ConceptDraw

PROJECT

- o   User Interface Reference
- o   Keyboard Shortcuts

Keyboard Shortcuts and Mouse Actions

Welcome to ConceptDraw PROJECT v11 for Windows

A full-featured project management solution with all the necessary functions right at your fingertips. Generates an extensive variety of reports on project and task statuses on macOS and Windows platforms. Centralizes project information through embedded documents and hyperlinks. Unique Multiproject Dashboard manages multiple projects from a single file. Powerful integration with other ConceptDraw products makes project management easier than ever before.

Manage Plans, Reports, and Changes
Benefits
ConceptDraw Maintenance Assurance
Technical Support

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.

Your Benefits
ConceptDraw PROJECT gives you the tools to evaluate your project planning. Streamlines meetings and ensures more effective planning and control thanks to live project dashboard illustrations, mind map reports, and knowledge metrics.

ConceptDraw Maintenance Assurance
We have developed an innovative maintenance program that makes sure you stay up to date. At the time of your buy a ConceptDraw product, you are able to purchase ConceptDraw Maintenance Assurance .
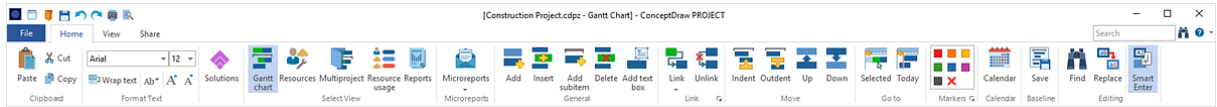
Technical Support
We offer unlimited free technical support to our users.
To send us a problem report or feature request, submit the ticket form in the Help Desk section on our Web site.
Replies are normally sent within one business day. We are always happy to answer your questions and hear your feedback.

Toolbar Tour

The ConceptDraw PROJECT v10 toolbar provides quick access to functions that are commonly performed within the program.

Quick Access
File
Home
View
Share

Quick Access

Quick Access menu facilitates access to the most frequently used functions. It is located at the top of [Toolbar](#).

	New	Start a new document
	Open	Open an existing document
	Save	Save the current document
	Undo	Undo the last action
	Redo	Redo the last undone action
	Print	Send the document directly to the default printer without making changes
	Print Preview	Preview and make changes to pages before printing

File
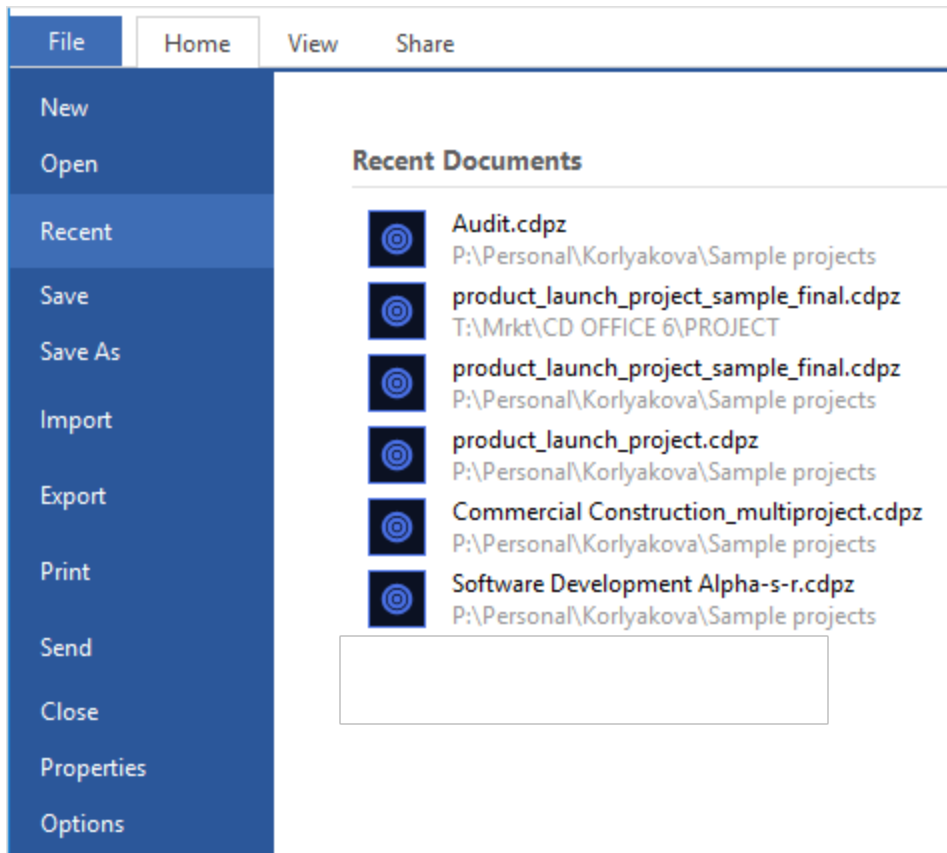
New   Create a new document
Open   Open an existing project
Recent   Show recently opened files
Save   Save the current document
Save As   Save a copy of the document
Import   Import the document
Export   Export the document
Print   Preview and print the document
Send   Send a document
Close   Close ConceptDraw PROJECT
Properties   Open the Document Properties dialog
Options   Open the Options dialog

Preview and print the current ConceptDraw PROJECT file

Print   Send the document to the default printer as it is.
                 Use the View tab to setup the printed document view.

Print Preview   Opens Print Preview tab

Print to   Print to Adobe PDF using the current print settings
Adobe PDF

Send the current document

E-mail   Send a copy of the document via e-mail as attachment

Open in MINDMAP   Open the current document in ConceptDraw MINDMAP

Import

Create ConceptDraw PROJECT document from other file types. The **Import** section provides the access to ConceptDraw PROJECT import opportunities:

MS Excel - Create project in new document from text outline

MS Project File - Creating new document on the basis of information taken from Microsoft Project * *.mpp* document

Mindjet MindManager - Creating new document on the basis of information taken from Mindjet MindManager * *.mmap* document

Text outline - Creating new document on the basis of information taken from Microsoft Excel * *.xlsx w*orkbook

Export

Create ConceptDraw PROJECT document from other file types. The **Export** section provides the access to ConceptDraw PROJECT export opportunities

Adobe PDF - Export the document to text outline

MS Excel - Save the document as Microsoft Excel workbook (*.xlsx)

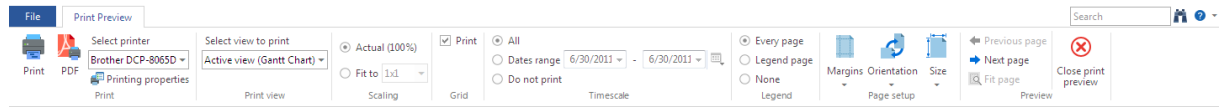MS Project File - Export the document to Microsoft Project XML

Mindjet MindManager - Save the document in Mindjet MindManager *.*mmap* format

Text Outline - Export the document to Adobe PDF

Print Preview

Preview and make changes to pages before printing.

Print

          Print the current document

          Print to Adobe PDF using the current print settings
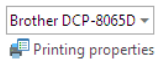
Brother DCP-8065D
Printing properties   Select the printer and set the printer properties

Print View

Select view to print

Active view (Gantt Chart)
Active view (Gantt Chart)
MultiProject
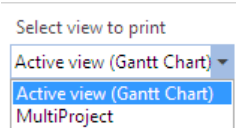
Select exactly the view you need to print: Gantt Chart, or Multiproject.

Scaling
Actual **-** Print the document in zoom 100% of the actual size.
Fit to **-** Set the number of pages , your document will be printed

Grid
Set the print options: Print the outline and Gantt chart , or Gantt chart only

Timescale
The timescale printing radio button allows to print the entire project timescale.
The dates range selection allows to select the time period to print.
"Do not print" radio button allows to print the entire document without timescale

Legend

Every page - Print the legend at the bottom of each page.
Legend page - Print the separate legend page.
None - Do not print legend.

Page Setup
Margins - Set the margins for the current document.
Orientation - Switch the pages between portrait and landscape layout.
Size - Choose the page size from the drop-down list.

Preview
Previous page/Next Page - Navigate between pages on page preview.
Fit page - Zoom the document so that entire document fits one page.
Close - Close Print preview.

Home

Clipboard

Paste   Paste content from the Clipboard

Cut   Cut selection and put it into Clipboard.

Copy   Copy the selection and put it into the Clipboard.

Format Text
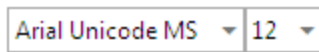
Font   Select font face

Font size   Select font size
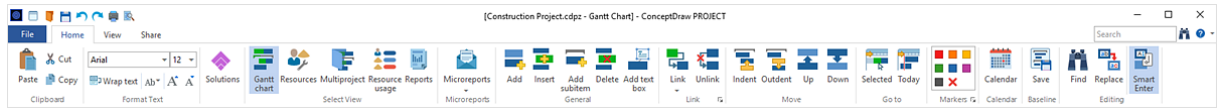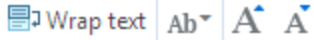
Grow font   Increase font size

Shrink font   Decrease font size

Make upper case   Convert selected to upper case

Make lower case   Convert selected to lower case

Make title case   Convert selected to title case

Make sentence   Convert selected to sentence case
case

Wrap text   Makes all content visible within a cell by
                     displaying it on multiple lines

Solutions

Solutions   Activate Solutions panel

Select View

Gantt Chart   Switch to Gantt Chart View

Resources   Switch to Resource list

Multiproject   Switch to Multiproject Dashboard

Resource usage   Switch to Resource usage view

Reports   Displays the generation window of the last report.
                     If no reports have been created yet, a window will
                     open for creating the first report in alphabetical
                     order in the list of available reports, provided in the
                     Solutions panel.

Microreports

| | **Microreports** | Generate Microreports |

General

	Add	Add new item to end
	Insert	Inserts new item into selected position
	Add sub item	Add sub item to selected item
	Delete	Delete selection

| | **Add text box** | Add a text note to selected task or phase. You can use the Text Box to add work details, supporting information, or other notes to tasks and phases on a project Gantt chart directly. A Text Box can contain just a text with no formatting. |
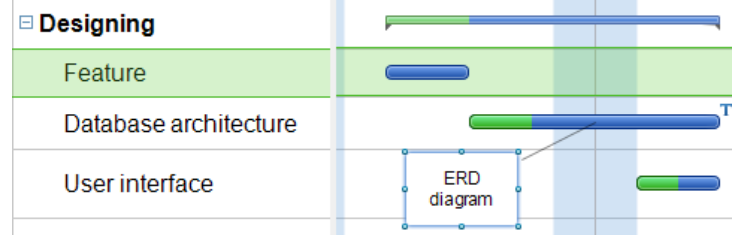
Link

| | **Link** | Link two or more selected items |

| | **Unlink** | Unlink two or more selected items |
| Link | **Edit button** | Edit predecessors using the Predecessors dialog |

Move

	Indent	Indent selected item (Move selected item one position right)
	Outdent	Outdent selected item (Move selected item one position left)
	Up	Move selected item one position up
	Down	Move selected item one position down

Go To

| | Selected | Show selected task on Gantt Chart |
| | Today | Show today's tasks on Gantt Chart view |

Markers

| | **Markers** | Mark selected item with selected color |
| | Edit Markers button | Opens the Edit markers dialog |

Calendar

| | **Calendar** | Shows Document Properties dialog, **Calendar** tab |

Baseline

| | **Save** | Save Baseline settings for selected tasks |

Editing

	Find	Activate Find dialog
	Replace	Activate Replace dialog
	Smart Enter	On/Off the **Smart Enter Mode**. When the Smart Enter Mode is active a new Task is added by the **Enter** key.

Microreports

ConceptDraw PROJECT gives you an opportunity to communicate with your team faster by using micro-reports.

A micro-report is a small piece of project information associated with specific task, phase, resource or project, which you can send via e-mail. It's a great time saver feature for daily communication with your team, and it allows you to report project statuses quickly and easily. The list of micro-reports for choosing is available:

- from the context menu of the the task, phase, resource or project;

- from the Micro-reports button on the Home tab.

Right click on selected project, phase, task or resource and select report, required.

Gantt Chart View
(Ctrl+Alt+G)

Project Phase

- Today Tasks List
- Critical Tasks List
- Today tasks list with assigned resorces
- Today resources list

Project Task

- Task status

Resources View
(Ctrl+Alt+R)

- Today Tasks List
- Milestones
- Objectives
- Projects List
- Next tasks
- Assigned tasks
- Critical tasks

Multiproject View
(Ctrl+Alt+J)

- Today Tasks List
- Today resources list
- Nearest milestones

You need to choose the desired type of microreport at the following list of microreports, and it will be opened and ready to send via e-mail.
 Microreports are generated as ConceptDraw MINDMAP files (cdmz), attached to email.
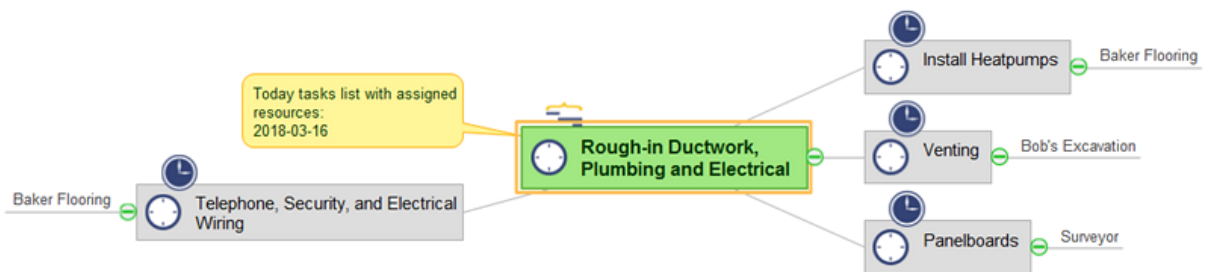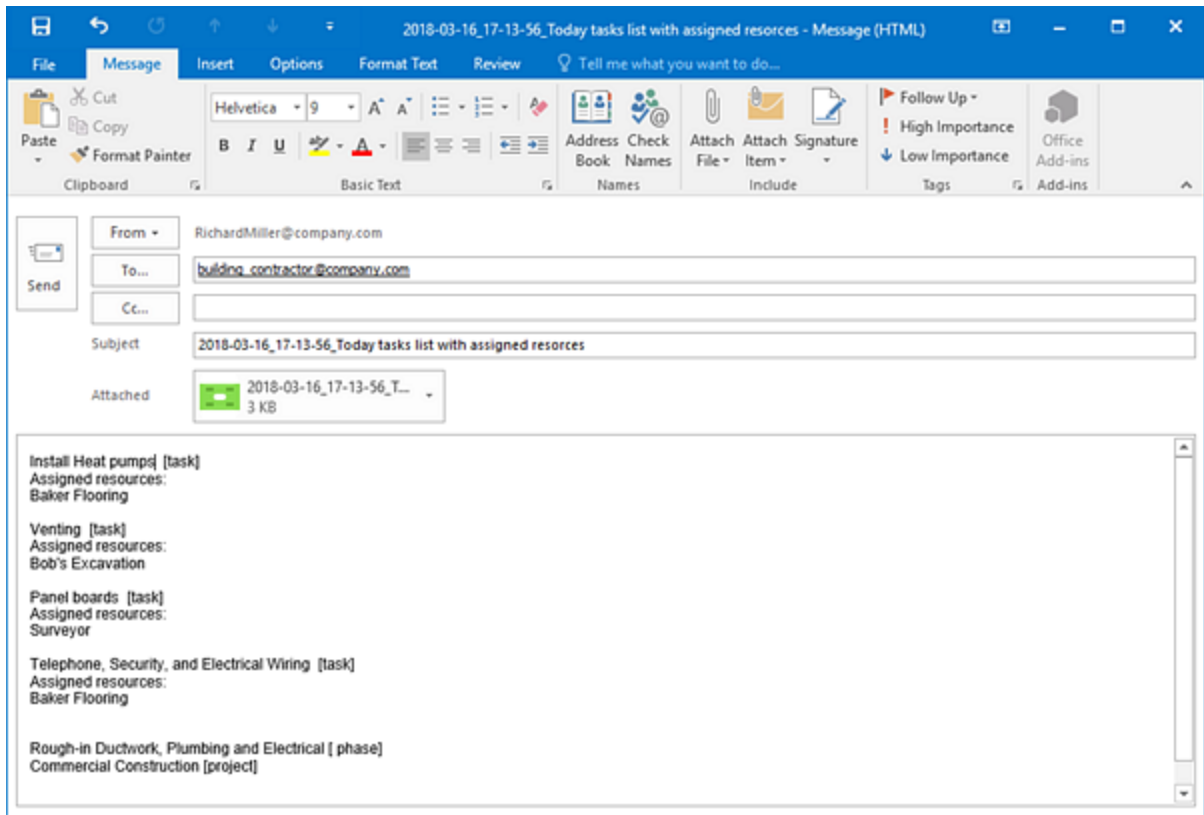
Project Baseline

ConceptDraw PROJECT provides the possibility to set a Project baseline. A Project baseline is a snapshot (copy) of the current main values of the project and tasks (Start, Finish, Cost). It is used for assessing performance, and improving the estimation accuracy. Save a baseline when the planning of project is completed and later compare with it the real values at the implementation and after completion your project.

To save a Baseline, click the Save Baseline button on the Home tab. The following message will appear:
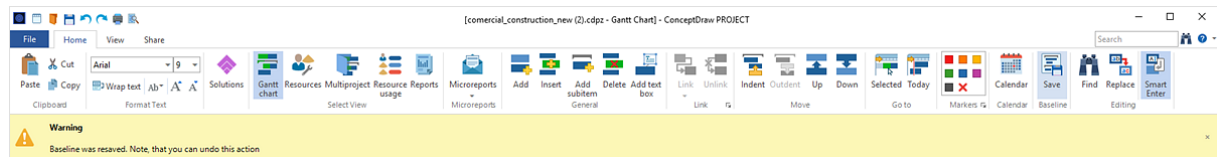
To undo the last action, click the Undo button on the Quick Access Toolbar or Ctrl+Z on the keyboard. . Baseline in ConceptDraw PROJECT includes three parameters: Baseline Start, Baseline Finish, and Baseline Cost. To display them on the Gantt chart, use the Column Customization dialog. Also the value of Baseline cost can also be found on the Task panel.
As the project progresses, the Baseline will help you measure any changes in the plan and to determine any differences from your original plan and the actual state of your project.
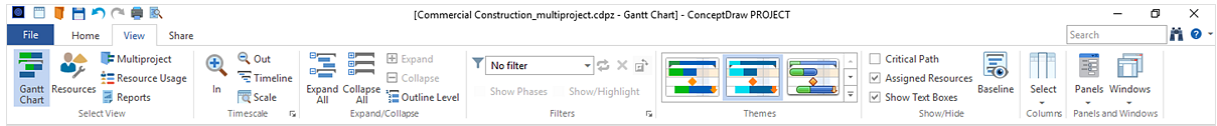
View

Select View

 Gantt Chart: Switch to Gantt Chart View.

 Resources: Switch to Resource list.

 Multiproject: Switch to Multiproject Dashboard.

 Resource usage: Switch to Resource usage view.

Timescale

 Zoom in

 Zoom out

 Timeline: Adjust zoom so, that the entire project timeline fit the screen.

 Scale: Show the scale choice drop-down list.

The button at the right bottom of the section opens Timescale dialog (A timescale ruler (or calendar) measures time for the tasks in your document.)

Expand/collapse

 Expand all: Expand all sub items.

 Collapse all: Collapse all sub items.

 Expand: Expand selected item.

 Collapse: Collapse selected item.

 Outline level: Show tasks of the certain outline level.

Filters
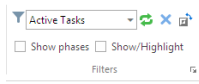
Select Filter:
Select the embedded filter and activate Filters mode.

↻   Apply previously selected filter.

✕   Clear the current filtering.

⊡   Invert the current filter.

Show phases: Show/Hide phases.

Show Highlight: Show/Hide Highlight.

Edit Filter button: Open the Filters Dialog.

Themes

Themes: Select the one of the available Gantt chart views

Show/Hide
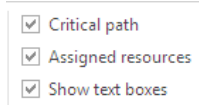
Critical path: Show/hide the critical path

Assigned resources: Show/hide the resources assigned to tasks on the Gantt

Show text boxes: Show/hide text boxes

Baseline: Show/hide the saved project baseline on the Gantt Chart

Columns

Customize columns: Open the Columns customization dialog and select columns to display in the project outline.

Panels and Windows

Panels: Manage Floating panels.

Windows: Shows the list of opened windows.

Gantt Chart

The Gantt chart is the default view of the project file when you run ConceptDraw PROJECT. Also it is

accessible by the button ▮▮ on the View tab Gantt chart window consists of two parts: the task list (project outline)
 and graphic presentation of the tasks (Gantt chart).

#		Name	Start	Finish	Duration	Complete	2019	June 2019	July 2019
							w19 w20 w21 w22	w23 w24 w25 w26	w27 w28 w29 w30 w
4		Clearing and Site Grading	5/6/2019	5/31/2019	20 d	25 %		Bob's Excavation; Excavator [1]	
5		Utilities	5/6/2019	6/7/2019	25 d	0 %		Surveyor 2	
6		Excavation	4/1/2019	4/22/2019	16 d	31 %	ration [100 %]; Excavator [1]		
7		Foundation and Backfill	5/20/2019	6/20/2019	24 d	51 %			
8		Footings	6/3/2019	6/20/2019	14 d	20 %		Surveyor 1	
9		Spread Footings	5/20/2019	6/7/2019	15 d	100 %		Baker Flooring; Concrete mixer [1]	
10		Concrete Piles	5/27/2019	6/7/2019	10 d	50 %		Bob's Excavation; Concrete mixer [1]	
11		Slab on Grade	5/26/2019			0 %		5/26/2019; Surveyor 2	
12		Walls	5/27/2019	6/14/2019	15 d	33 %		Baker Flooring; Truck [1]	
13		Exterior Wall Surfaces	5/13/2019	6/14/2019	25 d	40 %			
14		Brick	5/13/2019	6/14/2019	25 d	40 %		Bob's Excavation; Excavator [1]	
15		Exterior Trim	5/13/2019			0 %	5/13/2019		
16		Rough-in Ductwork, Plumbing and	6/3/2019	6/21/2019	15 d	54 %			
17		Install Heatpumps	6/3/2019	6/21/2019	15 d	33 %		Baker Flooring; Truck [1]	
18		Venting	6/3/2019	6/7/2019	5 d	25 %		Bob's Excavation	
19		Panelboards	6/3/2019			0 %		6/3/2019; Surveyor 2	

1. A task can be added to the document with one of the following methods:
- By pressing **Enter**
- Using the **General** section on the Home tab
- Applying the command **Insert New Task** from the context menu.

2. All parameters of the project tasks can be specified in the Tasks dialog. Some parameters can be specified in the context menu and on the Gantt chart.

3. Columns that contain the project outline information can be managed using the Column Customization dialog.
The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction.

4. The Gantt chart displays task as bars. Bars are arranged in accordance with the timescale, displaying the task start /end time and its duration.
The timescale can be changed. This can be done in the Timescale dialog, that can be accessed from the context menu.
Also can change the task start/end date, its duration and completion . To change start/end dates move the bar by your mouse. To change the task duration draw by the right edge of the bar, to change the percentage of completion draw by the left edge. In both cases the cursor should turn a double-sided arrow. The non-completed part of the task is shown in blue, the completed one - in green.

5. The names of the resources involved in these tasks are shown next to the tasks.

6. Links between dependent tasks are shown with arrows. The most common link type, *finish to start*, is assigned by the following way: first select the tasks to which you want to assign links, and then use one of the following:
- The **Link** group in the Home tab
- The context menu of the Gantt chart view
 Any link type can be customized using the dialog Predecessors.

7. The widths of the text and graphic parts of the diagram can be changed. For this set the cursor on the dividing line and draw to the needed direction.

Gantt Chart Context Menu

Access the most frequently used operations at Gantt Chart window via the context menu.
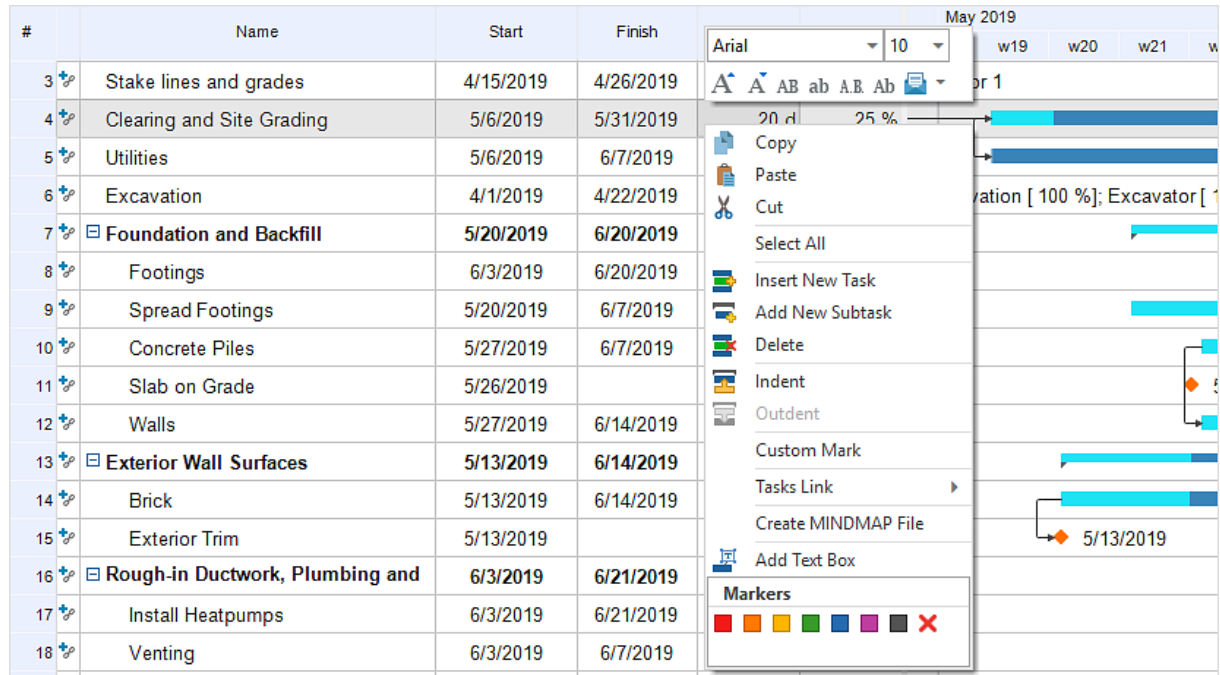
Gantt Chart Context Menu
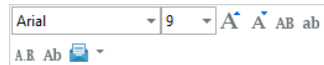
| **Text Format** | Change the text format of the project schedule |
| **Microreports** | Generate Microreports |
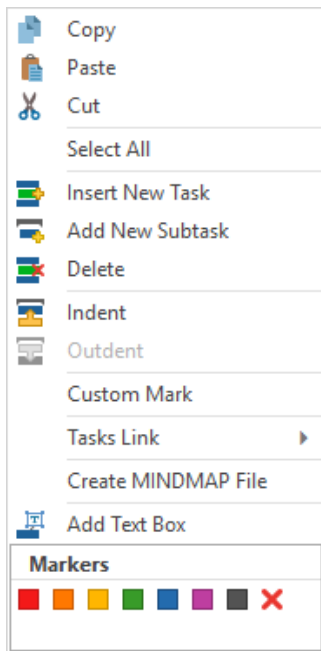
	Copy	Copy the selection and put it into the Clipboard.
	Cut	Cut selection and put it into Clipboard.
	Paste	Paste content from the Clipboard.
	Select All	Select all tasks.
	Insert New Task	Inserts new task into selected position.
	Add New Subtask	Add sub task to selected task.
	Delete	Delete selection.
	Indent	Indent selected tasks (Move selected item one position right).
	Outdent	Outdent selected tasks (Move selected item one position left).
	Custom Mark	Mark the tasks that need to be represented in the diagram.
	Task Link	Link two or more selected items.
	Create MINDMAP File	Generate a mind map (*. cdmz) from selected tasks. The file will be opened in ConceptDraw MINDMAP
	Add Text Box	Add a text box to selected item.
	Markers	Make the selected items looking like marked with a highlighter.

Gantt Chart Timescale Context Menu
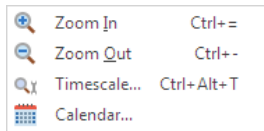
	Zoom In	Displays timescale in more detail (day instead of weeks, etc.)
	Zoom out	Displays a more generalized timescale (weeks instead of days, etc.)
	Timescale	Calls Timescale dialog that allows to customize timescale appearance. It gives more possibilities for this than **Zoom In** and **Zoom Out** commands. On the other hand mentioned commands allows to change calendar scale quicker.
	Calendar	Opens the Standard Calendar dialog

Resources

By clicking the button on the View tab, you open the Resources window. This window contains a list of resources with their characteristics.

#		Name	Type	Cost	Group	E-Mail	Notes	
1		Bob's Excavation	Work	165 $/h	Excavation	bob_excavation@gmail.com		
2		Surveyor 1	Work	100 $/h	Surveyor	surveyor2@gmail.com		
3		Baker Flooring	Work	140 $/h	Flooring	baker_flooring@gmail.com		
4		Surveyor 2	Work	100 $/h	Surveyor	surveyor2@gmail.com		
5		Excavator	Equipment	700 $	Excavation			
6		Truck	Equipment	700 $	Excavation			
7		Concrete mixer	Equipment	700 $	Flooring			
8		Bob's Excavation	Work	165 $/h	Excavation	bob_excavation@gmail.com		
9		Excavator	Equipment	700 $	Excavation			
10		Truck	Equipment	700 $	Excavation			
11		Baker Flooring	Work	140 $/h	Flooring	baker_flooring@gmail.com		
12		Concrete mixer	Equipment	700 $	Flooring			
13		Surveyor 2	Work	100 $/h	Surveyor	surveyor2@gmail.com		
14		Surveyor 1	Work	100 $/h	Surveyor	surveyor2@gmail.com		

1. Resources can be added by pressing **Enter**, or from the context menu by applying the command **Add Resource**.

2. Click the **Type** field of the Resource row. Add the resource type using the drop down menu.
Work resources are those with a cost over time. Other types of resources have a fixed cost per unit.

3. Columns that contains the resources information can be managed using the Column Customization dialog.
The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction.

4. Open Gantt Chart, View select a task and assign resources to task using the Assign Resources panel.

5. The information on the resources can be edited in the Resource panel.

Resources Context Menu

Access the most frequently used operations with resources via the context menu.

Name	Type	Cost	Group
Bob's Excavation	Arial ▾ 9 ▾		Excavation
Surveyor 1	A˄ A˅ AB ab A.B. Ab 🖻 ▾		Surveyor
Baker Flooring	Work	140 $/h	Flooring
Surveyor 2	📄 Copy		Surveyor
Excavator	E 📋 Paste		Excavation
Truck	E ✂ Cut		Excavation
Concrete mixer	E ▬ Add Resource		Flooring
Bob's Excavation	▬ Delete Resource(s)		Excavation
Excavator	E 🗓 Calendar...		Excavation
Truck	E **Markers**		Excavation
Baker Flooring	🟥 🟧 🟨 🟩 🟦 🟪 ⬛ ✕		Flooring
Concrete mixer	Equipment	700 $	Flooring

Resources List Context Menu
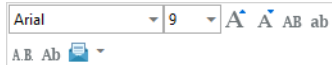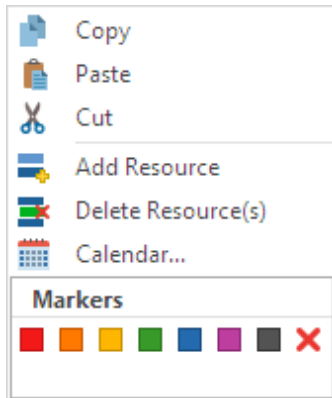
Arial ▾ 9 ▾ A˄ A˅ AB ab A.B. Ab 🖻 ▾	**Text Format**	Change the text format of the project schedule
	Microreports	Generate Microreports
📄 Copy	**Copy**	Copy the selection and put it into the Clipboard
📋 Paste	**Cut**	Cut selection and put it into Clipboard.
✂ Cut	**Paste**	Paste content from the Clipboard
▬ Add Resource	**Add Resource**	Inserts new resource
▬ Delete Resource(s)	**Delete Resource(s)**	Delete selected resources
🗓 Calendar...	**Calendar**	Opens the Standard Calendar dialog
Markers 🟥 🟧 🟨 🟩 🟦 🟪 ⬛ ✕	**Markers**	Set color markers

Multiproject

When you've got a multi-project file, use the button [image] on the View tab. It opens the Multiproject window. This window contains a list of projects with their characteristics.

#		Project Name	Priority	Start Date	Finish Date	Budget	Company	1st Quarter 2018			2nd Quarter 2018			3rd Quarter 2018			4th Q
								Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	O
1		Business Startup	★★★☆☆	2/12/2018	7/11/2018	$ 6,000	TechCorp							141 % ⫸ Brian Shark			
2		Web Site Launch	★★★☆☆	2/12/2018	4/19/2018	$ 6,000	TechCorp				18 % �» Brian Shark						
3		Release To Production	★★★☆☆	2/16/2018	3/23/2018	$ 10,000	TechCorp			0 % ■ James Smith							
4		Promo Program	★★★☆☆	1/19/2018	2/22/2018	$ 33,000	Evil Empire	0 % ■ Dart Weider									

1. Projects can be added to the document with one of the following methods:
- By pressing **Enter**
- Using the **General** section on the Home tab
- Applying the command **Insert New Task** from the context menu.

2. Columns that contains   information on the multiple project can be managed using the Column Customization dialog.
The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction.

3. You can set the visual parameters of the multiple project Gantt chart using the Multiproject Settings.

4. The timescale can be changed. This can be done in the Timescale dialog, that can be accessed from the context menu.
Also can change the task start/end date, its duration and completion . To change start/end dates move the bar by your mouse. To change the task duration you need to switch to Gantt Chart view.

5. You can group projects using the context menu . You can then select a project and use the **Group Projects** command from the context menu or create a **New Project Group** where you can then move your projects to. **Project Group** treats each project similarly to a phase, so all the properties are aggregated from the projects you include. Please note that Project Group only groups projects, so it does not have its own tasks.

Multiproject Context Menu

Access the most frequently used operations at Multiproject window via the context menu.
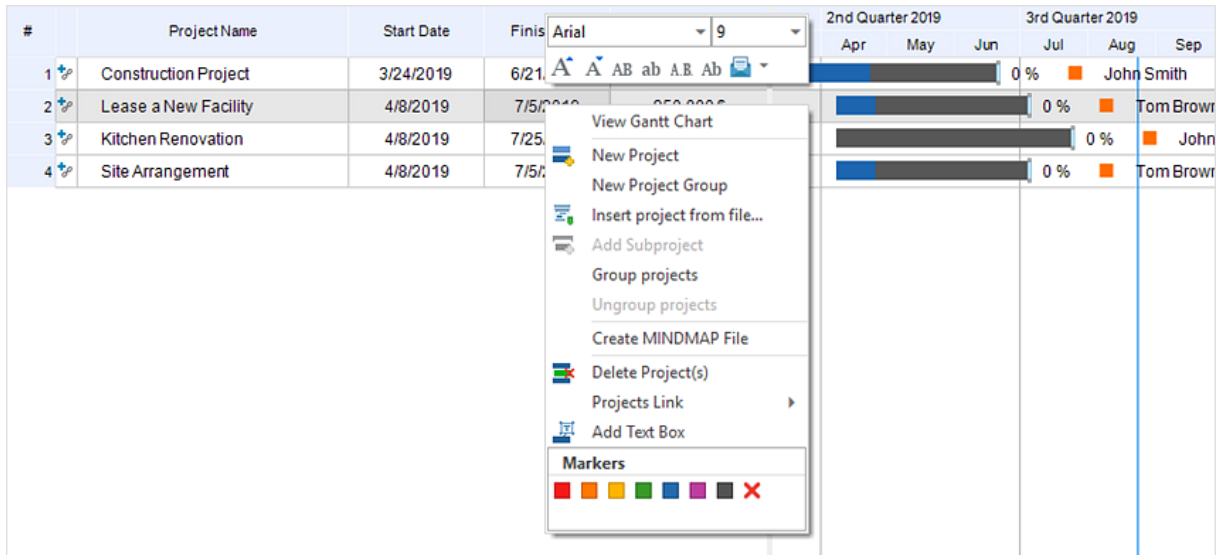
Multiproject Context Menu
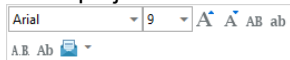
Text Format	Change the <u>text format</u> of the project schedule	
Microreports	Generate <u>Microreports</u>	
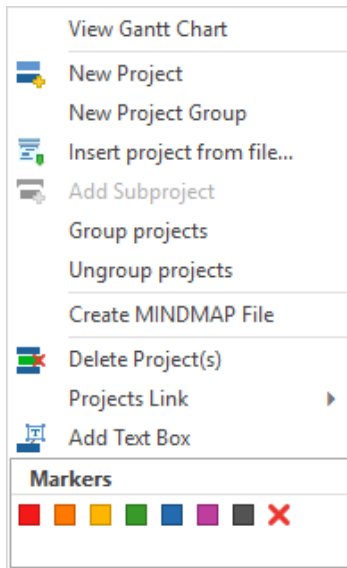
View Gantt Chart	Switch to <u>Gantt Chart View</u>
New Project	Add a new project
New Project Group	Add new project group
Insert project from file	Add a new project from file
Add Subproject	Add sub project to selected project
Group Projects	Join selected projects into a Project Group
Ungroup Projects	Split the Project Group into separate projects
Create Mind Map	Generate a multipage mind map (*. cdmz) from selected projects. The file will be opened in ConceptDraw MINDMAP
Delete Project (s)	Delete selected project (s)
Project Link Link	<u>Link</u> two or more selected projects
Add Text Box	Add a text box to selected item
Markers	Make the selected items looking like <u>marked</u> with a highlighter

Multiproject Timescale Context Menu

Zoom In	Displays timescale in more detail (day instead of weeks, etc.)	
Zoom out	Displays a more generalized timescale (weeks instead of days, etc.)	
Timescale	Calls [Timescale](#) dialog that allows to customize timescale appearance. It gives more possibilities for this than **Zoom In** and **Zoom Out** commands. On the other hand mentioned commands allows to change calendar scale quicker.	
Calendar	Opens the Standard [Calendar](#) dialog	

Multiproject Settings

You can change the visual parameters of the [Multiproject View](#)
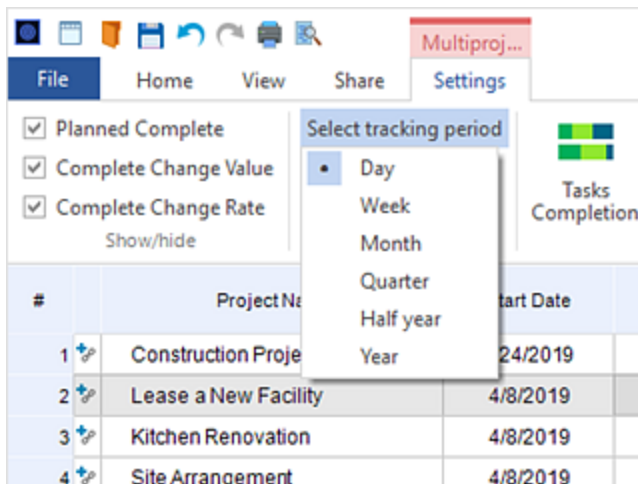
Show/hide

Planned complete	Show/hide the planned complete mark on the project Gantt chart
Complete change value	Show/hide the change of the complete value
Complete change rate	Show/hide the symbol of the complete change rate. Project's dynamics are shown using colored symbols: • yellow arrows indicate a normal completion level
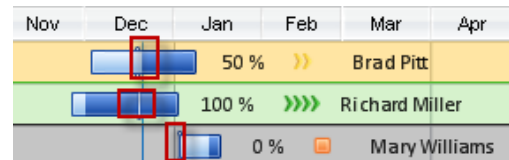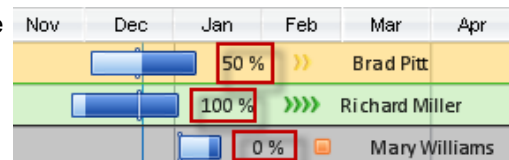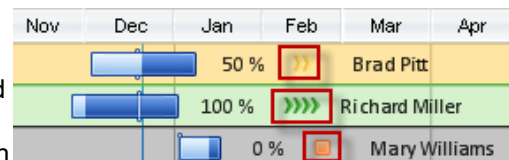
• green arrows means that a project is ahead of schedule
• orange square symbol signals that the project's completion didn't change, the project "sleeps" and we have zero progress.

Tracking period

Select tracking period

Set the frequency of complete values verification

•	Day
	Week
	Month
	Quarter
	Half year
	Year
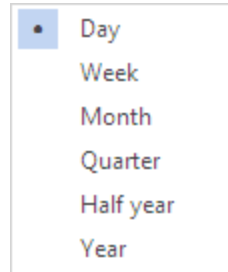
Task Completion

Show/hide the colored bar representing the situation with the completeness of the project's tasks. You can see the number of completed
tasks, the ones in the process, and those that
have not been started.

2	8	2	John Smith
5	1	14	Tom Brown
	97		John Smith
5	1	14	Tom Brown

Resource Usage

Resource Usage diagram consists of two parts: the task list and graphic presentation of the tasks.

Name	Project Name	Expenses	w20, 12 May 2019							w21, 19 May 2019					
			12	13	14	15	16	17	18	19	20	21	22	23	24
⊞ Bob's Excavation		121,600 $		200%								200%			
⊟ Surveyor 1		19,200 $													
Stake lines and grades	Construction Project	8,000 $													
Footings	Construction Project	11,200 $													
⊞ Baker Flooring		70,400 $										100%			
⊞ Surveyor 2		20,000 $		100%								100%			
⊞ Tom Sheldon		3,600 $									100				
⊞ Rich Gannon		15,600 $	200	100%								100			
⊞ Joe Smith		48,000 $									100		100		
⊞ Tom Farrell		46,800 $					100					100%		200	

It is a kind of a Gantt Chart which shows you all resources with their usage by tasks and time.

1. You can see the all resources and only allocated tasks in the left part of the diagram and their usage with timetable in the right part. Thus, you can see which resource haven't any tasks.

2. To quickly move to the [Resource view](#) just make a double-click on a resource.

3. To move to the [Gantt chart](#) view make a double-click on a task in the left part of the Resource Usage view.

4. The graphic part of the diagram displays task as bars. Bars are arranged in accordance with the timescale, displaying the task start /end time and its duration. The timescale can be changed. This can be done in the dialog [Timescale,](#)

5. Normally allocated resources are shown in blue color, over allocated resources - in red color and under allocated resources are shown in yellow, so you can quickly define which resources is over- or under allocated and find a solution for such issue.

Filters Mode

The embedded filters of ConceptDraw PROJECT can be very useful for viewing a specific range of information. You can apply filters to tasks, resources and even projects.
Filters mode can be activated from the Filters section on the View tab.

1. Select one of the embedded filters from the drop-down menu.
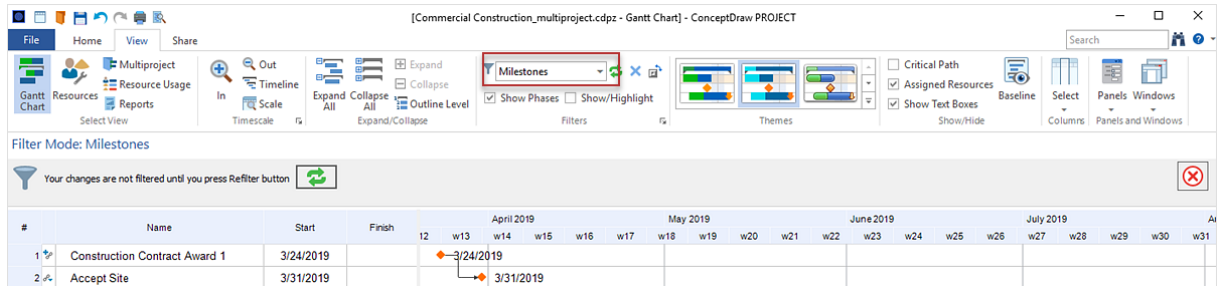
2. Toggle **Show/Highlight** item, to highlight filtered items without hiding the other data.
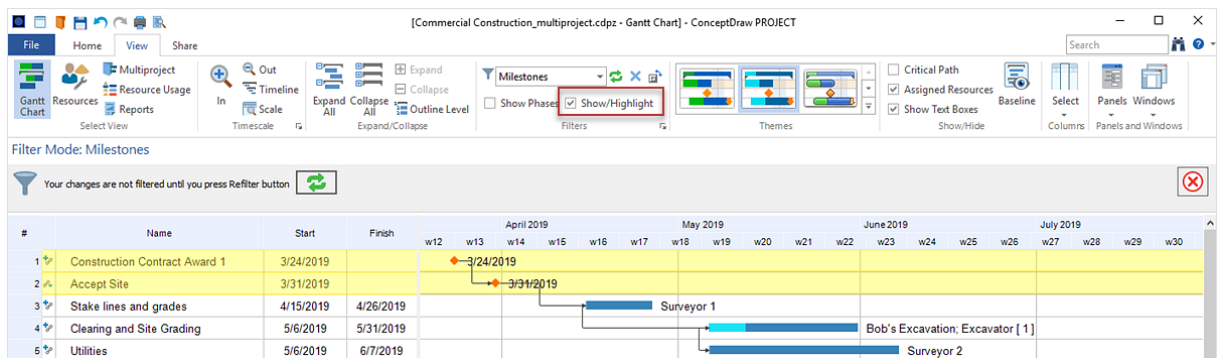
3. Toggle **Show Phases** item to display phases that are associated with tasks which are shown in the filtered view.
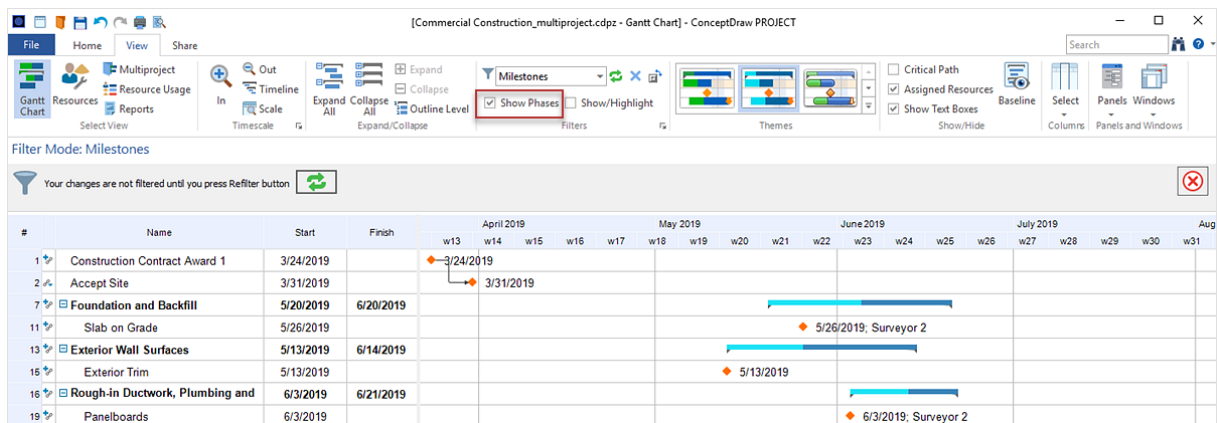
4. You can reverse filtering condition using **Invert** button.
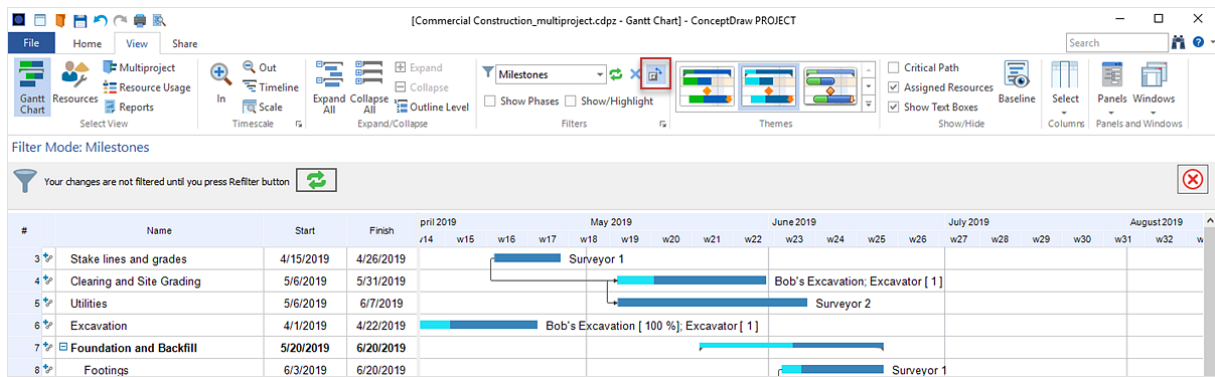
5. Use the **Refilter** button to reapply the filter when you have made changes in the project schedule.

6. To remove the filter, click on the **Clear Filter** button.
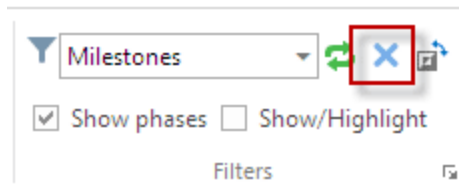
You can customize the filtering options using the [Filters](#) dialog

Critical Path

Critical Path Analysis helps identify the minimum length of time needed to complete a project. When you need to run an accelerated project, the critical path will help you identify which project steps you should accelerate to complete the project within the available time. Select the Gantt Chart View or Multiproject View and check the Critical path option on the View toolbar. The critical path will be highlighted with the red color.

The critical path of a single project shows which tasks are most critical: the ones that add up to the longest project duration.
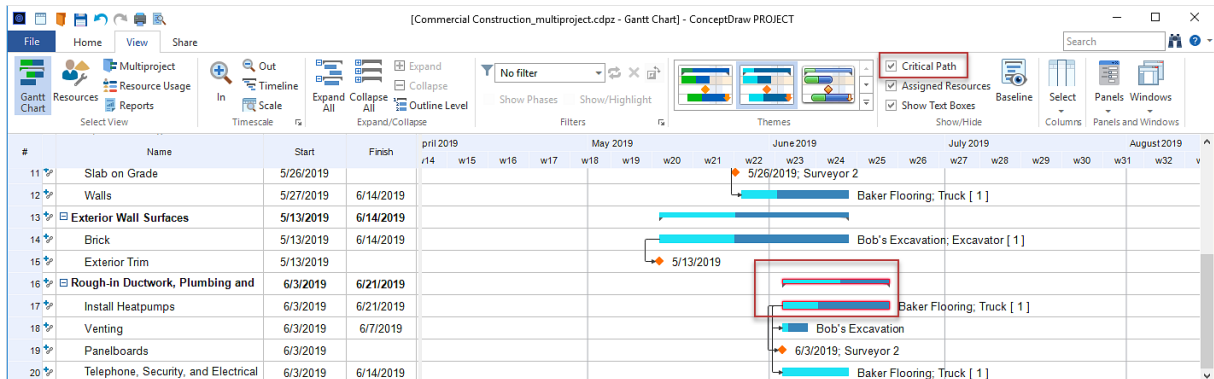
The critical path of a multiple project shows which projects are most critical to complete all the projects on time.
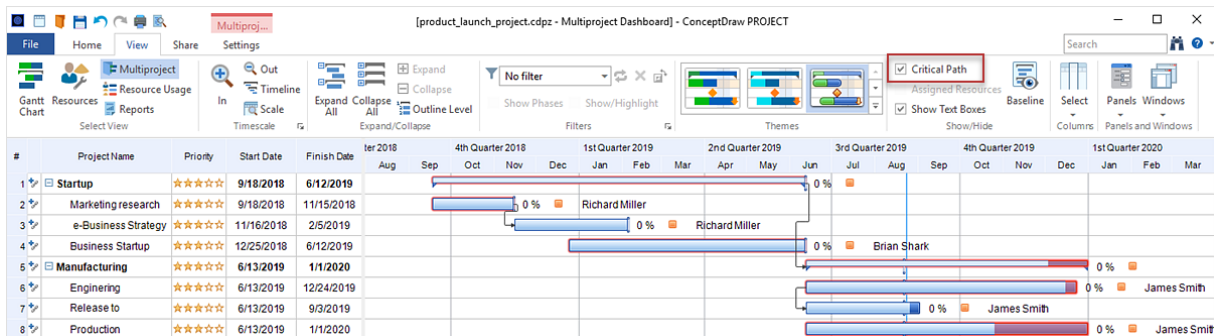
Share
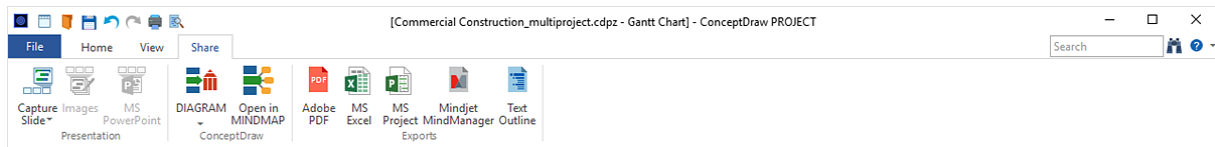
Presentation

Capture Slides

Visible area	
Whole view	

.
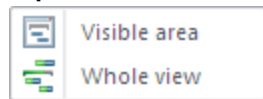
ConceptDraw PROJECT allows you to make slides for presentation. You can create slides from any of project views.
 Make slide from the current project view according to chosen option. The slides will appear in the pop-up Slide Preview panel.

Images: Save slides in PNG format.

MS PowerPoint: Save slides as MS PowerPoint presentation (PPTX).

ConceptDraw

DIAGRAM: Create a Project Management diagram in ConceptDraw DIAGRAM

Open in MINDMAP: Open the current document in ConceptDraw MINDMAP , having closed it in ConceptDraw PROJECT.

Exports

Adobe PDF: Export the document to Adobe PDF.

MS Excel: Save the document as Microsoft Excel workbook (XLSX).

MS Project: Export the document to Microsoft Project XML.

Mindjet MaindManager: Save the document in Mindjet MindManager format (MMAP).

Text Outline: Export the document to text outline.

DIAGRAM

Project management diagrams give you the ability to view at a detailed level project attributes such as project scope, logical connections in the project, critical paths, key events on the timeline, milestones, tasks, calendars for work, and resource utilization. Transforming project data into different visual forms is a productive way of looking at your project from different perspectives. It also helps you deliver project information in suitable way depending on your objectives and audience.

Select the proper diagram type from the drop-down list of the DIAGRAM button on the Share tab. There are 10 types of visual project diagrams available: Gantt Chart, Milestones chart, PERT chart, Radial Structure chart, Resource Calendar, Resource Usage diagram ,Timeline, Timeline From Marked Tasks , and WBS chart. The diagram will be generated and opened in ConceptDraw DIAGRAM.
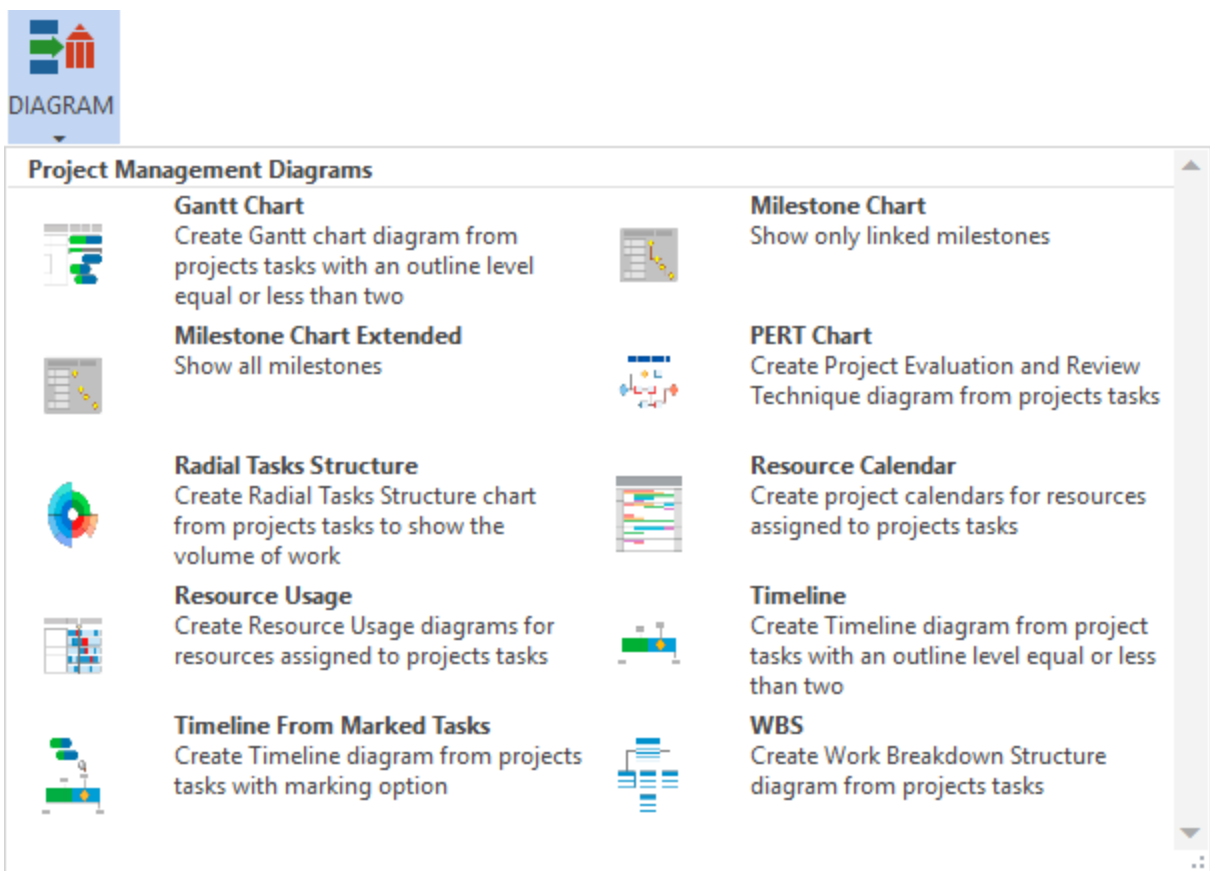
MINDMAP

The compatibility between ConceptDraw products allows you to migrate your documents from MINDMAP to PROJECT and vise versa. You can see the project data in a mind map structure by opening your

project in ConceptDraw MINDMAP [icon]. Mind map will consist from topics of Project Management type, which contain all project information. Project Notes will be opened as Notes to topics. All hyperlinks will be displayed in the Hypernote panel. This way you are switching views without creating extra files. You can see the same file in both applications:

ConceptDraw PROJECT
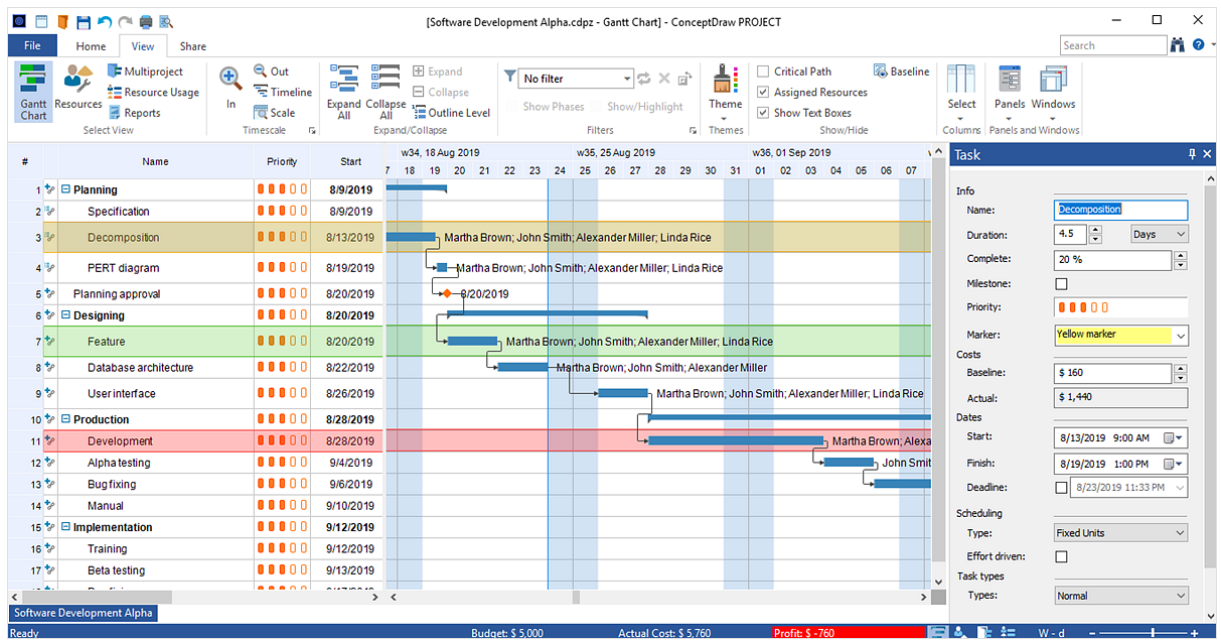
ConceptDraw MINDMAP
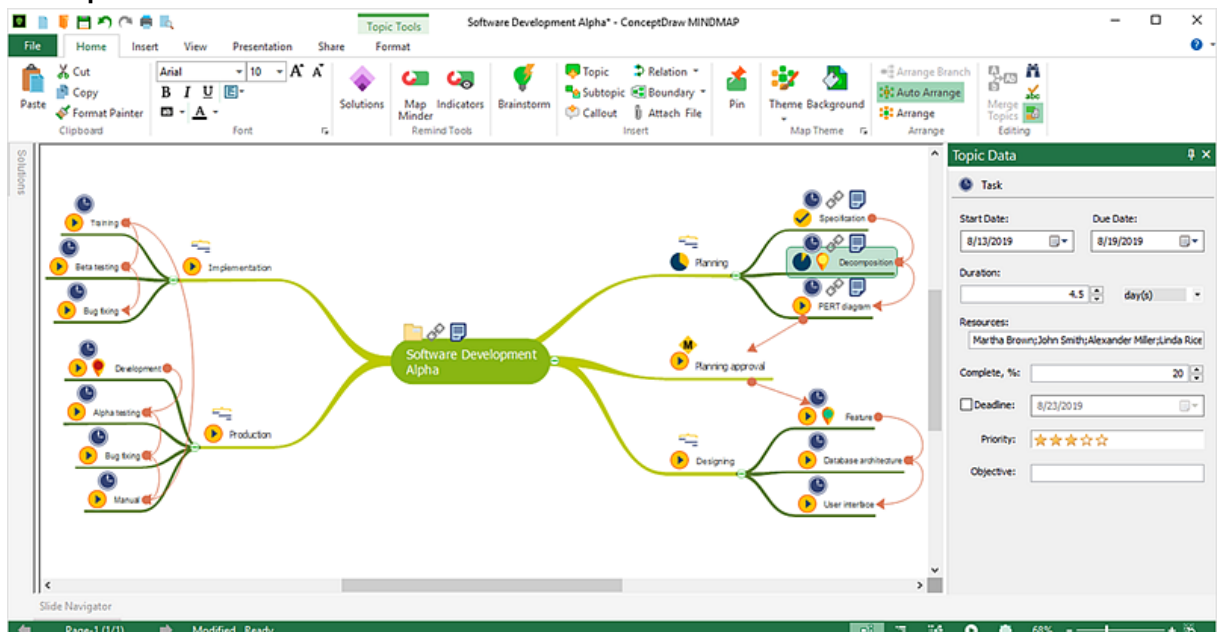
Dialogs

Floating Panels

Some tools and features in ConceptDraw PROJECT are accessible from the floating panels. Floating panels can be accessed from the drop down list of the Panels button on the View tab.
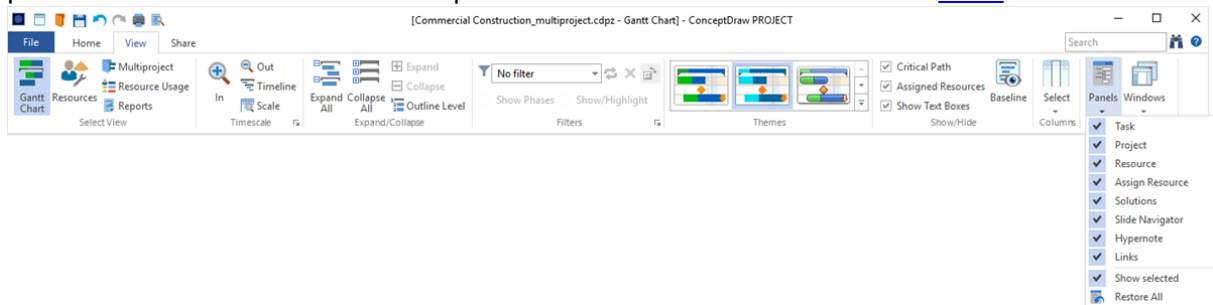
Task
Project
Resource
Assign Resources
Solutions
Slide Navigator
Hypernote
Links

Task

Task dialog can be accessed from **Panels** button on the View tab.
Task dialog defines the project parameters and allows you to manage a task information from the Gantt chart,
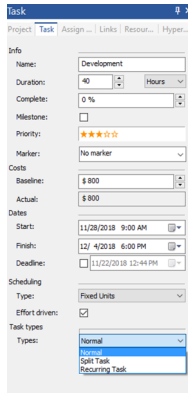
Name: Set up task name.
Duration: Set up task duration.
Measuring unit: Specify duration measuring unit.
Complete: Set up percentage of completeness.
Milestone: Convert task to milestone.
Priority: Set up task priority.
Marker: Specify task marker from list.
Baseline: Display task baseline cost.
Actual: Display task actual cost.
Start: Set up start date.
Finish: Set up finish date.
Deadline: Set up deadline date.
Scheduling: Set the Fixed Task Type
Effort driven: On/Off the Effort-Driven scheduling.
Task types: You can **Split a task**, or create a **Recurring task**.

The three Task Types used in ConceptDraw PROJECT are Fixed Units, Fixed Work, and Fixed Duration. Fixed Units is set as default.

Each of the task types affects scheduling when you edit one of the three elements as follows.

Task type	Units is edited	Duration is edited	Work is edited
Fixed Units	Duration is recalculated	Work is recalculated	Duration is recalculated
Fixed Work	Duration is recalculated	Units are recalculated	Duration is recalculated
Fixed Duration	Work is recalculated	Work is recalculated	Units are recalculated

Effort - Driven Task

Effort-driven scheduling is the default scheduling method used in ConceptDraw PROJECT . The duration of a task shortens or lengthens as resources were added or removed from a task, while the amount of effort necessary to complete a task remains unchanged. Effort-driven scheduling only takes effect when resources are added to or removed from a task.
Effort-driven calculation rules are not applied when you change work, duration, and unit values for resources already assigned to a task.

When working with effort-driven scheduling, keep the following in mind:
- The effort-driven calculations apply only after the first resources are initially assigned to the task.
- After the first resources are assigned, the work value doesn't change as new resources are assigned to or removed from the same task.
- If the assigned task type is Fixed Units, assigning additional resources shortens the duration of the task;
- If the assigned task type is Fixed Duration, assigning additional resources decreases the individual unit values for resources;
- If the assigned task type is Fixed Work, assigning additional resources shortens the duration of the task.

Split a Task

When you need to interrupt work on a task, you can split the task so that part of it starts later in the schedule. You can split a task into as many sections as you need.
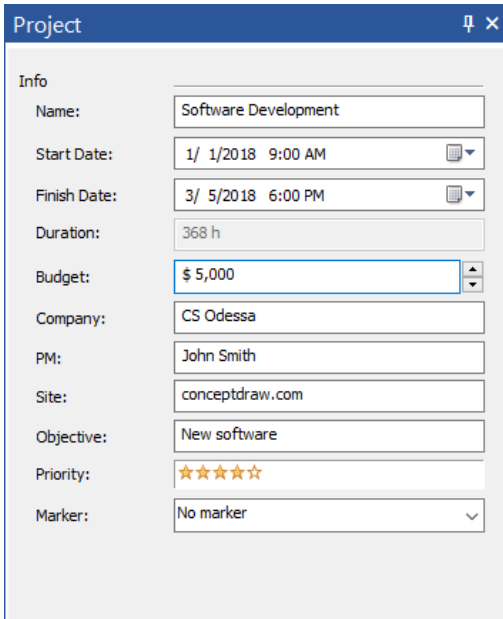
Recurring Tasks

If you have a task that occurs repeatedly during the course of a project, ConceptDraw PROJECT can help you create it as a recurring task, so you only have to set it up once.

Project

Project dialog can be accessed from **Panels** button on the View tab.
Project dialog defines the project parameters and allows you to manage a project information from the Gantt chart and the Multiproject View

Project ⊓ ✕	

Info

Name:	Software Development
Start Date:	1/ 1/2018 9:00 AM
Finish Date:	3/ 5/2018 6:00 PM
Duration:	368 h
Budget:	$ 5,000
Company:	CS Odessa
PM:	John Smith
Site:	conceptdraw.com
Objective:	New software
Priority:	★★★★☆
Marker:	No marker

Name - Set up project name

Start Date - Display project start day

Finish Date - Display project finish day

Duration - Display project duration

Budget - Set up project budget

Company - Set up Company name

PM - Set up project manager

Site - Set up project web-site

Objective - Set up project objective

Priority - Specify project priority

Marker - Specify project marker from list

Resource

Resource dialog can be accessed from **Panels** button on the View tab.

Resource dialog defines parameters of the project resources and allows you to manage a resource information in the Resources list,

Name - Set up resource name.

Type - Specify one of the following resource type: Work,; Material; Cost; Equipment or Company.
.

Cost - Set up resource cost. Work resources are those with a cost over time. Other types of resources have a fixed cost per unit

Group - Set up resource group

E-mail - Set up resource e-mail

Marker - Specify resource marker from list

Assign Resources

Assign Resources dialog can be accessed from Panels button on the View tab.
Use Assign Resources dialog to assign resources to project tasks,
Open Gantt Chart View and select a task to assign resources.
Select a particular resource from the resources listed at the Assign Resources panel and assign it to a task by double clicking or pressing the Enter key.
You can even create a new resource using buttons. The new resource will be added to both the Assign Resource dialog and the Resources list.
The Work resource you have assigned is displayed as 100% implementation. The other type resource is displayed as 1 unit implementation.You can change this allocation manually after the resource has been assigned.
Using the Effort Driven scheduling, when you assign or remove people from a task, the duration of the task will be the lengthened or shortened based on the number of resources assigned to it.
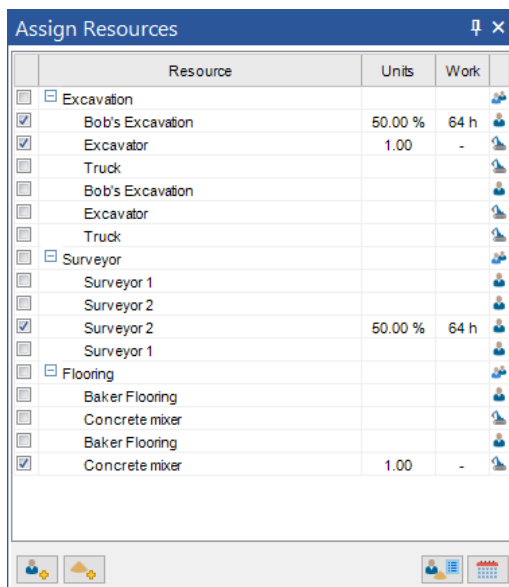
Resource - Displays the resource name.

Units - Resource utilization for the current task.

Work - Man-hours for the Work type resource.

Add Work resource - Add new human resource into resource pool

Add Material resource - Add new material resource into resource pool.

Move to Resources view - Switch to Resources view

Calendar - Set the specific calendar for Work type resource

Solutions

Solution panel contains a list of project management solutions located in Solution Park. It provides access to the number of project schedule examples, various types of reports and live graphical project dashboards. Open the example project file to modify it, or generate a tabular, visual and mind map reports on your project. Access the panel from the button ⬙ in the Home tab, or using the Panels list in the View tab.
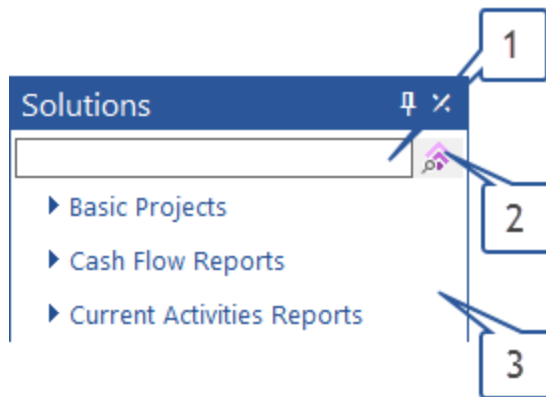
1. **Search window.** You can search for the required reports and examples. Enter the keyword in the search field. The corresponding solutions will be displayed in the panel.
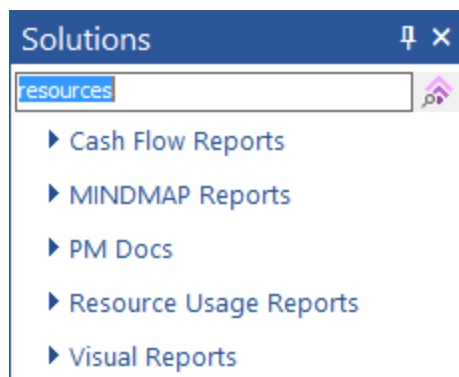
2. **Search in ConceptDraw STORE.** You can run the ConceptDraw STORE application to search for the the proper solution in Solution Park

3. **Solution section.** This section contains the list of available solutions in alphabetical order.
The following options are available here:
a) Use the drop-down button to preview Examples and Reports contained in the certain solution. You can open them by click.
b) Click to download and install a free, or previously purchased solution using the ConceptDraw STORE application.
c) Check, to view just solutions that are already installed.
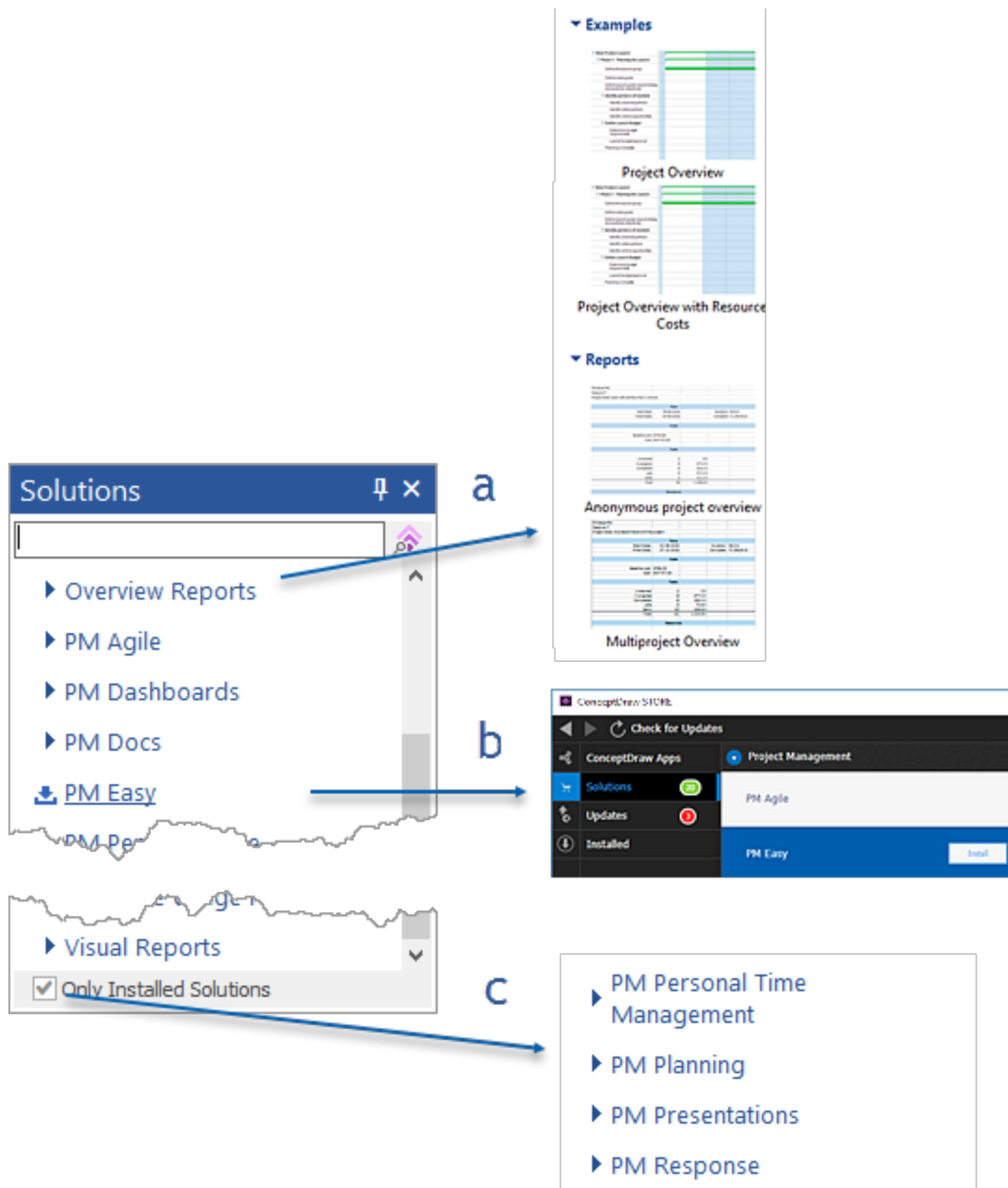
Tabular Reports

Tabular reports in ConceptDraw PROJECT are generated as electronic spreadsheets in MS Excell format (XLSX). This ability is convenient for your own use and for easily sharing the reports with stakeholders, even if they don't have ConceptDraw PROJECT installed. There are more than 30 tabular reports in ConceptDraw PROJECT. Reports are combined into 7 case-oriented solutions with many kinds of reports:

The group of Table Reports includes the following types of reports:

1. Basic Projects:
    - All Task Statuses – report the table of all tasks statuses for each project;

- Milestones – report the table of milestones for each project;
- Send Task List – report the table of tasks for each project;
- Task and Notes – report the table of tasks with start and finish dates and Text Notes.

2. Cash Flow Reports:
   - Cash Flow on Projects – report the table of daily expenses per project during one month;
   - Cash Flow on Resources – report the table of daily labor expenses per employee during one month;
   - Cash Flow on Tasks – report the table of daily expenses per task during one month.

3. Current Activities Reports:
   - Completed Tasks – report the table of completed tasks for each project;
   - Critical Tasks – report the table of critical tasks for each project;
   - Overdue Tasks – report the table of overdue tasks for each project;
   - Tasks in Progress – report the table of tasks in progress with task information for each project;
   - Unstarted Tasks – report the table of unstarted tasks with task information for each project.

4. Knowledge Reports:
   - Knowledge Schedule – report the table of all hyperlinks with dates and associated tasks;
   - Project Knowledge – report the table of all project hyperlinks;
   - Resource Knowledge – report the table of all resources hyperlinks.

5. Overview Reports:
   - Anonymous Project Overview – report the table of time, costs, tasks and resources overview without Resource names;
   - Multiproject Overview – report the table of time, costs, tasks and resources overview for each project.

6. PM Planning:
   - All Tasks All Columns List – report the table of entire project schedule including hidden columns;
   - All Visible Columns – report the table of project schedule excluding hidden columns;
   - Milestones with Notes and Objectives – report the table of milestones with notes and objectives for each project;
   - Multiproject Goals – report the table of projects objectives for each project;
   - Multiproject Managers – report the table of projects managers for each project;
   - Project Team – report the table of project employee including hyperlinks;
   - Resource Report – report the table of all kinds projects resources for each project;
   - Top Level Tasks – report the table of project top level phases and tasks with task information for each project.

7. Resource Usage Reports:
   - List of Materials – report the mind map of used materials for each project;
   - Materials Utilization – report the table of material resources utilization by tasks;

- Over Allocated Resources Details – report the table of overallocation periods with task assignments for each employee;
- Over Allocated Resources – report the table of workloads per tasks for each employee;
- Resource Report – report the table of all kinds projects resources for each project;
- Resource Usage – report the table of resource usage details for the current week;
- Resource Usage Summary – report the table of workload periods with costs per employee;
- Who Does What Details – report the table of tasks with statuses per employees for each project for the current week;
- Who Does What Loading Percent – report the table of employees loading in % during the period for each project;
- Who Does What Loading – report the table of employees loading during the period for each project;
- Who Does What When – report the table of daily tasks assignments of employees during current week for each project;
- Who Does What – report the table of employees workloads by tasks in current month for each project.

Follow the steps below to make the tabular report on your project:
1. On the Solutions panel find out the suitable report from the list above.

2. Click the report icon to view its preview on the right panel.

3. Specify the report parameters using the Report Parameters panel.

4. Press **Generate** to create the report.

5. The report will be generated and opened in MS Excel.

	A	B	C	D	E	F	G
1	Unique ID	Name	Duration	Start	Finish	Complete	Resource Name
2	419	Planning	40.00 h	3/19/2018	3/23/2018	2 %	
3	420	Specification	32.00 h	3/19/2018	3/22/2018	0 %	John Smith
4	421	Decomposition	16.00 h	3/21/2018	3/22/2018	10 %	Martha Brown, John Smith, Alexander Miller, Linda Rice
5	422	PERT diagram	20.00 h	3/21/2018	3/23/2018	0 %	Martha Brown, John Smith, Alexander Miller, Linda Rice
6	423	Planning approval	0 d	3/21/2018	3/21/2018	0 %	
7	424	Designing	40.00 h	3/21/2018	3/27/2018	25 %	
8	425	Feature	16.00 h	3/21/2018	3/22/2018	0 %	
9	427	Database architecture	32.00 h	3/21/2018	3/26/2018	25 %	Martha Brown, John Smith, Alexander Miller

Software Development   ⊕

Mind Map Reports

The mind map reports in ConceptDraw PROJECT are generated as ConceptDraw MINDMAP files (CDMZ). You can generate the report mind map with the help of compatibility between PROJECT and MINDMAP.

1. Find out MINDMAP reports in the Solutions panel.
2. Click the report icon to view its preview on the right panel.
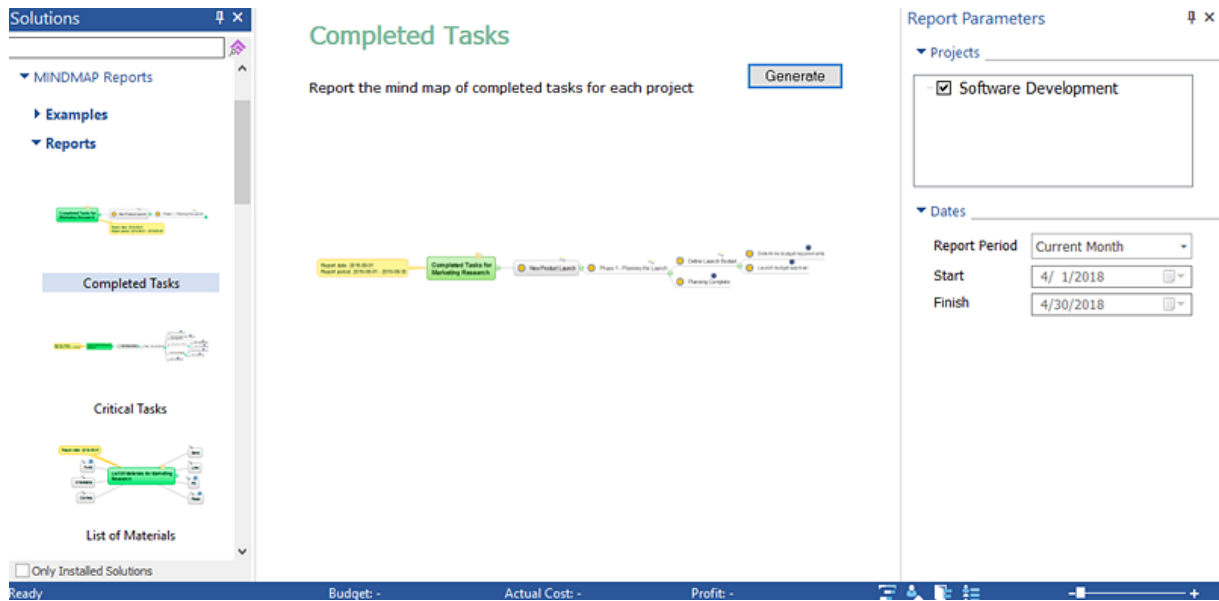
3. Specify the report parameters using the Report Parameters panel.
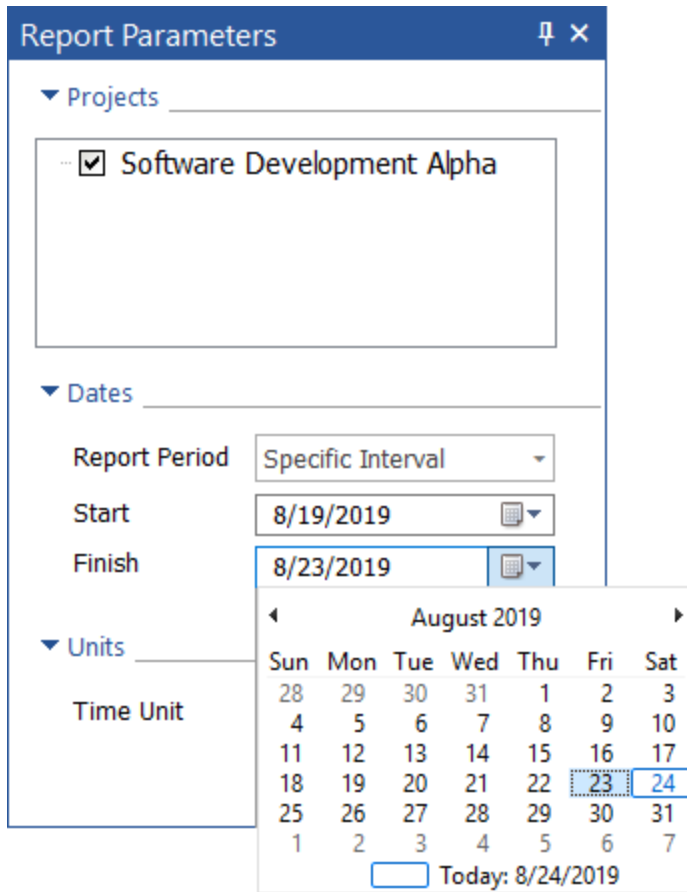
4. Press **Generate** to create the report.

5. The report will be generated and opened in ConceptDraw MINDMAP
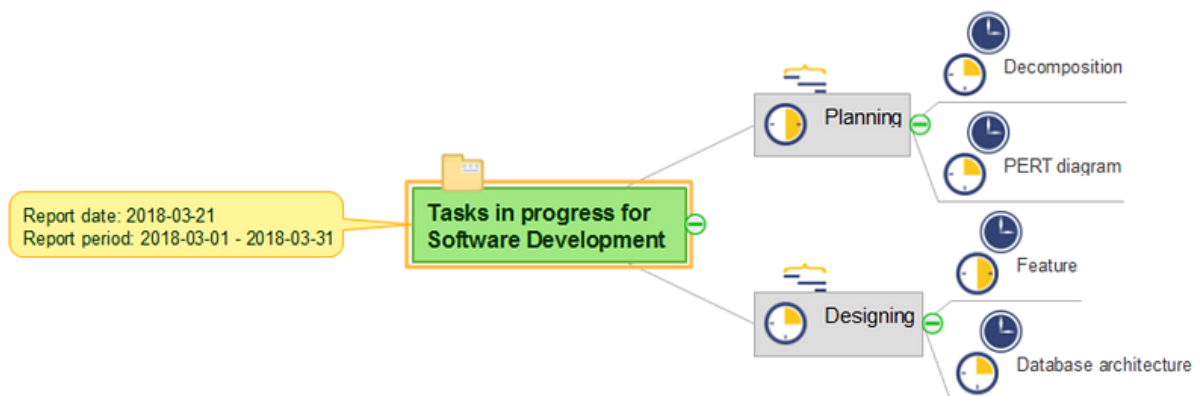
Visual Reports

Conceptdraw PROJECT has several types of visual reports that can help assess visually the difference between planned and actual project data. Conceptdraw PROJECT provides user with the possibility to track how the project is going. Project Manager can compare the actual data with the planned and

assess possible measures to resolve issues. The main tool for effective monitoring of the project implementation is the ability to save project Baseline. It includes the value of Baseline Start, Baseline Finish and Baseline Cost. All these indicators can operate effectively only in one case - if the project manager, constantly receives information about the actual data compared with planned.

Conceptdraw PROJECT has several types of visual reports that can help to assess visually the difference between planned and actual project data. The visual reports in ConceptDraw PROJECT are generated as ConceptDraw DIAGRAM files (CDDZ).

1. On the Solutions panel find out the suitable visual report.
2. Click the report icon to view its preview on the right panel.
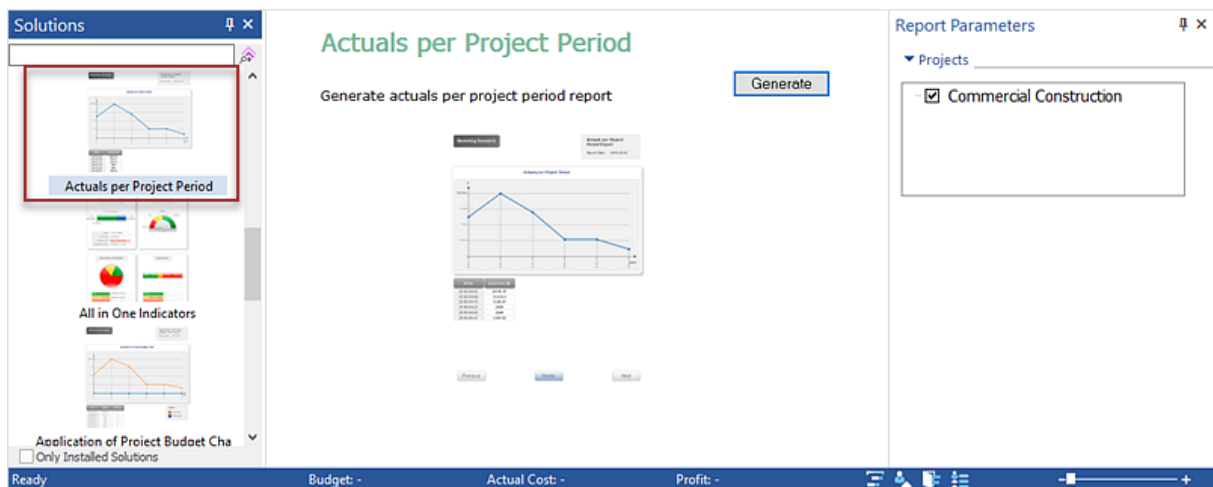
3. Press **Generate** to create the report.
4. The report will be generated and opened in ConceptDraw DIAGRAM

Commercial Construction

Actuals per Project Period Report

Report Date: 2018-03-21

Actuals per Project Period

Week	Expenses ($)
2018-02-16	3340
2018-02-23	24326.3
2018-03-02	29006.3
2018-03-09	32829.7
2018-03-16	15343
2018-03-23	7842.14
2018-03-30	952.5
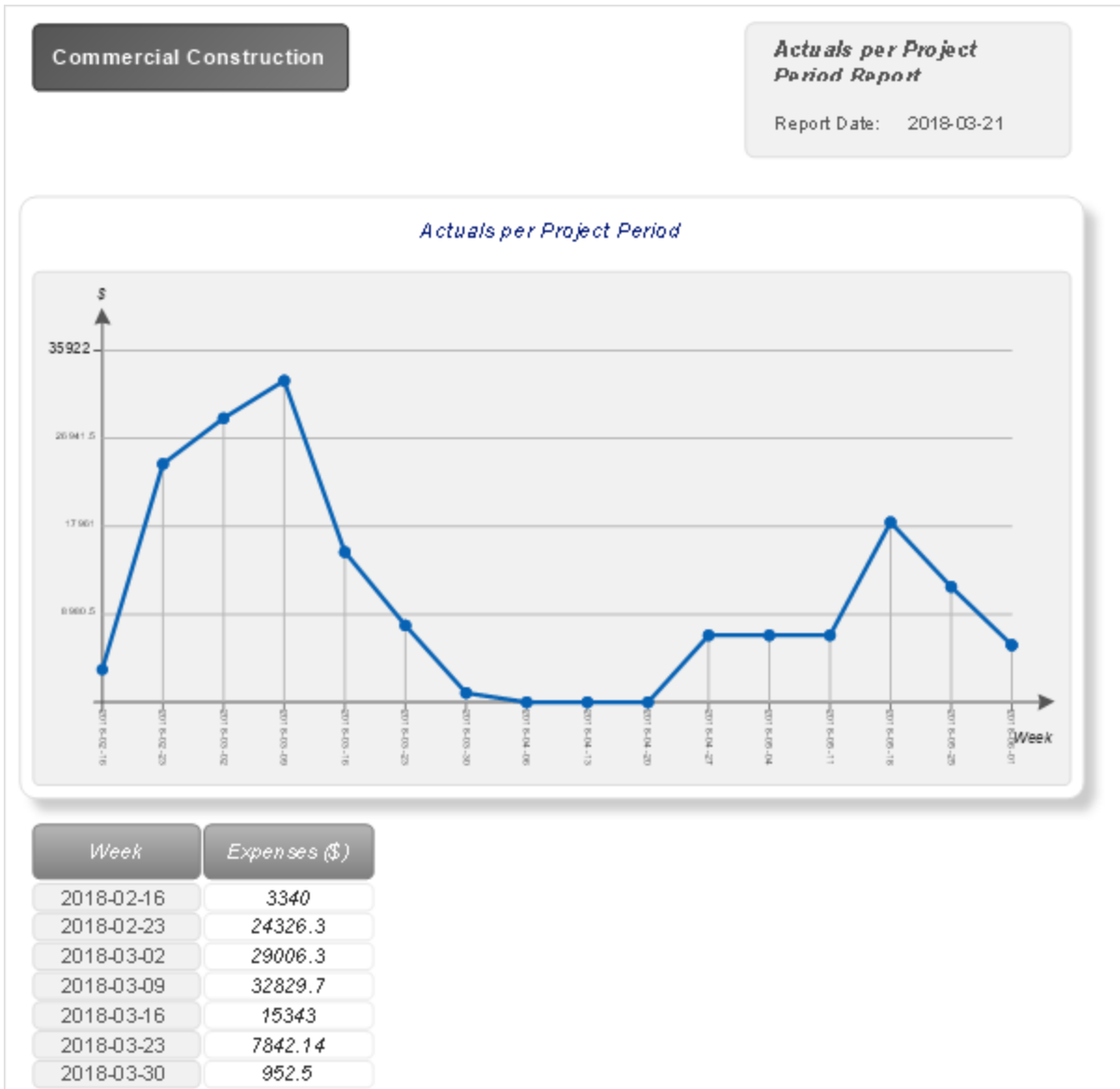
Dashboards

ConceptDraw PROJECT provides the possibility of creating visual project dashboards. The PM Dashboards solution allows generating accurate, timely, and professional looking Project Dashboard, Radar Chart and Tactical Dashboard. Project Dashboards are the helpful tool for tracking project progress and catching critical points. The ConceptDraw PROJECT's dashboards are opened as ConceptDraw DIAGRAM documents (CDDZ).

1. Find out the PM Dashboard solution in Solutions panel and select the dashboard type you need to

    create.

2. Click the certain dashboard icon to view its preview on the right panel.
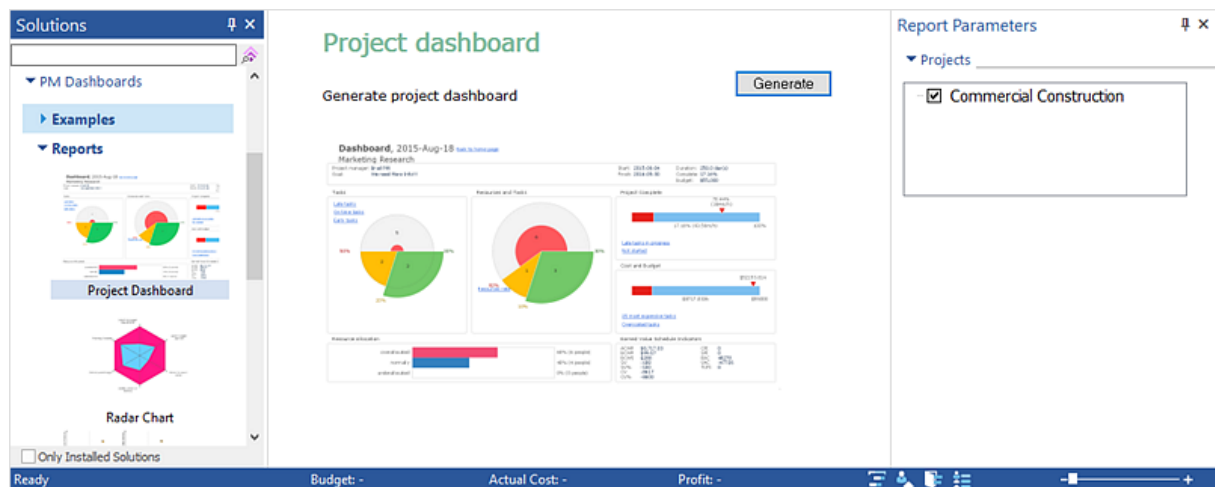
3. Press **Generate** to create the dashboard.

4.   Project Dashboard, Radar Chart and Tactical Dashboard will be generated and opened in ConceptDraw DIAGRAM.

Project Dashboard

The ConceptDraw PROJECT's dashboard displays the current status of your project and shows where you need to direct your management efforts. A Project Dashboard diagram is generated from your project data and will be opened in ConceptDraw DIAGRAM.

Project Dashboard is divided into several parts, each of them provides an overview of the project status. In other words Project Dashboard contains a summary of project information - general information about project, Tasks Completion, Resource and Tasks indicator, Project Complete indicator, Cost and Budget, Resource Allocation, and Earned Value Schedule Indicators.
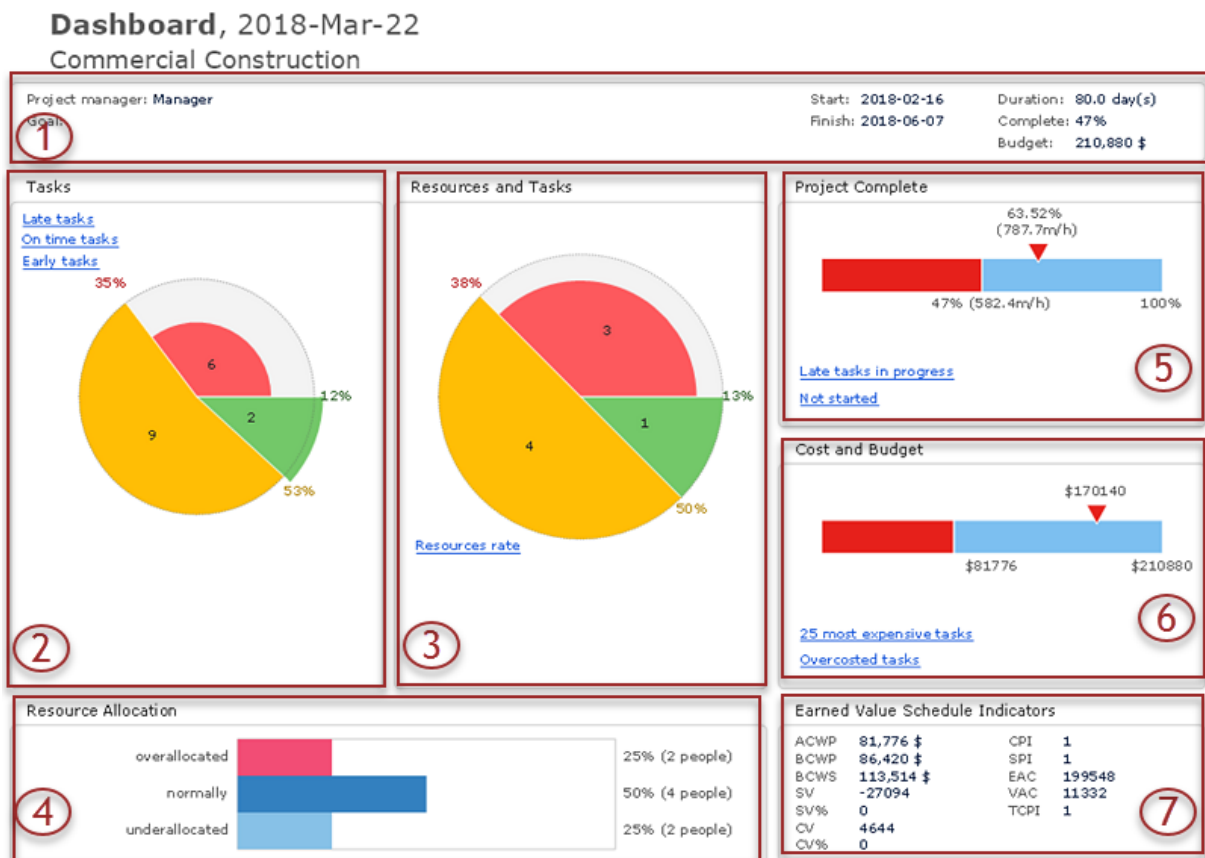
1. The block of general information contains the data about name of Project Manager, goal, project's start and finish dates, completing status and budget.

2. Tasks block provides the information about tasks completing. The indicators have a common color notation: red denotes late tasks, yellow shows a normal status (on time tasks), and green indicates tasks that are ahead of schedule (early tasks). Some indicators have links to additional graphical reports, double-click the link to open the corresponding diagram with all additional information in full screen mode. The list of tasks will be displayed with detailed information regarding their planned and actual level of completion, and assigned resources.
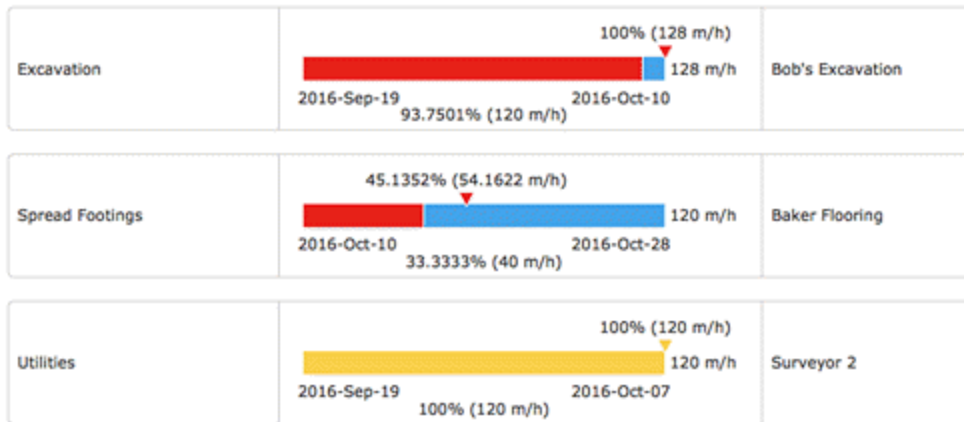
3. Resource and Tasks section allows to see all information about project's work resources. Resources are divided on groups on this pie chart, the color indicates if the group of resources is late (red color), ahead (green color), or in time (yellow color). The quantity of resources which contains each group is indicated in percents and by number on each sector. You can also view the degree of late or ahead of resources groups - the yellow sector is always on the circle's border, green sector exceeds the circle's border, and red sector tends to the center, the degree of remoteness from the border to one side or another is a degree of late or ahead.

This information is particularly useful for small projects, because for them the contribution of each participant is greatly and valuable, and it's important that each work regularly and in time. Resource and Tasks indicator for large projects allows to see immediately the red sector and resources that are much late. Click the Resource rate link to receive the detailed information for each work resource of project: which quantity of tasks it executes and what are their statuses.
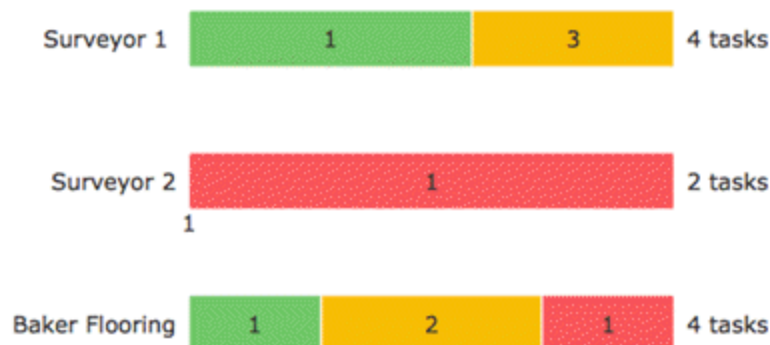
4. Project Complete indicator has three points you have to pay attention to color, current completion and planned completion. Progress bar shows current project completion, below you can see the completing status in percentage. Arrow shows planned project completion. You can click to get the additional information about late tasks in progress and not started tasks, the additional diagrams will be opened on the separated pages.
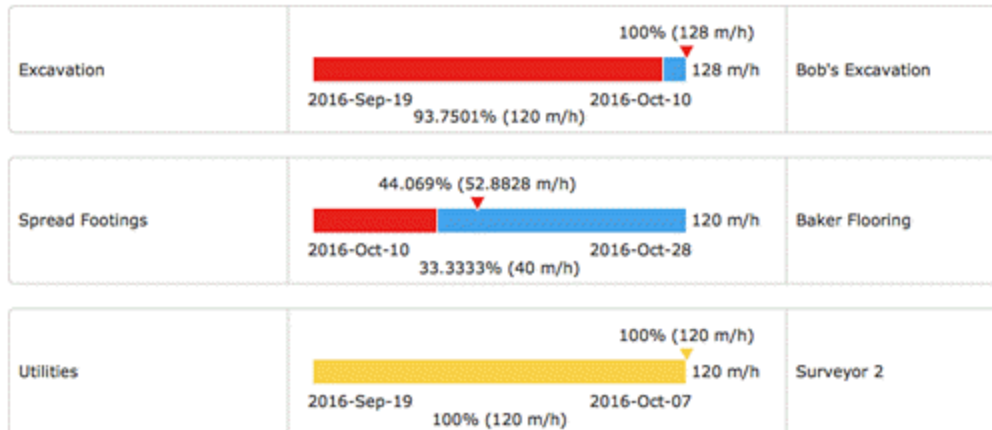
5. Cost and Budget Indicator shows at the right the allocated project budget, and progress bar shows its actual cost. The color indicates whether the project execution is within budget or, in other words, it does not exceed the project actual cost of allocated budget. You can click to get the additional information about 25 most expensive tasks and over-costed tasks.

6. Resource Allocation section allows to visually see what resources are over-allocated, under-allocated, and with normal status. Over-allocation is the result of assigning more tasks to a resource than the resource can accomplish in the working time available, under-allocation is assigning a resource to work fewer hours than the resource has available. This information is represented in the form of colored bars, and in percentage with information about quantity of persons at the brackets.

7. Earned Value Schedule Indicators [10] is a set of calculated project indicators:

- ACWP (Actual Cost of Work Performed) - is calculated as the sum of the products of actual costs of the task on the task complete for all tasks.
- BCWP (Budgeted Cost of Work Performed) - is calculated as the sum of the products of baseline costs of the task on the task complete for all tasks.
- BCWS (Budgeted Cost of Work Scheduled) - is calculated as the sum of the products of baseline costs of the task on the planned task complete for all tasks.
- SV=BCWP-BCWS

- SV%=(BCWP-BCWS)/BCWS, BCWS≠0
- CV=BCWP-ACWP
- CV%=(BCWP-ACWP)/BCWP, BCWP≠0
- CPI=BCWP/ACWP, ACWP≠0
- SPI=BCWP/BCWS, BCWS≠0
- EAC=ACWP+(BAC-BCWP)/CPI, where CPI≠0and BAC is calculated as the sum of the baseline costs of all tasks.
- VAC= BAC-EAC
- TCPI=(BAC-BCWP)/(BAC-ACWP)

Radar Chart

Radar Chart visually shows the degree of project completion. Each axis on the diagram corresponds to one chain of linked milestones, and the number of marks on the axis corresponds to the number of millstones.
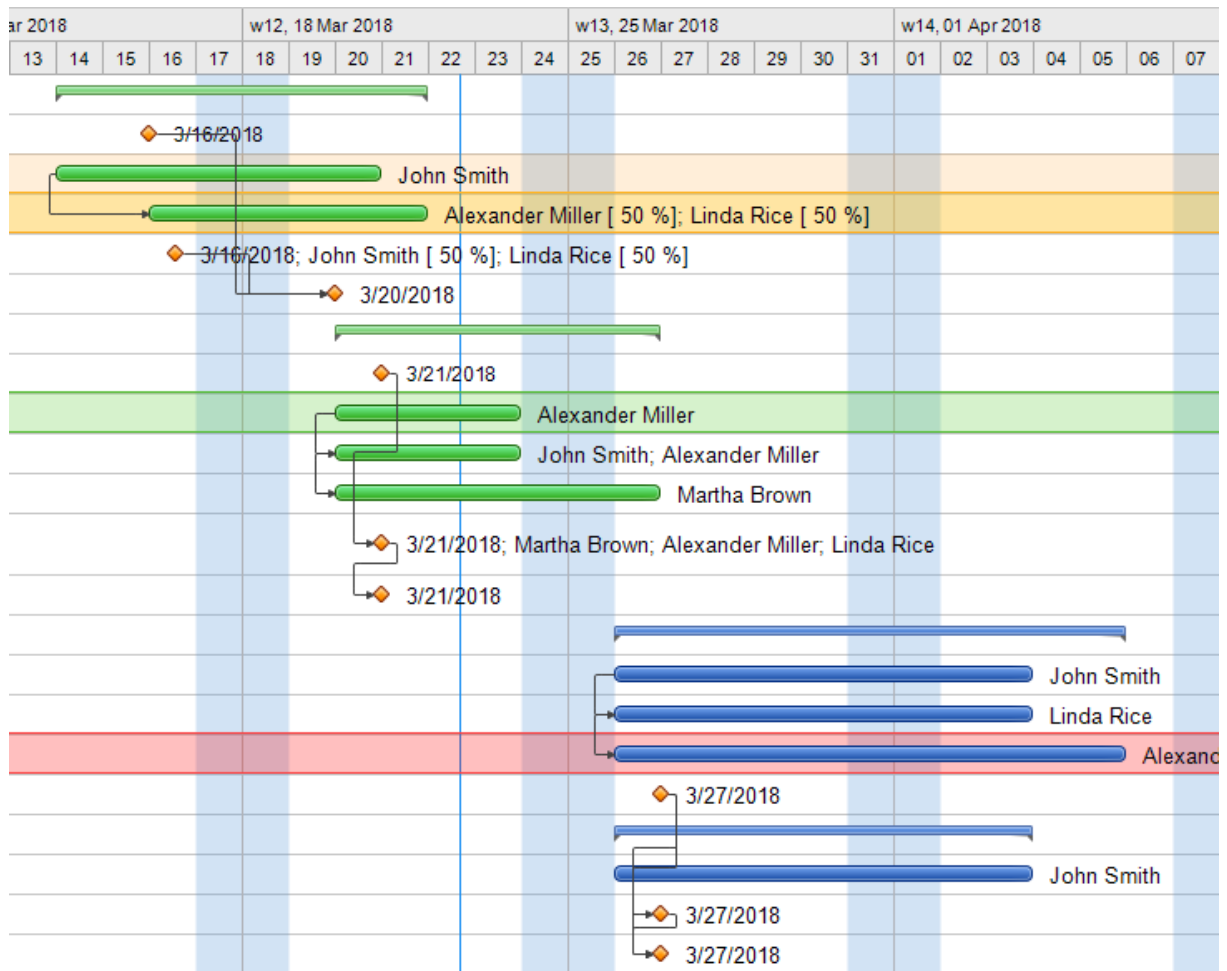
Purple polygon includes all milestones of all chains, the blue polygon includes the completed of them. The ratio of the areas of these polygons displays a degree of project completion.

Radar chart, 2018-Mar-22

Planning approval

General approval   Design approval
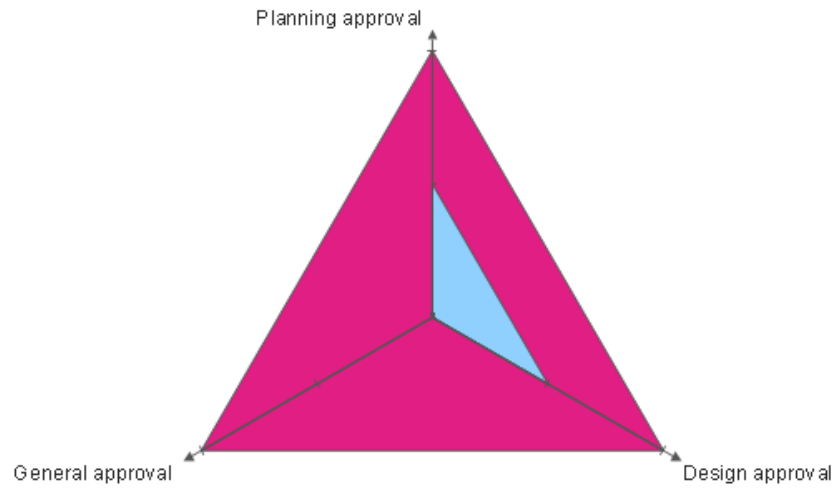
Tactical Dashboard

Tactical Dashboard allows to evaluate the progress of the project for some indexes and to compare it with an expected progress. There are compared the current indexes for an unfinished project on the tactical dashboard. So, it helps you make the tactical decisions.

#	Project Name	Priority	Start Date	4th Quarter 2017			1st Quarter 2018			2nd Quarter 2018			3rd Quarter 2018			4th Quarter 2018		
				Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	⊟ **Startup**	★★★★★	**11/20/2017**									0 %						
2	Marketing research	★★★★★	11/20/2017				0 %	Richard Miller										
3	e-Business Strategy	★★★★★	1/18/2018							0 %	Richard Miller							
4	Business Startup	★★★★★	12/25/2017								0 %	Brian Shark						
5	⊟ **Manufacturing**	★★★★★	**12/21/2017**											0 %				
6	Enginering	★★★★★	12/21/2017									0 %	James Smith					
7	Release to Production	★★★★★	12/21/2017						0 %	James Smith								
8	Production	★★★★★	2/5/2018										0 %	James Smith				
9	⊟ **Promotion**	★★★★★	**3/11/2018**						0 %									
10	Web Site Launch	★★★★★	3/11/2018						0 %	Brian Shark								
11	Promo Program	★★★★★	3/16/2018						0 %	Dart Weider								
12	Advertizing brochure	★★★★★	3/16/2018						0 %	Dart Weider								

 A Tactical Dashboard diagram is generated from multiple project data and will appear in ConceptDraw DIAGRAM. There are compared the main values: Cost, Work, Date and Work Resource Cost. The Complete of the project is taken as a measure of comparison.

Tactical dashboard, 2018-Mar-22

E	e-Business Strategy
W	Web Site Launch
AD	Advertising brochure
BU	Business Startup
EN	Engineering
MA	Marketing research
PR	Production
PR1	Promo Program
RE	Release to Production
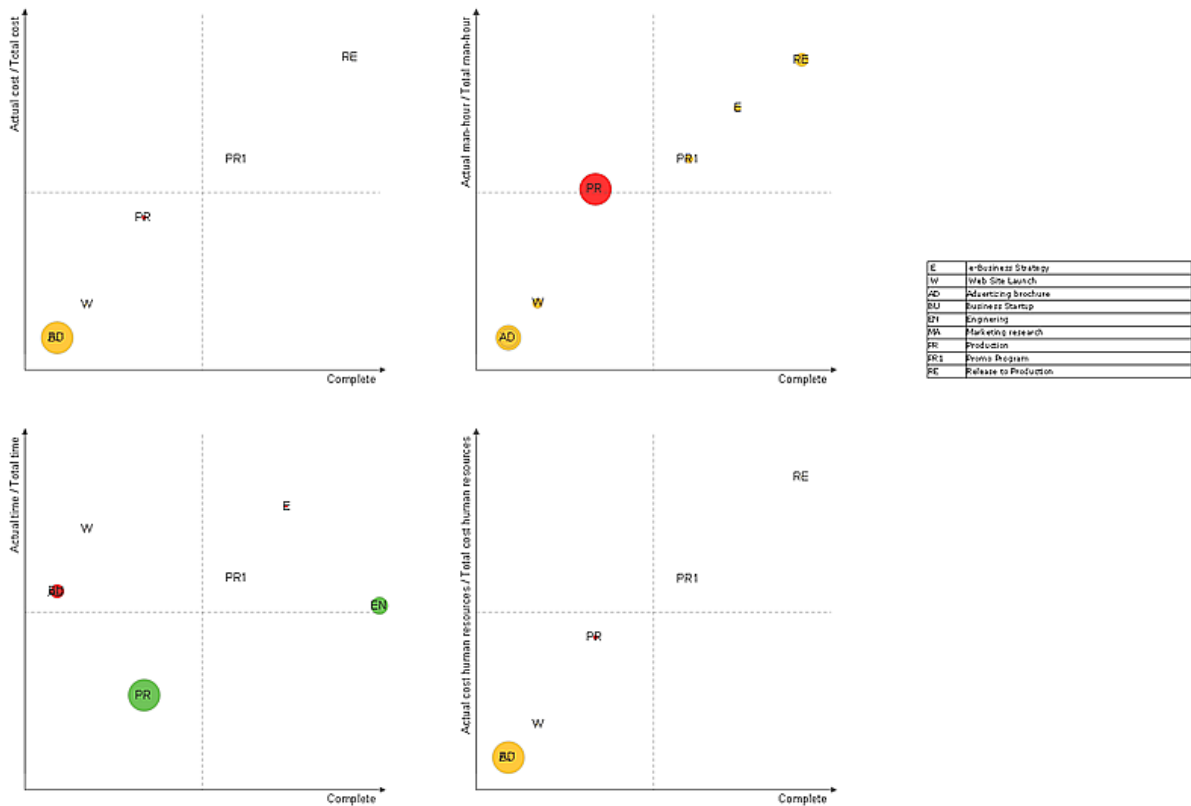
Tactical dashboard represents four positive quadrants of Cartesian coordinate system. The projects are displayed as circles on the plane in this coordinate system. Each of the diagrams reflects four indexes:

- X axis is a project Complete;
- Y axis is a relative estimated completion of project by any index that is calculated as quotient of the current value and the total value;
- Diameter of the circle is an absolute estimated completion by any index that is calculated as a difference of the current value and the total value;
- Color of the circle is a comparison of the relative estimated completion and project Complete: green reflects the ahead, red - the lag, and yellow - in time.

Note that diameters of all circles in the same coordinate system are standardized to the biggest that is taken as 100. A relative estimated completion is depicted reversed. The sign of project progress: the circles go down, the color is yellow or green, the diameters decrease.

Let's see in details each of four diagrams represented on the Tactical

1. Diagram with an estimate by the actual cost ("Actual cost / Total cost").
There are compared Actual cost and Total cost on this diagram. Actual cost is a sum of actual costs of all tasks of the project that are multiplied on their Complete. Total cost is a sum of actual costs of all tasks of the project.
2. Diagram with an estimate by the actual man-hour ("Actual man-hour / Total man-hour").
There are compared Actual man-hour and Total man-hour on this diagram. Actual man-hour is a sum of Work values of all tasks of the project that are multiplied on their Complete. Total man-hour is a sum of Work values of all tasks of the project.
3. Diagram with an estimate by the actual time ("Actual time / Total time").
There are compared Actual time and Total time on this diagram. Actual time is a period between more earlier date from project finish or current date, and project start date (Actual time=min (Finish date, Current date) - Start date).
Total time is a project duration, is calculated as difference between project finish and start dates (Total time=Finish date - Start date).
4. Diagram with an estimate by the actual cost of human resources ("Actual cost human resources / Total cost human resources").
There are compared Actual cost human resources and Total cost human resources on this diagram. Actual cost is a sum of Costs for all resource's tasks that are multiplied on their Complete with Work type in the project. Total cost human resources is a sum of Costs for all resource's tasks with Work type in the project.

Slide Navigator

You can create a presentation slides from a project file using the Capture Slides button [icon] on the
Share tab. Slides will appear in the pop-up Slide Preview panel.
Slide Preview panel can be accessed from **Panels** button on the View tab.
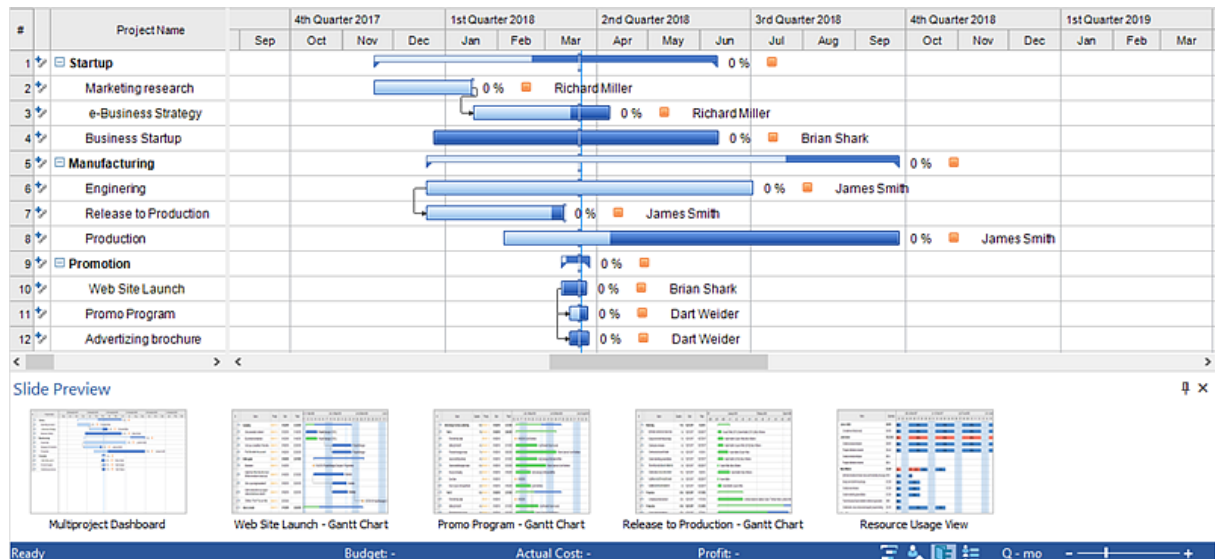
You can manage the slides in the Slide Preview panel using the context menu.
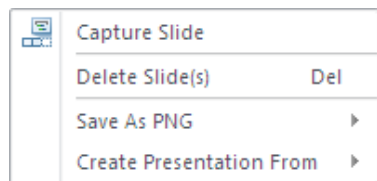
Capture Slide - Capture slide from a visible area of the current
project view
Delete Slide(s) - Delete the selected slides
Save as PNG - Export to PNG according to chosen option
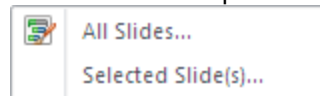
Create Presentation from - Export to PowerPoint Presentation
according to chosen options
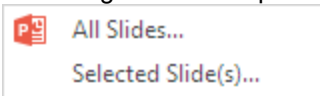
Hypernote

Hypernote panel can be accessed from **Panels** button on the View tab. Hypernote.
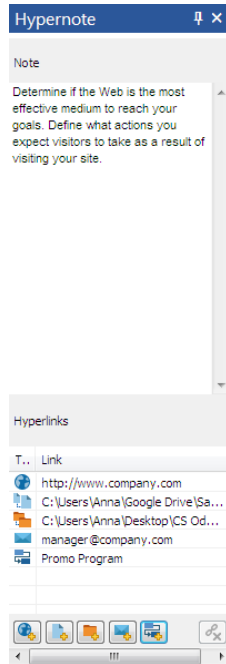
Notes - Notes section allows adding text Notes to project tasks, scheduled at the the Gantt chart View.

You can edit text Notes both from the Notes panel and the Notes column on the project grid. To display the Notes column on the grid, use the Column Customization dialog.

Hyperlinks - You can add several files hyperlinked to one task in your project file. You can add hyperlinks to documents or Web pages. Hyperlinks can also jump to tasks, resources or projects within your project file. The number of hyperlinks, you can add to each project item is unlimited.

> hyperlink to URL;
> hyperlink to document;
> hyperlink to folder;
> hyperlink to email address;
> hyperlink to other item in the current project file;

You can add a hyperlink by clicking the Hyperlink icon in the Gantt view grid.

To display the Hyperlink column on the grid,use the Column Customization dialog.

 Any item with a hyperlink will be marked with icon:

An item that has multiple hyperlinks will display this icon:

This panel brought together the functions of adding text notes and multiple hyperlinks. The earlier versions of ConceptDraw PROJECT had two different panels for these functionalities.

Links

Links panel can be accessed from **Panels** button on the View tab. It shows tasks linked with selected task. Once you have created a list of project tasks, you need to edit your project schedule in more detail by moving tasks, setting dependence between project tasks, or making other changes using the Links panel tools. For example: you have tasks that you would like to link together. But, also you need to add lag time between selected task and the preceding task on which it depends. You can make this also using the Predecessors dialog.
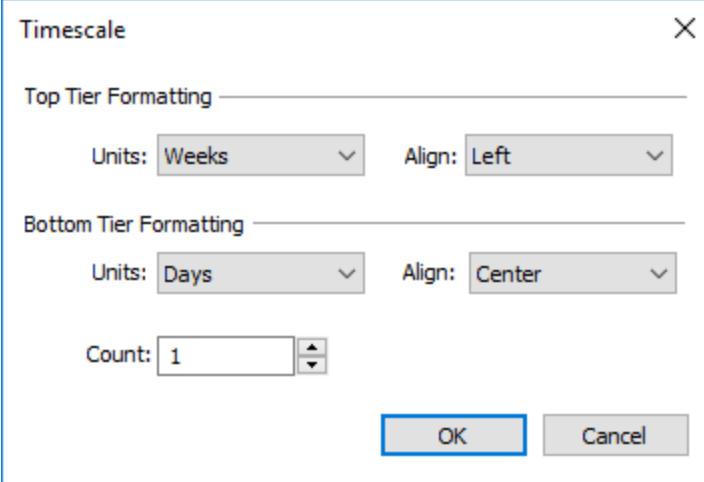
If you need to set a time lag between selected task and the subsequent one, you have to use the **Successors** tab.

Timescale

The Timescale dialog is called from the Timescale group of the <u>View</u> ribbon.
Use it to determine the time measure units   for tasks in your document.

```
Timescale                                          ✕

 Top Tier Formatting ─────────────────────────

     Units: [ Weeks        ⌄ ]   Align: [ Left         ⌄ ]

 Bottom Tier Formatting ──────────────────────

     Units: [ Days         ⌄ ]   Align: [ Center       ⌄ ]

     Count: [ 1      ] [⌃⌄]

                       [    OK    ]  [  Cancel  ]
```

Units - Specify units from units list for large and small scales on Timescale gauge.
Align - Specify text alignment on timescale.
Count - Specify units interval.

Column Customization

Customize columns dialog can be accessed from <u>View</u> tab
View and edit information   to be displayed at the project outline.
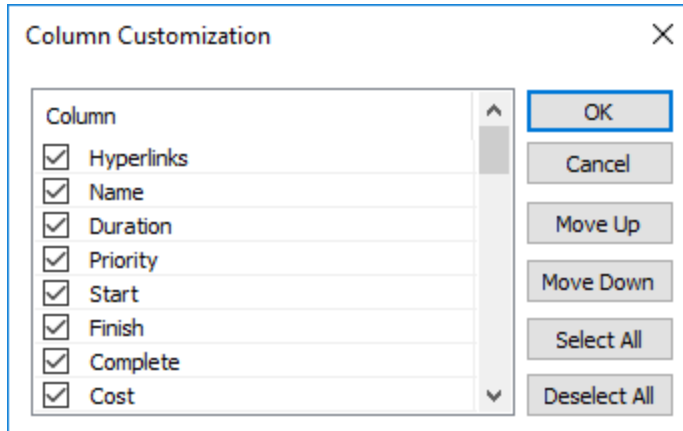
The Column Customization dialog contains the following columns:

Gantt Chart View	
Baseline Cost	Total planned cost for an task
Baseline Finish	The planned completion date for a task.
Baseline Start	The planned beginning date for a task.
Complete	The current status of task in percentages of the task's duration that has been completed.
Cost	The total scheduled cost for a task
Cost to Completion	The piece of total scheduled cost that remains for a task completion.
Cost1	The custom column, user can use to enter any additional information on the task cost
CP	Tasks, marked in this column make a project's critical path.

Custom Mark	Indicates tasks marked to be used in the Timeline from Marked Tasks report.
Custom 1-10	Additional specific information important for a particular project added by user.
Deadline	The target data, indicates when the task should be completed
Duration	The total span of a working time for a task
Early Finish	The earliest date that a task could possibly be completed.
Early Slack	The duration between the Early Start and Early Finish Dates
Early Start	The earliest date that a task could possibly begin.
Finish	The date when a task is scheduled to be completed
Hyperlinks	Add/Edit hyperlinks to a task
Late Finish	The latest date that a task can finish without delaying the finish of the project.
Late Slack	The duration between the Late Start and Late FinishDates
Late Start	The latest date that a task can start without delaying the finish of the project.
Name	Project task name
Notes	Comment you can enter about the current project
Outline Level	Displays the place of task in the project outline hierarchy.
Outline Number	The number that displays the associated task's position in the project outline hierarchy.

Planned Complete	The planned task completion status (percentages) at the current date.
Predecessors	The tasks numbers (#) on which the task depends before it can be started or finished.
Priority	The level of importance given to a task by project manager
Resources	Resources assigned to task
Start	The date when a task is scheduled to be started
Successors	The tasks numbers (#) that act as successors for the current task (tasks, whose start or finish date is driven by their [predecessor](#) task.)
Work	The total amount of time , scheduled on a task for all assigned resources., or the total amount of time , scheduled for particular resource on a task ([Assign Resource](#) panel)
Unique ID	The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new task is created in the current project.

Multiproject View

Baseline Cost	Total planned cost for a project
Baseline Finish	The planned completion date for a project
Baseline Start	The planned beginning date for a project.
Budget	The budget, allocated to a project.
Company	Company Name
Complete	The current status of project in percentages of the project's duration that has been completed.
Complete Increase	Changing of the Complete value between the current and previously saved measured in percent

Complete Increase Rate	Changing of the Complete Increase value between the current and previously saved measured in percent
Cost	The total scheduled cost for a project
Cost to Completion	The piece of total scheduled cost that remains for a project completion
Duration	The total span of a working time for a task
Finish Date	The date when a project is scheduled to be completed
Hyperlinks	Add/Edit hyperlinks to a project
Objective	Project objectives
Planned Complete	The planned project completion status (percentages) at the current date.
Priority	The level of importance given to a project by project manager
Project Description	Short description of the project
Project Manager	Who is project Manager?
Project Name	Project name
Project Site	Url of the corresponding website
Start Date	The date when a project is scheduled to be started
Resources View	
Cost	For Work resource displays the cost that accrues every time unit, the resource is used. For a non-human resource displays the cost that accrues at one unit of the resource usage.

Email	Contact email address assigned to resource
Group	A customizable field to structure resources into groups
Hyperlinks	Add/Edit hyperlinks to a resource
Name	Resource name
Notes	Comment you can enter about the current resource
Type	Type of the resource (work, material, cost, equipment, company)
Unique ID	The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new resource is created in the current project.

Edit Markers

Use the Edit markers dialog to set names for [Markers](). Just click a marker and start typing.

Edit markers   ✕

Red marker
Orange marker
Yellow marker
Green marker
Blue marker
Purple marker
Black marker

OK   Cancel
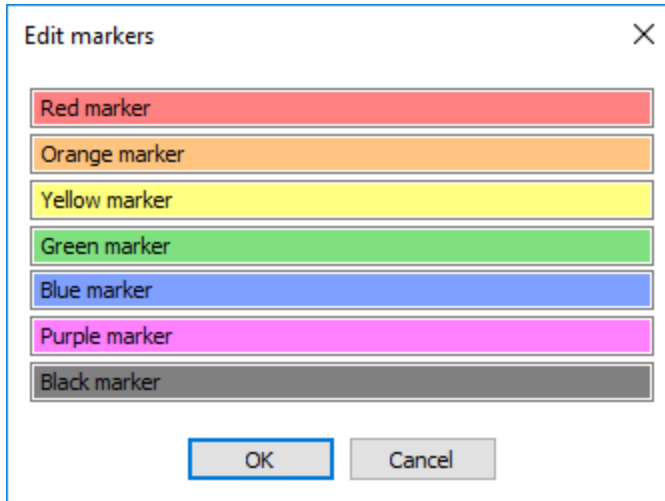
Predecessors

Predecessors dialog can be accessed from the **Link** section in the **Home** tab.

Once you have created a list of project tasks, you need to edit your project schedule in more detail by moving tasks, setting dependences between project tasks, or making other changes using the Home tab tools. For example: you have tasks that you would like to link together. But, also you need to add lag time between 2 tasks.
You can make this using the Predecessors dialog.

Filters

Those who use ConceptDraw PROJECT in their daily work may have faced the need to filter their project in some special way to get the appropriate information. To customize filtering options use the Filters dialog that can be accessed from **Edit Filter** button in the Filters section on the View tab.
In the left part of the window, you can specify the project view, which is filtered by default. There is also the filters list which contains predefined and user created filtering options.
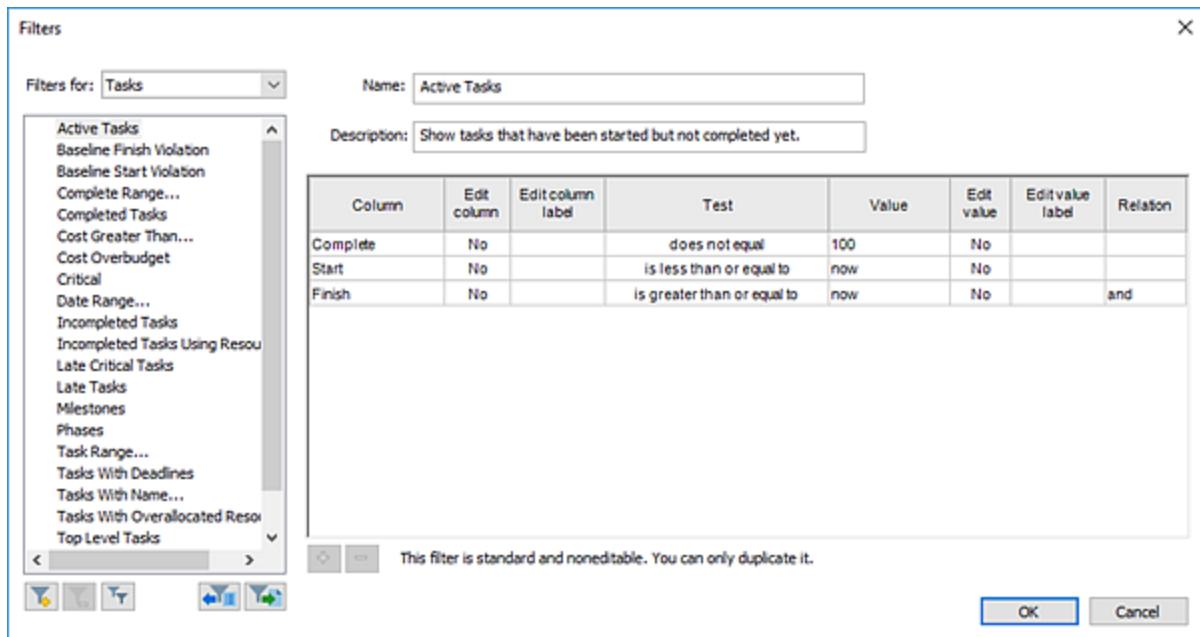
Filters for: Specify the project view, which is filtered by default: Project, Tasks, or Resources.

Available Filters List: The filters list which contains predefined and custom filters.
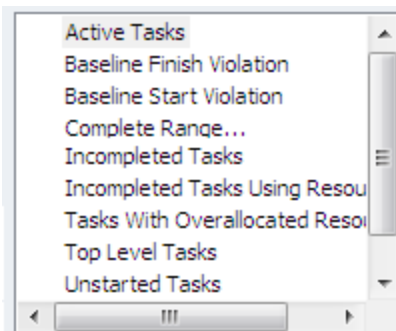
Add Filter: Add new custom filtering conditions.
Remove Filter: Remove the selected filters.
The predefined filtering options cannot be edited or removed.

Duplicate Filter: Duplicate the selected filters. If you need to modify predefined filter, you should duplicate this filter by clicking "Duplicate filter"

Add/Remove criterion row: Edit custom filter using editing window

Filters   ✕

Filters for: | Tasks ⌄ | Name: | John Smith completed tasks |

Active Tasks
Baseline Finish Violation
Baseline Start Violation   Description: | Show John Smith's tasks completed by 100% |
Complete Range...
Completed Tasks
Cost Greater Than...

Column	Edit column	Edit column label	Test	Value	Edit value	Edit value label	Relation
Complete	No		equals	100	No		
Start	No		is greater than or equal to	Start	No		and
Finish	No		is less than or equal to	Finish	No		and
Resources	No		contains	John Smith	Yes		and

Cost Overbudget
Critical
Date Range...
Incompleted Tasks
Incompleted Tasks Using Resou
John Smith completed tasks
Late Critical Tasks
Late Tasks
Milestones
Phases
Task Range...
Tasks With Deadlines
Tasks With Name...
Tasks With Overallocated Reso ⌄

<   >

➕ ➖

                                                          OK   Cancel

The predefined filtering options cannot be edited or removed.

Export Filter to File: This operation allows exporting selected custom filters into single XML file and copying it to other computer.

Import Filter from File: This operation allows importing your custom filters from XML file. Thus, the filters will be available on any computer no matter which ConceptDraw PROJECT document you work with.

Filter Mode: John Smith completed tasks

🔻 | John Smith | 🔄   ⊗

#		Name	Priority	Complete	1 Mar 2018						w12, 18 Mar 2018						w13, 25 Mar 2018					
					12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
3		Specification	★★★☆☆	100 %										John Smith									
5		PERT diagram	★★★☆☆	100 %						◆ 3/16/2018; John Smith [50 %]; Linda Rice [50 %]												
10		Database architecture	★★★☆☆	100 %													John Smith; Alexander Miller					

Options

Can be accessed from the File tab. Contains options preferences related to the most commonly used settings

General
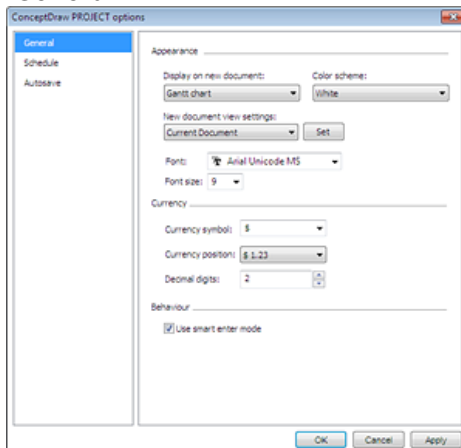
Display on a new document: Set up document default view
Color scheme: Set up document color scheme
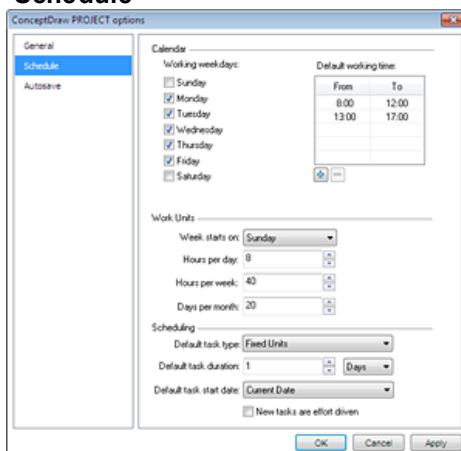**New document view settings**: Set up new document view (custom or default)
Currency symbol: Set up currency symbol
Currency position: Select currency position
Decimal digits: Set up amount of decimal digits
Behaviour: On/Off the Smart Enter mode

Schedule

Calendars:
Working week days: Set up working week days.
Default working time: Set up default schedule. Schedule is presented as set of daily working time intervals.

Work units:
Week starts on: Select week start.
Hours per day: Set up working hours amount per day.
Hours per week: Set up working hours amount per week.
**Day per month:** Set up working days amount per month.

Scheduling:
Default task type: Choose what you would like to fix: Units, Duration or Work
Default task duration: Set up a task duration on default
Default task start date : Set up a default start date of the new task
Effort - driven check box: Set up the effort-driven options for the new tasks
Read more how to use the Effort-Driven Scheduling Method
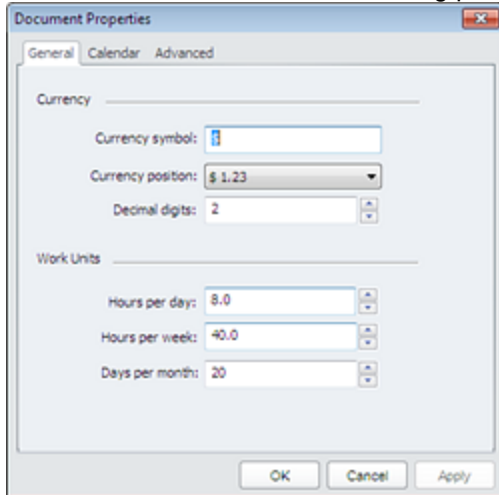
Autosave
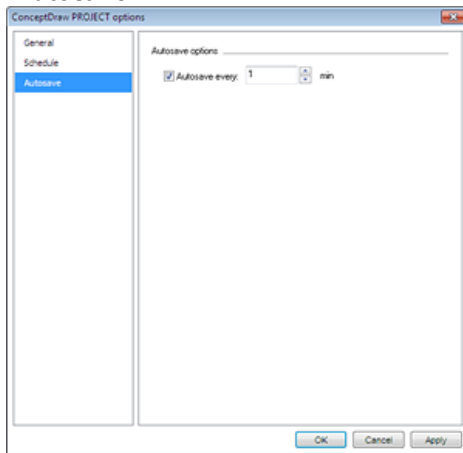
Autosave:
Switch on/of autosave
**Every:**
Set up autosave periodicity

Document Properties

View and Edit current document properties. Document properties dialog is available from the File ribbon.
It contains three tabs: General, Calendar and Advanced.
 General tab allows to set the starting points of project calculations : Currency and Work units.

Calendar tab is used to customize the default project calendar. You can set up schedule for all
resources in your project.
Select resource from the drop-down list to create resource personal schedule. Selects set of dates to do
this. Set up schedule to selected dates. Schedule is presented as set of daily working time intervals.
You can set the selected dates as non-working.
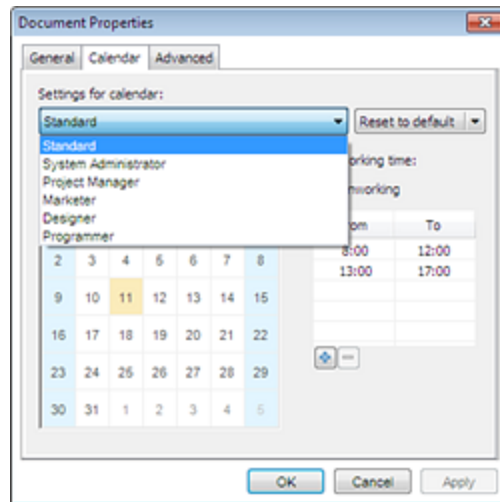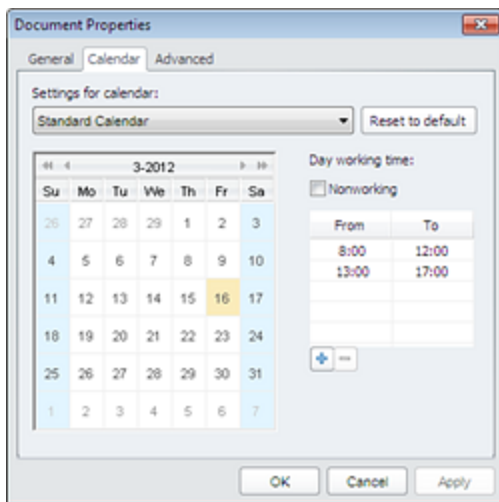
Advanced tab allows to set the critical path and critical task parameters.
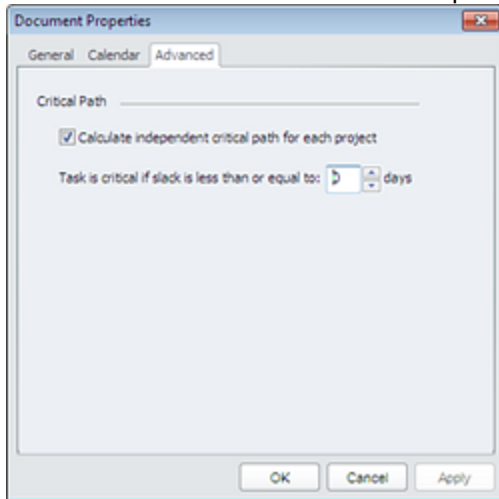
Find

This dialog allows you to search for text in a project schedule. You can call the dialog from the <u>Home</u>

tab button 🔭

The *Find* dialog:

Replace

This dialog allows you to replace text in a project schedule. You can call the dialog from the <u>View</u> tab

button
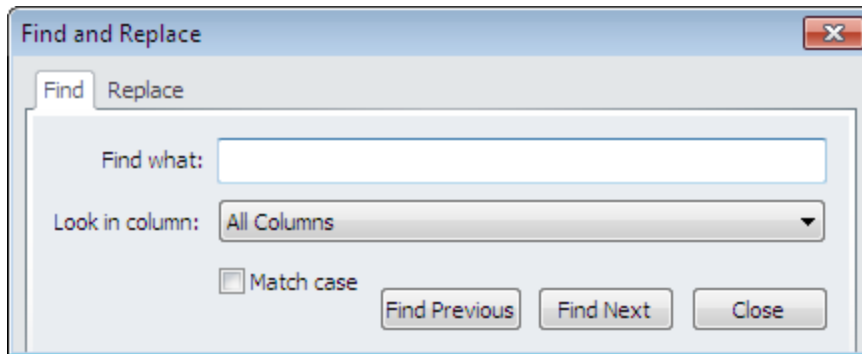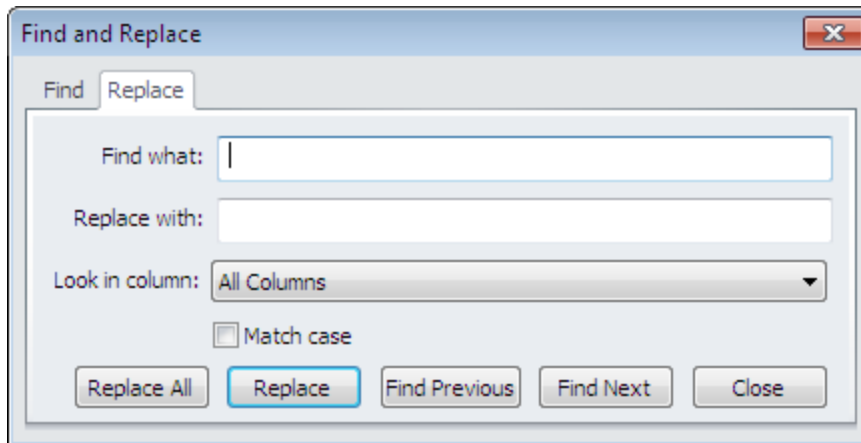
The Replace dialog:

Keyboard Shortcuts and Mouse Actions

Keyboard	Operation
ConceptDraw OFFICE Tools	
Ctrl + Shift + M	Create ConceptDraw MINDMAP file
Documents and Windows	
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 + Alt + P	Print the active document
Ctrl + F	Activate the Quick Find tool
Ctrl + Shift + F	Open the Find dialog
Ctrl + H	Open the Replace dialog
Ctrl + F4	Close the active document
Ctrl + W	
Ctrl + Tab	Activate the next window
Ctrl + PageUp, Ctrl + PageDown	Activate the next project in Gantt Chart View
Alt + F4	Quit ConceptDraw PROJECT

Keyboard	Operation
Presentation	
Ctrl + Shift + C	Capture Slide (Visible area)
Application	
F1	Call Help System
Alt + P	Preferences (Application settings)
Ctrl + F1	Call ConceptDraw PROJECT About Dialog
Tasks	
Insert	Insert new task
Ctrl + Enter	Add new subtask
Shift + Enter	Insert new task after selected
Alt + Enter	Add task to end of current level
Delete	Delete selected task(s)
Ctrl + M	Mark task as milestone
Ctrl + B	Create deadline for a task
Ctrl + Right	Indent task
Ctrl + Left	Outdent task
Ctrl + Down	Move item to the next position (one line down)
Ctrl + Up	Move item tone line up
Shift + Left	Collapse selected phase

Keyboard	Operation
Shift + Right	Expand selected phase
Ctrl + L	Link selected tasks
Ctrl + Shift + L	Unlink selected tasks
Ctrl + G	Go to selected task
Enter	Fast adding of new entities
Projects(s)	
Insert	New project
Ctrl + Shift + N	New project
Delete	Delete project
View	
Tab	Switch the View
Ctrl + Alt + G	Switch to Gantt Chart View
Ctrl + Alt + R	Switch to Resource List View
Ctrl + Alt + J	Switch to Multiproject Dashboard
Ctrl + Alt + U	Switch to Resource Usage View
Ctrl + R	Call Reports dialog
Shift + Mouse wheel	Horizontal Scroll
Click in Print Preview	Change zoom level (in cycle)
Page Up	Scroll up in Print Preview

Keyboard	Operation
Page Down	Scroll down in Print Preview
Editing	
Ctrl + Z Alt + Backspace	Undo the last operation
Ctrl + Y	Redo what was reserved by Undo
Ctrl + X Shift + Del	Cut the selection to the Document
Ctrl + C	Copy the selection to the Document
Ctrl + V Shift + Insert	Paste the content from the Document
Esc	Close Dialog
Selecting	
Select with Shift	Allow to select several tasks
Select with Ctrl	Allow to select several tasks (from the first to the second)
Ctrl + A	Select all the tasks on document