%	0.0 h				8.00h


Figure 13: Project Report in Spreadsheet (MS Excel®) Format.

## PRESENTING YOUR PROJECT

Also on the Reports tab, you have three buttons for creating slides of specific views within your project.

Scroll to an area of the Gantt Chart or Resources Sheet, and use the Zoom controls on the View toolbar to focus on the area you wish to capture, and then click

Capture slide  .

Expand the Slide Preview tab at the bottom of the window by clicking on it and you will see the slides you have created thus far. You can give your slides as Portable Network Graphics files by clicking the PNG button  .

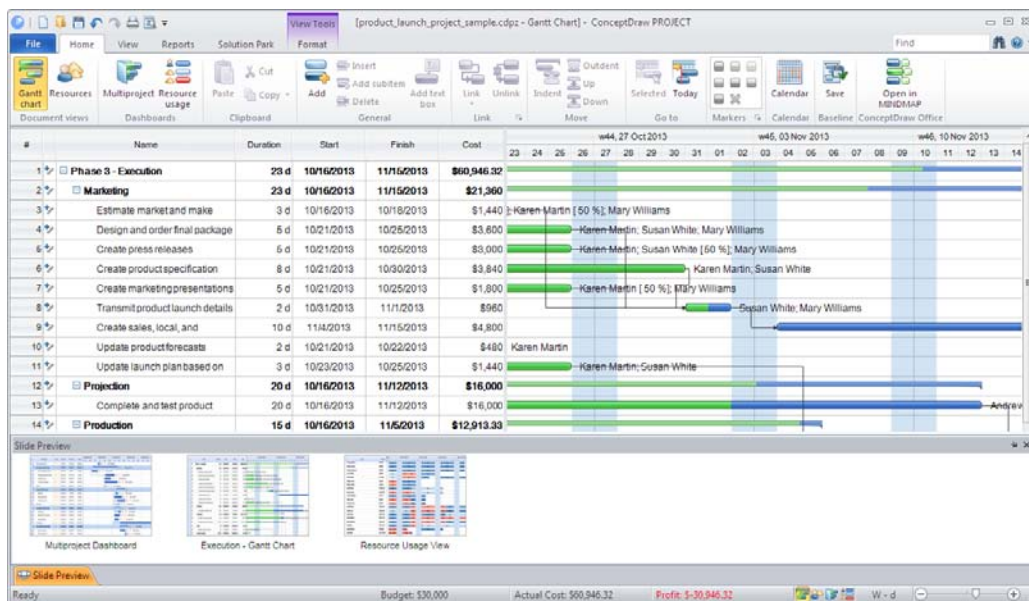


Figure 14: Project Slide Preview

## INTEGRATING WITH OTHER ConceptDraw Office APPLICATIONS

Using all three programs in the ConceptDraw Office suite in this way unlocks their true potential for increasing your productivity and facilitating your workflow.

---

### CONCEPTDRAW PRO

If you have ConceptDraw PRO installed, the Dashboards section of the Report toolbar on the toolbar can be used to generate drawings for tracking the status of your project at a glance.

Also, the Project Diagrams section can be used to draw a variety of diagrams, such as PERT charts and WBS (Work Breakdown Structure), suitable for printing and display.

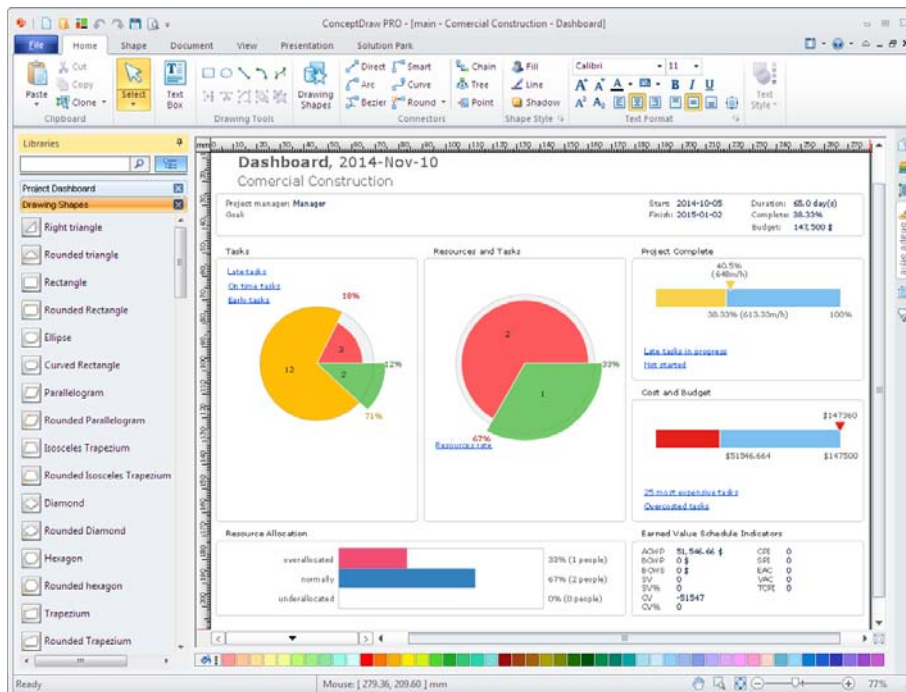



Figure 15: Project Dashboard

## CONCEPTDRAW MINDMAP

If you also have ConceptDraw MINDMAP installed, you can instantly create a mind map

from your Gantt chart by clicking Open in MINDMAP button  on the Reports toolbar. This allows you to take full advantage of ConceptDraw MINDMAP's visual, non-linear organization capabilities for reorganizing your project, and add content via Brainstorming mode.

You can then send the mind map back to PROJECT to use its more detailed resource and task management capabilities.

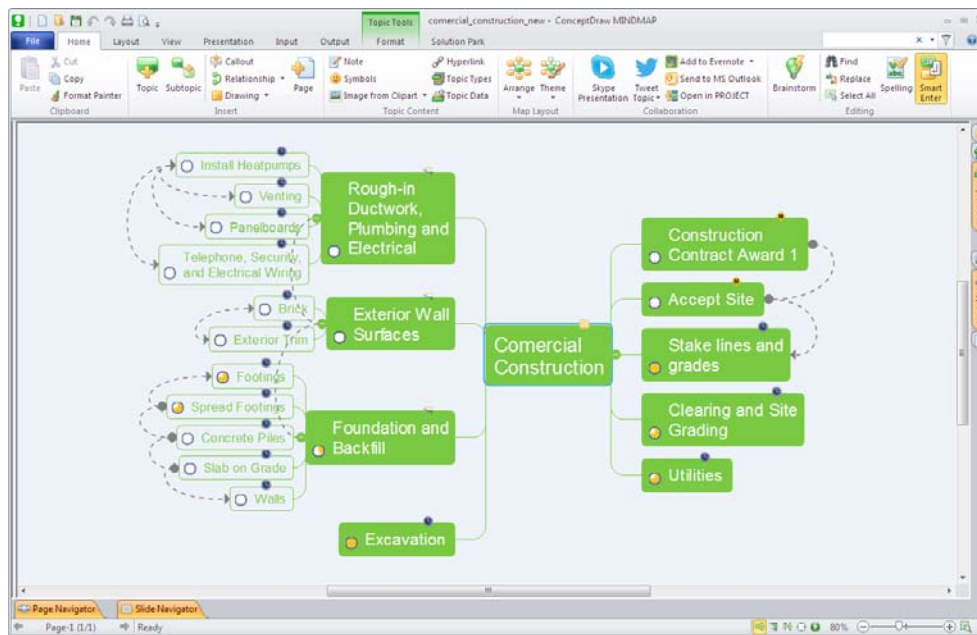


Figure 16: Project Mind Map

## WORKING WITH OTHER APPLICATIONS

ConceptDraw PROJECT has the ability to export to a number of usable file formats, giving ConceptDraw users powerful flexibility in working with others. Expand the File tab to view all of ConceptDraw PROJECT's import and export options.

Exporting to MS Project® is one of the best ways to share your project. ConceptDraw PROJECT 7 is thoroughly compatible with MS Project's, and can import from native .mpp format and export to MS Project XML files to make working across operating platforms not only possible, but effortless.

## SOLUTION PARK

ConceptDraw Solution Park is an ever-growing collection of business-specific solutions and product add-ons that are available to add continued value after the initial purchase of a ConceptDraw product. For more information, visit <http://www.conceptdraw.com/solution-park>

---

## VIDEO ROOM

CS Odessa offers a series of instructional videos for ConceptDraw Products. Users of all proficiency levels will find here new insights into the product's functionality, as well as helpful tips to expedite their workflow. <http://www.conceptdraw.com/video/>

---

## SAMPLES

CS Odessa offers an online collection of professional samples designed to help ConceptDraw users achieve their best. ConceptDraw Samples shows many of the varieties of tasks and possibilities that the ConceptDraw Product Line can achieve. <http://www.conceptdraw.com/samples/about-samples>

---

## NO-CHARGE SUPPORT

CS Odessa offers no-charge support for all licensed and trial users of ConceptDraw Products. ConceptDraw Maintenance Assurance P1 is also available to stay current with major updates to ConceptDraw Products.

---



## CROSS-PLATFORM LICENSING

CS Odessa is one of the only companies in the world that offers a cross-platform license. This means that if you want to install your product on a Mac and a PC for your use, you can do so with our license. Most companies require that you purchase a separate license for each platform.

---

## MULTI-DISPLAY SUPPORT

ConceptDraw PROJECT v6 supports working across multiple computer screens. You can open separate mind maps on different screens and copy-and-paste from one to the other.

---

## WINDOWS 32-/64-BIT SUPPORT

All ConceptDraw applications are compatible with Windows 7/8.1/10 32 and 64-bit architectures.

---

## ABOUT CS ODESSA

Founded in 1993, Computer Systems Odessa supplies cross-platform productivity tools and graphics technologies to professional and corporate users around the world.

From their headquarters in Odessa, Ukraine, and U.S. office in San Jose, CA, CS Odessa sells internationally in over 30 countries, both directly and through resellers.

The ConceptDraw Productivity Line has won numerous awards, and is used by hundreds of thousands all over the world. For more information, visit <http://www.conceptdraw.com>

---

## FREQUENTLY ASKED QUESTIONS

What is the difference between Technical Support and Maintenance Assurance P1?

*Technical support is a no charge item provided to our customers and individuals trialing or products. Our Tech Support team is there to help you with installing, product activation, and product issues. Technical support is available by submitting a ticket via our web site, and by phone and email. Minor product upgrades are at no additional cost.*

*When purchased at the same time of you ConceptDraw Product purchase, Maintenance Assurance P1 provides you the next major release of your product at no additional cost. When the next major upgrade of the product becomes available you will be notified of its availability for download and installation.*

Why is ConceptDraw Solution Browser part of the product I purchased?

*When you activate a purchased license for your product, that authorization is stored in the cloud, and then synchronized with your desktop product(s) using ConceptDraw Solution Browser. We do this so if the unthinkable occurs and you have a catastrophic event with your computer such as a hard disk failure, you can log into your account on ConceptDraw.com and retrieve your license, saving you time and headaches.*

*The ConceptDraw Solution Browser also manages the versioning of all of your products, and give you access to all of the additional business solutions found in the ConceptDraw Solution Park.*

I am with a large organization; do you support other methods of installation besides the one I experienced from my trial?

*We have additional methods of delivering product to the users in your organization. Please contact our sales or support team for details.*

Do you have pricing for academia and non-profits?

*Yes, we have aggressive pricing for students, educators and employees of certified nonprofit organizations. Contact our sales team for pricing details.*

TABLE OF FIGURES SUPPORT

Figure 1: Creating a new account on ConceptDraw.com.....	3
Figure 2: Downloading ConceptDraw Office Trial.....	4
Figure 3: Gantt Chart.....	5
Figure 4: Linked Items on the Gantt Chart.....	6
Figure 5: Assign Resources tab.....	7
Figure 6: List of Resource Types.....	7
Figure 7: Resource Sheet.....	7
Figure 8: Resource Usage View.....	8
Figure 9: Calendar.....	9
Figure 10: Hyperlink pane.....	10
Figure 11: Milestone on the Gantt chart.....	10
Figure 12: Multiproject View.....	11
Figure 13: Project Report in spreadsheet (MS Excel®) format.....	12
Figure 14: Project Slide Preview.....	13
Figure 15: Project Dashboard.....	14
Figure 16: Project Mind Map.....	15

## KEYBOARD SHORTCUTS

Following is an abbreviated list of the most commonly used keyboard shortcuts. See the in-program Help file for the comprehensive list.

Keystroke	Operation
Ctrl + N	Create a New Document
Ctrl + O	Open a Document
Ctrl + S	Save the active document
Ctrl + Shift + S	Save the active document under a new file name
Ctrl + P	Print Preview
Ctrl + F4	Close active document
Ctrl + Right	Indent task
Ctrl + Left	Outdent task
Ctrl + Down	Move item to the next position (one line down)
Ctrl + Up	Move item to the previous position (one line up)
Ctrl + L	Link selected tasks
Ctrl + Shift + L	Unlink selected tasks
Ctrl + Alt + G	Gantt Chart View
Ctrl + Alt + R	Resource List View
Ctrl + Alt + J	Projects Dashboard
Ctrl + Alt + U	Move to Resource Usage View
Ctrl + R	Call Reports dialog
Ctrl + Z	Undo the last operation
Ctrl + X	Cut the selection to the Document
Ctrl + C	Copy the selection to the Document
Ctrl + V	Paste the content from the Document
Ctrl + A	Select all the tasks on document

**CS Odessa**

Technical Support/Sales Phone Numbers

US/Canada/Mexico:

Technical Support (Toll Free): +1 (877) 441-1150 x4  
amersupport@csodessa.com

Sales (Toll Free): +1 (877) 441-1150 x3  
amersales@csodessa.com

Europe:

+38 0487601963  
support@conceptdraw.com  
sales@conceptdraw.com

© 2016, CS Odessa corp.