

o Keyboard Shortcuts

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Welcome to ConceptDraw PROJECT v14 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. <u>Manage Plans, Reports, and Changes</u> <u>Benefits</u> <u>ConceptDraw Maintenance Assurance</u> <u>Technical Support</u>

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 <u>ConceptDraw Maintenance Assurance</u>.

Technical Support

We offer unlimited free technical support to our users.

To send us a problem report or feature request, submit the <u>ticket</u> 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.

1

Toolbar Tour



The ConceptDraw PROJECT 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 <u>Toolbar</u>.

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

File

File	Home	View Share
New		
Open		Recent Documents
Recent		Software Development Alpha-r.cdpz C:\Users\anna\Documents\My ConceptDraw
Save		product_launch.cdpz C:\Users\anna\Documents\My ConceptDraw
Save As		- Meetings.cdpz
Import		C:\Users\anna\Documents\My ConceptDraw
		Commercial Construction_multiproject.cdpz C:\Users\anna\Documents\My ConceptDraw
Export		Business Startup.cdpz
Print		C:\Users\anna\Documents\My ConceptDraw
		Audit.cdpz C:\Users\anna\Documents\My ConceptDraw
Send		
Close		
Propertie	s	
Options		
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
<u>Print</u>		Preview and print the document
<u>Send</u>		Send a document
Close		Close ConceptDraw PROJECT
Propertie	S	Open the <u>Document Properties</u> dialog
Options		Open the <u>Options</u> dialog

4

Preview and print the current ConceptDraw PROJECT file

Print 📄	Send the document to the default printer as it is. Use the <u>View</u> tab to setup the printed document view.
Print Preview	Opens <u>Print Preview</u> tab
Print to Adobe PDF	Print to Adobe PDF using the current print settings
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

-

5

Print Preview

Preview and make changes to pages before printing.

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File	Print Preview									Search		ñ
	Select Printer	Select View to Print	Original Size	Print	All Dates Range 6/26/202: - 10/26/202: -	 Every Page Legend Page 			Ī	 Previous Page Next Page 	⊗	
Print P			◯ Fit to 1x1 👻		O Do not Print	 None 	Scale	Margins Orientation	Size	🔯 Fit Page	Close Print Preview	
	Print	Print View	Print Scale	Table	Gantt Chart	Legend		Paper Setup		Preview	i	

Print



Print the current document

Brother DCP-8065D -

Print to Adobe PDF using the current print settings

Brother DCP-8065D
Printing properties Sel

Select the printer and set the printer properties

Print View

Select exactly the <u>view</u> you need to print: Gantt Chart, or Multiproject.

```
Active view (Gantt Chart) -
Active view (Gantt Chart)
MultiProject
```

Select view to print

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

Phase	Ļ	Deadline	•	Link
Task		Milestone		

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.

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

PDF

Adobe PDF - Export the document to Adobe PDF

x

MS Excel - Save project tables from all <u>views</u> as <u>Microsoft Excel</u> workbook (*.xlsx)



MS Project File - Export the document to Microsoft Project XML



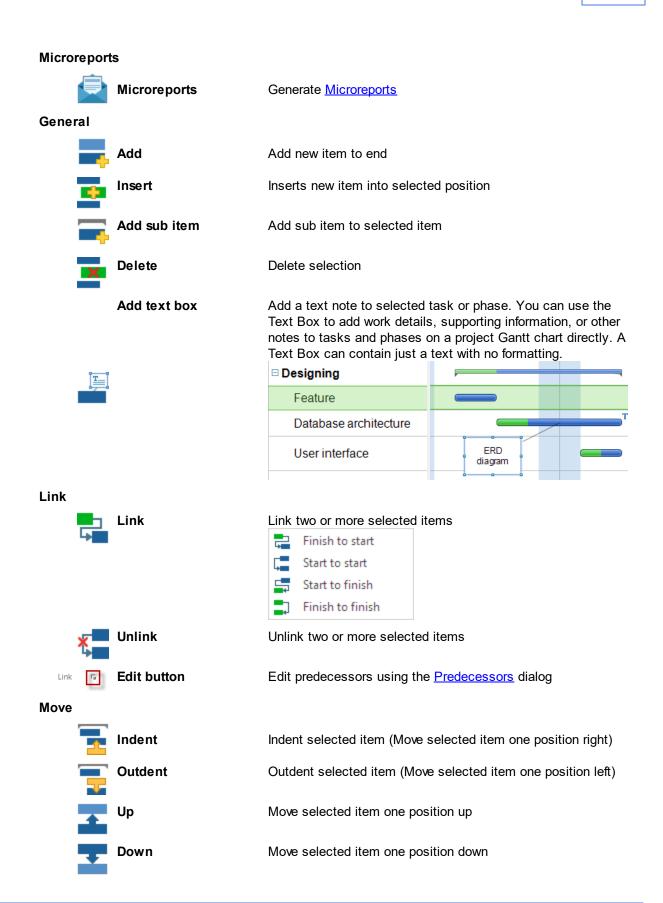
1

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

Text Outline - Export the document to the text outline

Home

Chart	Tiproject Reports Usage	hard) - ConceptDraw PROJECT
Clipboard		
Ê	Paste	Paste content from the Clipboard
*	Cut	Cut selection and put it into Clipboard.
	Сору	Copy the selection and put it into the Clipboard.
Format Text		
Arial Unicode MS 👻 12 👻	Font	Select font face
	Font size	Select font size
BJ Wrap text Ab▼ A A	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 case	Convert selected to sentence case
	Wrap text	Makes all content visible within a cell by displaying it on multiple lines
Solutions		
\Diamond	Solutions	Activate <u>Solutions</u> panel
Select View		
	Gantt Chart	Switch to Gantt Chart View
₿	Resources	Switch to <u>Resource</u> list
Ē	Multiproject	Switch to Multiproject Dashboard
÷=	Resource usage	Switch to <u>Resource usage</u> 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 <u>Solutions</u> panel.



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 <u>Edit markers</u> dialog
Calendar		
	Calendar	Shows Document Properties dialog, Calendar tab
Baseline		
Ē	Save	Save <u>Baseline</u> settings for selected tasks
Editing		
	Find	Activate Find dialog
ab ac	Replace	Activate <u>Replace</u> 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

	• 🖻 🗖) (~ 🛢 🖻	🔍 👼 🗟 [Audit.cdm2 - Gantt Chart] - ConceptDraw PROJECT													-		×													
File	Home	e View	Share																									Search		ñ	0 -
Ê.	🔏 Cut	Arial		12 -	\Diamond	-	\$₽	F	÷=	hal		-			×	Ģ	-	×	7	-	٠	•	-	1			Ę.	m	••••	~ J	
Paste	Copy	📰 Wrap Te	t Ab*	A A							Microreports												Selected		×	Calendar	Save	Find	Replace	Smart Enter	
Clipt	board	Fo	mat Text					Select View			Microreports			General			Lir	sk G		Mov	e		Goto		Markets 12	Calendar	Baseline		Editing		

ConceptDraw PROJECT gives you an opportunity to communicate with your team faster by using microreports.

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 and the <u>Home</u> tab.

List of reports available for various project tables:

Gantt Chart

Phase

- 1. <u>Deadline reminder</u> for all projects.
- 2. <u>Deadline reminder</u> for the current project.
- 3. Today tasks list.
- 4. Critical tasks list.
- 5. Today tasks list with assigned resources
- 6. Today resources list

Task

- 1. <u>Deadline reminder</u> for all projects.
- 2. Deadline reminder for the current project.
- 3. Task status.

Resources

- 1. Today tasks list for all resources.
- 2. Today tasks list.
- 3. Milestones.
- 4. Objectives.
- 5. Projects list.
- 6. Next tasks.
- 7. Assigned tasks.
- 8. Critical tasks.
- 9. <u>Deadline reminder</u> for the selected resource.

Multiproject Dashboard

- 1. <u>Deadline reminder</u> for all projects.
- 2. Today tasks list.
- 3. Today resources list.
- 4. Nearest milestones
- 5. Deadline reminder for the current project.

You need to select the desired type of microreport from the drop-down list, and it will be generated as a ready-to-send e-mail. Microreports of all types, except <u>reports on deadlines</u>, are generated in both text and mind map form as ConceptDraw MINDMAP files (CDMZ), attached to the email message.

H	চ ত া		- Assigned	tasks: Martha Br	own - M	ħ		×
File	Message	Insert	Options	Format Text	Review	Help	🔉 Tell	me
PERT Datal User	To Cc Subject Attached mposition [t diagram [ta base archite interface [ta ixing [task]	Assigned	5 KB		tasks.cdmz	•		



Deadline Reminders

A deadline is a target date indicating when a project task must be completed. If the deadline expires and the task is not completed, the deadline becomes overdue. Deadline Reminders are used to inform employees involved in a project of the task's upcoming and overdue deadlines. Microreports on deadlines are generated as email messages addressed to employees assigned to tasks that have upcoming or overdue deadlines.

Select a <u>project</u>, <u>task</u>, or <u>resource</u>. You need to choose the needed type of <u>Microreport</u> from the dropdown list. Ready-to-send e-mails will be generated. A task is included in the Deadline Reminder if all of the following conditions are met. You can check them on the <u>Task</u> panel.

1. The task has a Deadline parameter checked.

Dates	
Start:	8/31/2023 8:00 AM
Finish:	10/10/2023 5:00 PM
Deadline:	9/13/2023 12:00 AM ~

2. Task completion is less than 100%.

Task	Ţ,
Project Task Assig	n Links Resour Hyper.
Info Name:	CONVERSION REQUIREMEN
Duration:	29 🔺 Days 🗸
Complete:	45 %
mon for for for	Enguero Sugardon de

3. The Task Finish date is later than the report date.

Dates	
Start:	8/31/2023 8:00 AM
Finish:	10/10/2023 5:00 PM
Deadline:	9/13/2023 12:00 AM ~
mententente	and

Ready-to-send deadline reminders can be created automatically every time you run a project file. Simply check the "Generate deadline Microreports" option in the ConceptDraw PROJECT <u>Options</u> dialog box.

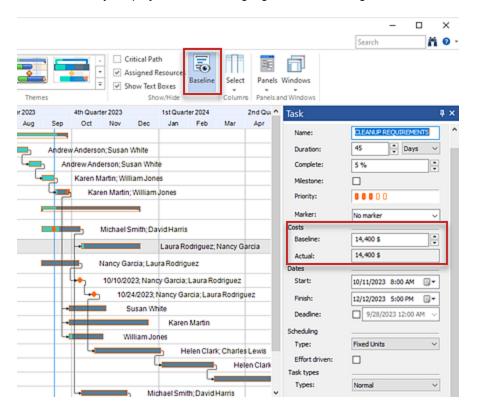
Project Baseline

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:

		• • •	. (~ 🛢 🛋						[Fir	nancial.c	dptz - Gi	antt Chart] - Con	ceptDraw PR	OJECT											- 0	ı ×
Fil	e	Home	View Share																					S	earch		ň 0 -
ſ		K Cut	Arial v 9 v	\Diamond	7	٩ 🗘		hal,		-		Ξ,	x	ļ	-	K.	1 1	1	Ŧ	F			***	F	ñ	100 1 00	- 2
Pas	te	Copy	Wrap Text Ab* A A	Solutions	Gantt R Chart	lesources Multip	oject Resour Usage	e Reports	Microreports	Add	Insert	Add Subitem	Delet	e Add Text Box	Link	Unlink	Indent Outd	ent Up	Down	Selected To	oday	×	Calendar	Save	Find	Replace	Smart Enter
	Clipb	bead	Format Text			Select	fiew		Microreports			Genera	1		U	ink G		Move		Go to		Markers G	Calendar	Baseline		Editing	
		Warning Baseline w	as resaved. Note, that you can	undo this acti	on																						×

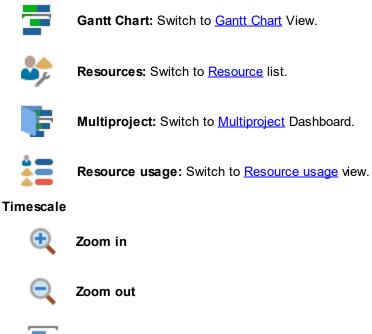
To undo the last action, click the Undo button on the <u>Quick Access Toolbar</u> or Ctrl+Z on the keyboard. . Baseline in ConceptDraw PROJECT includes three parameters: Baseline Start, Baseline Finish, and Baseline Cost. To display them on the Gantt chart, use the <u>Column Customization</u> dialog. Also the value of Baseline cost can also be found on the <u>Task</u> 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. You can highlight baseline using the button on the <u>View</u> tab.



View

🔟 🗐 📕 🏞 (* 🛢 🕵	[Audit.cdpz - Gantt Chart] - ConceptDraw PROJECT		×
File Home View Share		Search 🕅	0 -
🚍 🦊 🎼 🗮 📃	🔍 🔍 🔁 🖳 🔚 🔚 🏷 🔚 🔨 No filter 📑 🗢 X al 📑 🖬 🕞 🕞 🖓 Assigned Resources		
Gantt Resources Multiproject Resource Reports Chart Usage	In Out Timeline Scale Expand Collapse Expand Collapse Outline Show Phases Show/Highlight	Select Panels Windows	
Select View	Timescale 12 Expand/Collapse Filters 12 Themes Show/Hide	Columns Panels and Windows	

Select View



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 <u>Timescale</u> 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.

2

Outline level: Show tasks of the certain outline level.

Filters

T Active Tasks 🕞 🗸 💣	Select Filter:	
Show phases Show/Highlight	Select the embedded	filter and activate Filters mode.
Filters 15	\$	Apply previously selected filter.
	X	Clear the current filtering.
		Invert the current filter.
	Show phases: Sho	w/Hide phases.
	Show Highlight: SI	how/Hide Highlight.
	Edit Filter button:	Open the <u>Filters</u> Dialog.

Themes



Select the one of the available Gantt chart views

Show/Hide

Critical path Assigned resources Critical path: Show/hide the critical path

✓ Show text boxes

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

Typically each project has tasks and phases. Every task represents a single unit of work — a single step in a multi-step project. A group of related project tasks can be joined into phases.

The Gantt chart window consists of two parts: the project outline — a list of the project tasks and phases and its graphic representation — 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.

<u> </u>	Name	Start	Finish	Complete		Septembe	r 2023			October	2023			
11	Name	Start	Finsh	Complete	x34 w38	5 w36	w37	w38	w39	w40	w41	w42	w43	
3 %	Stake lines and grades	8/28/2023	9/8/2023	100 %	ſ		Sur	veyor 1						
4 🐓	Clearing and Site Grading	9/4/2023	9/22/2023	67 %		- r		•	Bob	's Exca	vation; E	Excavat	or [1]	
5 🐓	Utilities	9/13/2023	10/17/2023	100 %									Surve	yo
6 🍫	Excavation	8/14/2023	9/4/2023	100 %	_		Bob's E	xcavation	n (100 9	6]; Exca	vator [1	1]		
7 🍫 🖂	Foundation and Backfill	9/4/2023	10/5/2023	32 %		_								
8 🍫	Footings	9/18/2023	10/5/2023	0 %	2			r			Surv	/eyor 1		
9 🍫	Spread Footings	9/4/2023	9/22/2023	53 %	_			- t	•Bak	er Floor	ing; Cor	ncrete n	nixer [1]
10 🐓	Concrete Piles	9/11/2023	9/22/2023	30 %				+	Bot	s Exca	vation; C	Concrete	e mixer (1
11 🐓	Slab on Grade	9/11/2023	9/12/2023	100 %				Surveyo	or 2					
12 🐓	Walls	9/11/2023	9/29/2023	33 %			L.			Bak	er Floo	ring; Tru	ick [1]	
13 🏷 🖂	Exterior Wall Surfaces	8/23/2023	9/26/2023	40 %	-	_	-							
14 3	Brick	8/23/2023	9/26/2023	40 %						Bob's B	Excavat	ion; Exc	avator [1)
	-			>	<									

1. A task can be added to the document with one of the following methods:

- By pressing Enter
- Using the **General** section on the <u>Home</u> tab
- Applying the command Insert New Task from the context menu.

To turn the selected task into a phase, use the <u>Outdent</u> command. To add a task to a phase, use the <u>Add Subtask</u> command.

All parameters of the project tasks and phases can be specified in the <u>Tasks</u> dialog. Some parameters can be specified in the <u>context menu</u> and on the Gantt chart.

Columns that contain the project outline information can be managed using the <u>Column Customization</u> 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.

2. 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 <u>Timescale</u> dialog, that can be accessed from the <u>context menu</u>.

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 and the completed one are shown in different colors, depending on the current <u>Theme</u>. To show/hide the resources involved in these tasks, use the <u>Show/Hide</u>

section in the View tab.

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.

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.

3. The navigation bar at the bottom of the Gantt chart window allows you to quickly navigate between the multiple projects Gantt windows that your <u>multiproject</u> contains. Use the "Multi Gantt" option to manage all the projects of a multiproject file from a single window.

		Nama	Duration	Charl	Finish	Consider		w33,	13 Au	g 202	3				w34	20 A	ug 20	23				w35,	27 Aug
#	22 🧚 🗄 55 🏷 🗄	Name	Duration	Start	Finish	Complete		13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
1	•	Construction Project	52 d	8/7/2023	10/17/2023	62 %							-							-			
22	•	🗄 Lease a New Facility	65 d	8/14/2023	11/10/2023	17 %							-			-				-			
55	÷	Kitchen Renovation	69 d	7/28/2023	11/2/2023	25 %																	
177	•	Site Arrangement	65 d	8/17/2023	11/15/2023	17 %																	
178	*	PROGRAMMING 18,38 days?	6 d	8/17/2023	8/24/2023	43 %						-				-	_	_	- 2				
179	•3	Tenant, Leasing Agent, and Architect meet to establish Program 9	3 d	8/17/2023	8/21/2023	50 %)						
180	•3	Tenant Sign-off on approved, written Program	3 d	8/22/2023	8/24/2023	35 %										L	•						
<						>		¢															>
Mul	ti Ga	Construction Project Lease a New	Facility Kitc	hen Renovation	Site Arrangen	nent																	
						Budget:	1,0	45,88	D \$		ŀ	(ctual	l Cost	: 506,	,680 \$			Prof	it: 539	,200 \$	5		

Gantt Chart Context Menu

Access the most frequently used operations at Gantt Chart window via the context menu.

#		Name	Start	Finish	Complete	ust 2023 Septem	nber 2023 October 2023
۳.		Name	Start	rinsii	Complete	w32 w33 w34 w35 w3	36 w37 w38 w39 w40 w41 w42 w43
1	F	Construction Contract Award 1	8/7/2023		0 %	◆1 8/7/2023	
2	•	Accept Site	8/14/2023		0 %	Arial - 10 -	
3	•	Stake lines and grades	8/28/2023	9/8/2023	100 %	🗛 🖌 AB ab A.B. Ab 🚍 🖌	Surveyor 1
4	*	Clearing and Site Grading	9/4/2023	9/22/2023	67 %		Bob's Excavation; Excavator [1]
5	•	Utilities	9/13/2023	10/17/2023	100 %	Сору	Surve
6	•	Excavation	8/14/2023	9/4/2023	100 %	Paste	Bob's Excavation [100 %]; Excavator [1]
7	*/ E	Foundation and Backfill	9/4/2023	10/5/2023	32 %	Paste as	
8	*	Footings	9/18/2023	10/5/2023	0 %	Select All	Surveyor 1
9	•	Spread Footings	9/4/2023	9/22/2023	53 %		Baker Flooring; Concrete mixer [1
10	*	Concrete Piles	9/11/2023	9/22/2023	30 %	Add New Subtask	Bob's Excavation; Concrete mixer
11	•;	Slab on Grade	9/11/2023	9/12/2023	100 %	Add New Subtask Delete	Surveyor 2
12	•	Walls	9/11/2023	9/29/2023	33 %		Baker Flooring; Truck [1]
13	*	Exterior Wall Surfaces	8/23/2023	9/26/2023	40 %	Outdent	
14	•	Brick	8/23/2023	9/26/2023	40 %	Custom Mark	Bob's Excavation; Excavator
15	•	Exterior Trim	8/23/2023		0 %	Tasks Link	
16	* E	Rough-in Ductwork, Plumbing and Electrical	9/6/2023	9/26/2023	67 %	Create MINDMAP File	
17	•	Install Heatpumps	9/6/2023	9/26/2023	33 %	Add Text Box	Baker Flooring; Truck [1]
18	•	Venting	9/6/2023	9/12/2023	100 %	Markers	Bob's Excavation
19	•	Panelboards	9/6/2023		100 %		9/6/2023; Surveyor 2
20	•	Telephone, Security, and Electrical Wiring	9/6/2023	9/19/2023	100 %		Baker Flooring; Truck [1]

Gantt Chart Context Menu **-** 10 **-**

Ē	Aria		Text Format	Change the <u>text format</u> of the project schedule
1	A ^	Ă AB ab A.B. Ab 🚘 🍷	Microreports	Generate Microreports
		Copy Paste Paste as ► Cut Select All Insert New Task Add New Subtask Delete Indent Outdent	Copy Paste Paste as Cut Select All Insert New Task Add New Subtask Delete Indent Outdent	Copy the selection and put it into the Clipboard. Paste content from the Clipboard. Options for pasting tasks copied to the clipboard. Cut selection and put it into Clipboard. Select all tasks. Inserts new task into selected position. Add sub task to selected task. Delete selection. Indent selected tasks (Move selected item one position right). Outdent selected tasks (Move selected item one position left).
		Custom Mark Tasks Link	Custom Mark	Mark the tasks that need to be represented in the diagram.
	眞	Create MINDMAP File Add Text Box	Task Link Create MINDMAP File	Link two or more selected items. Generate a mind map (*. cdmz) from selected tasks.
	Ma	arkers	Add Text Box Markers	The file will be opened in ConceptDraw MINDMAP Add a text box to selected item. Make the selected items looking like <u>marked</u> with a highlighter.

20

Gantt Chart Timescale Context Menu

0 0	Zoom <u>I</u> n Zoom <u>O</u> ut Timescale	Ctrl+= Ctrl+- Ctrl+Alt+T	Zoom In Zoom out	Displays timescale in more detail (day instead of weeks, etc.) Displays a more generalized timescale (weeks instead of days, etc.)
	Calendar		Timescale	Calls <u>Timescale</u> 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 <u>Calendar</u> dialog

Resources

By clicking the button $\overset{\bullet}{\checkmark}$ on the <u>View</u> tab, you open the Resources window. This window contains a list of resources with their characteristics.

1	٦		Name	Туре	Cost	Group	E-Mail	Notes	
Ľ	÷	7	Bob's Excavation	Work	165 \$/h	Excavation	bob_excavation@gmail.com		
2	2	*	Surveyor 1	Work	100 S/h	Surveyor	survevor2@gmail.com		181
ſ	_	÷1	Baker Flooring	Work	140 S/h	Flooring	baker flooring@gmail.com		
L	2		Surveyor 2	Work	100 \$/h	Surveyor	surveyor2@gmail.com		
6	5 '	*	Excavator	Equipment	700 S	Excavation;Landscape			
6	3	2	Truck 3	Equipment	700 S	Excavation;Landscape			
7	7	2	Concrete mixer	Equipment	700 \$	Flooring			
8	3	2	Tom Sheldon	W Con	150 \$/h	Surveyor;Excavation	tom_sheldon@gmail.com		181
9	9	*	Rich Gannon	.4	150 \$/h	Surveyor;Flooring	rich_gannon@gmail.com		181
10		*	Joe Smith	Work	150	Surveyor;Flooring	joe_smith@gmail.com		181
11	1	2	Tom Farrell	Work	150	Surveyor;Landscape			181
12	2	2	Mike Grabowski	Work	150 \$/h	Surveyor;hvac	6		181
13	3	2	Jane Postal	Work	150 \$/h	Landscape			181
14	•	2	Pat O'Tormey	Work	150 \$/h	Landscape		ح کا	
15	5	*	HVAC R Us	Company	5,000 S	hvac			
16	3	*	Exteriors Unlimited	Material	5,000 \$	Landscape			

1. Hyperlink. Click the 🧚 icon to add a hyperlink to the resource. The icon 🐣 means that this resource is already accompanied by a hyperlink.

2. Resources can be added by pressing **Enter**, or from the <u>context menu</u> by applying the command **Add Resource**.

3. Click the **Type** field of the Resource row. Add the resource type using the drop down menu. There are five types of Resources in ConceptDraw PROJECT:

Work resources – People assigned to complete a task. Has a cost depending on the time unit. **Material** resources – Consumables used as project proceeds. Has a cost per unit.

Cost resources – Financial cost associated with a task. Has a cost per unit and is applied to specify the applicable cost, every time you use the resource.

Equipment resources - Technical equipment used to perform a task. Has a cost per unit and is applied if the cost of the equipment used does not depend on the time units

Company resources – Cost associated with corporate resources assigned to a task. Has a cost per unit and is applied to specify the applicable cost, every time you use the company resource.

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

5. Group. You can categorize project resources by groups. To add a group name, just click the field and type it. The same resource can be engaged to several groups. Use the <u>Resource</u> panel for grouping. Assigning a resource group to a task means assigning all resources included in this group in an equal percentage. Grouping resources allows you to view and report summary information of resources and assignments.

6. Columns that contains contact email and the additional resources information.

7. Click the icon ^{III} to open the Work resource individual <u>calendar</u>. You can modify the common working hour schedules individually for each employee.

Columns that contains the resources information can be managed using the <u>Column Customization</u> 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. Open <u>Gantt Chart</u>, View select a task and assign resources to task using the <u>Assign Resources</u> panel. The information on the resources can be edited in the <u>Resource</u> panel.

Resources Context Menu

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

Name	Туре	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	р Сору		Surveyor
Excavator	E Paste		Excavation
Truck	E Cut		Excavation
Concrete mixer	E _	esource	Flooring
Bob's Excavation		Resource(s)	Excavation
Excavator	E Markers	101	Excavation
Truck	E		Excavation
Baker Flooring			Flooring
Concrete mixer	Equipment	700 \$	Flooring

Resources List Context Menu

Arial	✓ 10	Text Format	Change the <u>text format</u> of the project schedule
A .	A AB ab A.B. Ab 🚍 🍷	Microreports	Generate Microreports
1 1 1 1	Copy Paste Cut	Copy Cut Paste Add Resource	Copy the selection and put it into the Clipboard Cut selection and put it into Clipboard. Paste content from the Clipboard Inserts new resource
	Add Resource Delete Resource(s) Calendar	Delete Resource(s) Calendar Markers	Delete selected resources Opens the Standard <u>Calendar</u> dialog Set color markers
Ma	rkers		

Multiproject Dashboard

ConceptDraw PROJECT lets you track multiple projects at the same time. The Multiproject View permits the managing of multiple projects and a mutual resource pool from a single file. When you've got a multiproject file, use the button **F** on the <u>Home</u> or <u>View</u> tab. It opens the Multiproject window. This window contains a list of projects with their characteristics.

💽 📰 File	Home		lultiproj 3 Settings		[C	ommercial Constr	uction_multiprojec	t_new.cdpz - Multiproject
	Cut Copy	→ Wrap Text Ab → A	A Solutions	Gantt Resources	Multiproject A Select View	Resource Reports Usage	Microreports Microreports	Add Insert Add St Add Insert Add Te Add General
#		Project Name	Start Date	Finish Date	Bur	er 2023 Aug Sep	4th Quarter 2023 Oct Nov	1st Quarter 2024 Dec Jan Feb
1	1 Constru	uction	8/7/2023	11/15/2023	615,		0 9	6 📕
2	Cons	struction Project	8/7/2023	10/17/2023	245,		0 % 📕	John Smith
5	Site /	Arrangement	8/17/2023	11/15/2023	370,0		0 9	6 📕 Tom Brown
4	Renova	ation	7/28/2023	11/10/2023	430,0 🕨		0 %	•
5	🐓 Leas	e a New Facility	8/14/2023	11/10/2023	250,0		0 %	Tom Brown
6	🐓 Kitch	en Renovation	7/28/2023	11/2/2023	180,0		0 %	John Smith

- 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 <u>Column</u> <u>Customization</u> 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 <u>Multiproject Settings</u> tab.

4. The timescale can be changed. This can be done in the <u>Timescale</u> dialog, that can be accessed from the <u>context menu</u>.

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 <u>Gantt Chart</u> view.

5. 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. You can group projects using the <u>context menu</u>. 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.

Multiproject Context Menu

Access the most frequently used operations at Multiproject window via the context menu.

	Project Name	Priority	Start Date	Finish Date	Aria	el 👻 9	-	4th Quar	ter 2022		1st Quart	ter 2023
·	Projectivanie	Filolity	Start Date	Finish Date	A	A AB ab A.B. Ab 🔤 🎽	*P	Oct	Nov	Dec	Jan	Feb
1 🐓	Construction		7/21/2022	11/11/2022	580,8			_				
2 🐓	Construction Project		7/21/2022	10/6/2022	2	View Gantt Chart	÷	John	Smith			
3 🏷	Site Arrangement		8/15/2022	11/11/2022	3 🔫	New Project	- 14		Tor	m Brown		
4 🐓	Renovation		9/9/2022	1/11/2023	3 🕎	New Project Group Insert project from file						
5 🐓	Lease a New Facility		10/13/2022	1/11/2023	2 🔫	Add Subproject					Tom	Brow
6 🐓	Kitchen Renovation		9/9/2022	12/28/2022	1	Group projects	- 1				John Sm	hith
						Ungroup projects						
						Create MINDMAP File						
					-	Delete Project(s)						
						Projects Link						
					眞	Add Text Box						
					M	arkers						
					-							
					_							

Multiproject Context Menu

Arial		÷ 10	*
A A	AB ab	A.B. Ab 🚍	Ŧ

Text Format

Microreports

Change the text format of the project schedule Generate Microreports

	View Gantt Chart		View Gantt Chart	Switch to Gantt Chart View
	New Project		New Project	Add a new project
-			New Project Group	Add new project group
	New Project Group		Insert project from file	Add a new project from file
E,	Insert project from file		Add Subproject	Add sub project to selected project
	Add Subproject		Group Projects	Join selected projects into a Project Group
			Ungroup Projects	Split the Project Group into separate projects
	Group projects		Create Mind Map	Generate a multipage mind map (*. cdmz) from
	Ungroup projects		-	selected projects. The file will be opened in
	Create MINDMAP File			ConceptDraw MINDMAP
_	Delete Designat(s)		Delete Project (s)	Delete selected project (s)
_	Delete Project(s)		Project Link Link	Link two or more selected projects
	Projects Link	•	Add Text Box	Add a text box to selected item
Ţ	Add Text Box		Markers	Make the selected items looking like marked
Ma	arkers			with a highlighter

Multiproject Timescale Context Menu

Ð	Zoom <u>I</u> n	Ctrl+=	Zoom In
Θ	Zoom <u>O</u> ut	Ctrl+-	Zoom out
Qĭ	Timescale	Ctrl+Alt+T	
	Calendar		Timescale

Displays timescale in more detail (day instead of weeks, etc.) Displays a more generalized timescale (weeks instead of days, etc.) Calls <u>Timescale</u> 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.

Opens the Standard Calendar dialog

Multiproject Settings

	You can change the visual	parameters of the	Multiproje	ect View
--	---------------------------	-------------------	------------	----------

Calendar

💽 📰 File	File Home	🍽 🛑 📓	Share		ultiproj. ettings		
 ✓ Planned Complete ✓ Complete Change Value ✓ Complete Change Rate Show/hide ✓ Complete Journal 					Tasks Completi	on	
#	1	Project Name			Sta	rt Date	Finish Date
1	1 💱 🗆 Construction				8/7	/2023	11/15/2023
2	2 🍫 Construction Project			8/7	/2023	10/17/2023	
3	🐓 🛛 Site An	rangemer	nt		8/17	7/2023	11/15/2023

Show/hide

Planned complete

Show/hide the planned complete mark on the project Gantt chart

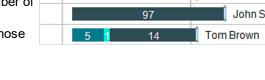
Nov	Dec	Jan	Feb	Mar	Apr
		50 %	>>	Brad Pitt	
		100 %	>>>>	Richard M	iller
		0	% 📃	MaryV	Villiams

Complete	Show/hide the change of the complete value	
change value		

Nov	Dec	Ja	an	Feb	Mar	Apr
			50 %	>>	Brad Pitt	
		10	00 %	»»»	Richard M	iller
			0 9	% 🔲	MaryV	Villiams

Complete	Show/hide the symbol of the complete	Nov Dec Jan Feb Mar Apr
change rate	change rate.	50 % 🕥 Brad Pitt
	Project's dynamics are shown using colored symbols:	100 % Nichard Miller
	 yellow arrows indicate a normal completion level 	🔲 0 % 📃 Mary Williams
	 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	Select tracking period	• Day
period	Set the frequency of complete values verification	Week
		Month
		Quarter
		Half year
		Year
Task	Show/hide the colored bar representing the	2 8 2 John Smith
Completion	situation with the completeness of the	5 1 14 Tom Brown
	project's tasks. You can see the number of completed	97 John Smith
	tasks, the ones in the process, and those that	5 1 14 Tom Brown

have not been started.



Resource Usage

By clicking the button for the <u>View</u> tab, you open the Resource Usage window. Resource Usage diagram consists of two parts: the task list and graphic presentation of the tasks.

Name	Project Name	E	13 54	p 202	3				w37,	10 Se	p 200	23				w38	17 Se	p 2023		
Name	ProjectName	Expenses	04	05	06	07	80	09	10	11	12	13	14	15	16	17	18	19 2	0 21	1 2
Bob's Excavation		148,800 \$				00%												00%		
Clearing and Site Grading	Construction	24,000 \$		1	00%						-	100%						100	%	
Excavation	Construction	25,600 \$	0																	
Concrete Piles	Construction	16,000 \$									-	100%						100	%	
Brick	Construction	40,000 \$		1	00%							100%						100	%	
Venting	Construction	8,000 \$			1	00%				100	%									
Design provides Construction	Lease a New Facility	17,600 S			1	00%						100%					1	00%		
Design provides Construction	Site Arrangement	17,600 S										100%						100	%	
Surveyor 1		19,200 \$		1	00%													100	%	
Stake lines and grades	Construction	8,000 \$		1	00%															
Footings	Construction	11,200 \$																100	%	
Baker Flooring		84,480 \$	100	16		00%						0016								
Spread Footings	Construction	19,200 \$		1	00%							100%						100	%	
Walls	Construction	19,200 \$										100%						100	%	
Install Heatpumps	Construction	19,200 \$			1	00%						100%						100	%	
Telephone, Security, and Electrical	Construction	12,800 \$			1	00%						100%					100	5		
Design provides Construction	Lease a New Facility	14,080 S			1	00%						100%					1	00%		

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

1. You can find out which projects resources are used in, what tasks are assigned to them, and finally, how much it costs.

2. To quickly move to the <u>Resource view</u> just make double-click on a resource name.

3. To move to the <u>Gantt chart</u> view make a double-click on a task name.

4. The graphic part of the diagram displays tasks as bars. Bars are arranged in accordance with the <u>Timescale</u>, displaying the task start /end time, duration, and percentage of resource working time occupied on a task.

5. If the total resource load currently exceeds 100%, the resource chart bar will show it with a red color.

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 <u>View</u> tab.

1. Select one of the embedded filters from the drop-down menu.

File		Home View Share				[Commercial	Construction_mul	ltiproject	t_new.cdpz	2 - 9
Gant		esources Multiproject Resource Reports Usage	In Out	Timeline Scale		apse Outline Level*	Milestones Show Phases		• 🗢 🗙 ow/Highlig	
		Select View	Т	imescale	ra Expand/Collapse			Filters		
				•						
T	You	r changes are not filtered until you press Refilter		2	#2023	September 20	23		October 202	23
Y	You	r changes are not filtered until you press Refilter Name	button 了	Start	it2023 w32 w33 w34 w35	September 20 w36		w39		23 w4
•	You									
* 1 2		Name	Priority	8/7/2023	w32 w33 w34 w35					
1	*	Name Construction Contract Award 1	Priority	8/7/2023 8/14/2023	w32 w33 w34 w35					

2. Toggle **Show/Highlight** item, to highlight filtered items without hiding the other data.

File		Home View Share			[Co	ommercial Construction_multiproject_new.c	cdpz - Gi
Gant	t Re	Select View	In Out	Timeline Scale	Expand Collapse Expand Collapse All Expand/Collapse		× c
ilter	Mo	ode: Milestones					
Y	Your	r changes are not filtered until you press Refilt	er button 📿				
		Name	Priority	Start	August 2023	September 2023	
	•				w31 w32 w33 w34	September 2023 w35 w36 w37 w38 w39	
# 1 2		Construction Contract Award 1	Priority	8/7/2023	w31 w32 w33 w34	w35 w38 w37 w38 w39	Octob w40
1	2	Construction Contract Award 1 Accept Site			w31 w32 w33 w34	w35 w38 w37 w38 w39	
1 2	2	Construction Contract Award 1		8/7/2023 8/14/2023	w31 w32 w33 w34	w35 w38 w37 w38 w39	w40
1 2 3	2 2	Construction Contract Award 1 Accept Site Stake lines and grades		8/7/2023 8/14/2023 8/28/2023	w31 w32 w33 w34	w35 w38 w37 w38 w39	w40
1 2 3 4	2 2 2	Construction Contract Award 1 Accept Site Stake lines and grades Clearing and Site Grading		8/7/2023 8/14/2023 8/28/2023 9/4/2023	w31 w32 w33 w34	w35 w38 w37 w38 w39	w40 b's Exc

3. Toggle **Show Phases** item to display phases that are associated with tasks which are shown in the filtered view.

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	n
	U
-	•

	🗂 🧧 💾 🎮 (** 🖷 🐘				[Commercia	al Construction	_multiproject_n	new.cdpz - (
File	Home View Share							
	i 🐎 📑 🔠 🛛	⊕ ⊝	= 🔍			T Milestor	nes 🔻	\$ × c
Gant Char	tt Resources Multiproject Resource Reports Usage	In Out	Timeline Scale	Expand Collapse Expand Co All All	ollapse Outline Level*	Show P	hases 🗌 Show	/Highlight
	Select View	Tin	nescale r	Expand/Collaps	se		Filters	
T	Your changes are not filtered until you press Refilter	button 🔁						
•			_	August 2023	1	September 2023	3	0
•	Your changes are not filtered until you press Refilter	Priority	Start	August2023 w31 w32 w33	w34 w35		3 /37 w38	-
? •			_					0 w39
* 1 2	Name Construction Contract Award 1	Priority	Start	w31 w32 w33				-
1	Name Construction Contract Award 1 Accept Site	Priority	Start 8/7/2023	w31 w32 w33	w34 w35			-
1 2 13 15	Name Construction Contract Award 1 Accept Site S Exterior Wall Surfaces Exterior Trim	Priority	Start 8/7/2023 8/14/2023	w31 w32 w33	w34 w35			-
1 2 13 15	Name Construction Contract Award 1 Accept Site Exterior Wall Surfaces Exterior Trim Rouch in Ductwork Plumbing and	Priority	Start 8/7/2023 8/14/2023 8/23/2023	w31 w32 w33	w34 w35	w36 w		-

File		Home View Share														
		🐦 📭 🏭	hal	Ð	€	= 	1					Mile	stones		- 🕫 >	
Gantt Chart		ources Multiproject Resource Usage	Reports	In	Out	Timeline Sca	ale Expan	d Collaps All	e Expand	Collapse	Outline Level *	🗌 Sho	w Phase	s 🗌 Sh	ow/Highl	light
		Select View			Tim	escale	rs.	Ex	pand/Colla	apse				Filters		
		de: Milestones changes are not filtered until you p	press Refilt	er button [2											
7			press Refilt	er button [Priori		Start	w35	September w36	2023 w37	w38	w39	October 2 w40	2023 w41	w42	w43	
7	Your	changes are not filtered until you ;	press Refilt	L	ŧγ	Start 8/28/2023			w37	w38 reyor 1	w39			w42	w43	
7 # 3	Your	changes are not filtered until you p Name	press Refilt	Priori	∜ 0 0				w37 Surv				w41			
7 * 3 4	Your o	changes are not filtered until you p Name Stake lines and grades	press Refilt	Priori	*/	8/28/2023			w37 Surv	eyor 1		w40	w41			

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.

Milestones	- ⊄ × ⊡`
Show phases] Show/Highlight
Filt	ers 🖓

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.

•		i 📩 🔿 (* 🖨 🗟			[Co	mm	ercial Con	struction	_multiproj	ject_new	.cdpz - G	antt Chart] - Con	ceptDraw	PROJECT					
File		Home View Share																	_	_
Gantt	Re	esources Multiproject Resource Reports				and		Outline	No fi	ilter v Phases		v/Highligh					•	•		ned Resour
Chart		Usage Select View	Timescale	- All	All Expand	/Coll		Level*			Filters	., i ngi mgi	5		т	hemes		÷	Show	v Text Boxes Show/Hic
		Name	Start	Finish	Complete			-	ust 2023				ptembe				Octobe			
2	•	Accept Site	8/6/2023		0 %	:9	w30	w31	w32	w33 6/2023	w34	w35	w36	w37	w38	w39	w40	w41	w42	w43
3	•	Stake lines and grades	8/28/2023	9/8/2023	100 %							-								
4	*	Clearing and Site Grading	9/4/2023	9/22/2023	67 %								-	-	•					
5	*	Utilities	9/11/2023	10/13/2023	100 %									-			-		0	
6	*	Excavation	8/14/2023	9/4/2023	100 %															
7	7	Foundation and Backfill	9/4/2023	10/13/2023	32 %							- 1		-	-		-		•	
8	*	Footings	9/18/2023	10/5/2023	0 %										ſ					
9	*	Spread Footings	9/4/2023	9/22/2023	53 %									-	<u> </u>	2 🖡				
10	*	Concrete Piles	9/11/2023	9/22/2023	30 %											1				
11	*	Slab on Grade	9/25/2023	9/26/2023	100 %															
12	*	Walls	9/25/2023	10/13/2023	33 %											L 💳	-			
13	*	Exterior Wall Surfaces	8/21/2023	9/22/2023	40 %						-				-					

The critical path of a multiple project shows which projects are most critical to complete all the projects on time.

File			ultiproj		[Co	mmercial Constructio	on_multip	roject_nev	v.cdpz - Multipro	ject Dashbo	oard] - ConceptDr	aw PROJEC	т				
Gant	t R	Home View Share S esources Multiproject Resource Repu Select View	orts In Or		le Expand Collaps All All	e Expand Collapse C	Dutline evel*	No filt] ⇔ × ⊡ /Highlight	•	Them			-	Critical Pat Issigned R how Text Sho	Resource
		ProjectName	Start Date	Finish Date	Budget	Company	rter 2023		3rd Quarter 202		4th Quarter 2023	Dec	1st Quar Jan		Mar	2nd Qua	
1	•	Construction	7/30/2023	11/15/2023	615,880 \$		May	Jun	Jul Aug	Sep	Oct Nov	Dec	Jan	Feb	Mar	Apr	May
2	•	Construction Project	7/30/2023	10/13/2023	245,880\$	ABC Construction			6	6	2 John Smith	n					
3	•	Site Arrangement	8/17/2023	11/15/2023	370,000 \$	Constructor Ltd				5 1	14 T	om Brown					
4	\$	Renovation	7/28/2023	11/10/2023	430,000 \$												
5	*	Lease a New Facility	8/14/2023	11/10/2023	250,000\$	Constructor Ltd				5 1	14 To	m Brown					
6	*	Kitchen Renovation	7/28/2023	11/2/2023	180,000\$	ABC Construction			28	1	2 John	Smith					

Share

🔘 🔲 📕 🎦 🦳 🗐		[Commercial Construction_multiproject_new.cdpz - Gantt Chart] - ConceptDraw PROJECT
File Home View Shar		
.= 🗊 📴 🖬		
Capture Images MS DIAGRA Slide* PowerPoint Co	M Open in MINDMAP PDF Excel * Project MindManager Outline ceptDraw Exports	

Presentation

Captı	ure Slides
Ξ	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 <u>Slide Preview</u> 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 <u>MINDMAP</u>, having closed it in ConceptDraw PROJECT.

Exports



Adobe PDF: Export the document to Adobe PDF.

MS Excel: Options for Export project tables, as they appear in <u>View</u> mode, to a <u>Microsoft Excel</u> 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.

🞯 🛅 📕 🗂 🦳 🚔 🔣		[Commercial Construction_multiproject_new.cdpz - Gantt Chart] - ConceptDraw PROJECT
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Capture Images MS DIAGRAM Open in Slide * PowerPoint MINDMAP	Adobe MS MS Mindjet Text PDF Excel≠ Project MindManager Outline	
Presentation ConceptDraw	Exports	

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.

Project Manag	ement Diagrams		
7	Gantt Chart Create Gantt chart diagram from projects tasks with an outline level equal or less than two	Ĺ	Milestone Chart Show only linked milestones
لُ می	Milestone Chart Extended Show all milestones		PERT Chart Create Project Evaluation and Review Technique diagram from projects tasks
0	Radial Tasks Structure Create Radial Tasks Structure chart from projects tasks to show the volume of work		Resource Calendar Create project calendars for resources assigned to projects tasks
	Resource Usage Create Resource Usage diagrams for resources assigned to projects tasks		Timeline Create Timeline diagram from project tasks with an outline level equal or less than two
	Timeline From Marked Tasks Create Timeline diagram from projects tasks with marking option		WBS Create Work Breakdown Structure diagram from projects tasks



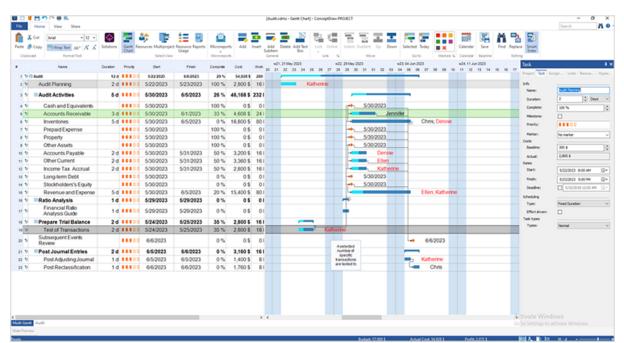
34

MINDMAP

o 🗇 📮 💾 🥱 (* 🖨 🗮 🖻		[Commercial Construction_multiproject_new.cdpz - Gantt Chart] - ConceptDraw PROJECT
File Home View Share		
	🔁 🖬 🖻 🚺	
Capture Images MS DIAGRAM Slide* PowerPoint _	Open in Adobe MS MS Mindjet Text ///NDMAP PDF Excel▼ Project MindManager Outline	
Presentation Concept	tDraw Exports	

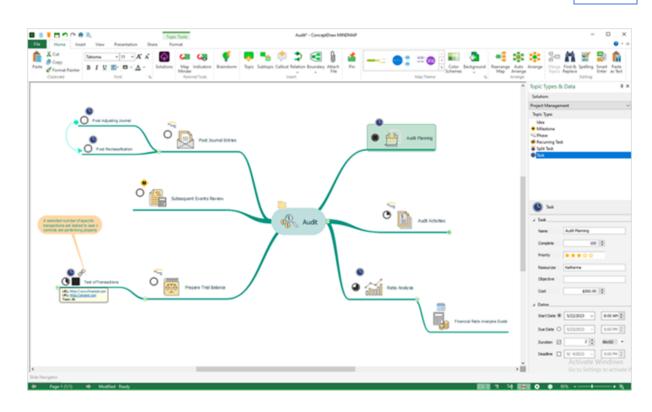
The compatibility between ConceptDraw products allows you to migrate your documents from MINDMAP to PROJECT and vise versa. You can see the project data in a mind map structure by opening your project in ConceptDraw MINDMAP. Mind map will consist from topics of Project Management type, which contain 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





MS Excel

o 🗉 🏮 💾 🍙 🧠 🚔	R.		[Commercial Construction_multiproject_new.cdpz - Gantt Chart] - ConceptDraw PROJECT
File Home View	Share		
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Capture Images MS Slide* PowerPoint	DIAGRAM Open in Ado MINDMAP PD	be MS MS Mindjet Text F Excel▼ Project MindManager Outline	
Presentation	ConceptDraw	Exports	

The drop-down list of export to MS Excel options contains two items:

1. Export tables from all views (also available from the File menu)

In this case, the Excel file will contain all the tables from the project file. The same function is available in the <u>Export</u> section of the <u>File</u> menu under the Export to MS Excel item.

1	A	В	С	D	E	F
1	Name	Start	Finish	Complete	Cost	Work
2	Audit Planning	9/5/2023	9/6/2023	10 %	2,800.00\$	16 h
3	Preliminary Analysis	9/11/2023	9/12/2023	33 %	4,400.00 \$	24 h
4	Prepare Trial Balance	9/11/2023	9/12/2023	50 %	2,800.00 \$	16 h
5	Test of Transactions	9/11/2023	9/12/2023	50 %	2,800.00 \$	16 h
6	Ratio Analysis	9/11/2023	9/11/2023	0 %	1,600.00\$	8 h
7	Audit Activ <mark>ities</mark>	9/13/2023	9/19/2023	0 %	33.672.00 \$	168 h 🚽
	Multiproject Dashboard	Audit - Gantt Chart	Resource Sheet	Resource Usag		: . .
	-				• • •	+ 100%

2. Export table from the current view

In this case, the Excel file will contain a single table - the last one opened before going to the Share tab. For example, to export the Resources Usage table to MS Excel, the following steps are required:

- 1. Open Resource usage view.
- 2. Go to the Share tab and select item 2 from the drop-down menu.

	А	В	С	D
1	Name	Project Name	Expenses	
2	Bob's Excavation	•	148,800 \$	
3	Clearing and Site Grading	Construction Project	89,600 \$	
4	Excavation	Construction Project	46,400 \$	
5	Concrete Piles	Construction Project	64,000 \$	
6	Brick	Construction Project	121,600 \$	
	Resource Usage Sheet (+)			

Dialogs

Timescale Column Customization Edit Markers Predecessors Filters Options Document Properties Find Replace

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 Form	atting			
Units:	Weeks ~	Alig	n: Left	\sim
Bottom Tier Fo	ormatting			
Units:	Days 🗸	Alig	n: 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.

Column Customization		×
Column	^	ОК
Hyperlinks		Cancel
Name Name		
Duration		Move Up
Priority		
Start		Move Down
Finish		Select All
Complete		Delect All
Cost	~	Deselect All

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
СР	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.	

The planned task completion status (percentages) at the current date.	
The tasks numbers (#) on which the task depends before it can be started or finished.	
The level of importance given to a task by project manager	
Resources assigned to task	
The date when a task is scheduled to be started	
The tasks numbers (#) that act as successors for the current task (tasks, whose start or finish date is driven by their <u>predecessor</u> task.)	
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 (<u>Assign Resource</u> panel)	
The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new task is created in the current project.	
Total planned cost for a project	
The planned completion date for a project	
The planned beginning date for a project.	
The budget, allocated to a project.	
Company Name	
The current status of project in percentages of the project's duration that has been completed.	
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
Туре	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 <u>Markers</u>. Just click a marker and start typing.

Edit markers			×
Red marker			
Orange marker			
Yellow marker			
Green marker			
Blue marker			
Purple marker			
Black marker			
	ОК	Cancel	

Predecessors

Predecessors dialog can be accessed from the <u>Link</u> 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 <u>Home</u> 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.

=		N	lame	Start	Finish	07	0.0	00			12				w38 6 17	17 S			24
1	*	Audit		9/5/2023	9/25/2023	07	00	03	10	-	12	15	14 1	5 1	0 17	10	19	20	21
2	•3	Audit Plann	ing	9/5/2023	9/6/2023		Kath	rine	Smi	th			+		-				
3	•	Preliminary	y Analysis	9/11/2023	9/14/2023				Π	-									
4	*/	Prepare	Trial Balance	9/11/2023	9/12/2023					-									
5	s	Test o	f Transactions	9/11/2023	9/12/2023				L		-	K	atherir	ne Sr	nith				
6	•	Ratio An	alysis	9/14/2023	9/14/2023					_			þ	De	nise N	lorsto	on		
7	•/	Audit Acti	Predecessors									×							
8	•	Cash ar											կ•ւ	9	9/15/20	23			_
9	÷	Accoun						Delete	:		New		•				1		Denis
10	¢	Invento		Link From								-	╓╇╸						ь
11	*	Prepaic	4 - Test of Transacti			Cha	Type			Lag	_		 ≁.	9	9/15/20	23			
12	÷	Propert	4 - Test of Transacti	ons		Sta	irt to S	start		3 d			+∙.	9	9/15/20	23			
13	f	Other A											հ	9	9/15/20	23			
14	•⁄	Accoun											+			1		Jenn	ifer St
15	•	Other C											+						
16	÷	Income														1			
17	¢	Long-te											⊢ • `	9	9/15/20	23			
18	•/	Stockh											կ∙ւ	9	9/15/20	23			
19	•	Revenu																	Þ
20	•/	Subseque																	L.,
								ОК		(ancel								

Filters

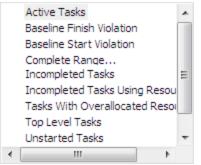
Those who use ConceptDraw PROJECT in their daily work may have faced the need to filter their project in some special way to get the appropriate information. To customize filtering options use the Filters dialog that can be accessed from **Edit Filter** button in the <u>Filters</u> section on the View 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.

ters for: Tasks V	Name: /	ctive Tasks						
Active Tasks A Baseline Finish Violation	Description:	how tasks th	at have been st	arted but not completed yet.				
Baseline Start Violation Complete Range Completed Tasks	Column	Edit column	Edit column label	Test	Value	Edit value	Edit value label	Relation
Cost Greater Than	Complete	No		does not equal	100	No		
Cost Overbudget Critical	Start	No		is less than or equal to	now	No		
Date Range	Finish	No		is greater than or equal to	now	No		and
Incompleted Tasks Using Resou Late Critical Tasks Late Tasks Milestones								

•	۱
	•

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"

ers for: Tasks	V Name:	John Smith co	mpleted tasks					
Active Tasks Active Tasks Active Tasks Active Tasks Baseline Finish Violation Baseline Start Violation	Description:	Show John Sr	nith's tasks comp	veted by 100%				
Complete Range Completed Tasks	Column	Edit column	Edit column label	Test	Value	Edit value	Edit value label	Relator
Cost Greater Than	Complete	No		equais	100	No		
Cost Overbudget Critical	Start	No		is greater than or equal to	Start	No		and
Date Range	Finish	No		is less than or equal to	Finish	No		and
Incompleted Tasks	Resources	No		contains	John Smith	Yes		and
John Smith completed tasks Late Critical Tasks Late Tasks Milestones Phases Task Range Tasks With Deadlines Tasks With Name								
Tasks With Overallocated Resol								

*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	٢N	lode: John Smith completed tas	ks																				
7	J	ohn Smith																				8)
=	1	Name	Priority	Complete		ar 20	18				w12,	18 M	ar 201	8				w13,	25	Mar 20	18		
*		Name	Prionty	Complete	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
3	1	Specification	★★★☆☆	100 %						-				Jol	ın Ş	mith							
5	1 9	PERT diagram	★★★☆☆	100 %					0	3/16	/2018	; Jo	hn S	mith	[50	%]; L	inda	Rice	[5	0 %]			
10	+2	Database architecture	☆☆☆☆☆	100 %											-		Jo	hn Sr	mith	n; Alex	ande	r Mil	ler

Options

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

onceptDraw PROJECT options		
General Schedule Autosave	Appearance Digilar on new document: Gantt chart v New document view settings: Current Document v Pont: P Arial Pont size: 9 v Currency Currency position: \$ Currency position: \$ 1.23	Color scheme: whose v Set v v v v
	Decinal digits: 2 Behaviour Uses smart enter mode 2 Generate deadine Microreports	8

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 On/Off the deadline Mircoreports automatic generation

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 <u>Effort-Driven Scheduling</u> <u>Method</u>

Schedule

keneral	Calendar			
chedule	Working week days:	Defaul	t working to	ne:
utosave	Sunday	Fa	om	To
	Monday	8	00	12:00
	C Tuesday			17:00
	Wednesday			
	C Thursday			
	Friday		_	
	Saturday	•		
	Week starts on: Sun Hours per day: Hours per week: 40 Days per month: 20 Scheduling	day v • • •		
	Default task type: Fire	d Lleite		
	Default tack duration: 1		Days	-
	Default task start date: Curr	ent Date		~

onceptDraw PROJECT	options	;
General Schedule Autosave	Autosave optionsAutosave every: 1	min

Autosave: Switch on/of autosave Every: Set up autosave periodicity

Document Properties

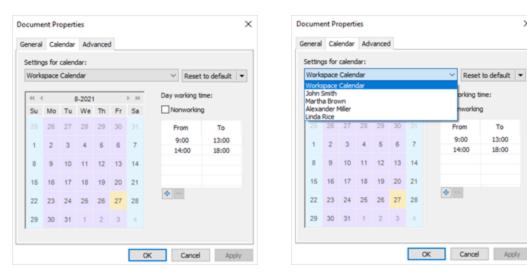
View and Edit current document properties. Document properties dialog is available from the <u>File</u> ribbon. It contains three tabs: General, Calendar and Advanced.

General tab allows to set the starting points of project calculations : Currency and Work units.

	nt Properti				
General	Calendar	Advanced			
Curren	ку				-
	Currenc	y symbol: \$		~	
	Currency	position: \$	1.23	~	
	Decir	nal digits: 2		-	
Work (Units				-
	Hours	per day: 8		-	
	Hours	per week:	0	÷	
	Days p	er month: 2	0		

Calendar tab is used to customize the default project <u>calendar</u>. You can set up schedule for all resources in your project.

Select resource from the drop-down list to create a Work 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.

Documer	nt Properti	5	×
General	Calendar	Advanced	
Critical	Path		
	Calculate in	dependent critical path for ex	ach project
Та	sk is critical	f slack is less than or equal to	x: þ .⊜days
		OK	Cancel Apply

Find

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



Find and Replace			×
Find Replace			
Find what:			
Look in column:	All Columns		\sim
	Match case	Find Previous Find Next	Close

Replace

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



The Replace dialog:

Find and Replace	×
Find Replace	
Find what:	
Replace with:	
Look in column: All Columns	~
Match case	
Replace All Replace Fi	nd Previous Find Next Close

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 <u>View</u> tab.



Task Project Resource Assign Resources Solutions Slide Navigator Hypernote Links

Task

Task dialog can be accessed from **Panels** button on the <u>View</u> tab.

Task dialog defines the project parameters and allows you to manage a task information from the <u>Gantt</u>,

Info	
Name:	Clearing and Site Grading
Duration:	20 🔹 Days 🗸
Complete:	75 %
Milestone:	
Priority:	
Marker:	No marker 🗸
Costs	
Baseline:	27,100 \$
Actual:	27,100 \$
Dates	
Start:	9/26/2022 8:00 AM
Finish:	10/21/2022 5:00 PM
Deadline:	9/16/2022 1:06 PM ~
Scheduling	
Type:	Fixed Units ~
Effort driven:	
Task types	
Types:	Split Task 🗸
Count:	Normal Split Task Recurring Task

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.

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

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

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.

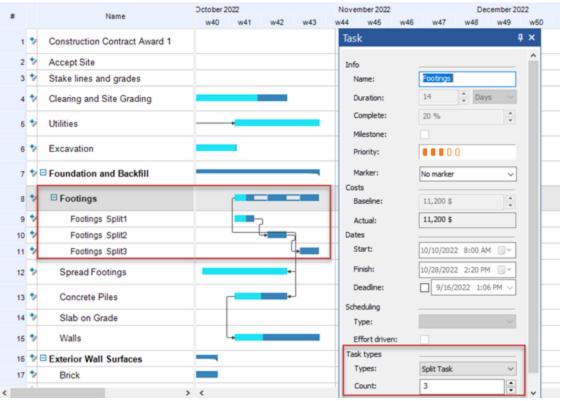
Effort-driven calculation rules are not applied when you change work, duration, and unit values for resources already assigned to a task.

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.

		322 October 2022	November 2022	December 2022
•	Name	w37 w38 w39 w40 w41 w42 w43	Task	ą ×
1 🍫	Construction Contract Award 1	9/11/2022	Info	
2 %	Accept Site	J 9/9/2022	Name:	Excavation
3 2	Stake lines and grades		Duration:	26 🕂 Days 🗸
4 2	Clearing and Site Grading		Complete:	0%
-	creating and one chaoling		Miestone:	
5 🍫	Utilities		Priority:	
6 2	Excavation		Marker:	No marker ~
7 2	Excavation Recurring1		Costs	
8 2	Excavation Recurring2		Baseline:	21,120 \$
9 2	Excavation Recurring3		Actual:	63,360 \$
	L		Dates	
10 7/1	Foundation and Backfill		Start:	9/19/2022 8:00 AM
11 🍫	E Footings		Finish:	10/24/2022 5:00 PM
12 🎾	Footings Split1	 >	Deadine:	9/16/2022 1:06 PM ~
13 🍫	Footings Split2		Scheduling	
14 🎷	Footings Split3		Type:	~ ~
15 🍤	Spread Footings		Effort driven:	
16 🍤	Concrete Piles		Task types Types:	Recurring Task ~
17 🍤	Slab on Grade		Count:	3
	Walle		Period:	S 🗘 Days 🗸

Project

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

Project		ą×
Info		
Name:	Kitchen Renovation	ı
Start Date:	9/ 9/2022 8:00 A	AM 🔲 🔻
Finish Date:	12/28/2022 8:00 A	AM 🔲 🔻
Duration:	78	Days 🗸
Budget:	100,000 \$	Minutes Hours
Company:	ABC Construction	Days Weeks
PM:	John Smith	Months
Site:	www.abcconstruct	ion.com
Objective:	Renovate private k	itchen
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. Select the duration units using the drop-down list.
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 <u>View</u> tab. Resource dialog defines parameters of the project resources and allows you to manage a resource information in the <u>Resources</u> list,

Resource	ų ×	
Info Name: Type:	Joe Smith Work ~	Name - Set up resource name. Type - Specify one of the following resource type: Work,; Material; Cost; Equipment or Company.
Cost: Group:	150 \$ ► Per hour ∨ Flooring, Landscape ♥	Cost - Set up resource cost. Work resources are those with a cost over time. Other types of resources have a fixed cost per unit
E-Mail: Marker:	joe_smith@gmail.com	Group - Set up resource group. The resource can participate in several groups
		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 <u>View</u> 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	Units	Work	
🔲 🖻 Excava	tion			2
Bob	's Excavation	50.00 %	64 h	2
Exca	avator	1.00	-	1
Truc	*			1
Bob	's Excavation			å
Exca	avator			9
Truc	*			2
🔲 🗆 Surveya	or			2
Surv	veyor 1			2
Surv	veyor 2			2
Surv	veyor 2	50.00 %	64 h	å
Surv	veyor 1			2
🔲 🖻 Flooring	1			3
Bak	er Flooring			2
Con	crete mixer			2
Bak	er Flooring			å
Con	crete mixer	1.00	-	2

Resource - Displays the resource name.

Units - Resource utilization for the current task.

Work - Man-hours for the <u>Work</u> type resource.



Add Work resource - Add new human resource into resource pool

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



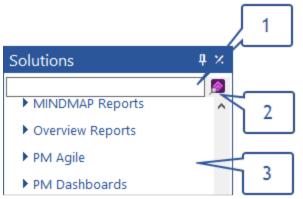
Move to Resources view - Switch to Resources view

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 <u>project</u> <u>dashboards</u>. Open the example project file to modify it, or generate a <u>tabular</u>, <u>visual</u> and <u>mind map</u>

reports on your project. Access the panel from the button where the <u>Home</u> tab, or using the <u>Panels</u> list in the <u>View</u> 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

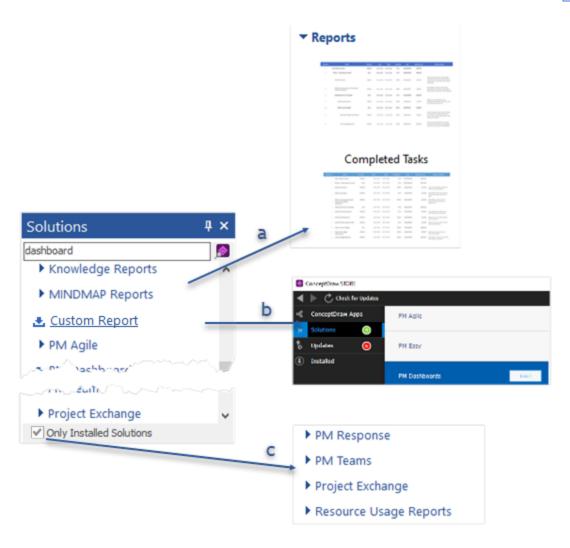
3. Solution section. This section contains the list of available solutions in alphabetical order.

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.

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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 predesigned 30 tabular reports in ConceptDraw PROJECT. Reports are combined into 7 case-oriented <u>solutions</u> with many kinds of reports. Along with pre-designed tabular reports, ConceptDraw PROJECT users can create <u>custom reports</u> based on a self-designed Excel template. The group of pre-designed 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;

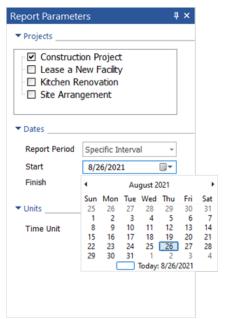
- Multiproject Goals report the table of projects objectives for each project;
- Multiproject Managers report the table of projects managers for each project;
- Project Team report the table of project employee including hyperlinks;
- Resource Report report the table of all kinds projects resources for 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.

Solutions 4 × Current Activities Reports Examples Reports	represents the spreads the project's tasks, whii Complete in a Gantt Ch reporting period is set a changed to another des with the indication the p phases are not 100% or	sks report generated for your project heet containing the information r th are completed, i.e. the tasks w art equals to 100%. By default, th s a current week, but optionally ired one. This report includes th hases to which they belong, eve ompleted, and contains the corre ut duration, start and finish date	egarding /hich he Generate it can be t tasks en if these sponding	Projects Projects Construct Construct Ktchen R Ste Arran	ion Project New Facility enovation
Completed Tasks	baseline cost and responses to the second se		es, cost,	Dates Report Period Start Finish	Document Timeline • 7/16/2021 • 11/25/2021 •
- Simple Simple	i kolonistan kati i Mariashiga Ma	NA.100 NA.100 NO NA.000 NA.000 <th< th=""><th></th><th>▼ Units Time Unit</th><th>Use Current Documen' *</th></th<>		▼ Units Time Unit	Use Current Documen' *
Critical Tasks		10.103 0.4.2.6 60 80.008 8.0.2.6 8.0.2			
Only Installed Solutions Ready	Budget: -	Actual Cost: -	Profit: -	医黄素素	+

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	В	С	D	E	F	G	н	1
1	Unique ID	Name	Duration	Start	Finish	Complete	Cost	Baseline Cost	Resource Name
2	6	Accept Site	0 d	7/18/2021		100 %	0\$	0\$	
3	7	Stake lines and grades	10.00 d	7/26/2021	8/6/2021	100 %	8,000 \$	8,000 \$	Surveyor 1
4	8	Clearing and Site Grading	20.00 d	8/9/2021	9/3/2021	100 %	27,100 \$	26,300 \$	Bob's Excavation, Excavator [1]
5	9	Utilities	15 d	8/9/2021	8/27/2021	100 %	12,000 \$	12,000 \$	Surveyor 2
6	10	Excavation	16.00 d	8/2/2021	8/23/2021	100 %	21,820\$	21,180 \$	Bob's Excavation, Excavator [1]
7	11	Foundation and Backfill	25.00 d	8/9/2021	9/10/2021	70 %	60,100 \$	63,700 \$	
8	13	Spread Footings	15 d	8/9/2021	8/27/2021	100 %	17,500 \$	17,500 \$	Baker Flooring, Concrete mixer [1]
9	14	Concrete Piles	10.00 d	8/23/2021	9/3/2021	100 %	13,900 \$	13,500 \$	Bob's Excavation, Concrete mixer [1]
10	17	Exterior Wall Surfaces	25.00 d	8/30/2021	10/1/2021	100 %	33,700 \$	35,900 \$	
11	18	Brick	25.00 d	8/30/2021	10/1/2021	100 %	33,700 \$	19,900 \$	Bob's Excavation, Excavator [1]
12	20	Rough-in Ductwork, Plumbing and Electrical	15 d	8/2/2021	8/20/2021	100 %	36,000 \$	43,800 \$	
13	21	Install Heatpumps	15 d	8/2/2021	8/20/2021	100 %	17,500 \$	17,500 \$	Baker Flooring, Truck [1]
14	22	Venting	5.00 d	8/9/2021	8/13/2021	100 %	6,600 \$	6,400 \$	Bob's Excavation
15	24	Telephone, Security, and Electrical Wiring	10.00 d	8/9/2021	8/20/2021	100 %	11,900 \$	11,900 \$	Baker Flooring, Truck [1]

Custom Repots

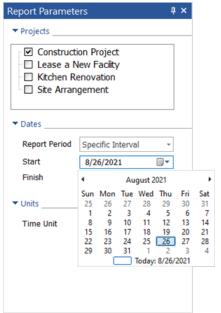
ConceptDraw PROJECT allows you to create a tabular project report based on a custom Excel template. Using the Report Wizard you can generate a custom project status report based on the ConceptDraw PROJECT file data. Use an Excel document to create a report template. With the help of customizable macros place the necessary data in the required cells.

Follow the steps below to make the tabular report on your project:

- 1. Install the Custom Report Solution via ConceptDraw STORE. Find it in the Project Management category on the Solutions tab.
- 2. Find out Custom Reports in the Solutions panel.
- 3. Click the report icon to view its preview on the right panel.

Solutions 4 3		istom	Report						Report Paramete	
 Custom Report 	The	"Custom	Report" is Cust	om Report.	. That's all we k	now.	[Generate	Construct	
▼ Reports	1	A	B C	D	E F	G	н	I	Lease a N Kitchen R Site Arran	lew Facility enovation
Custom	2 3 4					+			▼ Dates	
Custom Excel Report	5					+			Report Period	Document Timeline +
	7	_	Custom						Start	7/16/2021
Earned Value Management (EVM) Dashboard	8								Finish	11/25/2021
Knowledge Reports	10					• 			▼ Units	
MINDMAP Reports	12	_		_		•			Time Unit	Use Current Documen *
Overview Reports	13			_	1					
▶ PM Agile	15								 Miscellaneous 	
PM Dashboards	16								<select excel<="" td=""><td>template></td></select>	template>
PM Docs										
• PM Easy	~									
Only Installed Solutions										
Ready			Budget: 210,880	s	Actual Cost: 198	,720 \$	Profit: 12,1	60 S 🚍	🔺 📭 🏭	+

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



- 2. Press Generate to create the report.
- 3. The report will be generated and opened in MS Excel.

The Custom Reports solution includes the installation of an add-on for MS Excel. The CDProject menu item will appear on the MS Excel toolbar after the successful installation of the solution. The Report Wizard supplied with add-on allows you to build custom templates for various project reports based on the ConceptDraw PROJECT file data.

									202	-09-01_18-27-56	Project Report_Examp	le 2 - Excel
File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	CD Pro	oject 📿 Te	ll me what you want to	do
👌 🖣 Proj	ject Name ject Budget ject Company		t Description	ैं प Project Site ैं प Project Duratio ैं प Project Priority Project	on 🛃	Project Start Project Finis Project Con	h Date	ै्ब Project			ैं ब Task Start Date ैं ब Task Finish Date ैं ब Task Complete Task	
L4	• <> = =	×	$\sqrt{f_x}$									
1		A		В				с			D	
1 2												
3 Pro 4	ject Name		Tas	sk Name		Res	ource	Name	×	Task Cost		
6	PRJ_PROJEC	T_NAME() =0	DPRJ_TASK_NAM	ИE()	=CI	OPRJ_R	ESOURCE_	NAME()	=CDPRJ_TASK	_COST("##> 10000")

How it works

1. Use an Excel blank Workbook to create a report template. With the help of customizable macros, place the necessary data in the required cells.

2. In each line of the Template Sheet, the Report Wizard searches and processes certain macros. For example:

CDPRJ_PROJECT_NAME () - displays the name of the Project.

CDPRJ_TASK_DURATION () - displays the duration of the Task.

CDPRJ_RESOURCE_TYPE () - displays the type of the resource.

CDPRJ_TASK_NAME ([PH]) - displays only Phases.

CDPRJ_TASK_NAME ([T]) - displays only Tasks

CDPRJ_TASK_NAME ([M]) - displays only Milestones

3. Filters by certain conditions can be used as parameters. For example:

CDPRJ_TASK_NAME (## = " Task1 ") - displays the name of the task if this name is "Task1".

CDPRJ_TASK_DURATION ("##> 5 & ## <10") - displays the duration of tasks from 5 to 10 units.

4. Use the saved Excel Template to start generating a report from the Report section in the Solutions panel.

5. The Report Wizard loads the Excel Workbook with the report template and creates a new Workbook.

1	A	В	С	D
3	Project Name	Task Name	Resource Name	Task Cost
4				
5	Construction Project	1_4.Clearing and Site Grading	Bob's Excavation	17985.0
6	Construction Project	1_4.Clearing and Site Grading	Excavator	17985.0
7	Construction Project	1_7.Foundation and Backfill	Bob's Excavation	63063.0
8	Construction Project	1_7.Foundation and Backfill	Surveyor 1	63063.0
9	Construction Project	1_7.Foundation and Backfill	Baker Flooring	63063.0
10	Construction Project	1_7.Foundation and Backfill	Surveyor 2	63063.0
11	Construction Project	1_7.Foundation and Backfill	Truck	63063.0
12	Construction Project	1_7.Foundation and Backfill	Concrete mixer	63063.0
13	Construction Project	1_7.1.Footings	Surveyor 1	11200.0
14	Construction Project	1_7.2.Spread Footings	Baker Flooring	13266.733
15	Construction Project	1 7.2.Spread Footings	Concrete mixer	13266.733

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.

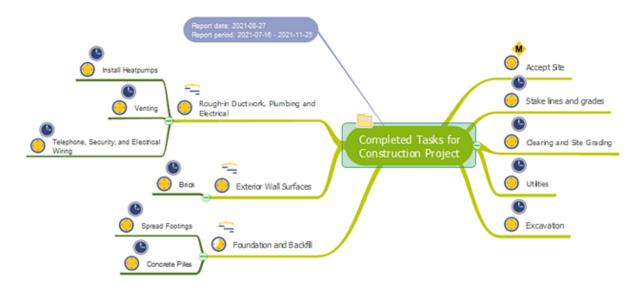
- 1. Find out MINDMAP reports in the Solutions panel.
- 2. Click the report icon to view its preview on the right panel.

Solutions # × MINDMAP Reports Examples Reports	The "Cor project r the hiera already period. E month, t before g	pleted Tasks" report formed for your epresents the Mind Map composed fro archy of your project tasks which are completed at the time of the reporting y default, the reporting period is a cur vut you can change it to the desired or enerating this report. For the multiproj age Mind Map document will be created	Generate rrent ject,	Report Paramete ✓ Projects ✓ Construct └── Lease a N └── Ktchen R └── Ste Arran	ion Project Jew Facility enovation
Control Links of the American State Street S				▼ Dates	
				Report Period	Document Timeline *
Completed Tasks				Start	7/16/2021
				Finish	11/25/2021
	Naud die 2016-000 Naud gene 2016-000	and Constant Statute - O Schwarzant - O Sur Law Parts - O Schwarzant - O Schwarza			
Critical Tasks					
Only Installed Solutions					
Ready	Budget: -	Actual Cost: -	Profit: -	F 🔩 📑 🚝	- +

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

Report Paramete	ers				ą	×	
▼ Projects							
Constructi	lew f enov	acility ation					
▼ Dates	_						
Report Period	Spe	cific Ir	terva	al	-		
Start	8/2	6/202	1				
Finish	•		Au	gust 2	021		•
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
 Units 	25				29		31
	1		3	4	-	6	7
Time Unit	8				12		
					19		
	22	23 30		25	and a state of the	27 3	28 4
	29	50			: 8/26/2	_	4
			_	louay	0/20/2	2021	

- 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.

I III	presenced in one of	the project expenses by weeks table.			
Accumulative Budget Actuals					
Actuals per Project Period	Budget: -	Actual Cost: - Profile	. 7	A B- 2=	

- 3. Press **Generate** to create the report.
- 4. The report will be generated and opened in ConceptDraw DIAGRAM





Floating Panels	Solutions	Visual Reports	
			_ 74

Dashboards

ConceptDraw PROJECT provides the possibility of creating visual project dashboards. The PM Dashboards solution allows generating accurate, timely, and professional looking <u>Project Dashboard</u>, <u>Radar Chart</u> and <u>Tactical Dashboard</u>. 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.

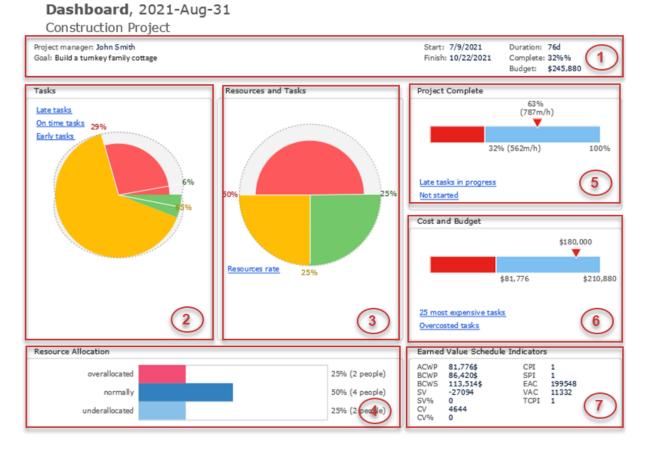
Solutions	summarizing the informatic several parts displaying op that are late, on time and underallocated, as well as indicators. You can also fin of Earned Value Schedule 1 reports. The usage of seve recognizing whether every This report for a multiproje summarizing the informatic Dashbeard, 2015-Jug-18 o	sport generated for your pro- in according to your project's neral information about you sarly, the quantitative ratios late, early and on time reso the bars depicting the data indicators calculated for your al bright colours provides a bring is moving well in your it it will contain the individual in about all projects' completed	iject offers the ConceptDraw D s state on one page, which is project, the quantRative rate of resources = overallocated, a on project complete, costs ar project, and in kns: in additiona idditional visual assistance in in project and in identification the pages for each project and on Res.	divided into is of project tasks normally and ry performance di budget, the list I graphical istantly problem areas.	Projects Orostruction Project Dease a New Facility Kichen Renovation	×
~	Harketing Research		Test 2014-04 Context 2013-0410			
			halph Brites			
	Tana Lakoaka Dolina Saka Lakoaka	Resources and fails	71 APR (100 PPR)			
Radar Chart	-	-	Lake San Date of San			
100 III			Cort and Redget			
		-	APT/100 attes Butel exects bets Consultation			
Tactical Dashboard	Respond Alexandre		Garranti rakar bolyakun bolyakun			
		STA 2 and A				
▶ PM Docs	united and a second	Ph 11 percent	S.			
PM Easy						
PM Personal Time						
Only Installed Solutions						
Ready		Budget: -	Actual Cost: -	Profit: -	三人的姓	

- 3. Press **Generate** to create the dashboard.
- 4. <u>Project Dashboard</u>, <u>Radar Chart</u> and <u>Tactical Dashboard</u> 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)

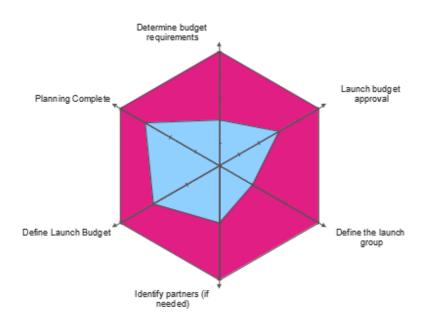
Radar Chart

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.

#		Name	Start	Finish	w34,	22	Aug 20	21				w35,	29 Au	g 20	21
*		Name	Start	Finish	22	23	3 24	25	26	27	28	29	30	31	01
1	P	Project	8/22/2021	9/22/2021		-								_	
2	•2	New Product Launch	8/22/2021	8/31/2021	<u> </u>		8/22/2	021							
3	•2	Phase 1 - Planning the Launch	8/22/2021	8/31/2021	<u> </u>		8/22/2	021							
4	•2	Define the launch group	8/24/2021					<u>م</u>	8/2	4/202	21				
5	•2	Define sales goals	8/24/2021			l		~	8/2	4/202	21				
6	•20	Define launch goals (launch timing and publicity objectives)	8/25/2021				-	~	8/2	5/202	21				
7	•2	Identify partners (if needed)	8/25/2021				-	<u>~</u>	8/2	5/202	21				
8	•2	Identify channel partners	8/25/2021				-	<u> </u>	8/2	5/202	21				
9	•8	Identify retail partners	8/25/2021				Ļ	<u> </u>	8/2	5/202	21				

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, 2021-Aug-31



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.

#		Name	Start	Finish		w35	29 A	ug 20	21				w36,	05 Se	p 202	1		
#		Name	Start	Finish	28	29	30	31	01	02	03	04	05	06	07	08	09	10
1	•9	□ Marketing Research	8/30/2021	8/31/2021			-											
2	•	Define the launch group	8/30/2021	8/31/2021			<u> </u>			Jam	nes Si	mith;、	John	Brow	n; Ma	ry Wil	liams	5
3	¢	Define sales goals	8/30/2021	8/31/2021														
4	P	Define launch goals (launch timing	8/30/2021	8/31/2021						Dav	id; Mi	ike; C	larc					
5	P	Planning the Launch	8/31/2021	8/31/2021				-		1								
6	¢	Define the launch group	8/31/2021	8/31/2021)	Dav	id; Mi	ike; C	larc				
7	•2	Define sales goals	8/31/2021	8/31/2021)								
8	•,0	Define launch goals (launch timing	8/31/2021	8/31/2021)	Jam	nes Si	mith;	John I	Brown	n; Ma	ry Wil	lliam

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.

					81
Tactical dash	board, 2021-Aug-31				
Adual cast (Tota cast.	ee Complete	Providence in the second management of the second sec	te Campiana	G shortaling Contealing G association G association G association G association G association G zero G zero	
Actual time / Yaal time	e e Campista	Adual cart human meaurose / Total carthuman meaurose	Carryless.		

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.

Dashboards

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.

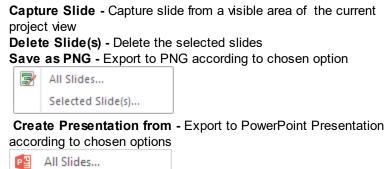
Slide Navigator

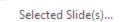
You can create a presentation slides from a project file using the Capture Slides button <u>Share</u> tab. Slides will appear in the pop-up Slide Preview panel. Slide Preview panel can be accessed from **Panels** button on the <u>View</u> tab.

	Name	Start	Finish				August 2	021			Sep	ptember 20	21			October 2	021	
· .	rearrie	Start	Finan	7 w28	w29	w30	w31	w32	w33	w34	w35	w36	w37	w38	w39	w40	w41	w42
12	Construction Contract /	Award 1 7/16/202	1	<u>_</u>	7/	/16/2021												
2 🍫	Accept Site	7/19/202	1		++4	7/19/202	21											
3 🍫	Stake lines and grades	7/26/202	1 8/6/2021		l	-		Sur	veyor 1									
4 7/	Clearing and Site Grad	ing 8/9/2021	9/3/2021					•		_		Bol	o's Exca	vation;	Excava	tor [1]		
6 🏷	Utilities	8/9/2021	8/27/2021								Su	rveyor 2						
6 🏷	Excavation	8/2/2021	8/23/2021								Bob's E	xcavatio	n (100 ⁻	%]: Exc	avator	[1]		
7 🍫	E Foundation and Back	fill 8/9/2021	9/10/2021					-										
8 🏞	Footings	8/23/202	1 9/9/2021								_		Surv	reyor 1				
9 🍫	Spread Footings	8/9/2021	8/27/2021								- Da	ker Floor	ing: Cor	ncrete n	nixer [1	1		
10 🍫	Concrete Piles	8/23/202	1 9/3/2021						(-	-	Bol	o's Exca	vation;	Concre	te mixer (1]	
11 🏷	Slab on Grade	8/23/202	1							٠	8/23/20	21; Surv	eyor 2					
12 🏷	Walls	8/23/202	1 9/10/2021						l				Ba	ker Floo	oring; Tr	uck [1]		
13 🏷	Exterior Wall Surfaces	s 8/30/202	1 10/1/2021								-				-			
14 🏷	Brick	8/30/202	1 10/1/2021								-					Bo	b's Exca	avation
15 🏷	Exterior Trim	8/30/202	1								-++	8/30/20	21					
			>	<)
onstruct	ion Project Lease a New Fa	cility Kitchen Renovation	Site Arrangement	Multi Gantt	t													
lide Pro	eview																	ą
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Mult	iproject Dashboard	Construction Project - Gantt Ch	art Lease a Nei	w Facility - Gan	tt Chart	Kitche	n Renoval	tion - Gant	tt Chart	Site	Arrangem	ent - Gant	Chart		Resour	ce Usage V	lew	

You can manage the slides in the Slide Preview panel using the context menu.







on the

Hypernote

Hypernote panel can be accessed from **Panels** button on the <u>View</u> tab.

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Note			
	t of transaction focuses on the i	ndividual transactions	~
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т	Link	Owner	
	www.financial.com	Test of Transactions	
O	project.com	Test of Transactions	
	Cash and Equivalents	Test of Transactions	
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4	📘 💐 🤘 🗮 🖂 Shov	w Subitems	° <mark>×</mark>

Notes - Notes section allows adding text Notes to project tasks, scheduled at the the <u>Gantt chart</u> 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 <u>Column Customization</u> 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;
- where the second second

hyperlink to other item in the current project file;

You can add a hyperlink by clicking the Hyperlink icon ¹/₂ in the <u>Gantt view</u> grid. To display the Hyperlink column on the grid,use the <u>Column Customization</u> 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 <u>View</u> 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 <u>Predecessors</u> dialog.

	01 02 03 04 05 06 07 08 09 10 11 12	2 13 14 15
Task		
Phase		
Task 1		
Task 2		
Task 3		
Task	Links	Ψ×
Task	Predecessors Successors	^
Task	# Task Name Type Lag	
	3 Task 1 FS 1d	E
		+

If you need to set a time lag between selected task and the subsequent one, you have to use the **Successors** tab.

	01 02 03 04 05 06 07 08 09 10 11 12 13 14	15
Task		
Phase		
Task 1		
Task 2		
Task 3		
Task	Links	×
Task	Predecessors Successors	
Task	# Task Name Type Lag	
	5 Task 3 FS 2 d	Ξ
		Ŧ

Keyboard Shortcuts and Mouse Actions

Keyboard	Operation	
ConceptDraw OFFICE Tools		
Ctrl + Shift + M	Create ConceptDraw MINDMAP file	
Documents and Windo	DWS	
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	Undo the last operation
Alt + Backspace	
Ctrl + Y	Redo what was reserved by Undo
Ctrl + X	Cut the selection to the Document
Shift + Del	
Ctrl + C	Copy the selection to the Document
Ctrl + V	Paste the content from the Document
Shift + Insert	
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
Esc	Deselect