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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.

[Manage Plans, Reports, and Changes](#)

[Benefits](#)

[ConceptDraw Maintenance Assurance](#)

[Technical Support](#)

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### 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.

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### 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.

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### ConceptDraw Maintenance Assurance

We have developed an innovative maintenance program that makes sure you stay up to date. At the time of your buy a ConceptDraw product, you are able to purchase [ConceptDraw Maintenance Assurance](#).

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### Technical Support

We offer unlimited free technical support to our users.

To send us a problem report or feature request, submit the [ticket](#) form in the Help Desk section on our Web site.

Replies are normally sent within one business day. We are always happy to answer your questions and hear your feedback.

## Toolbar Tour



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

### [Quick Access](#)

[File](#)

[Home](#)








[View](#)

[Share](#)

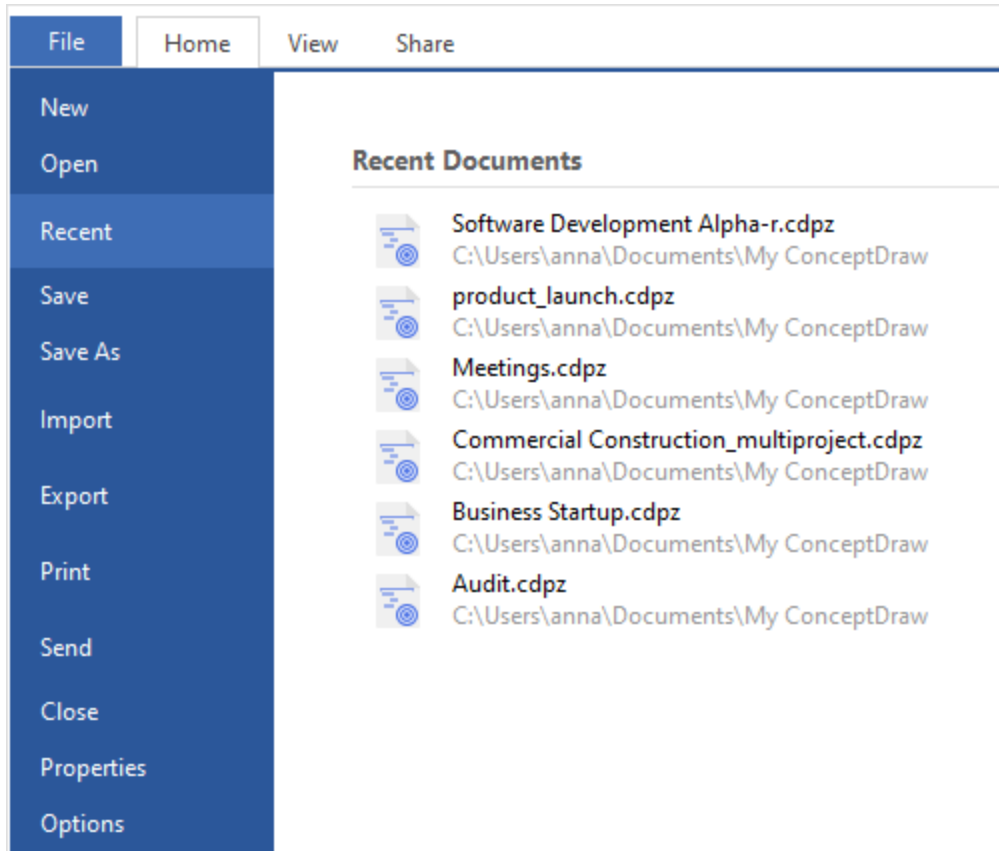
## Quick Access



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




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

## File





- |                        |   |
|------------------------|---|
| New                    | Create a new document                               |
| Open                   | Open an existing project                            |
| Recent                 | Show recently opened files                          |
| Save                   | Save the current document                           |
| Save As                | Save a copy of the document                         |
| <a href="#">Import</a> | Import the document                                 |
| <a href="#">Export</a> | Export the document                                 |
| <a href="#">Print</a>  | Preview and print the document                      |
| <a href="#">Send</a>   | Send a document                                     |
| Close                  | Close ConceptDraw PROJECT                           |
| Properties             | Open the <a href="#">Document Properties</a> dialog |
| Options                | Open the <a href="#">Options</a> dialog             |

Preview and print the current ConceptDraw PROJECT file

- |   |  |
|---|--|
|  Print                 | Send the document to the default printer as it is.<br>Use the <a href="#">View</a> tab to setup the printed document view. |
|  Print Preview         | Opens <a href="#">Print Preview</a> tab  |
|  Print to<br>Adobe PDF | Print to Adobe PDF using the current print settings  |

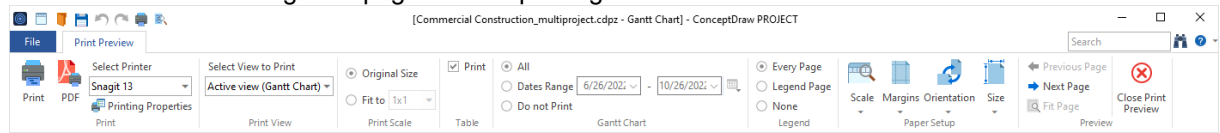
Send the current document

- |   |  |
|---|--|
|  E-mail          | Send a copy of the document via e-mail as attachment             |
|  Open in MINDMAP | Open the current document in ConceptDraw <a href="#">MINDMAP</a> |



### Print Preview

Preview and make changes to pages before printing.



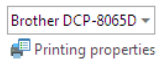
### Print



Print the current document

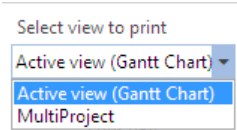


Print to Adobe PDF using the current print settings



Select the printer and set the printer properties

### Print View



Select exactly the view you need to print: Gantt Chart, or Multiproject.

### Scaling

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

### Grid

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

### Timescale

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

### Legend



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

### Page Setup

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

### Preview

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

## 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* workbook

## Export

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



Adobe PDF - Export the document to Adobe PDF



MS Excel - Save project tables from all [views](#) as [Microsoft Excel](#) workbook ( \*.xlsx)



MS Project File - Export the document to Microsoft Project XML



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



Text Outline - Export the document to the text outline

## Home



### Clipboard



**Paste**

Paste content from the Clipboard



**Cut**

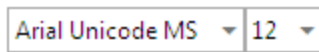
Cut selection and put it into Clipboard.



**Copy**

Copy the selection and put it into the Clipboard.

### Format Text

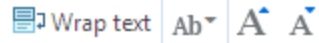


**Font**

Select font face

Font size

Select font size



Grow font

Increase font size

Shrink font

Decrease font size

Make upper case

Convert selected to upper case

Make lower case

Convert selected to lower case

Make title case

Convert selected to title case

Make sentence case

Convert selected to sentence case

Wrap text

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

### Solutions



**Solutions**

Activate [Solutions](#) panel

### Select View



**Gantt Chart**

Switch to [Gantt Chart](#) View



**Resources**

Switch to [Resource](#) list



**Multiproject**

Switch to [Multiproject](#) Dashboard



**Resource usage**

Switch to [Resource usage](#) view

**Reports**

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



**Microreports**



**Microreports**

Generate [Microreports](#)

**General**



**Add**

Add new item to end



**Insert**

Inserts new item into selected position



**Add sub item**

Add sub item to selected item

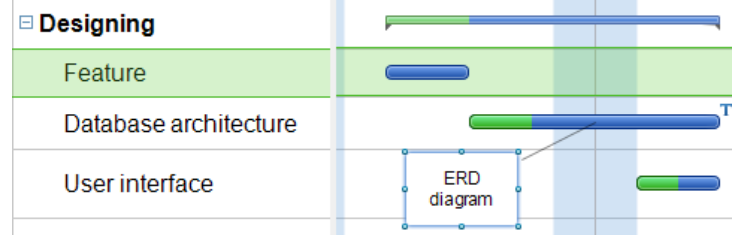


**Delete**

Delete selection

**Add text box**

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



**Link**



**Link**

Link two or more selected items

- Finish to start
- Start to start
- Start to finish
- Finish to finish



**Unlink**

Unlink two or more selected items

Link



**Edit button**

Edit predecessors using the [Predecessors](#) dialog

**Move**



**Indent**

Indent selected item (Move selected item one position right)



**Outdent**

Outdent selected item (Move selected item one position left)



**Up**

Move selected item one position up



**Down**

Move selected item one position down

**Go To**



Selected

Show selected task on Gantt Chart



Today

Show today's tasks on Gantt Chart view

**Markers**



**Markers**

Mark selected item with selected color

Edit Markers button

Opens the [Edit markers](#) dialog

**Calendar**



**Calendar**

Shows [Document Properties](#) dialog, **Calendar** tab

**Baseline**



**Save**

Save [Baseline](#) settings for selected tasks

**Editing**



**Find**

Activate [Find](#) dialog



**Replace**

Activate [Replace](#) dialog



**Smart Enter**


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

## Microreports



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

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

- from the context menu of the the task, phase, resource or project;
- from the Micro-reports button  on the [Home](#) tab.

List of reports available for various project tables:

### [Gantt Chart](#)

#### Phase

1. [Deadline reminder](#) for all projects.
2. [Deadline reminder](#) 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. [Deadline reminder](#) for all projects.
2. [Deadline reminder](#) for the current project.
3. Task status.

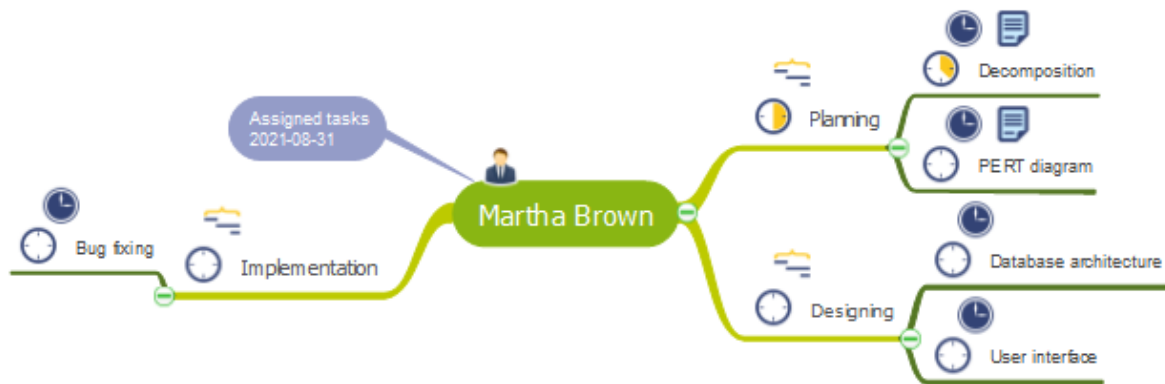
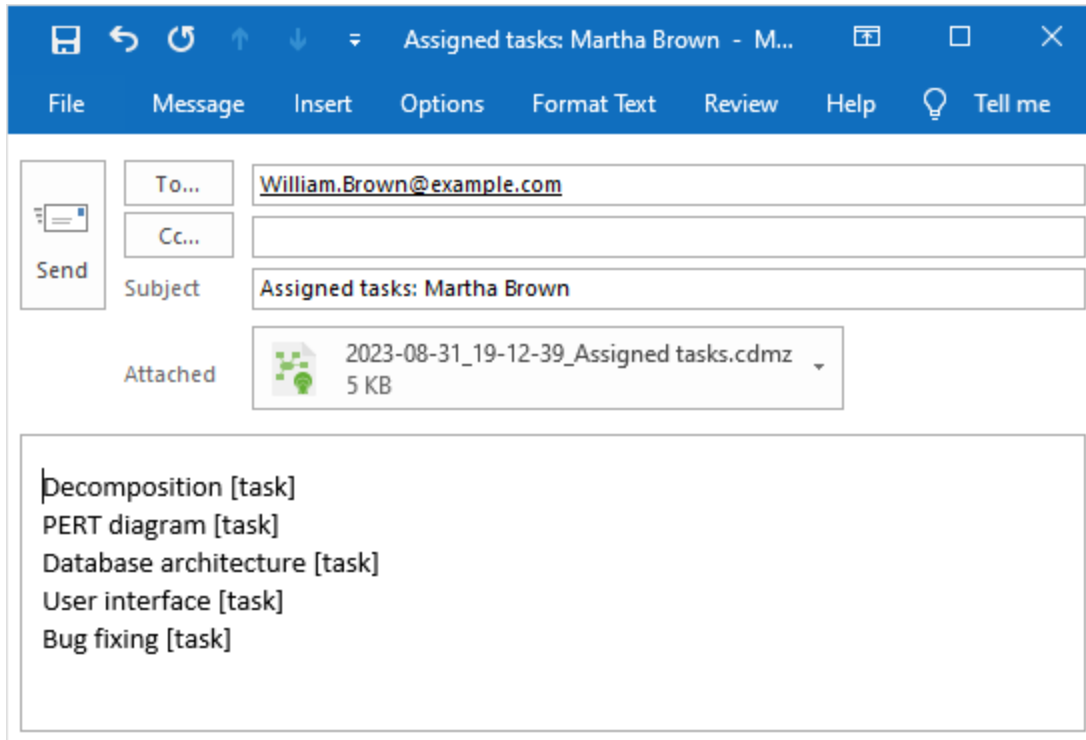
### [Resources](#)

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. [Deadline reminder](#) for the selected resource.

### [Multiproject Dashboard](#)

1. [Deadline reminder](#) 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 [reports on deadlines](#), are generated in both text and mind map form as ConceptDraw MINDMAP files (CDMZ), attached to the email message.



**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 [project](#), [task](#), or [resource](#). You need to choose the needed type of [Microreport](#) from the drop-down 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 [Task](#) 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

Project Task Assign... Links Resour... Hyper.

Info

Name: CONVERSION REQUIREMEN

Duration: 29 Days

Complete: 45 %

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

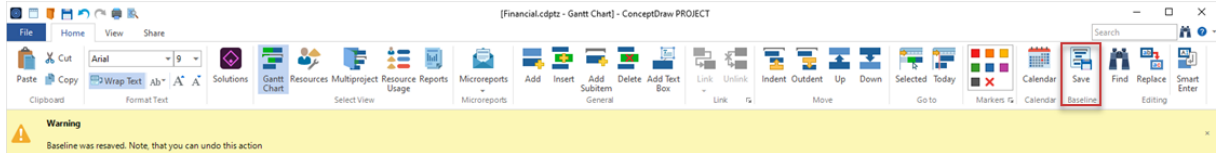
Deadline:  9/13/2023 12:00 AM

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 [Options](#) dialog box.

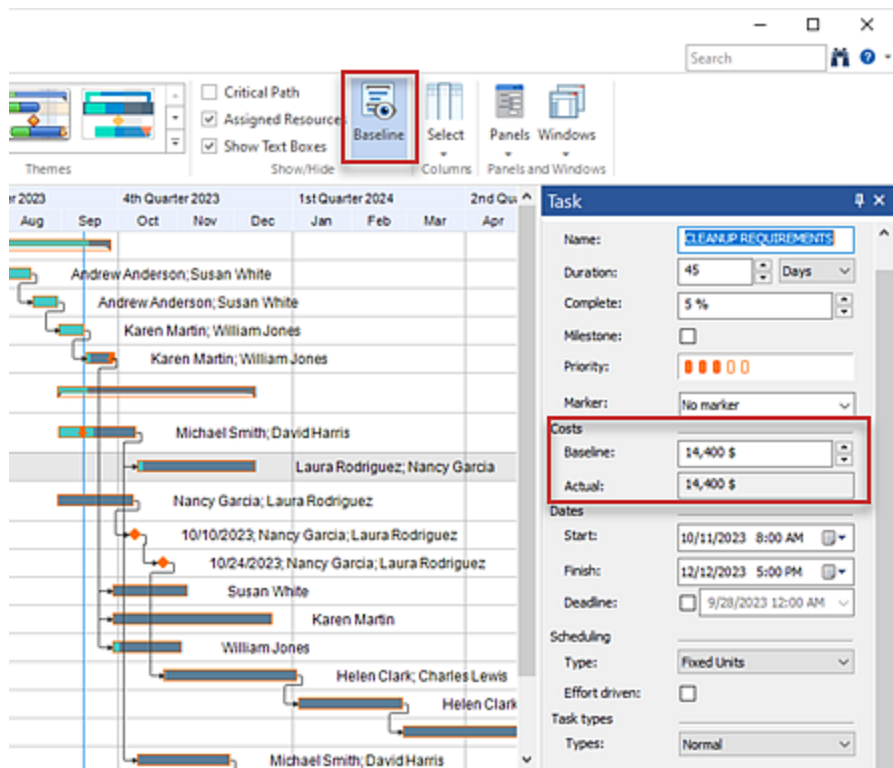
### Project Baseline

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.

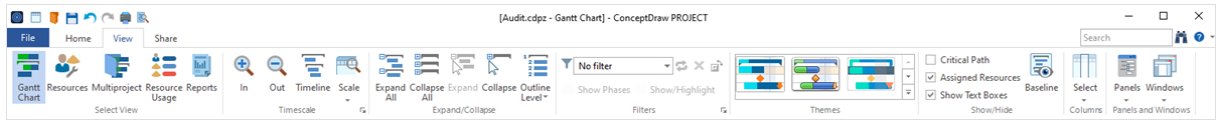
To save a Baseline, click the Save Baseline button  on the Home tab. The following message will appear:



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



## View



### Select View



**Gantt Chart:** Switch to [Gantt Chart](#) View.



**Resources:** Switch to [Resource](#) list.



**Multiproject:** Switch to [Multiproject](#) Dashboard.



**Resource usage:** Switch to [Resource usage](#) view.

### Timescale



**Zoom in**



**Zoom out**



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



**Scale:** Show the scale choice drop-down list.

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

### Expand/collapse



**Expand all:** Expand all sub items.



**Collapse all:** Collapse all sub items.



**Expand:** Expand selected item.

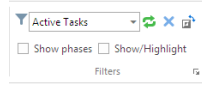


**Collapse:** Collapse selected item.






**Outline level:** Show tasks of the certain outline level.

**Filters**



**Select Filter:**

-  Select the embedded filter and activate [Filters](#) mode. Apply previously selected filter.
-  Clear the current filtering.
-  Invert the current filter.

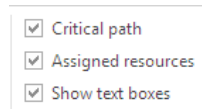
- Show phases:** Show/Hide phases.
- Show Highlight:** Show/Hide Highlight.
- Edit Filter button:** Open the [Filters](#) Dialog.


**Themes**



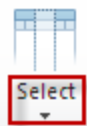
**Themes:** Select the one of the available Gantt chart views

**Show/Hide**



- Critical path:** Show/hide the [critical path](#)
- Assigned resources:** Show/hide the [resources](#) assigned to tasks on the Gantt
- Show text boxes:** Show/hide [text boxes](#)
-  **Baseline:** Show/hide the saved project [baseline](#) on the Gantt Chart

**Columns**



**Customize columns:** Open the [Columns customization](#) dialog and select columns to display in the project outline.

**Panels and Windows**




**Panels:** Manage [Floating panels](#).

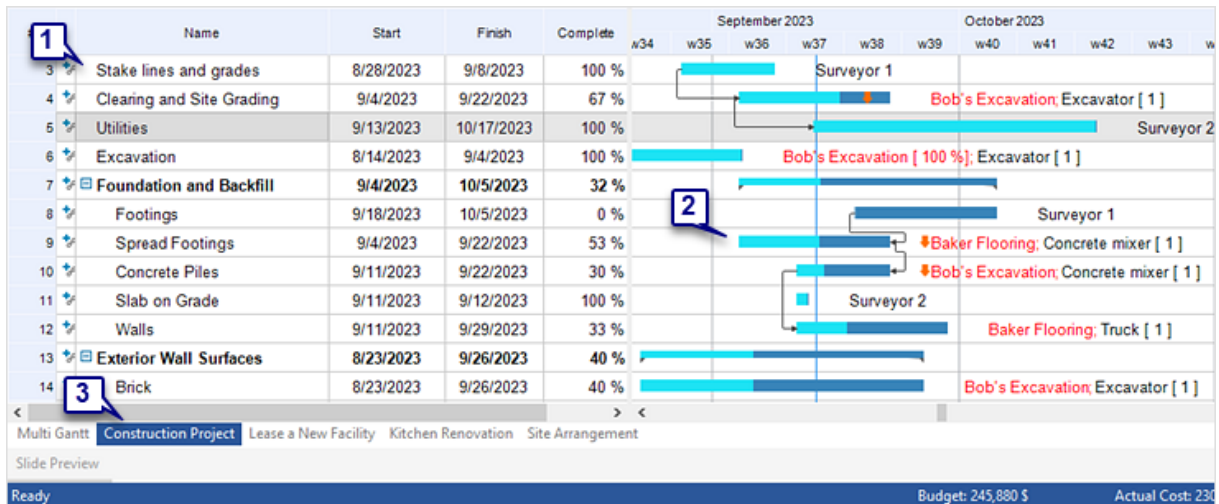
**Windows:** Shows the list of opened windows.

### Gantt Chart

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.



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

- By pressing **Enter**
- Using the **General** section on the [Home](#) tab
- Applying the command **Insert New Task** from the [context menu](#).

To turn the selected task into a phase, use the [Outdent](#) command. To add a task to a phase, use the [Add Subtask](#) command.

All parameters of the project tasks and phases can be specified in the [Tasks](#) dialog. Some parameters can be specified in the [context menu](#) and on the Gantt chart.

Columns that contain the project outline information can be managed using the [Column Customization](#) dialog.

The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction.

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 [Timescale](#) dialog, that can be accessed from the [context menu](#).

Also can change the task start/end date, its duration and completion . To change start/end dates move the bar by your mouse. To change the task duration draw by the right edge of the bar, to change the percentage of completion draw by the left edge. In both cases the cursor should turn a double-sided arrow. The non-completed part of the task and the completed one are shown in different colors, depending on the current [Theme](#). To show/hide the resources involved in these tasks, use the [Show/Hide](#) section in the [View](#) tab.

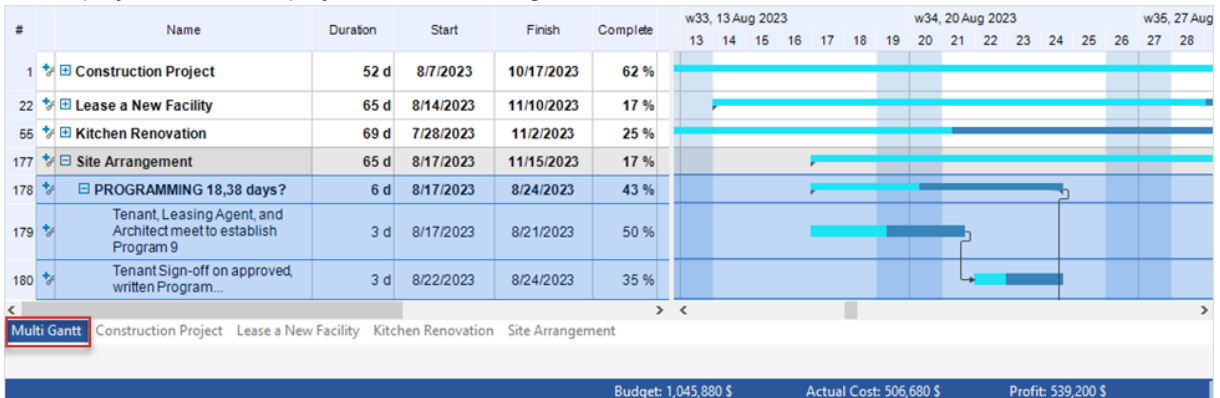
Links between dependent tasks are shown with arrows. The most common link type, **finish to start**, is assigned by the following way: first select the tasks to which you want to assign links, and then use one of the following:

- 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](#).

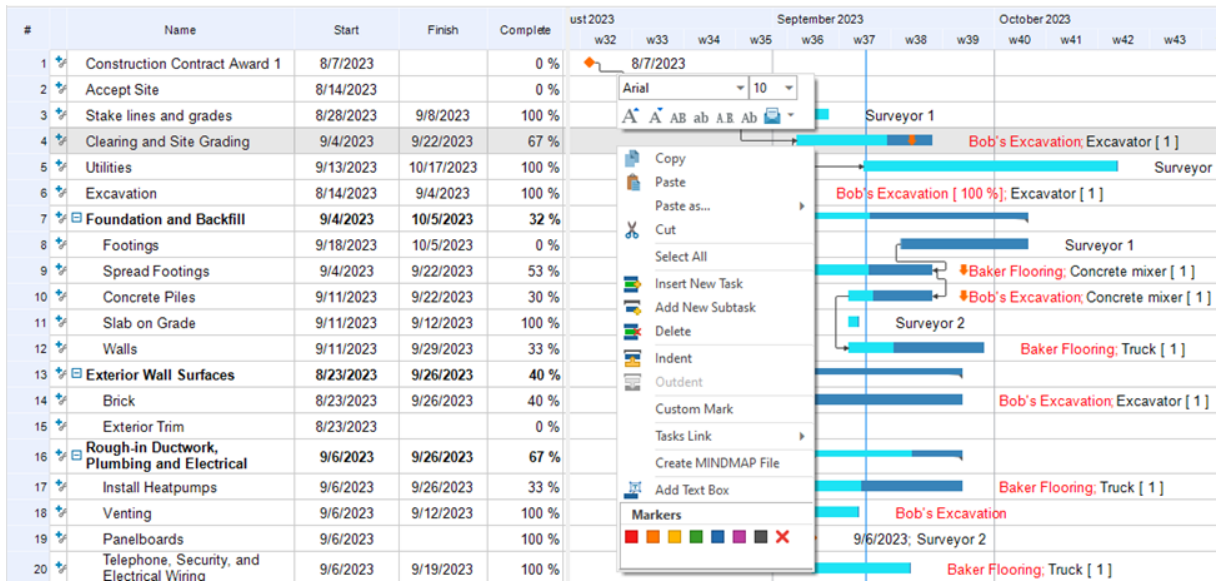
The widths of the text and graphic parts of the diagram can be changed. For this set the cursor on the dividing line and draw to the needed direction.

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 [multiproject](#) contains. Use the "Multi Gantt" option to manage all the projects of a multiproject file from a single window.

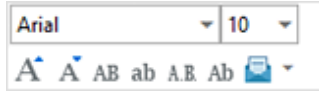


*Gantt Chart Context Menu*

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

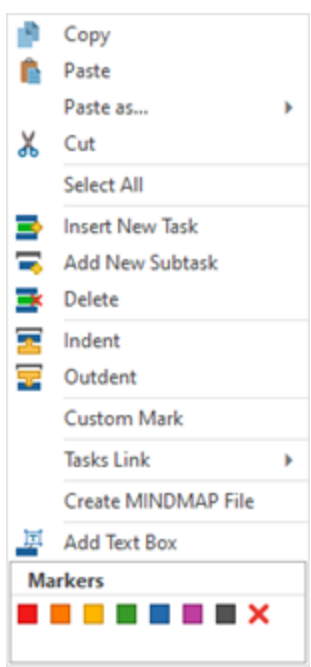


Gantt Chart Context Menu



**Text Format**  
**Microreports**

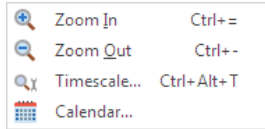
Change the [text format](#) of the project schedule  
Generate [Microreports](#)



**Copy**  
**Paste**  
**Paste as**  
**Cut**  
**Select All**  
**Insert New Task**  
**Add New Subtask**  
**Delete**  
**Indent**  
**Outdent**  
**Custom Mark**  
**Task Link**  
**Create MINDMAP File**  
**Add Text Box**  
**Markers**

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).  
Mark the tasks that need to be represented in the diagram.  
[Link](#) two or more selected items.  
Generate a mind map (\*. cdmz) from selected tasks.  
The file will be opened in ConceptDraw MINDMAP  
Add a text box to selected item.  
Make the selected items looking like [marked](#) with a highlighter.


Gantt Chart Timescale Context Menu





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



### Resources

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

	Name	Type	Cost	Group	E-Mail	Notes
1	Bob's Excavation	Work	165 \$/h	Excavation	<a href="mailto:bob_excavation@gmail.com">bob_excavation@gmail.com</a>	
2	Surveyor 1	Work	100 \$/h	Surveyor	<a href="mailto:surveyor2@gmail.com">surveyor2@gmail.com</a>	
	Baker Flooring	Work	140 \$/h	Flooring	<a href="mailto:baker_flooring@gmail.com">baker_flooring@gmail.com</a>	
2	Surveyor 2	Work	100 \$/h	Surveyor	<a href="mailto:surveyor2@gmail.com">surveyor2@gmail.com</a>	
5	Excavator	Equipment	700 \$	Excavation,Landscape		
6	Truck	Equipment	700 \$	Excavation,Landscape		
7	Concrete mixer	Equipment	700 \$	Flooring		
8	Tom Sheldon	Work	150 \$/h	Surveyor,Excavation	<a href="mailto:tom_sheldon@gmail.com">tom_sheldon@gmail.com</a>	
9	Rich Gannon	Work	150 \$/h	Surveyor,Flooring	<a href="mailto:rich_gannon@gmail.com">rich_gannon@gmail.com</a>	
10	Joe Smith	Work	150 \$/h	Surveyor,Flooring	<a href="mailto:joe_smith@gmail.com">joe_smith@gmail.com</a>	
11	Tom Farrell	Work	150 \$/h	Surveyor,Landscape		
12	Mike Grabowski	Work	150 \$/h	Surveyor,hvac		
13	Jane Postal	Work	150 \$/h	Landscape		
14	Pat O'Tormey	Work	150 \$/h	Landscape		
15	HVAC R Us	Company	5,000 \$	hvac		
16	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 [context menu](#) 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 [Resource](#) 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  to open the Work resource individual [calendar](#). You can modify the common working hour schedules individually for each employee.

Columns that contains the resources information can be managed using the [Column Customization](#) dialog.

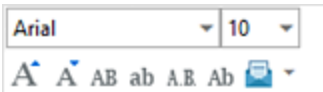
The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction. Open [Gantt Chart](#), View select a task and assign resources to task using the [Assign Resources](#) panel. The information on the resources can be edited in the [Resource](#) panel.

**Resources Context Menu**

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

Name	Type	Cost	Group
Bob's Excavation	Arial	9	Excavation
Surveyor 1	Arial		Surveyor
Baker Flooring	Work	140 \$/h	Flooring
Surveyor 2			Surveyor
Excavator	E		Excavation
Truck	E		Excavation
Concrete mixer	E		Flooring
Bob's Excavation			Excavation
Excavator	E		Excavation
Truck	E		Excavation
Baker Flooring			Flooring
Concrete mixer	Equipment	700 \$	Flooring

**Resources List Context Menu**

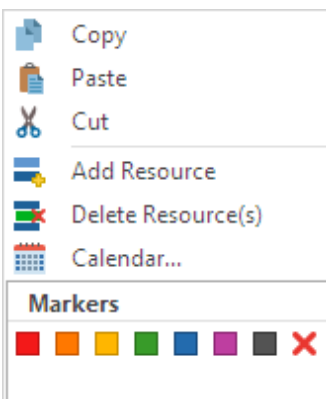


**Text Format**

Change the [text format](#) of the project schedule

**Microreports**

Generate [Microreports](#)



**Copy**

Copy the selection and put it into the Clipboard

**Cut**

Cut selection and put it into Clipboard.

**Paste**

Paste content from the Clipboard

**Add Resource**

Inserts new resource

**Delete Resource(s)**

Delete selected resources


**Calendar**

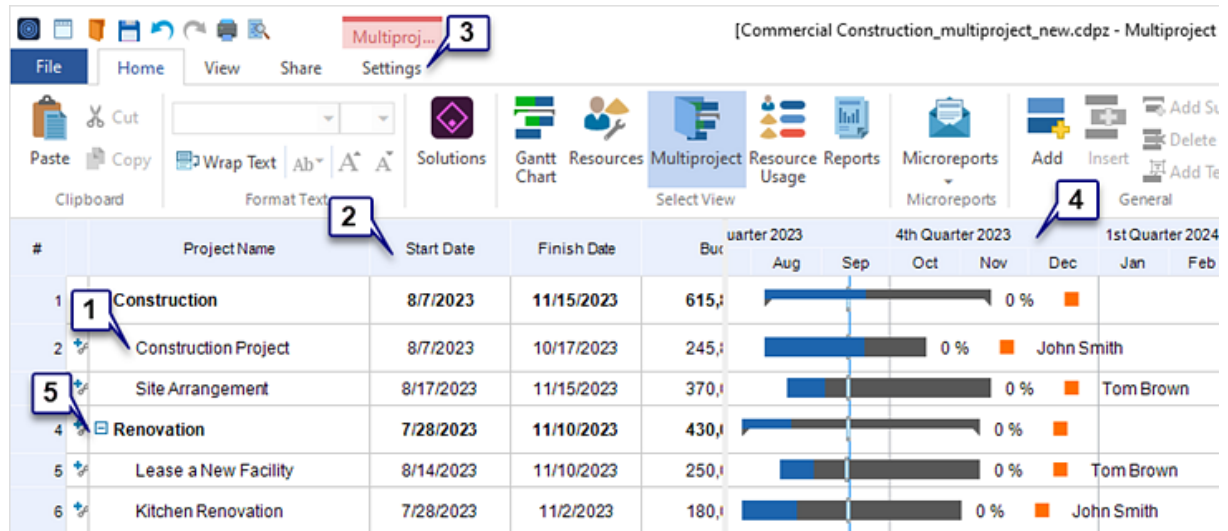
Opens the Standard [Calendar](#) dialog

**Markers**

Set color markers

## 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  on the [Home](#) or [View](#) tab. It opens the Multiproject window. This window contains a list of projects with their characteristics.



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

- By pressing **Enter**
- Using the **General** section on the [Home](#) tab
- Applying the command **Insert New Task** from the [context menu](#).

2. Columns that contains information on the multiple project can be managed using the [Column Customization](#) dialog.

The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction.

3. You can set the visual parameters of the multiple project Gantt chart using the [Multiproject Settings](#) tab.

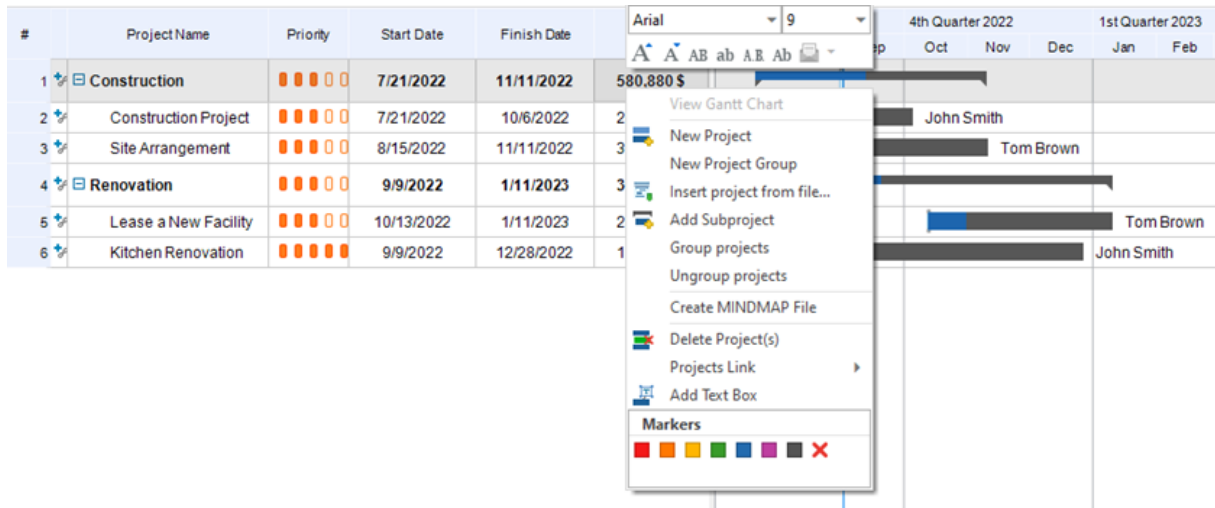
4. The timescale can be changed. This can be done in the [Timescale](#) dialog, that can be accessed from the [context menu](#).

Also can change the task start/end date, its duration and completion. To change start/end dates move the bar by your mouse. To change the task duration you need to switch to [Gantt Chart](#) view.

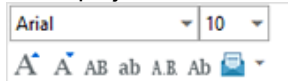
5. Project Group treats each project similarly to a phase, so all the properties are aggregated from the projects you include. Please note that Project Group only groups projects, so it does not have its own tasks. You can group projects using the [context menu](#). You can then select a project and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

### Multiproject Context Menu

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

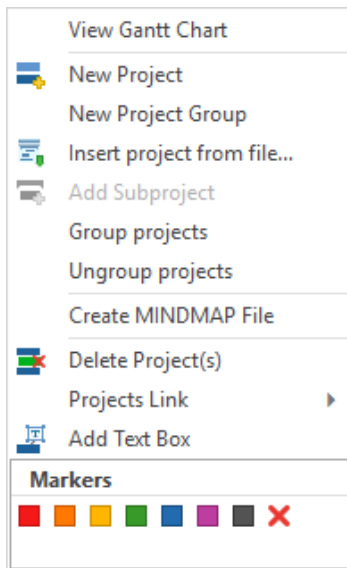


### Multiproject Context Menu



#### Text Format Microreports

Change the [text format](#) of the project schedule  
Generate [Microreports](#)



#### View Gantt Chart New Project New Project Group Insert project from file Add Subproject Group Projects Ungroup Projects Create Mind Map

#### Delete Project (s) Project Link Link Add Text Box Markers

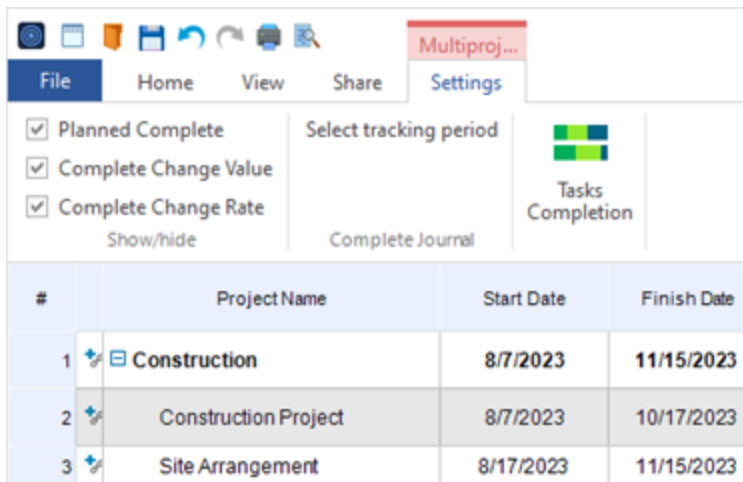
Switch to [Gantt Chart View](#)  
Add a new project  
Add new project group  
Add a new project from file  
Add sub project to selected project  
Join selected projects into a Project Group  
Split the Project Group into separate projects  
Generate a multipage mind map (\*. cdmz) from selected projects. The file will be opened in ConceptDraw MINDMAP  
Delete selected project (s)  
[Link](#) two or more selected projects  
Add a text box to selected item  
Make the selected items looking like [marked](#) with a highlighter

### Multiproject Timescale Context Menu

	Zoom In	Ctrl+=	Zoom In	Displays timescale in more detail (day instead of weeks, etc.)
	Zoom Out	Ctrl+-	Zoom out	Displays a more generalized timescale (weeks instead of days, etc.)
	Timescale...	Ctrl+Alt+T	Timescale	Calls <a href="#">Timescale</a> dialog that allows to customize timescale appearance. It gives more possibilities for this than <b>Zoom In</b> and <b>Zoom Out</b> commands. On the other hand mentioned commands allows to change calendar scale quicker.
	Calendar...		Calendar	Opens the Standard <a href="#">Calendar</a> dialog

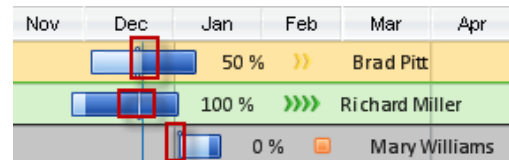
### Multiproject Settings

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

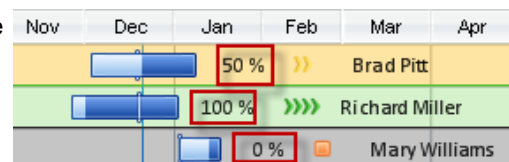


#### Show/hide

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



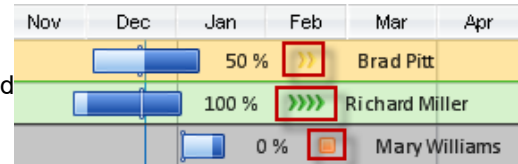
**Complete change value** Show/hide the change of the complete value



**Complete change rate**

Show/hide the symbol of the complete change rate.  
 Project's dynamics are shown using colored symbols:

- yellow arrows indicate a normal completion level
- green arrows means that a project is ahead of schedule
- orange square symbol signals that the project's completion didn't change, the project "sleeps" and we have zero progress.



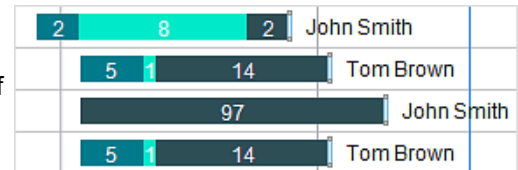
**Tracking period**

Select tracking period  
 Set the frequency of complete values verification

- Day
- Week
- Month
- Quarter
- Half year
- Year


**Task Completion**

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



### Resource Usage



By clicking the button  on the [View](#) tab, you open the Resource Usage window. Resource Usage diagram consists of two parts: the task list and graphic presentation of the tasks.

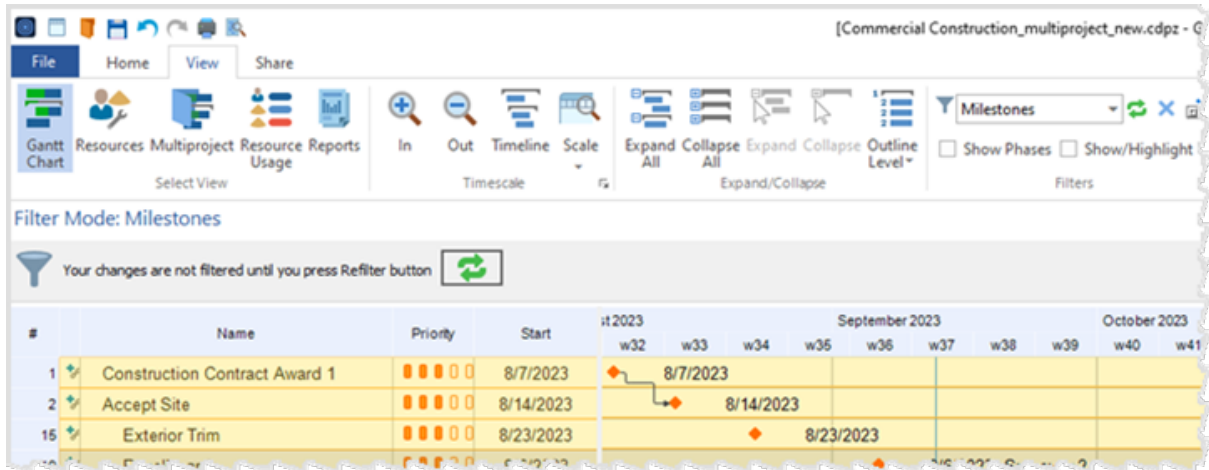
Name	Project Name	Expenses	13 Sep 2023							w37, 10 Sep 2023							w38, 17 Sep 2023							
			04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22			
<b>Bob's Excavation</b>		<b>148,800 \$</b>	[Red bar indicating 100% usage]																					
Clearing and Site Grading	Construction	24,000 \$	[100%]							[100%]							[100%]							
Excavation	Construction	25,600 \$	[100%]																					
Concrete Piles	Construction	16,000 \$	[100%]																					
Brick	Construction	40,000 \$	[100%]							[100%]							[100%]							
Venting	Construction	8,000 \$	[100%]							[100%]							[100%]							
Design provides Construction	Lease a New Facility	17,600 \$	[100%]							[100%]							[100%]							
Design provides Construction	Site Arrangement	17,600 \$	[100%]							[100%]							[100%]							
<b>Surveyor 1</b>		<b>19,200 \$</b>	[100%]																					
Stake lines and grades	Construction	8,000 \$	[100%]							[100%]							[100%]							
Footings	Construction	11,200 \$	[100%]																					
<b>Baker Flooring</b>		<b>84,480 \$</b>	[Red bar indicating 100% usage]																					
Spread Footings	Construction	19,200 \$	[100%]							[100%]							[100%]							
Walls	Construction	19,200 \$	[100%]																					
Install Heatpumps	Construction	19,200 \$	[100%]							[100%]							[100%]							
Telephone, Security, and Electrical	Construction	12,800 \$	[100%]							[100%]							[100%]							
Design provides Construction	Lease a New Facility	14,080 \$	[100%]							[100%]							[100%]							

- 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 [Resource view](#) just make double-click on a resource name.
  3. To move to the [Gantt chart](#) 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 [Timescale](#), 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.

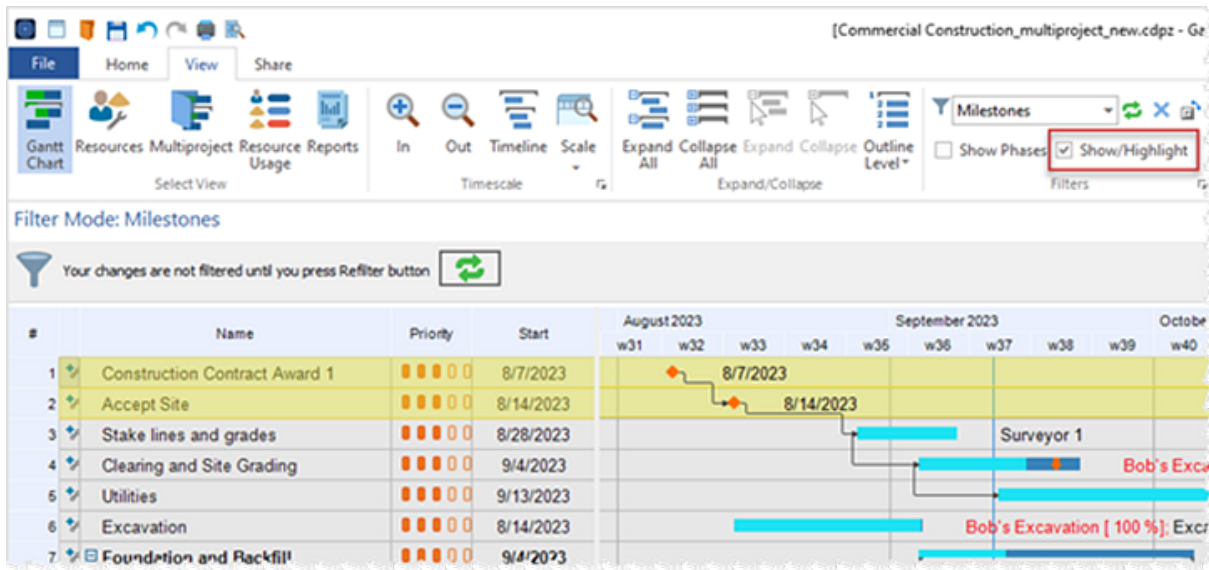
### Filters Mode

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 [View](#) tab.

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



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



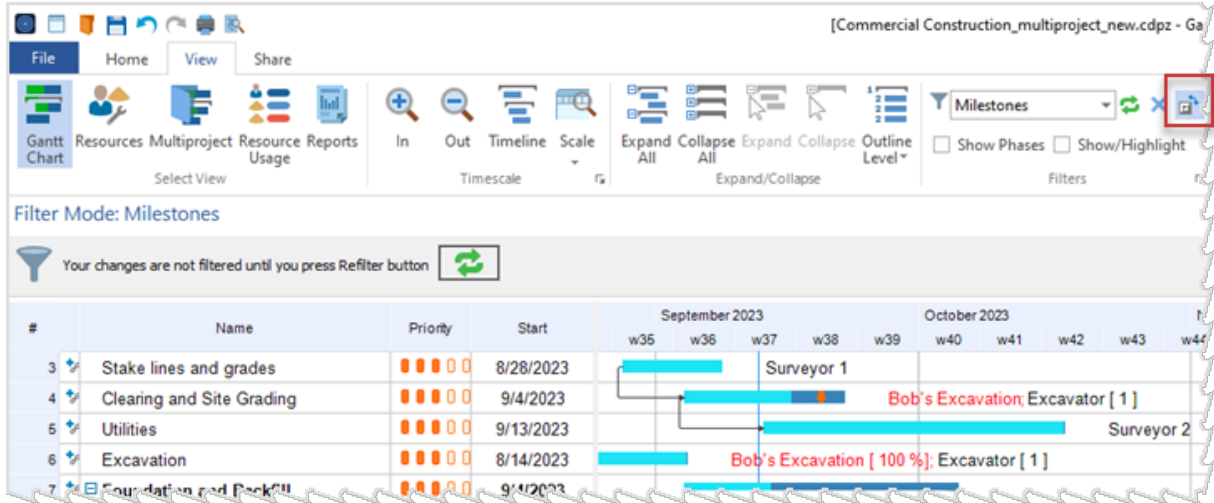
3. Toggle **Show Phases** item to display phases that are associated with tasks which are shown in the filtered view.




The screenshot shows the software interface in 'View' mode, specifically the 'Filter Mode: Milestones' section. The toolbar includes options for 'Gantt Chart', 'Resources', 'Multiproject', 'Resource Usage', 'Reports', and 'Usage'. The 'View' tab is active, showing options for 'In', 'Out', 'Timeline', and 'Scale'. The 'Milestones' filter is selected, and the 'Show Phases' checkbox is checked and highlighted with a red box. Below the toolbar, a message states 'Your changes are not filtered until you press Refilter button'. The main area displays a Gantt chart with a table of tasks:

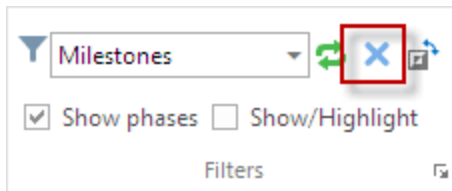
#	Name	Priority	Start	August 2023				September 2023				Oct/		
				w31	w32	w33	w34	w35	w36	w37	w38		w39	w40
1	Construction Contract Award 1	00000	8/7/2023		8/7/2023									
2	Accept Site	00000	8/14/2023		8/14/2023									
13	Exterior Wall Surfaces	00000	8/23/2023											
15	Exterior Trim	00000	8/23/2023											
16	Rough-in Ductwork, Plumbing and Electrical	00000	9/6/2023											
19	Panelboards	00000	9/6/2023											

4. You can reverse filtering condition using **Invert** button.



5. Use the **Refilter** button  to reapply the filter when you have made changes in the project schedule.

6. To remove the filter, click on the **Clear Filter** button.

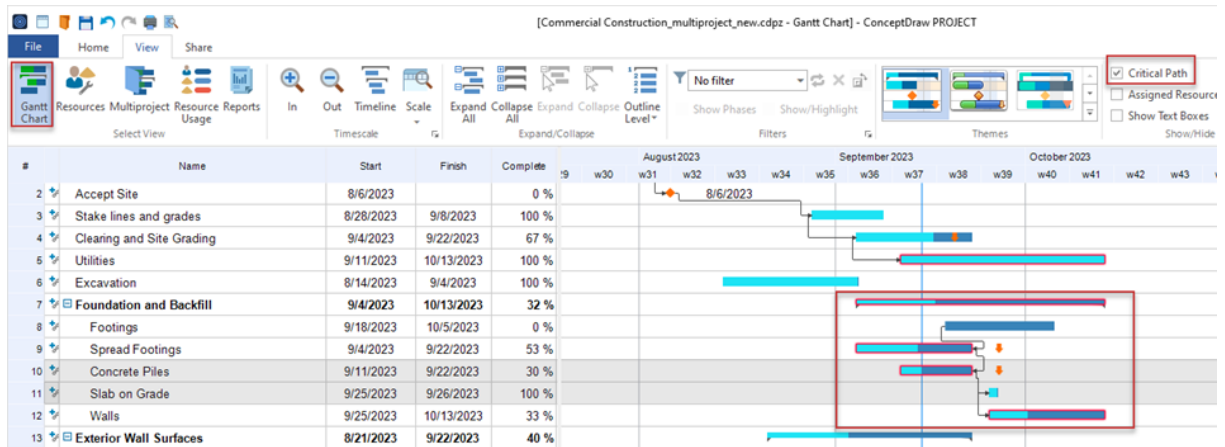


You can customize the filtering options using the [Filters](#) dialog

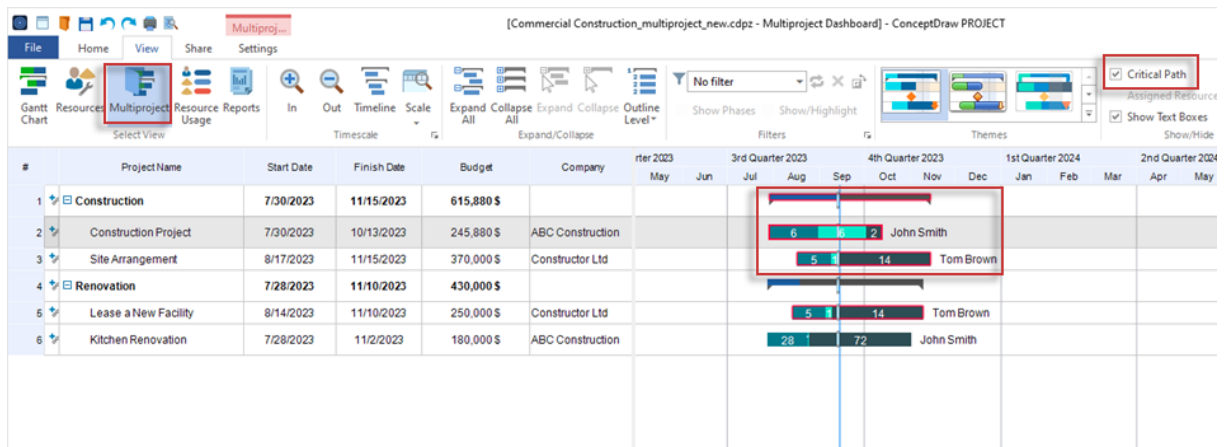
### Critical Path

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

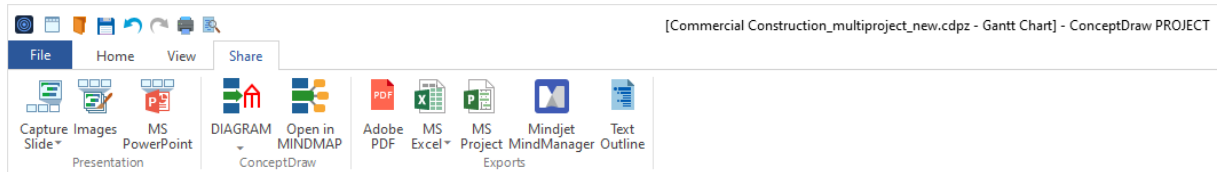
The critical path of a single project shows which tasks are most critical: the ones that add up to the longest project duration.



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



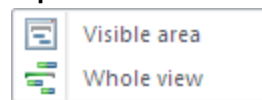
## Share



### Presentation



#### Capture Slides



ConceptDraw PROJECT allows you to make slides for presentation. You can create slides from any of [project views](#).

Make slide from the current project view according to chosen option. The slides will appear in the pop-up [Slide Preview](#) panel.



**Images:** Save slides in PNG format.



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

### ConceptDraw

**DIAGRAM:** Create a Project Management diagram in ConceptDraw [DIAGRAM](#)

**Open in MINDMAP:** Open the current document in ConceptDraw [MINDMAP](#) , having closed it in ConceptDraw PROJECT.

### Exports



**Adobe PDF:** Export the document to Adobe PDF.



**MS Excel:** Options for Export project tables, as they appear in [View](#) mode, to a [Microsoft Excel](#) workbook (XLSX).



**MS Project:** Export the document to Microsoft Project XML.



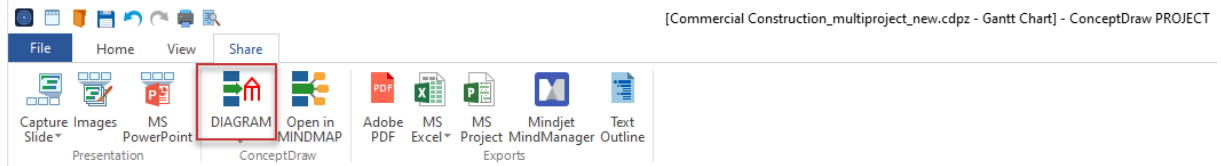
**Mindjet MindManager:** Save the document in Mindjet MindManager format (MMAP).






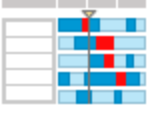





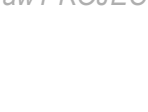
**Text Outline:** Export the document to text outline.

## DIAGRAM

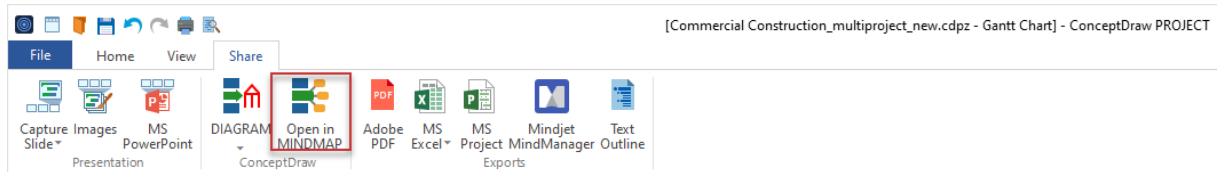
Project management diagrams give you the ability to view at a detailed level project attributes such as project scope, logical connections in the project, critical paths, key events on the timeline, milestones, tasks, calendars for work, and resource utilization. Transforming project data into different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



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

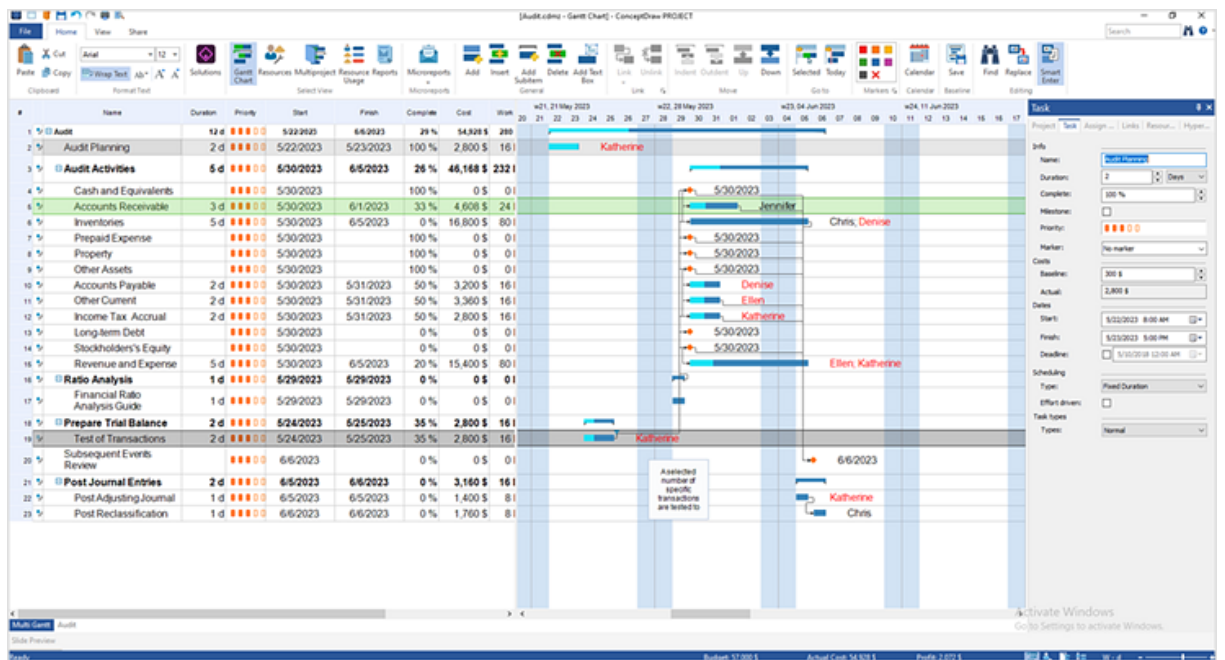
Project Management Diagrams	
	<p><b>Gantt Chart</b> Create Gantt chart diagram from projects tasks with an outline level equal or less than two</p>
	<p><b>Milestone Chart</b> Show only linked milestones</p>
	<p><b>Milestone Chart Extended</b> Show all milestones</p>
	<p><b>PERT Chart</b> Create Project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

### MINDMAP

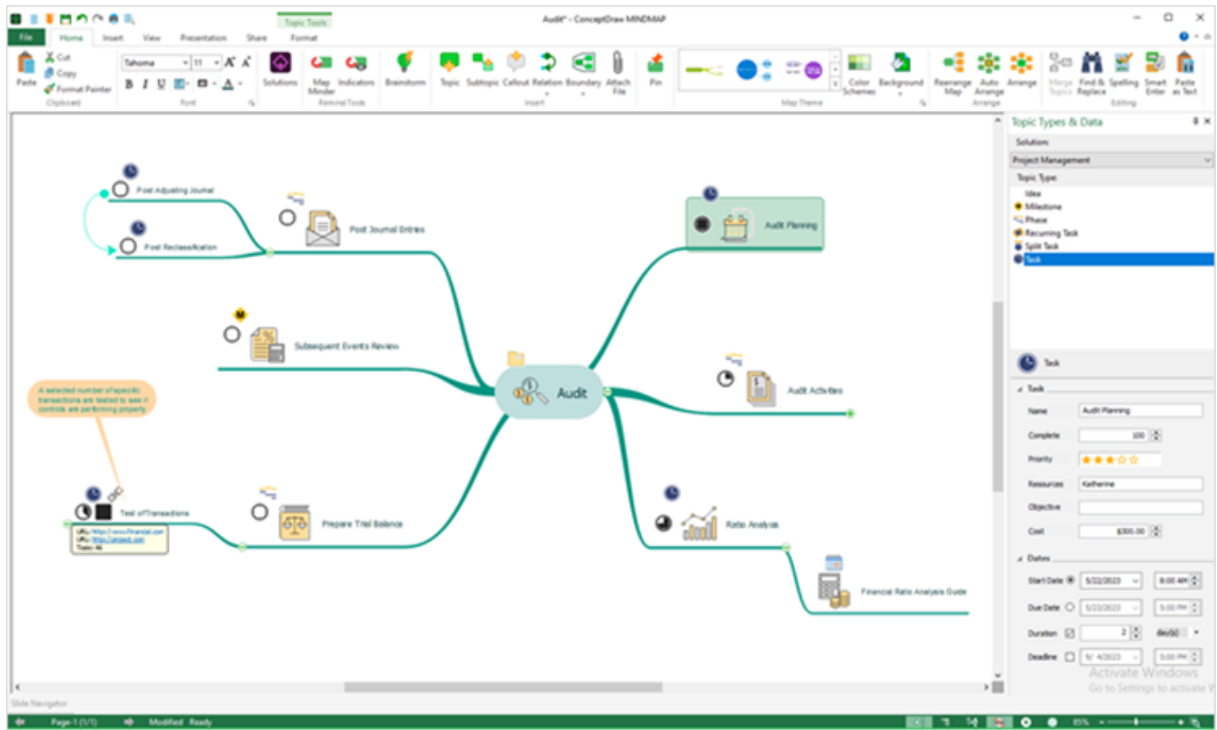


The compatibility between ConceptDraw products allows you to migrate your documents from MINDMAP to PROJECT and vice versa. You can see the project data in a mind map structure by opening your project in ConceptDraw MINDMAP. Mind map will consist from topics of Project Management type, which contain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

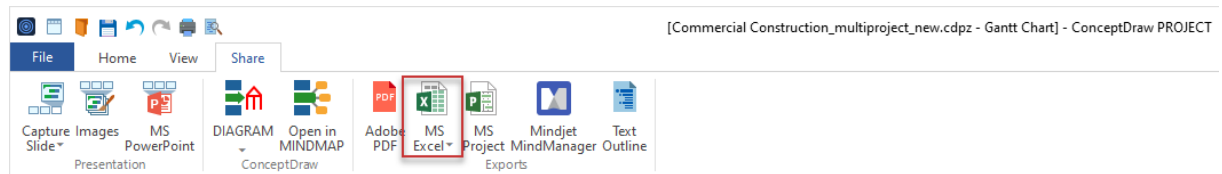
### ConceptDraw PROJECT



### ConceptDraw MINDMAP



### MS Excel



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 [Export](#) section of the [File](#) menu under the Export to MS Excel item.

	A	B	C	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
	Test of Transactions	9/11/2023	9/12/2023	50 %	2,800.00 \$	16 h
5						
6	Ratio Analysis	9/11/2023	9/11/2023	0 %	1,600.00 \$	8 h
7	Audit Activities	9/13/2023	9/19/2023	0 %	33,672.00 \$	168 h

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.

	A	B	C	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 \$	



## Dialogs

[Timescale](#)

[Column Customization](#)

[Edit Markers](#)

[Predecessors](#)

[Filters](#)

[Options](#)

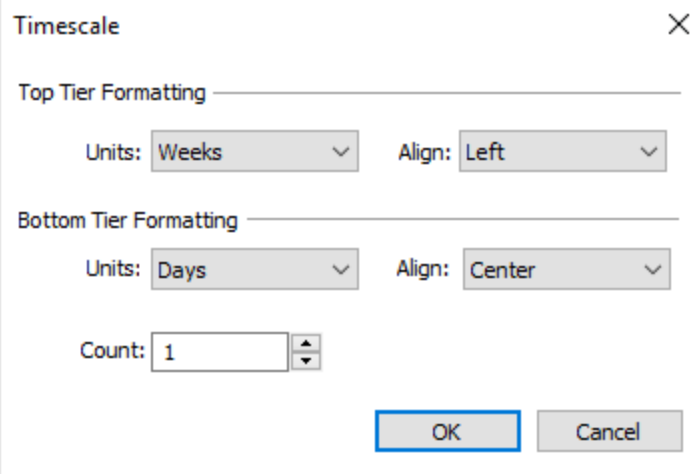
[Document Properties](#)

[Find](#)

[Replace](#)

## Timescale

The Timescale dialog is called from the Timescale group of the [View](#) ribbon. Use it to determine the time measure units for tasks in your document.



The screenshot shows the Timescale dialog box with the following settings:

- Top Tier Formatting:**
  - Units: Weeks
  - Align: Left
- Bottom Tier Formatting:**
  - Units: Days
  - Align: Center
- Count:** 1

Buttons: OK, Cancel

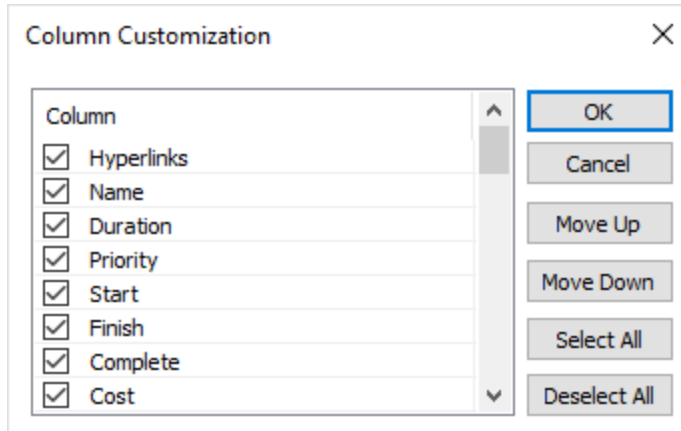
**Units** - Specify units from units list for large and small scales on Timescale gauge.

**Align** - Specify text alignment on timescale.

**Count** - Specify units interval.

## Column Customization

Customize columns dialog can be accessed from [View](#) tab View and edit information to be displayed at the project outline.



The Column Customization dialog contains the following columns:

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

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

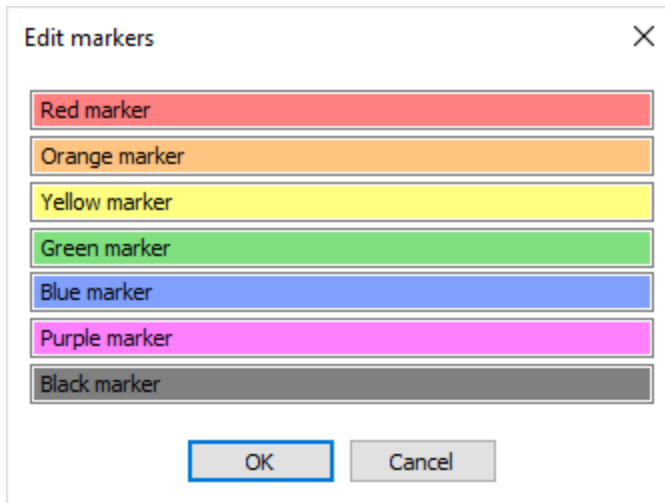
Planned Complete	The planned task completion status (percentages) at the current date.
Predecessors	The tasks numbers (#) on which the task depends before it can be started or finished.
Priority	The level of importance given to a task by project manager
Resources	Resources assigned to task
Start	The date when a task is scheduled to be started
Successors	The tasks numbers (#) that act as successors for the current task (tasks, whose start or finish date is driven by their <a href="#">predecessor</a> task.)
Work	The total amount of time , scheduled on a task for all assigned resources., or the total amount of time , scheduled for particular resource on a task ( <a href="#">Assign Resource</a> panel)
Unique ID	The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new task is created in the current project.
<b>Multiproject View</b>	
Baseline Cost	Total planned cost for a project
Baseline Finish	The planned completion date for a project
Baseline Start	The planned beginning date for a project.
Budget	The budget, allocated to a project.
Company	Company Name
Complete	The current status of project in percentages of the project's duration that has been completed.
Complete Increase	Changing of the Complete value between the current and previously saved measured in percent

Complete Increase Rate	Changing of the Complete Increase value between the current and previously saved measured in percent
Cost	The total scheduled cost for a project
Cost to Completion	The piece of total scheduled cost that remains for a project completion
Duration	The total span of a working time for a task
Finish Date	The date when a project is scheduled to be completed
Hyperlinks	Add/Edit hyperlinks to a project
Objective	Project objectives
Planned Complete	The planned project completion status (percentages) at the current date.
Priority	The level of importance given to a project by project manager
Project Description	Short description of the project
Project Manager	Who is project Manager?
Project Name	Project name
Project Site	Url of the corresponding website
Start Date	The date when a project is scheduled to be started
<b>Resources View</b>	
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	<a href="#">Comment</a> you can enter about the current resource
Type	Type of the resource (work, material, cost, equipment, company)
Unique ID	The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new resource is created in the current project.

## Edit Markers

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





## Predecessors

Predecessors dialog can be accessed from the [Link](#) section in the **Home** tab.

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

You can make this using the Predecessors dialog.

#	Name	Start	Finish
1	Audit	9/5/2023	9/25/2023
2	Audit Planning	9/5/2023	9/6/2023
3	Preliminary Analysis	9/11/2023	9/14/2023
4	Prepare Trial Balance	9/11/2023	9/12/2023
5	Test of Transactions	9/11/2023	9/12/2023
6	Ratio Analysis	9/14/2023	9/14/2023

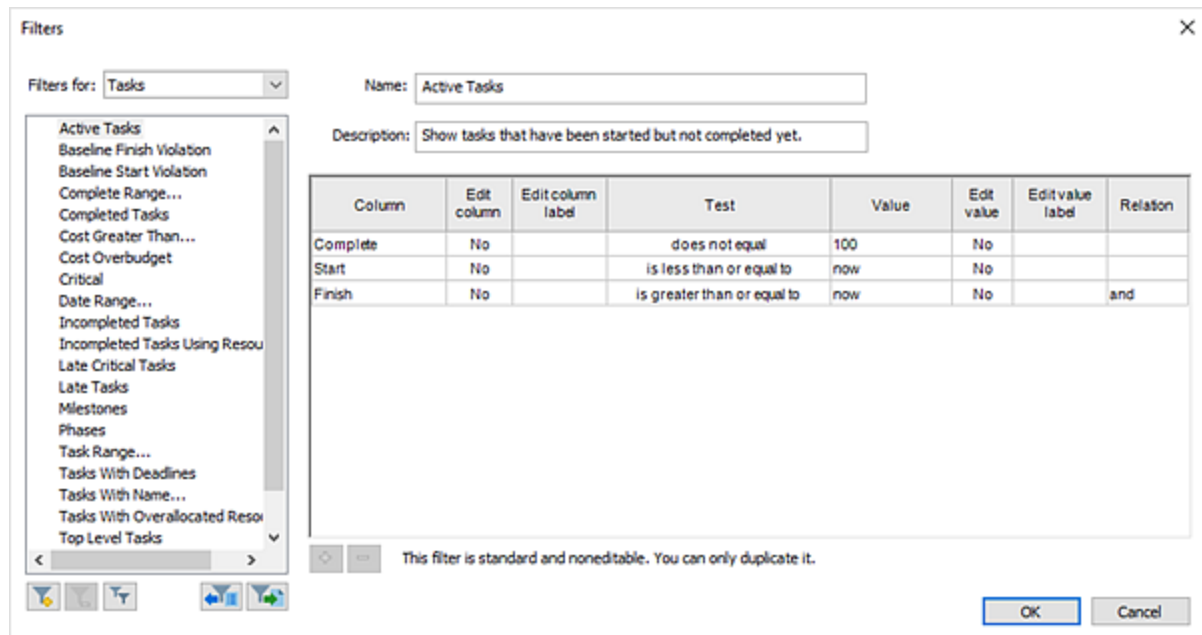
  

Link From	Type	Lag
4 - Test of Transactions	Start to Start	3 d

## Filters

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

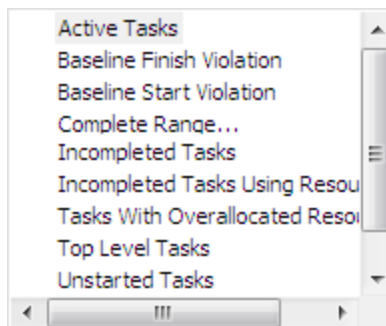
In the left part of the window, you can specify the project view, which is filtered by default. There is also the filters list which contains predefined and user created filtering options.





Filters for:

**Filters for:** Specify the project view, which is filtered by default: Project, Tasks, or Resources.

**Available Filters List:** The filters list which contains predefined and custom filters.



 **Add Filter:** Add new custom filtering conditions.

 **Remove Filter:** Remove the selected filters.

*\*The predefined filtering options cannot be edited or removed.*

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



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

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

*\*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.

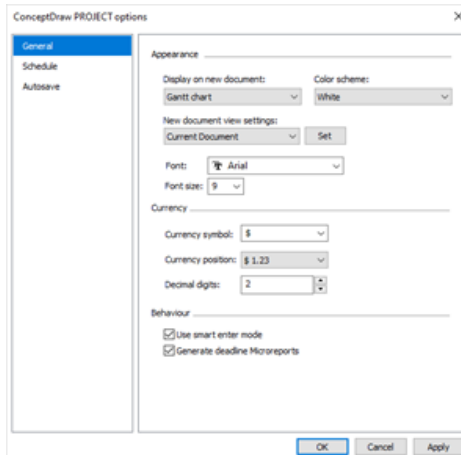
**Import Filter from File:** This operation allows importing your custom filters from XML file. Thus, the filters will be available on any computer no matter which ConceptDraw PROJECT document you work with.

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

## Options

Can be accessed from the [File](#) tab. Contains options preferences related to the most commonly used settings

### General



**Display on a new document:** Set up document default view

**Color scheme:** Set up document color scheme

**New document view settings:** Set up new document view (custom or default)

**Currency symbol:** Set up currency symbol

**Currency position:** Select currency position

**Decimal digits:** Set up amount of decimal digits

**Behaviour:** On/Off the Smart Enter mode

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

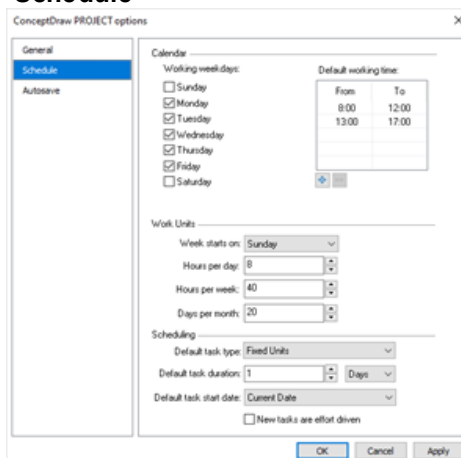
**Default task duration:** Set up a task duration on default

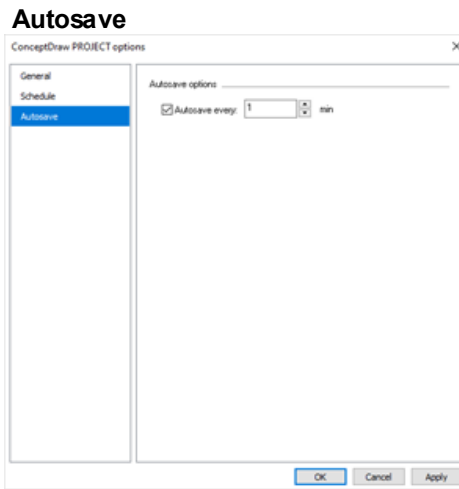
**Default task start date :** Set up a default start date of the new task

**Effort - driven check box:** Set up the effort-driven options for the new tasks

Read more how to use the [Effort-Driven Scheduling Method](#)

### Schedule



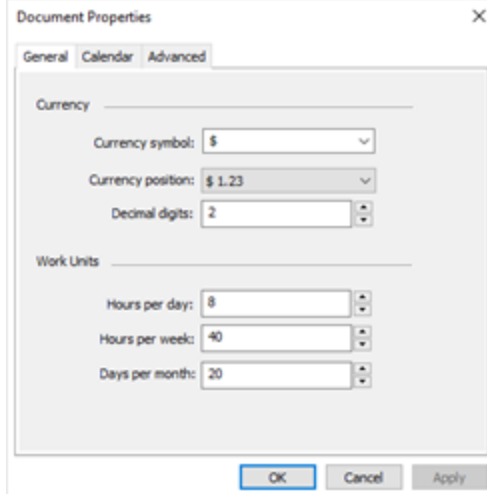


**Autosave:**  
Switch on/of autosave  
**Every:**  
Set up autosave periodicity

## Document Properties

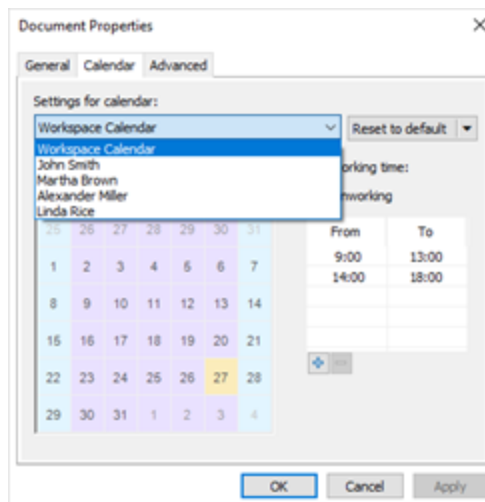
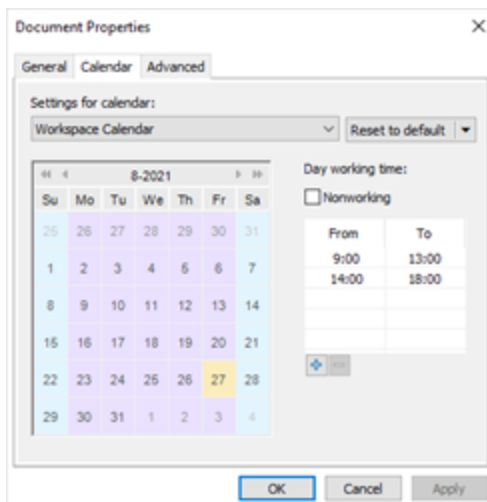
View and Edit current document properties. Document properties dialog is available from the [File](#) ribbon. It contains three tabs: General, Calendar and Advanced.

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

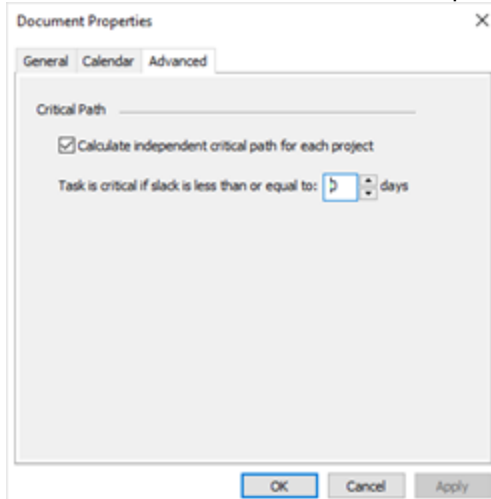


Calendar tab is used to customize the default project [calendar](#). You can set up schedule for all resources in your project.

Select resource from the drop-down list to create 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.

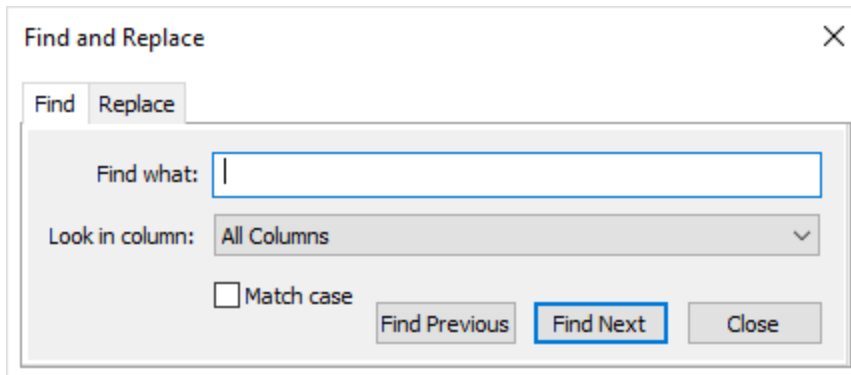


## Find

This dialog allows you to search for text in a project schedule. You can call the dialog from the [Home](#)

tab button 

The *Find* dialog:



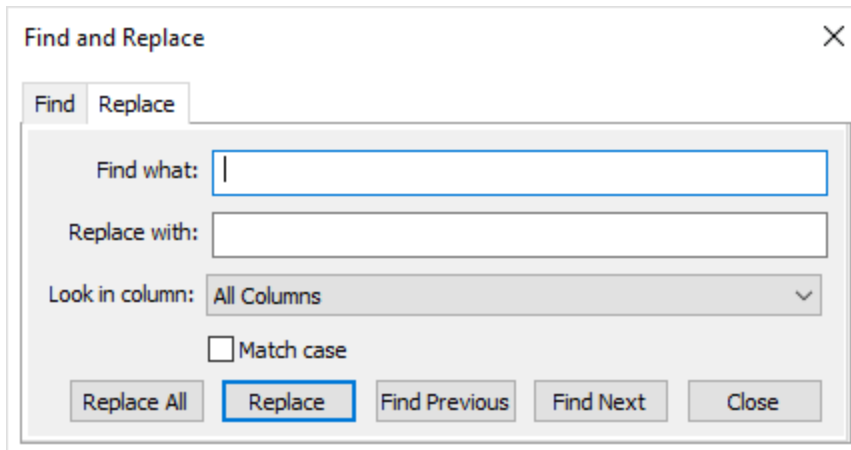


## Replace

This dialog allows you to replace text in a project schedule. You can call the dialog from the [View](#) tab

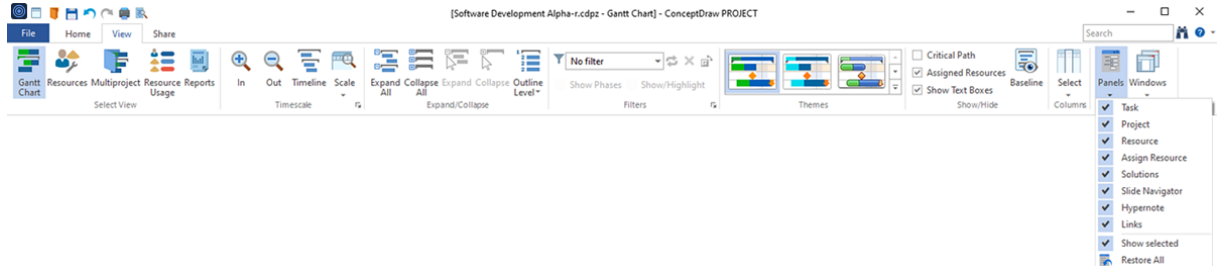
button 

The Replace dialog:



## Floating Panels

Some tools and features in ConceptDraw PROJECT are accessible from the floating panels. Floating panels can be accessed from the drop down list of the Panels button on the [View](#) tab.

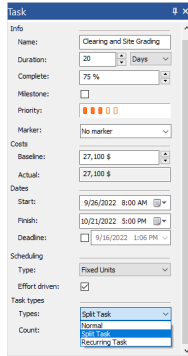


- [Task](#)
- [Project](#)
- [Resource](#)
- [Assign Resources](#)
- [Solutions](#)
- [Slide Navigator](#)
- [Hypernote](#)
- [Links](#)

## Task

Task dialog can be accessed from **Panels** button on the [View](#) tab.

Task dialog defines the project parameters and allows you to manage a task information from the [Gantt chart](#),



- Name:** Set up task name.
- Duration:** Set up task duration.
- Measuring unit:** Specify duration measuring unit.
- Complete:** Set up percentage of completeness.
- Milestone:** Convert task to milestone.
- Priority:** Set up task priority.
- Marker:** Specify task marker from list.
- Baseline:** Display task baseline cost.
- Actual:** Display task actual cost.
- Start:** Set up start date.
- Finish:** Set up finish date.
- Deadline:** Set up deadline date.
- Scheduling:** Set the [Fixed Task Type](#)
- Effort driven:** On/Off the [Effort-Driven](#) scheduling.
- Task types:** You can [Split a task](#), or create a [Recurring task](#).

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

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

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

### Effort - Driven Task

Effort-driven scheduling is the default scheduling method used in ConceptDraw PROJECT . The duration of a task shortens or lengthens as resources were added or removed from a task, while the amount of effort necessary to complete a task remains unchanged. Effort-driven scheduling only takes effect when resources are added to or removed from a task.

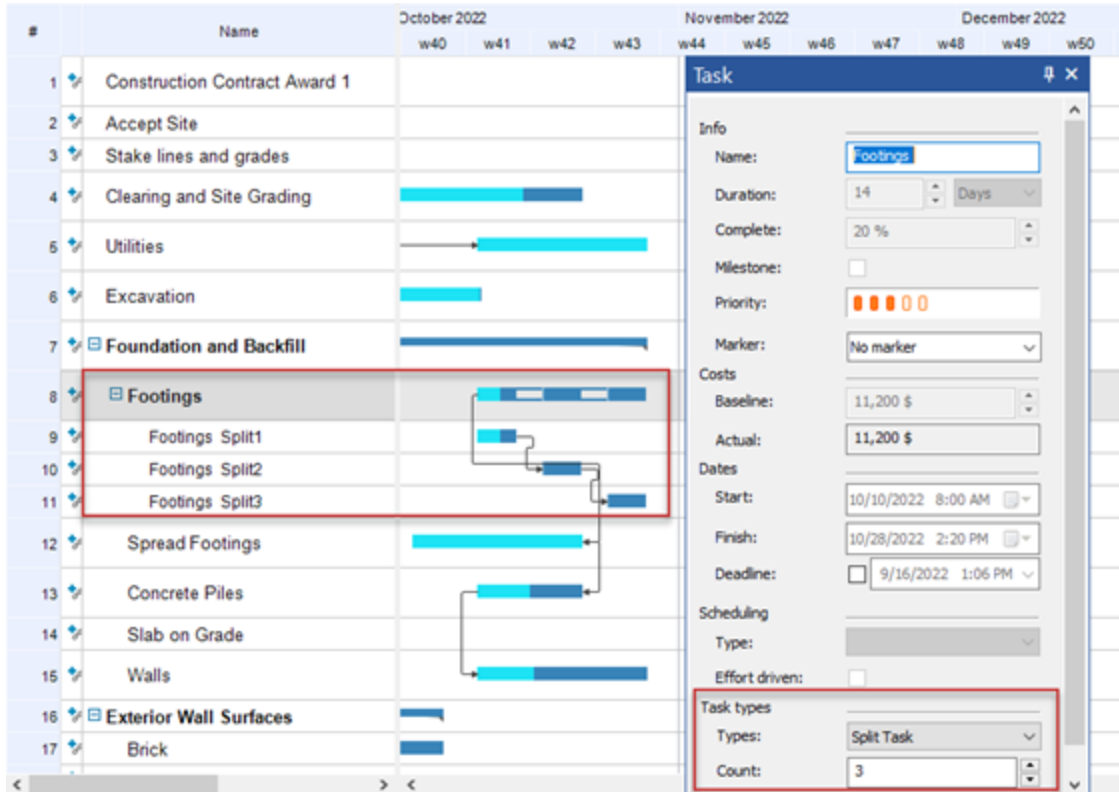
Effort-driven calculation rules are not applied when you change work, duration, and unit values for resources already assigned to a task.

When working with effort-driven scheduling, keep the following in mind:

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

### Split a Task

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



### Recurring Tasks

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

The screenshot displays a project management software interface. On the left, a Gantt chart shows a project schedule from late September to early December 2022. The tasks listed are: Construction Contract Award 1, Accept Site, Stake lines and grades, Clearing and Site Grading, Utilities, Excavation, Excavation Recurring1, Excavation Recurring2, Excavation Recurring3, Foundation and Backfill, Footings, Footings Split1, Footings Split2, Footings Split3, Spread Footings, Concrete Piles, and Slab on Grade. The 'Excavation' task is highlighted with a red box. On the right, a 'Task' details panel is open, showing information for the selected 'Excavation' task. The panel includes sections for Info, Costs, Dates, Scheduling, and Task types. The 'Task types' section is highlighted with a red box, showing 'Types' set to 'Recurring Task', 'Count' set to 3, and 'Period' set to 5 Days.

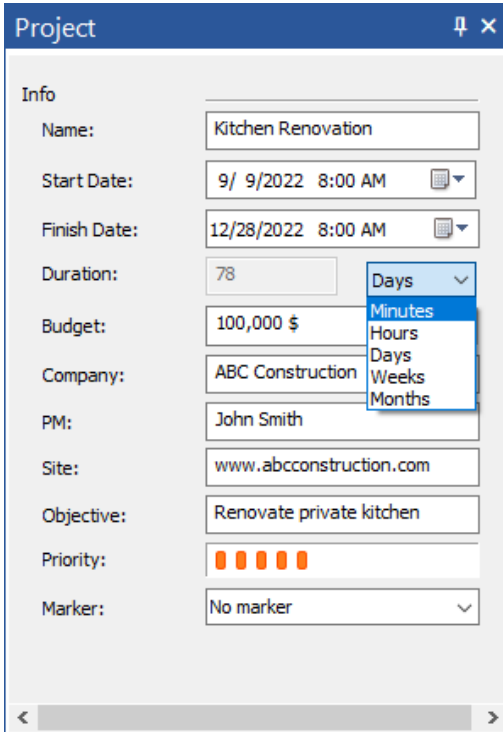
#	Name	Start	End
1	Construction Contract Award 1	9/11/2022	
2	Accept Site	9/9/2022	
3	Stake lines and grades		
4	Clearing and Site Grading		
5	Utilities		
6	Excavation		
7	Excavation Recurring1		
8	Excavation Recurring2		
9	Excavation Recurring3		
10	Foundation and Backfill		
11	Footings		
12	Footings Split1		
13	Footings Split2		
14	Footings Split3		
15	Spread Footings		
16	Concrete Piles		
17	Slab on Grade		

Section	Property	Value
Info	Name	Excavation
	Duration	25 Days
	Complete	0 %
	Milestone	<input type="checkbox"/>
Costs	Baseline	21,120 \$
	Actual	63,360 \$
Dates	Start	9/19/2022 8:00 AM
	Finish	10/24/2022 5:00 PM
	Deadline	<input type="checkbox"/> 9/16/2022 1:06 PM
Task types	Types	Recurring Task
	Count	3
	Period	5 Days

## Project

Project dialog can be accessed from **Panels** button on the [View](#) tab.

Project dialog defines the project parameters and allows you to manage a project information from the [Gantt chart](#) and the [Multiproject](#) View



The screenshot shows the 'Project' dialog box with the following fields and values:

- Name:** Kitchen Renovation
- Start Date:** 9/ 9/2022 8:00 AM
- Finish Date:** 12/28/2022 8:00 AM
- Duration:** 78 (with a dropdown menu open showing options: Days, Minutes, Hours, Weeks, Months)
- Budget:** 100,000 \$
- Company:** ABC Construction
- PM:** John Smith
- Site:** www.abconstruction.com
- Objective:** Renovate private kitchen
- Priority:** 5 orange dots
- 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

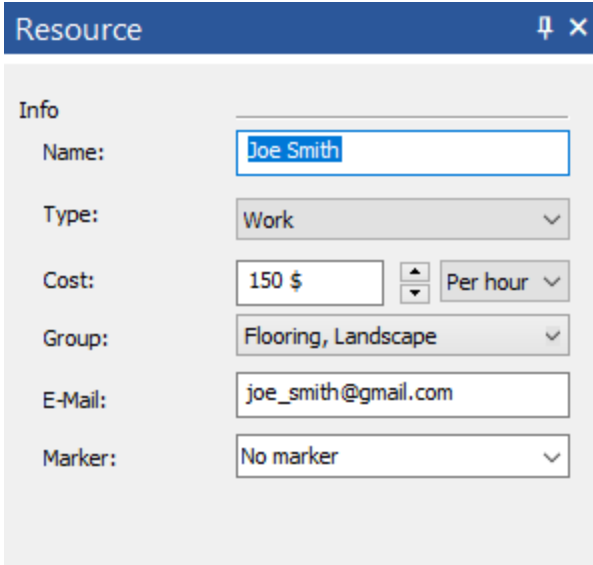
**Priority** - Specify project priority

**Marker** - Specify project marker from list

## Resource

Resource dialog can be accessed from **Panels** button on the [View](#) tab.

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



The screenshot shows a dialog box titled "Resource" with a blue header bar containing a pin icon and a close icon. The dialog is divided into an "Info" section with the following fields:

- Name:** A text input field containing "Joe Smith".
- Type:** A dropdown menu with "Work" selected.
- Cost:** A text input field containing "150 \$" and a unit dropdown menu with "Per hour" selected.
- Group:** A dropdown menu with "Flooring, Landscape" selected.
- E-Mail:** A text input field containing "joe\_smith@gmail.com".
- Marker:** A dropdown menu with "No marker" selected.

**Name** - Set up resource name.

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

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

**Group** - Set up resource group. 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 [View](#) tab.

Use Assign Resources dialog to assign resources to project tasks,

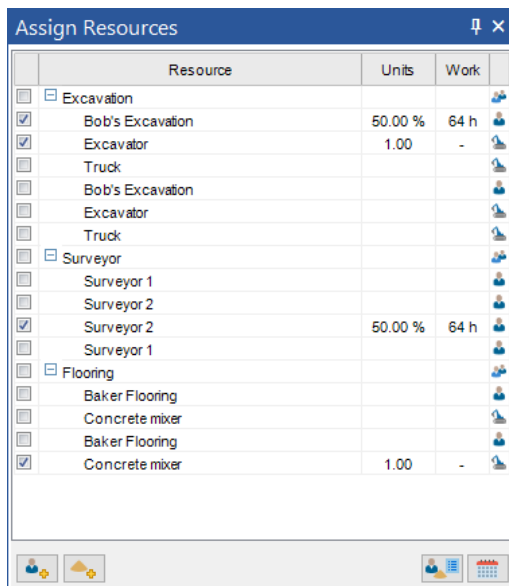
Open [Gantt Chart](#) View and select a task to assign resources.

Select a particular resource from the resources listed at the Assign Resources panel and assign it to a task by double clicking or pressing the Enter key.

You can even create a new resource using buttons. The new resource will be added to both the Assign Resource dialog and the [Resources](#) list.

The Work resource you have assigned is displayed as 100% implementation. The other type resource is displayed as 1 unit implementation. You can change this allocation manually after the resource has been assigned.

Using the [Effort Driven](#) scheduling, when you assign or remove people from a task, the duration of the task will be the lengthened or shortened based on the number of resources assigned to it.




**Resource** - Displays the resource name.


**Units** - Resource utilization for the current task.

**Work** - Man-hours for the [Work](#) type resource.

 **Add Work resource** - Add new human resource into resource pool


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

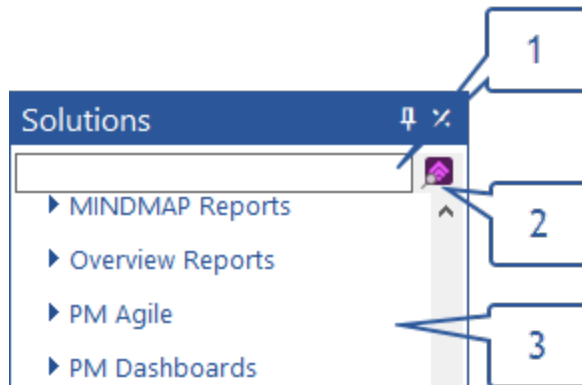
 **Move to Resources view** - Switch to [Resources](#) view

 **Calendar** - Set the specific calendar for [Work](#) type resource

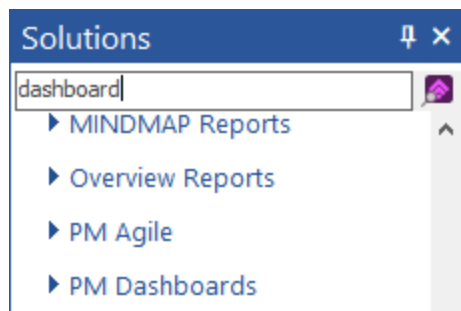
## Solutions

Solution panel contains a list of project management solutions located in Solution Park. It provides access to the number of project schedule examples, various types of reports and live graphical [project dashboards](#). Open the example project file to modify it, or generate a [tabular](#), [visual](#) and [mind map](#)

reports on your project. Access the panel from the button  in the [Home](#) tab, or using the [Panels](#) list in the [View](#) tab.



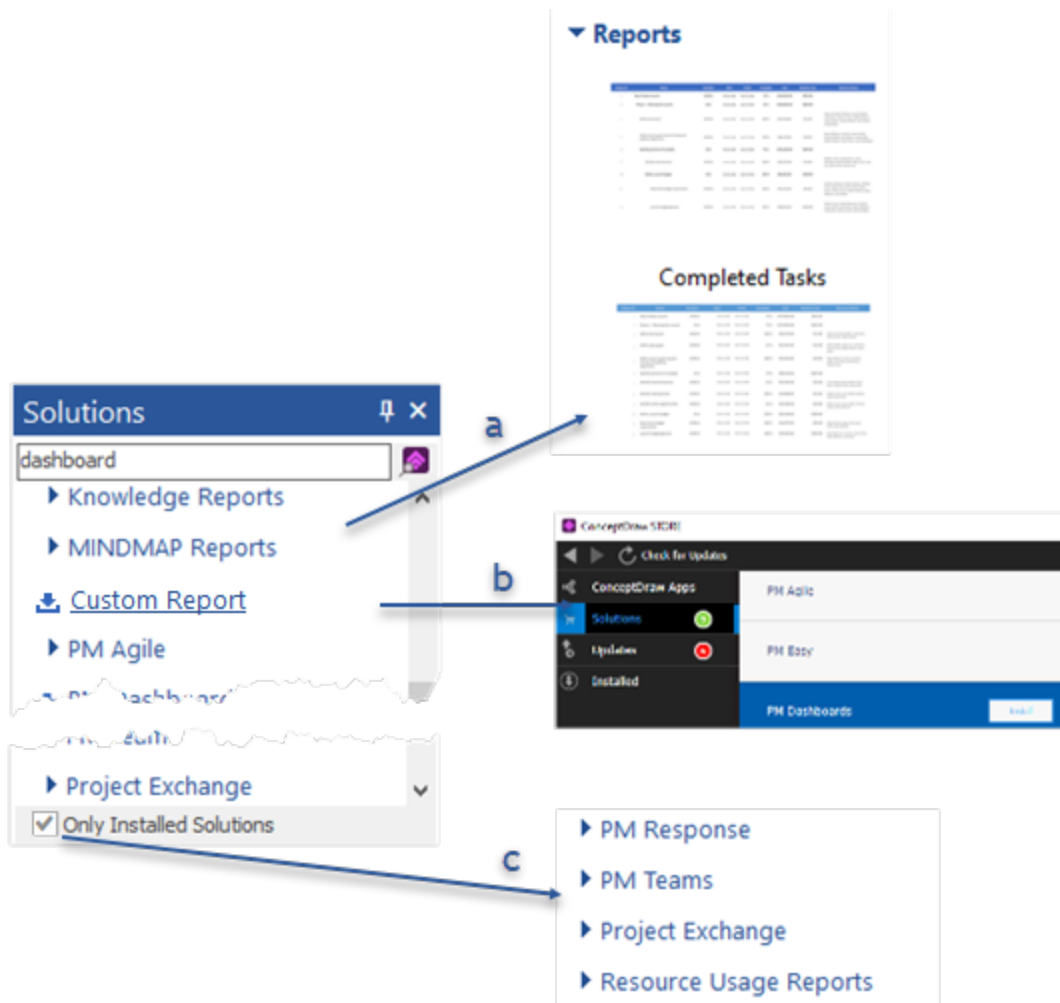
1. **Search window.** You can search for the required reports and examples. Enter the keyword in the search field. The corresponding solutions will be displayed in the panel.



2. **Search in ConceptDraw STORE.** You can run the ConceptDraw STORE application to search for the the proper solution in Solution Park

3. **Solution section.** This section contains the list of available solutions in alphabetical order. The following options are available here:

- Use the drop-down button to preview Examples and Reports contained in the certain solution. You can open them by click.
- Click to download and install a free, or previously purchased solution using the ConceptDraw STORE application.
- Check, to view just solutions that are already installed.



## Tabular Reports

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

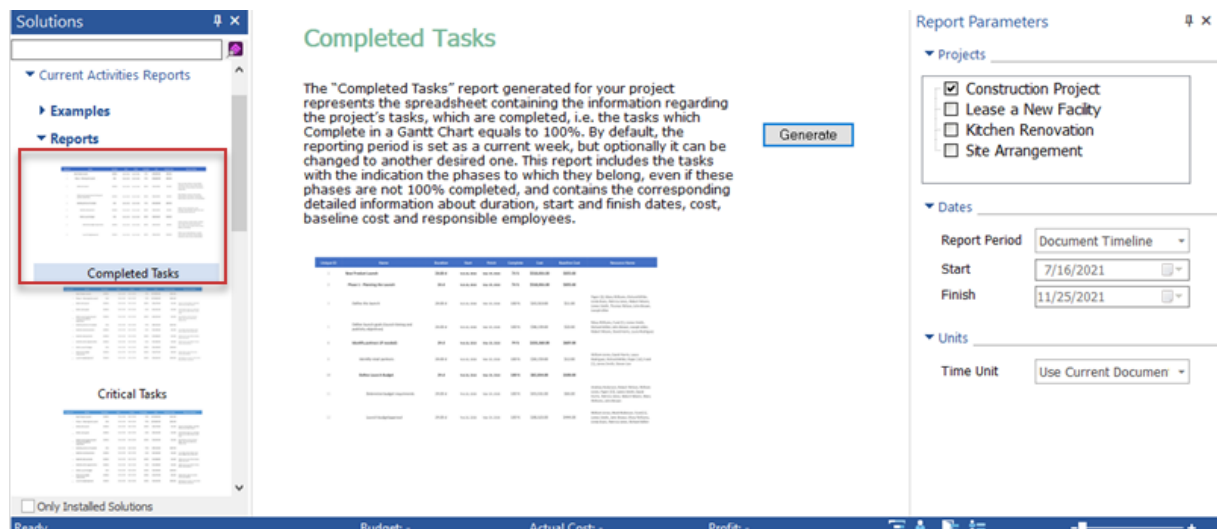
- Multiproject Goals – report the table of projects objectives for each project;
- Multiproject Managers – report the table of projects managers for each project;
- Project Team – report the table of project employee including hyperlinks;
- Resource Report – report the table of all kinds projects resources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

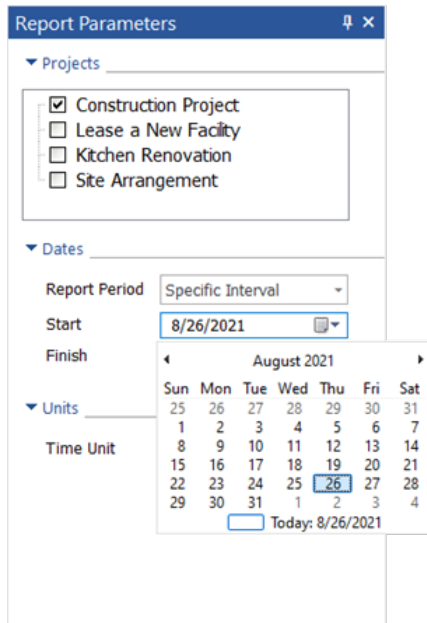
- List of Materials – report the mind map of used materials for each project;
- Materials Utilization – report the table of material resources utilization by tasks;
- Over Allocated Resources Details – report the table of overallocation periods with task assignments for each employee;
- Over Allocated 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.



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



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

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

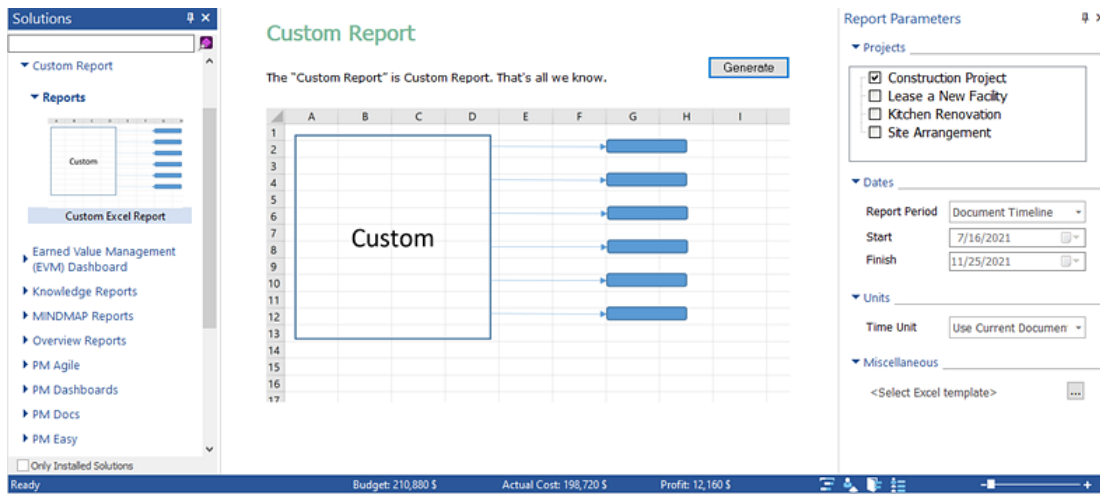
	A	B	C	D	E	F	G	H	I
	Unique ID	Name	Duration	Start	Finish	Complete	Cost	Baseline Cost	Resource Name
2	6	Accept Site	0 d	7/18/2021		100 %	0 \$	0 \$	
3	7	Stake lines and grades	10.00 d	7/26/2021	8/6/2021	100 %	8,000 \$	8,000 \$	Surveyor 1
4	8	Clearing and Site Grading	20.00 d	8/9/2021	9/3/2021	100 %	27,100 \$	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	<b>Foundation and Backfill</b>	<b>25.00 d</b>	<b>8/9/2021</b>	<b>9/10/2021</b>	<b>70 %</b>	<b>60,100 \$</b>	<b>63,700 \$</b>	
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	<b>Exterior Wall Surfaces</b>	<b>25.00 d</b>	<b>8/30/2021</b>	<b>10/1/2021</b>	<b>100 %</b>	<b>33,700 \$</b>	<b>35,900 \$</b>	
11	18	Brick	25.00 d	8/30/2021	10/1/2021	100 %	33,700 \$	19,900 \$	Bob's Excavation, Excavator [1]
12	20	<b>Rough-in Ductwork, Plumbing and Electrical</b>	<b>15 d</b>	<b>8/2/2021</b>	<b>8/20/2021</b>	<b>100 %</b>	<b>36,000 \$</b>	<b>43,800 \$</b>	
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**

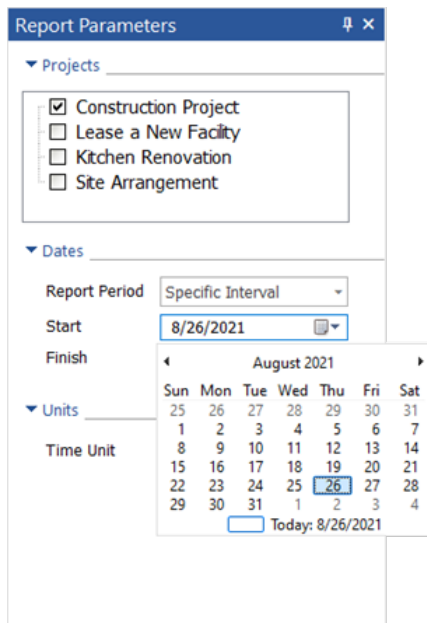
ConceptDraw PROJECT allows you to create a tabular project report based on a custom Excel template. Using the Report Wizard you can generate a custom project status report based on the ConceptDraw PROJECT file data. Use an Excel document to create a report template. With the help of customizable macros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

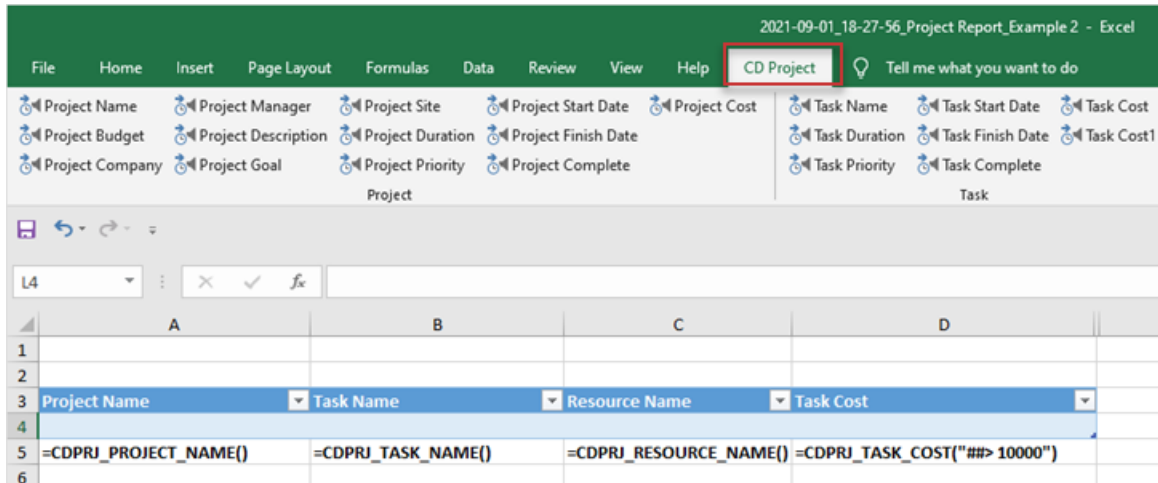


1. Specify the report parameters using the Report Parameters panel.



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.



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.

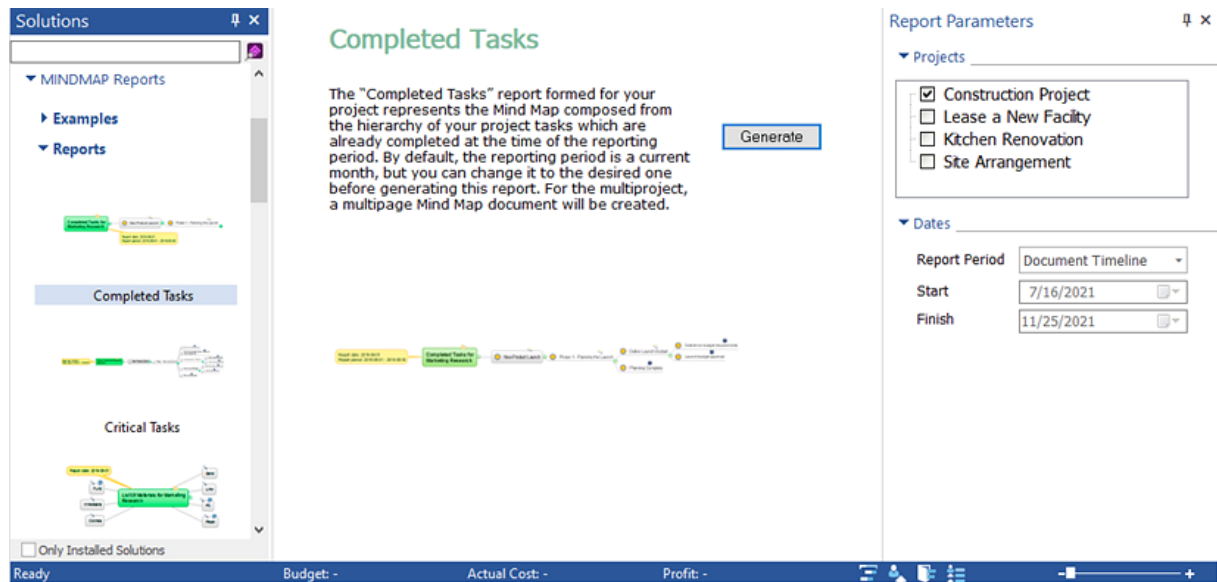
	A	B	C	D
3	Project Name	Task Name	Resource Name	Task Cost
4				
5	Construction Project	1_4.Clearing and Site Grading	Bob's Excavation	17985.0
6	Construction Project	1_4.Clearing and Site Grading	Excavator	17985.0
7	Construction Project	1_7.Foundation and Backfill	Bob's Excavation	63063.0
8	Construction 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



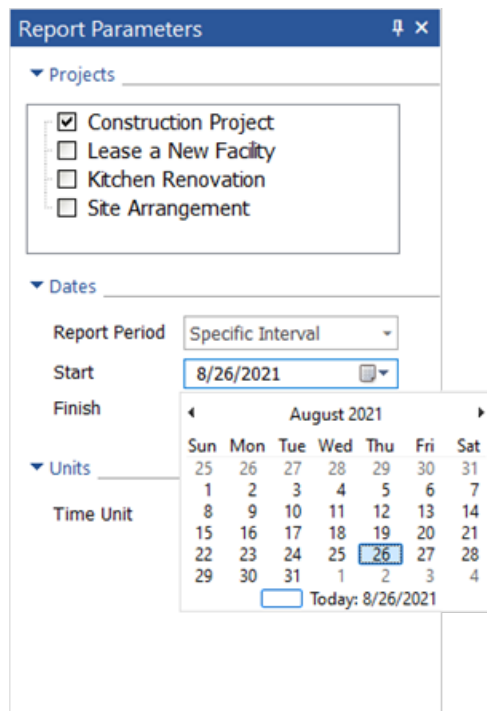
### Mind Map Reports

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.

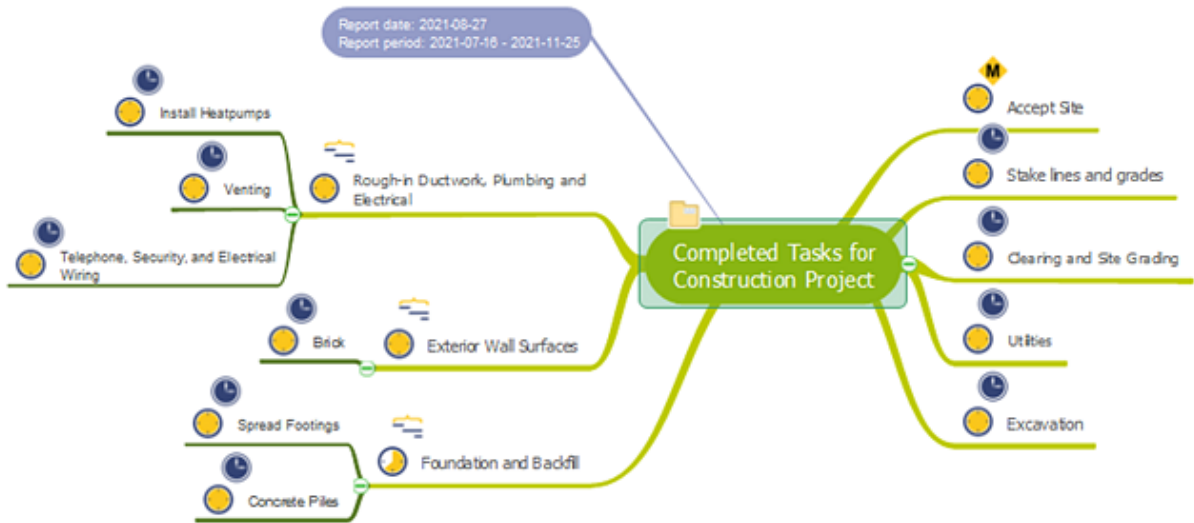
1. Find out MINDMAP reports in the Solutions panel.
2. Click the report icon to view its preview on the right panel.



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



4. Press **Generate** to create the report.
5. The report will be generated and opened in ConceptDraw MINDMAP

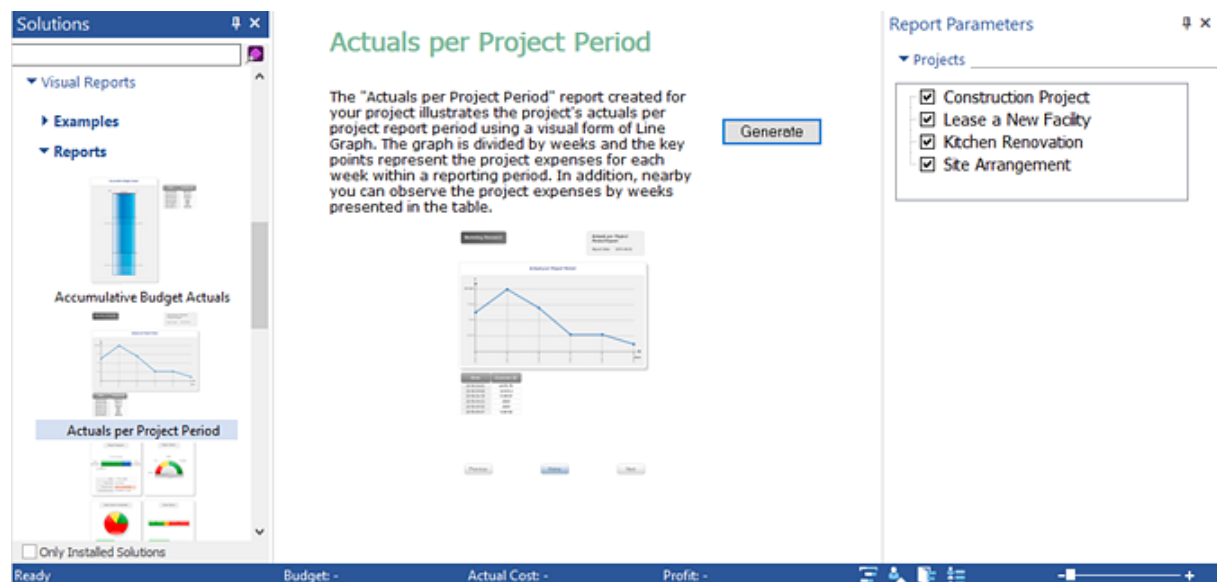


## Visual Reports

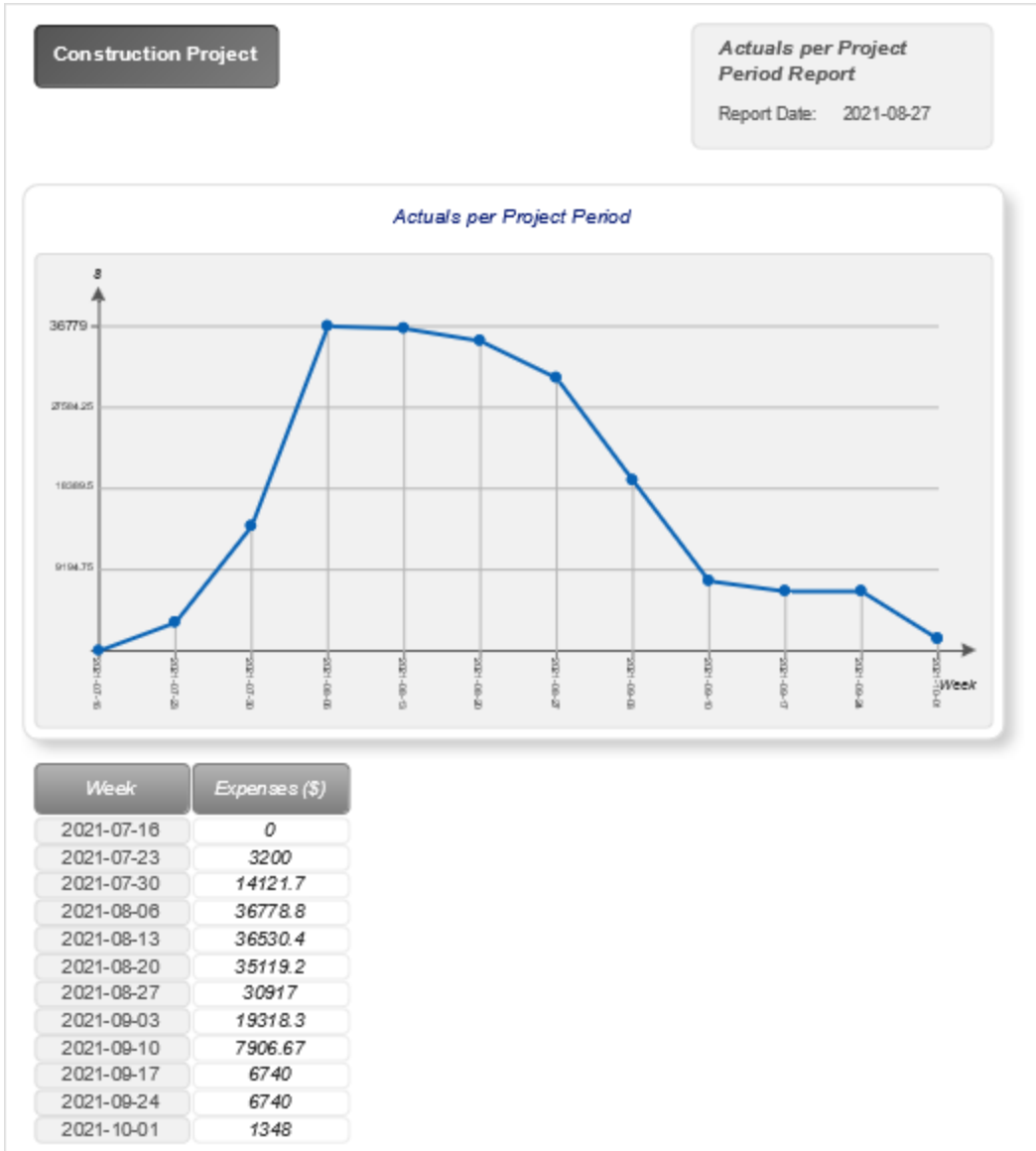
Conceptdraw PROJECT has several types of visual reports that can help assess visually the difference between planned and actual project data. Conceptdraw PROJECT provides user with the possibility to track how the project is going. Project Manager can compare the actual data with the planned and assess possible measures to resolve issues. The main tool for effective monitoring of the project implementation is the ability to save [project Baseline](#). It includes the value of Baseline Start, Baseline Finish and Baseline Cost. All these indicators can operate effectively only in one case - if the project manager, constantly receives information about the actual data compared with planned.

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

1. On the Solutions panel find out the suitable visual report.
2. Click the report icon to view its preview on the right panel.



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





## Dashboards

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

1. Find out the PM Dashboard solution in Solutions panel and select the dashboard type you need to create.
2. Click the certain dashboard icon to view its preview on the right panel.

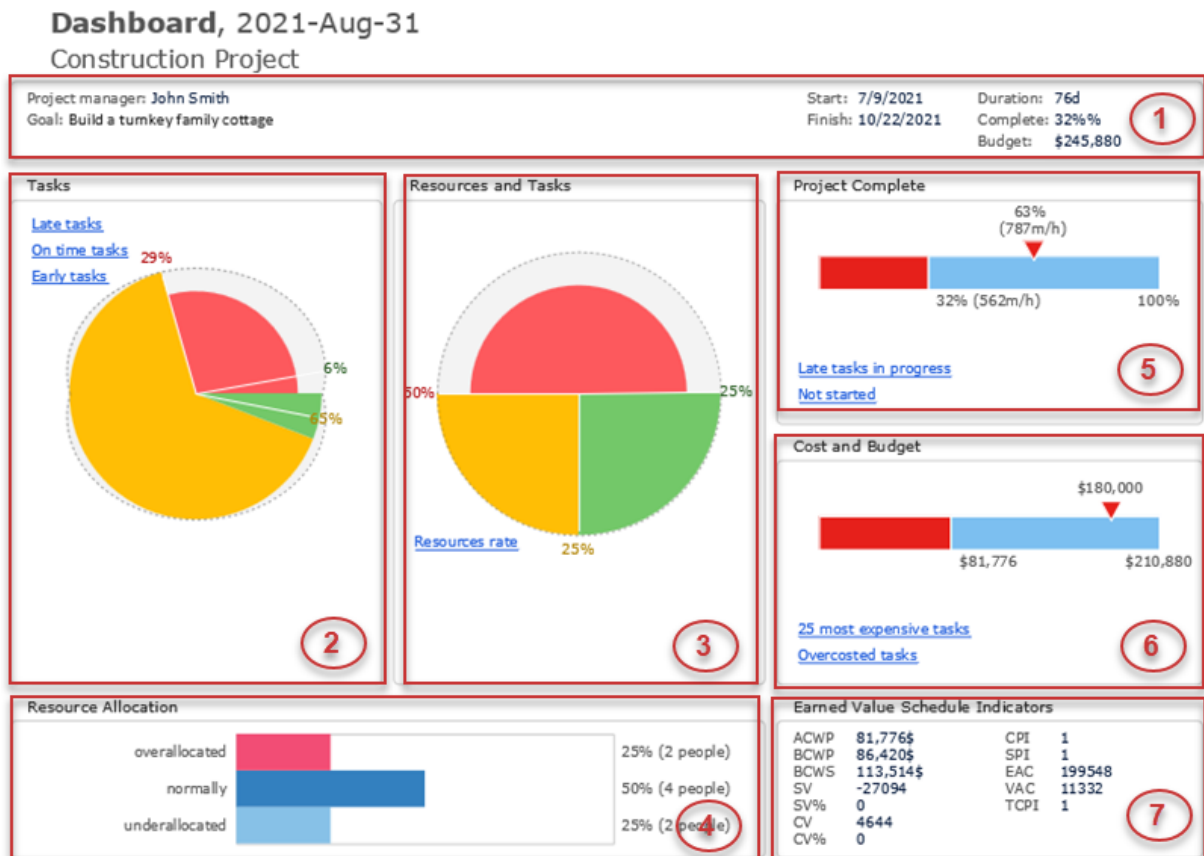
The screenshot displays the ConceptDraw PROJECT interface. On the left, the 'Solutions' panel is open, showing 'PM Dashboards' with sub-categories like 'Examples' and 'Reports'. The 'Project Dashboard' icon is highlighted. In the center, a preview of the 'Project dashboard' report is shown, featuring a title, a descriptive paragraph, and several charts including a radar chart and a tactical dashboard. A 'Generate' button is visible next to the preview. On the right, the 'Report Parameters' dialog box is open, showing a list of projects with checkboxes: 'Construction Project', 'Lease a New Facility', 'Kitchen Renovation', and 'Site Arrangement'. The status bar at the bottom shows 'Ready', 'Budget: -', 'Actual Cost: -', and 'Profit: -'.

3. Press **Generate** to create the dashboard.
4. [Project Dashboard](#), [Radar Chart](#) and [Tactical Dashboard](#) will be generated and opened in ConceptDraw DIAGRAM.

*Project Dashboard*

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

Project Dashboard is divided into several parts, each of them provides an overview of the project status. In other words Project Dashboard contains a summary of project information - general information about project, Tasks Completion, Resource and Tasks indicator, Project Complete indicator, Cost and Budget, Resource Allocation, and Earned Value Schedule Indicators.



1. The block of general information contains the data about name of Project Manager, goal, project's start and finish dates, completing status and budget.

2. Tasks block provides the information about tasks completing. The indicators have a common color notation: red denotes late tasks, yellow shows a normal status (on time tasks), and green indicates tasks that are ahead of schedule (early tasks). Some indicators have links to additional graphical reports, double-click the link to open the corresponding diagram with all additional information in full screen mode. The list of tasks will be displayed with detailed information regarding their planned and actual level of completion, and assigned resources.

3. Resource and Tasks section allows to see all information about project's work resources. Resources are divided on groups on this pie chart, the color indicates if the group of resources is late (red color), ahead (green color), or in time (yellow color). The quantity of resources which contains each group is indicated in percents and by number on each sector. You can also view the degree of late or ahead of resources groups - the yellow sector is always on the circle's border, green sector exceeds the circle's border, and red sector tends to the center, the degree of remoteness from the border to one side or another is a degree of late or ahead.

This information is particularly useful for small projects, because for them the contribution of each participant is greatly and valuable, and it's important that each work regularly and in time. Resource and Tasks indicator for large projects allows to see immediately the red sector and resources that are much late. Click the Resource rate link to receive the detailed information for each work resource of project: which quantity of tasks it executes and what are their statuses.



4. Project Complete indicator has three points you have to pay attention to color, current completion and planned completion. Progress bar shows current project completion, below you can see the completing status in percentage. Arrow shows planned project completion. You can click to get the additional information about late tasks in progress and not started tasks, the additional diagrams will be opened on the separated pages.

5. Cost and Budget Indicator shows at the right the allocated project budget, and progress bar shows its actual cost. The color indicates whether the project execution is within budget or, in other words, it does not exceed the project actual cost of allocated budget. You can click to get the additional information about 25 most expensive tasks and over-costed tasks.

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

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

- ACWP (Actual Cost of Work Performed) - is calculated as the sum of the products of actual costs of the task on the task complete for all tasks.
- BCWP (Budgeted Cost of Work Performed) - is calculated as the sum of the products of baseline costs of the task on the task complete for all tasks.
- BCWS (Budgeted Cost of Work Scheduled) - is calculated as the sum of the products of baseline costs of the task on the planned task complete for all tasks.
- $SV = BCWP - BCWS$
- $SV\% = (BCWP - BCWS) / BCWS$ ,  $BCWS \neq 0$
- $CV = BCWP - ACWP$
- $CV\% = (BCWP - ACWP) / BCWP$ ,  $BCWP \neq 0$
- $CPI = BCWP / ACWP$ ,  $ACWP \neq 0$
- $SPI = BCWP / BCWS$ ,  $BCWS \neq 0$
- $EAC = ACWP + (BAC - BCWP) / CPI$ , where  $CPI \neq 0$  and BAC is calculated as the sum of the baseline costs of all tasks.
- $VAC = BAC - EAC$
- $TCPI = (BAC - BCWP) / (BAC - ACWP)$

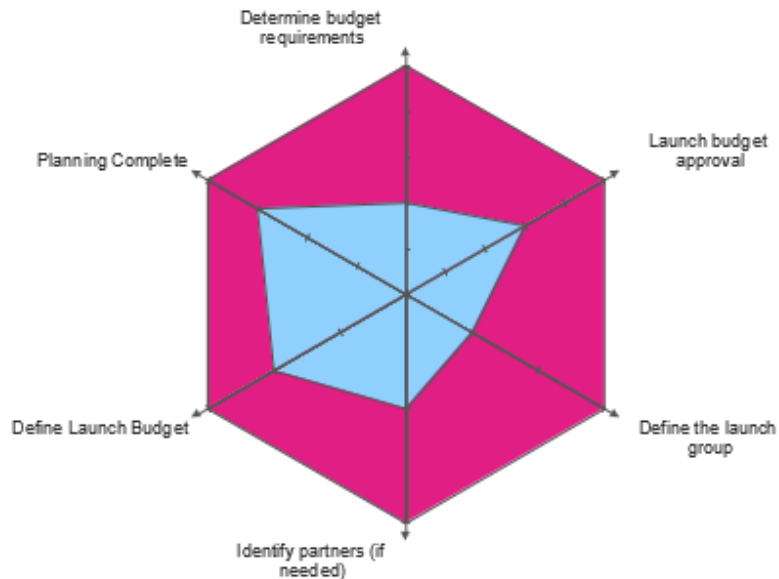
**Radar Chart**

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 2021					w35, 29 Aug 2021							
				22	23	24	25	26	27	28	29	30	31	01		
1	Project	8/22/2021	9/22/2021	[Gantt bar from 8/22 to 9/22]												
2	New Product Launch	8/22/2021	8/31/2021	8/22/2021												
3	Phase 1 - Planning the Launch	8/22/2021	8/31/2021	8/22/2021												
4	Define the launch group	8/24/2021					8/24/2021									
5	Define sales goals	8/24/2021					8/24/2021									
6	Define launch goals (launch timing and publicity objectives)	8/25/2021					8/25/2021									
7	Identify partners (if needed)	8/25/2021					8/25/2021									
8	Identify channel partners	8/25/2021					8/25/2021									
9	Identify retail partners	8/25/2021					8/25/2021									

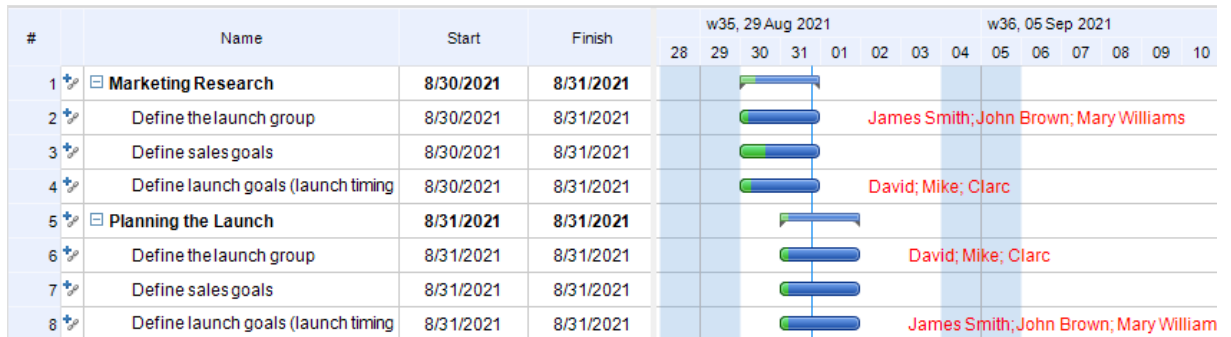
Purple polygon includes all milestones of all chains, the blue polygon includes the completed of them. The ratio of the areas of these polygons displays a degree of project completion.

**Radar chart, 2021-Aug-31**



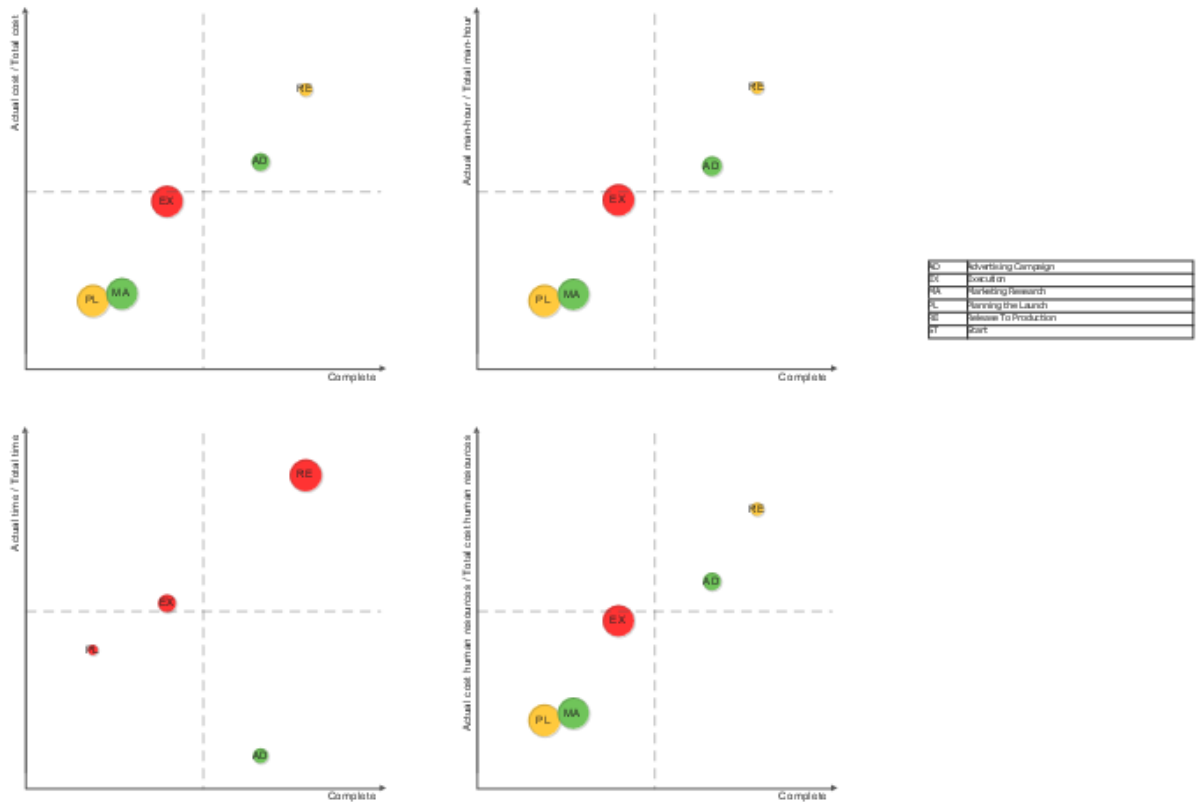
*Tactical Dashboard*

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.



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

Tactical dashboard, 2021-Aug-31



Tactical dashboard represents four positive quadrants of Cartesian coordinate system. The projects are displayed as circles on the plane in this coordinate system. Each of the diagrams reflects four indexes:

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

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

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

1. Diagram with an estimate by the actual cost ("Actual cost / Total cost").

There are compared Actual cost and Total cost on this diagram. Actual cost is a sum of actual costs of all tasks of the project that are multiplied on their Complete. Total cost is a sum of actual costs of all tasks of the project.

2. Diagram with an estimate by the actual man-hour ("Actual man-hour / Total man-hour").

There are compared Actual man-hour and Total man-hour on this diagram. Actual man-hour is a sum of Work values of all tasks of the project that are multiplied on their Complete. Total man-hour is a sum of Work values of all tasks of the project.

3. Diagram with an estimate by the actual time ("Actual time / Total time").


There are compared Actual time and Total time on this diagram. Actual time is a period between more earlier date from project finish or current date, and project start date (Actual time= $\min(\text{Finish date}, \text{Current date}) - \text{Start date}$ ).

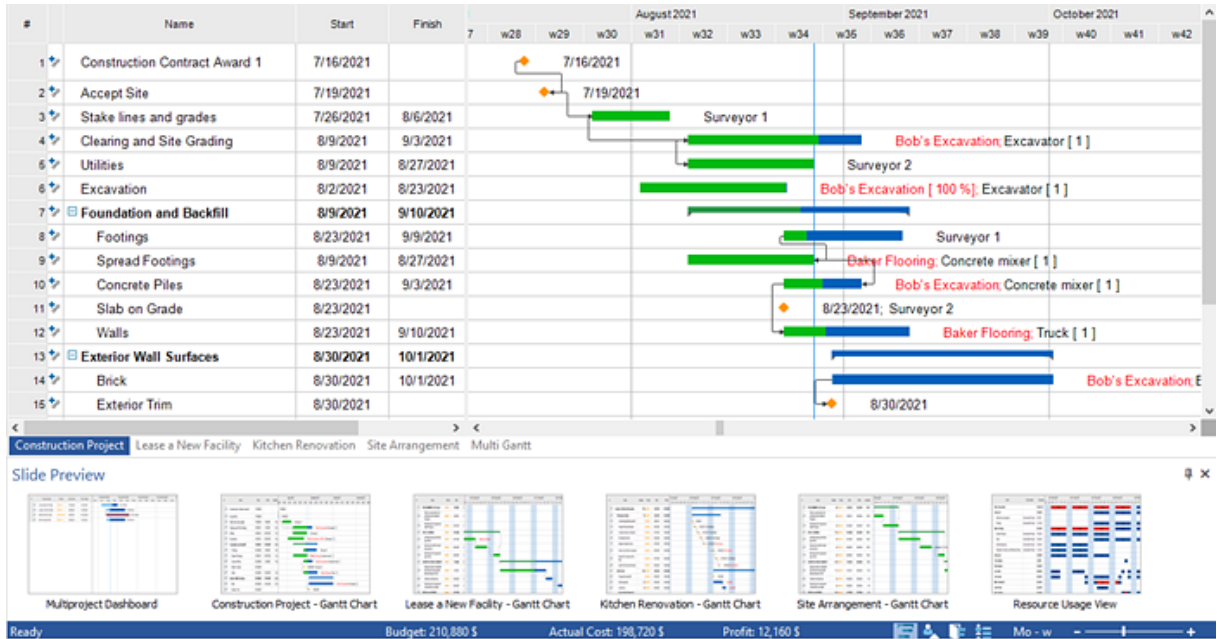
Total time is a project duration, is calculated as difference between project finish and start dates (Total time= $\text{Finish date} - \text{Start date}$ ).

4. Diagram with an estimate by the actual cost of human resources ("Actual cost human resources / Total cost human resources").

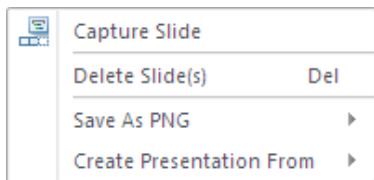
There are compared Actual cost human resources and Total cost human resources on this diagram. Actual cost is a sum of Costs for all resource's tasks that are multiplied on their Complete with Work type in the project. Total cost human resources is a sum of Costs for all resource's tasks with Work type in the project.

## Slide Navigator

You can create a presentation slides from a project file using the Capture Slides button  on the [Share](#) tab. Slides will appear in the pop-up Slide Preview panel. Slide Preview panel can be accessed from **Panels** button on the [View](#) tab.



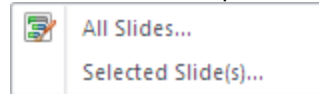
You can manage the slides in the Slide Preview panel using the context menu.



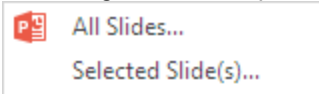
**Capture Slide** - Capture slide from a visible area of the current project view

**Delete Slide(s)** - Delete the selected slides

**Save as PNG** - Export to PNG according to chosen option

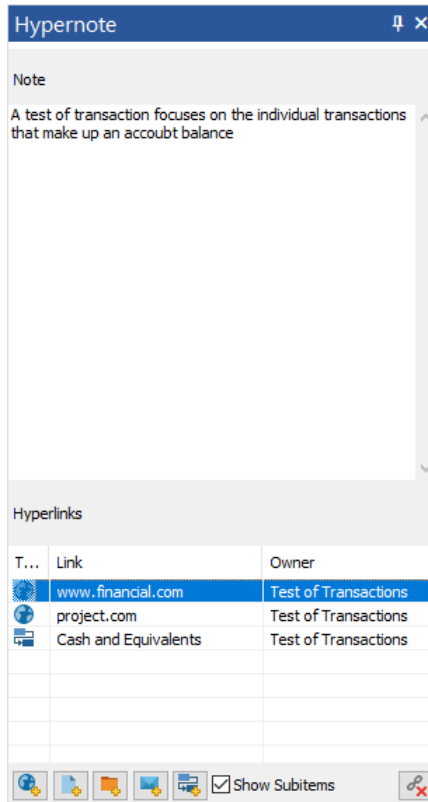


**Create Presentation from** - Export to PowerPoint Presentation according to chosen options



## Hypernote

Hypernote panel can be accessed from **Panels** button on the [View](#) tab.



**Notes** - Notes section allows adding text Notes to project tasks, scheduled at the the [Gantt chart](#) View. You can edit text Notes both from the Notes panel and the Notes column on the project grid. To display the Notes column on the grid, use the [Column Customization](#) dialog.

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

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

You can add a hyperlink by clicking the Hyperlink icon in the [Gantt view](#) grid. To display the Hyperlink column on the grid, use the [Column Customization](#) dialog.

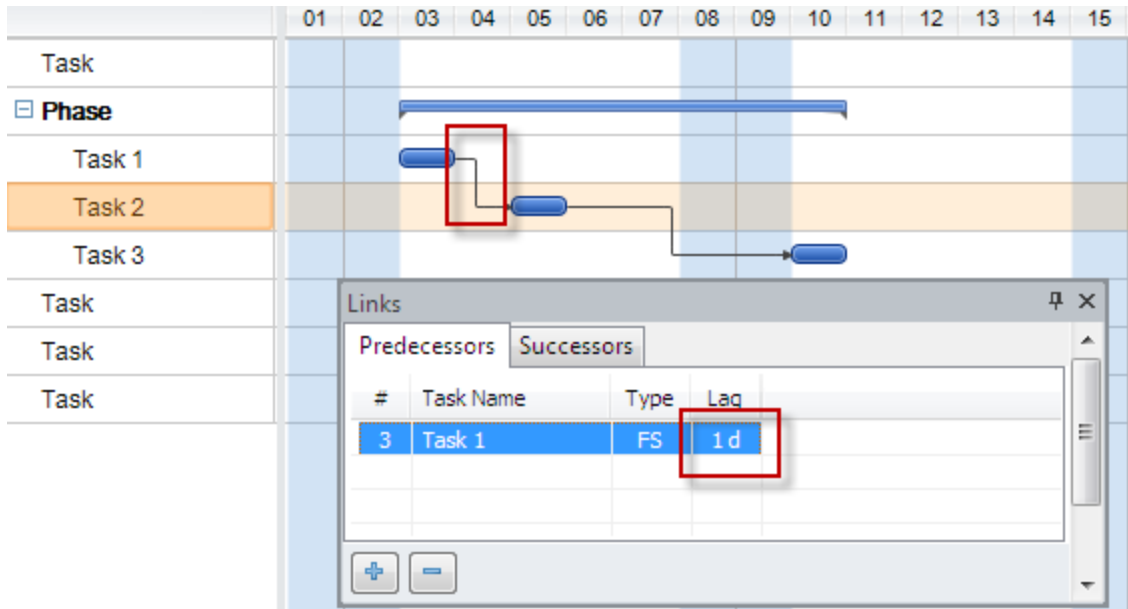
Any item with a hyperlink will be marked with icon:

An item that has multiple hyperlinks will display this icon:

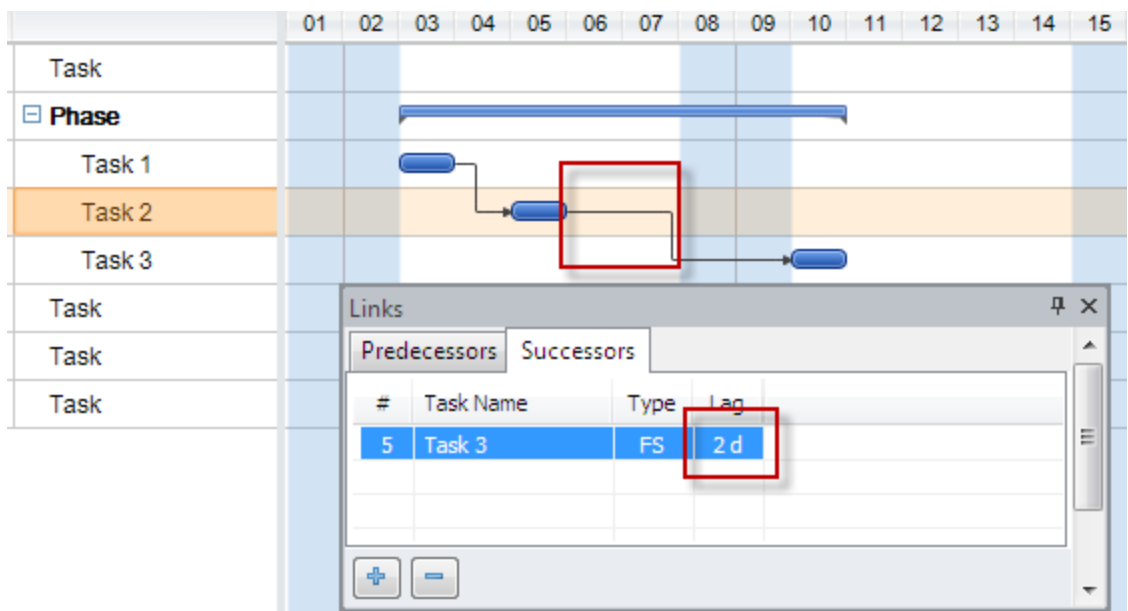
This panel brought together the functions of adding text notes and multiple hyperlinks. The earlier versions of ConceptDraw PROJECT had two different panels for these functionalities.

### Links

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



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





## Keyboard Shortcuts and Mouse Actions

Keyboard	Operation
<b>ConceptDraw OFFICE Tools</b>	
Ctrl + Shift + M	Create ConceptDraw MINDMAP file
<b>Documents and Windows</b>	
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
<b>Presentation</b>	
Ctrl + Shift + C	Capture Slide (Visible area)
<b>Application</b>	
F1	Call Help System
Alt + P	Preferences (Application settings)
Ctrl + F1	Call ConceptDraw PROJECT About Dialog
<b>Tasks</b>	
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
<b>Projects(s)</b>	
Insert	New project
Ctrl + Shift + N	New project
Delete	Delete project
<b>View</b>	
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
<b>Editing</b>	
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
<b>Selecting</b>	
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