

o Keyboard Shortcuts

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Welcome to ConceptDraw PROJECT 15 for Windows

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

Manage Plans, Reports, and Changes

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

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

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

Your Benefits

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

ConceptDraw Maintenance Assurance

We have developed an innovative maintenance program that makes sure you stay up to date. At the time of your buy a ConceptDraw product, you are able to purchase <u>ConceptDraw Maintenance Assurance</u>.

Technical Support

We offer unlimited free technical support to our users.

To send us a problem report or feature request, submit the <u>ticket</u> form in the Help Desk section on our Web site.

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

1

Toolbar Tour



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

Quick Access File Home View Share



Quick Access

Quick Access menu facilitates access to the most frequently used functions. It is located at the top of <u>Toolbar</u>.

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

File

File	Home	View Share
New		
Open		Recent Documents
Recent Save Save As Import Export Print Send Close		Software Development Alpha-r.cdpz C:\Users\anna\Documents\My ConceptDraw product_launch.cdpz C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw Software Development Alpha-r.cdpz C:\Users\anna\Documents\My ConceptDraw Software Development Alpha-r.cdpz C:\Users\anna\Documents\My ConceptDraw Software Development Alpha-r.cdpz C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw C:\Users\anna\Documents\My ConceptDraw
Propertie	s	
Options		
New		Create a new document.
Open		Open an existing project.
Recent		Show recently opened files.
Save		Save the current document.
Save As		Save a copy of the document.
Import		Import the document.
<u>Export</u>		Export the document.
<u>Print</u>		Preview and print the document.
<u>Send</u>		Send a document.
Close		Close ConceptDraw PROJECT.
Propertie	S	Contains options allowing you to configure the parame document in the <u>Document Properties</u> dialog.
Options		Allows to configure the application settings in the <u>Optio</u> you to change default application settings that will be a documents created in ConceptDraw PROJECT.

Preview and print the current ConceptDraw PROJECT file

Print 📄	Send the document to the default printer as it is. Use the <u>View</u> tab to setup the printed document view.
Print Preview	Opens <u>Print Preview</u> tab
Print to Adobe PDF	Print to Adobe PDF using the current print settings
Send the current document	
E-mail	Send a copy of the document via e-mail as attachment
Open in MINDMAP	Open the current document in ConceptDraw MINDMAP

-|

5

Print Preview

Preview and make changes to pages before printing.

File	Print Preview								Search	ň 0 ·
Print PDF	Snagit 13	Select View to Print Active view (Gantt Chart) 👻	 Original Size 	Print	All Dates Range 6/27/2011 - 6/27/2011 -	 Every Page Legend Page 		 Previous Page Next Page 	Close Print Preview	
Select Prin	-		○ Fit to 1x1 👻		O Do not Print	O None	Orientation	K Fit Page		
	Print	Print View	Print Scale	Table	Gantt Chart	Legend	Paper Setup	1	Preview	

Print

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	Ξ	ŀ

Print the current document

Print to Adobe PDF using the current print settings

Brother DCP-8065D -Printing properties Select the printer and set the printer properties

Print View

Select view to print

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

Active view (Gantt Chart) 🔻
Active view (Gantt Chart)
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 w*orkbook

Export

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

PDF

Adobe PDF - Export the document to Adobe PDF

x

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



MS Project File - Export the document to Microsoft Project XML



1

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

Text Outline - Export the document to the text outline

Home

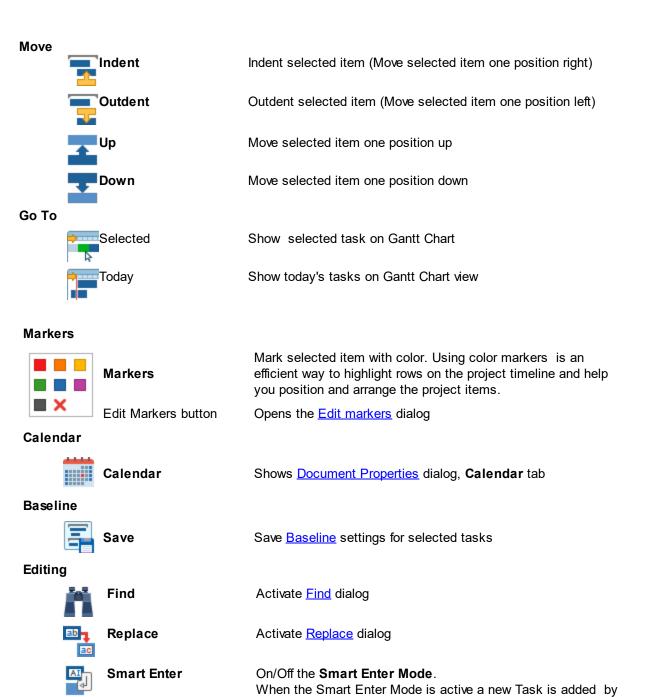
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Paste 📑 Copy	🖶 Wrap Text Ab* A A											Indent Outdent Up				Calendar		Find Replac	
Clipboard	Format Text		Select	View	Microreports			General		Lini	k G	Move		Go to	Markers G	Calendar	Baseline	Editir	19

Clipboard

Ê	Paste	Paste content from the Clipboard
¥	Cut	Cut selection and put it into Clipboard.
	Сору	Copy the selection and put it into the Clipboard.
Format Text		
Arial Unicode MS 👻 12 👻	Font	Select font face
	Font size	Select font size
∃J Wrap text Ab A A	Grow font	Increase font size
	Shrink font	Decrease font size
	Make upper case	Convert selected to upper case
	Make lower case	Convert selected to lower case
	Make title case	Convert selected to title case
	Make sentence case	Convert selected to sentence case
	Wrap text	Makes all content visible within a cell by displaying it on multiple lines
Solutions		
>	Solutions	Activate <u>Solutions</u> panel
Select View		
=	Gantt Chart	Switch to Gantt Chart View
₽	Resources	Switch to <u>Resource</u> list
Ē	Multiproject	Switch to Multiproject Dashboard
	Resource usage	Switch to <u>Resource usage</u> view

9

Reports Displays the generation window of the last report. If no reports hal 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 new item to end Add Insert Inserts new item into selected position Add sub item Add sub item to selected item Delete selection Delete 🔚 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. Designing Feature Database architecture ERD User interface diagram Link Link two or more selected items Link ÷ Finish to start Ļ. Start to start 5 Start to finish Finish to finish Unlink Unlink two or more selected items Edit button Edit predecessors using the Predecessors dialog Link 5



the Enter key.

ConceptDraw PROJECT User Interface Reference

Microreports

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Paste	🗗 Ca	ору	📑 W	rap Te	xt AJ	b* A	ĂĂ	Soluti							Microreports													Calendar	Save	Find	Replace	Smart Enter	
Clip	board			Fo	rmat T	ext						Select View			Microreports		General			Lir	k G		Mov	e		Go to	Markers	G Calendar	Baseline		Editing		

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

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

- from the context menu of the the task, phase, resource or project;
- from the Micro-reports button 🔛 on the <u>Home</u> tab.

List of reports available for various project tables:

Gantt Chart

Phase

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

Task

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

Resources

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

Multiproject Dashboard

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

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

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



Deadline Reminders

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

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

1. The task has a Deadline parameter checked.

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

2. Task completion is less than 100%.

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

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

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

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

Project Baseline

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

To save a Baseline, click the Save Baseline button appear:

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0	lipboard	Format Text			Select	iew		Microreports			Genera	1		U	nk 15		Move	e		Got	0	Markers G	Calendar	Baseline		Editing	
A	Warni Baselir	ig e was resaved. Note, that you ci	n undo this act	ion																							×

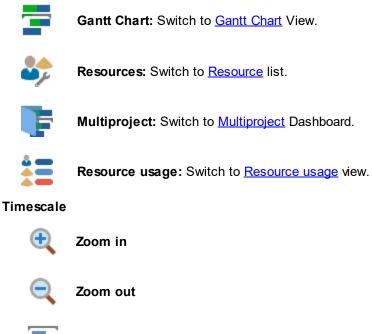
To undo the last action, click the Undo button on the <u>Quick Access Toolbar</u> or Ctrl+Z on the keyboard. . Baseline in ConceptDraw PROJECT includes three parameters: Baseline Start, Baseline Finish, and Baseline Cost. To display them on the Gantt chart, use the <u>Column Customization</u> dialog.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

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		_	_			_	_	_		Actual:	\$3,651.7	6		
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	-		-	-				-		Start:	8/14/202	4 8:00 /	M 🗐	,
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										Scheduling				
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View

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Gantt Resources Multiproject F	Resource Reports Usage	In	Out Timeli	ne Scale	Expand Collapse All All	Expand Collap	ise Outline Level*	Show Phases	s Show/Highlight					Baseline	Select	Panels \	Windows	
Select View			Timescale	5	Exp	and/Collapse			Filters	G.	Themes		Show/Hide		Columns	Panels an	d Windows	s

Select View



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



Scale: Show the scale choice drop-down list.

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

Expand/collapse



Expand all: Expand all sub items.



Collapse all: Collapse all sub items.



Expand: Expand selected item.



Collapse: Collapse selected item.

1 2 2

Outline level: Show tasks of the certain outline level.

16

Filters

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

Themes



Select the one of the available Gantt chart views

Show/Hide

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

✓ Show text boxes

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

Show text boxes: Show/hide text boxes

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

Columns



-

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

Panels and Windows



*

Panels: Manage Floating panels.

Windows: Shows the list of opened windows.

18

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 <u>Home</u> or <u>View</u> tab.

1 Name	Start	Finish	Complete			kugust 2024				Septemb				Octobe	
				w29 w30	w31	w32	w33	w34	w36	w36	w37	w38	w39	w40	w
1 VConstruction Contract Award 1	7/12/2024		0 %	7/12/2024											
2 V Accept Site	7/19/2024		0 %	L+ <u> </u>	/19/2024										
3 🎐 Stake lines and grades	8/2/2024	8/15/20	100 %		- H			Surv	eyor 1						
4 🎐 Clearing and Site Grading	8/9/2024	8/29/20	67 %		l	-				Bob'	s Excava	tion; Ex	cavator (1	
6 🎐 Utilities	8/20/2024	9/23/20	100 %											Surveyor	2
6 2 Excavation	7/19/2024	8/9/202	100 %		-		Bob	s Exca	vation [100 %]; 8	Excavato	r[1]			
7 🍤 🖻 Foundation and Backfill	8/9/2024	9/11/20	32 %		- Г	2 -									
8 V Footings	8/23/2024	9/11/20	0 %			-		r I				Survey	yor 1		
9 V Spread Footings	8/9/2024	8/29/20	53 %						1	Bake	r Floorin	g: Conc	rete mixe	or[1]	
10 V Concrete Piles	8/16/2024	8/29/20	30 %							Bob'	s Excava	ition; Co	ncrete m	ixer[1]	
11 🍤 Slab on Grade	8/16/2024	8/19/20	100 %						Surveyo	r 2					
2 V Walls	8/16/2024	9/5/202	33 %				4				Bake	r Floorin	g; Truck	[1]	
3 2 Exterior Wall Surfaces	7/30/2024	9/2/202	40 %		-		-								
14 🎾 Brick	7/30/2024	9/2/202	40 %		_						Bob's Ex	cavatio	r, Excav	ator [1]	
6 2 Exterior Trim	7/30/2024		0 %		L	7/30/20	24								
Rough-in Ductwork, Plumbing and	8/13/2024	9/2/202	67 %				-	_		•					
17 + 3 Install Heatpumps	8/13/2024	9/2/202	33 %			(Baker Fl	ooring: 1	Truck [1]	
4			>												
ti Gantt Construction Project Site Arrangement	Lease a New Fa	cility Kitcl	hen Renovation	1											
Preview															
W				Ba	doet: 245.	880 \$		rtual Cov	st: 230.40	20	Profit	15,480 \$:		H

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.

#	Name			Start	Finish	Complete	Cost	Baseline Cost	Resources
2	*Accept Site	~		scending escending		0 %	0\$	0 \$	
14	Brick		No So		2024	40 %	40,700 \$	40,700 \$	Bob's Excavation, Excavator
4	Clearing and Site Grad			Column	2024	67 %	24,700 \$	32,700 \$	Bob's Excavation, Excavator
10	*Concrete Piles	ATR.		n Customization	2024	30 %	16,700 \$	16,700 \$	Bob's Excavation, Concrete mixer
1	Construction Contract	Awar		8/7/2024		0 %	0\$	0 \$	
6	*Excavation		8/14/2024		9/4/2024	100 %	26,300 \$	26,300 \$	Bob's Excavation, Excavator
15	*Exterior Trim			8/23/2024		0 %	0\$	0\$	
13	*Exterior Wall Surfaces	;		8/23/2024	9/26/2024	40 %	40,700 \$	40,700 \$	
8	*Footings			9/18/2024	10/7/2024	0 %	11,200 \$	11,200 \$	Surveyor 1
7	*Foundation and Backf	ill		9/4/2024	10/7/2024	32 %	69,300 \$	67,700 \$	
17	*Install Heatpumps			9/6/2024 9/26/202		33 %	19,900 \$	19,900 \$	Baker Flooring, Truck
19	*Panelboards			9/6/2024		100 %	0\$	0\$	Surveyor 2

Columns that contain the project outline information can be managed using the Task Grid Context Menu.

Sort Ascending - Sort the project outline list by the column selected (A to Z for words, or smallest to largest for numbers);

Sort Descending - Sort the project outline list by the column selected (Z to A for words, or largest to smallest for numbers);

Not Sorting - Cancel sorting;

Hide Column - Hide the selected column;

Column Customization - invoke 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.

19

20

2. The Gantt chart displays task as bars. Bars are arranged in accordance with the timescale, displaying the task start /end time and its duration.

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

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

Any link type can be customized using the dialog Predecessors.

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

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

		Name	Start	Finish	Complete	17	w34		2024 20 21	22	23	24			g 202- 27		29	30		w36, 01	01 Sep 02	03		5 06	6
1	2	Construction	7/12/2024	10/16/2024	45 %		-																		
2	•	Construction Project	7/12/2024	9/23/2024	62 %	-	-	-			-	_	_		_	_	_	-	-	-	_	_	_	_	-
з	•	Construction Contract Award 1	7/12/2024		0 %																				
4	1	Accept Site	7/19/2024		0 %																				
5	•	Stake lines and grades	8/2/2024	8/15/2024	100 %	Surv	eyor	1																	
6	•	Clearing and Site Grading	8/9/2024	8/29/2024	67 %	-					-	_	_					E	3ob's	Exc	avatio	n;E	cava	tor [1	1
7	•	Utilities	8/20/2024	9/23/2024	100 %			•																	
8	•	Excavation	7/19/2024	8/9/2024	100 %	Excav	ator	[1]																	
9	•⁄	Foundation and Backfill	8/9/2024	9/11/2024	32 %	-					-	-			-	-	-	-		-		-	-		
10	•	Footings	8/23/2024	9/11/2024	0 %					ſ	-	_	_							-					
11	*	Spread Footings	8/9/2024	8/29/2024	53 %	_					_	_	_				t	E	Bake	Flo	oring;	Con	crete	mixer (Ľ
12	•	Concrete Piles	8/16/2024	8/29/2024	30 %	-						_	_				+	- 6	3ob's	Exc	avatio	on; C	oncret	e mix	er
13	*	Slab on Grade	8/16/2024	8/19/2024	100 %	-			Sur	veyor	2														
14	•	Walls	8/16/2024	9/5/2024	33 %	-												-		-					
15	2	Exterior Wall Surfaces	7/30/2024	9/2/2024	40 %	_												-							
16	•	Brick	7/30/2024	9/2/2024	40 %	_						_	_					-		-		8	ob's l	Excav	at
17	2	Exterior Trim	7/30/2024		0 %																				
udbi (Sant	tt Construction Project Site Arrangem	ent Lease a New Faci	lity Kitchen Renova	> tion	<																			
de P			energia e recertato	- A CONTRACTOR OF A																					
ιdγ	-					R	udae	E 1,043	890.5	_	Å.	hard (out 1	506.68	n \$		D.	of the S	539.20	ns			1C	1 A. 1	r

Gantt Chart Context Menu

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

	Name	Start	Finish	Complete	24 w28	August 2024 w29 w30 w31 w32	September 2024 October 2024 w33 w34 w35 w36 w37 w38 w39 w40 w41
						Arial • 10 •	H .
4 3	Clearing and Site Grading	8/9/2024	8/29/2024	67 %		A A AB ab A.B. Ab 🔤 🗸	Bob's Excavation; Excavator [1]
5 🕏	Utilities	8/20/2024	9/23/2024	100 %		A A AB ab A.B. Ab 🔛 🕇	Surveyor 2
6 🕏	Excavation	7/19/2024	8/9/2024	100 %		📄 Сору	Bob's Excavation [100 %]; Excavator [1]
7 🍤	Foundation and Backfill	8/9/2024	9/11/2024	32 %		Paste	
8 🍤	Footings	8/23/2024	9/11/2024	0 %		Paste as	Surveyor 1
9 🍤	Spread Footings	8/9/2024	8/29/2024	53 %		👗 Cut	Baker Flooring; Concrete mixer [1]
10 🍤	Concrete Piles	8/16/2024	8/29/2024	30 %		Select All	Bob's Excavation; Concrete mixer [1]
11 🍤	Slab on Grade	8/16/2024	8/19/2024	100 %		Insert New Task	Surveyor 2
12 🍤	Walls	8/16/2024	9/5/2024	33 %		Add New Subtask	Baker Flooring; Truck [1]
13 🍤	Exterior Wall Surfaces	7/30/2024	9/2/2024	40 %		Delete	
14 🍤	Brick	7/30/2024	9/2/2024	40 %		🚾 Indent	Bob's Excavation; Excavator [1]
15 🍤	Exterior Trim	7/30/2024		0 %		📰 Outdent	24
16 🍤	Rough-in Ductwork, Plumbing and Electrical	8/13/2024	9/2/2024	67 %		Custom Mark Tasks Link	
17 🍤	Install Heatpumps	8/13/2024	9/2/2024	33 %			Baker Flooring; Truck [1]
18 🕏	Venting	8/13/2024	8/19/2024	100 %		Create MINDMAP File	Bob's Excavation
19 🍤	Panelboards	8/13/2024		100 %		Add Text Box	+ 8/13/2024; Surveyor 2
20 🍤	Telephone, Security, and Electrical Wiring	8/13/2024	8/26/2024	100 %		Markers	Baker Flooring: Truck [1]
<					<		
Multi Ga	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Lease a New Fa	cility Kitchen	Renovation			
Slide Pre	view						
Ready						Budget: 245,880 \$ Ac	tual Cost: 230,400 \$ Profit: 15,480 \$ 📰 🔩 📑 🗄

Gantt Chart Context Menu

Gai	ILL CHAIL CONLEXT MENU		
Aria	al 👻 10 👻	Text Format	Change the text format of the project schedule
A	A AB ab A.B. Ab 🚘 🍷	Microreports	Generate Microreports
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Copy Paste Paste as ► Cut Select All Insert New Task Add New Subtask Delete Indent Outdent	Copy Paste Paste as Cut Select All Insert New Task Add New Subtask Delete Indent Outdent	Copy the selection and put it into the Clipboard. Paste content from the Clipboard. Options for pasting tasks copied to the clipboard. Cut selection and put it into Clipboard. Select all tasks. Inserts new task into selected position. Add sub task to selected task. Delete selection. Indent selected tasks (Move selected item one position right). Outdent selected tasks (Move selected item one position left).
	Custom Mark	Custom Mark	Mark the tasks that need to be represented in the diagram.
	Tasks Link 🕨	Task Link	Link two or more selected items.
	Create MINDMAP File	Create MINDMAP File	Generate a mind map (*. cdmz) from selected
回	Add Text Box		tasks.
	arkers	Add Text Box Markers	The file will be opened in ConceptDraw MINDMAP Add a text box to selected item. Make the selected items looking like <u>marked</u> with a highlighter.

Gantt Chart Timescale Context Menu

0 0 0	Zoom <u>I</u> n Zoom <u>O</u> ut Timescale	Ctrl+= Ctrl+- Ctrl+Alt+T	Zoom In Zoom out	Displays timescale in more detail (day instead of weeks, etc.) Displays a more generalized timescale (weeks instead of days, etc.)
	Calendar		Timescale Calendar	Calls <u>Timescale</u> dialog that allows to customize timescale appearance. It gives more possibilities for this than Zoom In and Zoom Out commands. On the other hand mentioned commands allows to change calendar scale quicker. Opens the Standard <u>Calendar</u> dialog

Resources

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

To assign resources to a specific task you should open <u>Gantt Chart</u>, select a task and then assign resources to task using the <u>Assign Resources</u> panel.

The information on the resources can be edited in the <u>Resource</u> panel.

1	1	Name	Type	Cost	Group	E-Mail	Notes	
-	2	Bob's Excavation	Work	165 \$/h	Excavation	bob_excavation@gmail.com		
2	*/	Surveyor 1	Work	100 \$/h	Surveyor	survevor2@gmail.com		
Ċ	•	Baker Flooring	Work	140 S/h	Flooring	baker_flooring@gmail.com		181
Ľ	2	Surveyor 2	Work	100 \$/h	Surveyor	surveyor2@gmail.com		
5	*	Excavator	Equipment	700 S	Excavation;Landscape			
6	*	Truck 3	Equipment	700 S	Excavation;Landscape			
7	*	Concrete mixer	Equipment	700 S	Flooring			
8	*	Tom Sheldon	W Con	150 \$/h	Surveyor;Excavation	tom_sheldon@gmail.com		1x1
9	*	Rich Gannon	4	150 S/h	Surveyor;Flooring	rich_gannon@gmail.com		181
10	*	Joe Smith	Work	150	Surveyor;Flooring	joe_smith@gmail.com		181
11	*	Tom Farrell	Work	150 5	Surveyor;Landscape	C		181
12	*	Mike Grabowski	Work	150 \$/h	Surveyor;hvac	6		181
13	*	Jane Postal	Work	150 \$/h	Landscape			181
14	*	Pat O'Tormey	Work	150 \$/h	Landscape		ح کا	
15	*	HVAC R Us	Company	5,000 S	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 <u>context menu</u> by applying the command **Add Resource**.

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

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

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

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

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

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

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

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

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

Columns that contains the resources information can be managed using the Resource List Context Menu.

#		Name	_	Туре	Cost		Group	E-Mail	
3	•20	Baker Flooring		Sort Ascending Sort Descending	/h	n I	Flooring	baker_flooring@gmail.com	
1	•	Bob's Excavation		No Sorting	۷h	n I	Excavation	bob excavation@gmail.com	
7	*20	Concrete mixer		Hide Column	S		Building		
5	•	Excavator	ff)	Column Customizat	ion S		Excavation		
16	•	Exteriors Unlimited		Work	150 \$/h	ו ו	Building		
15	Þ	HVAC R Us		Work	150 \$/h	n I	Facilities		
13	•20	Jane Postal		Work	150 \$/h	n I	Facilities		
10	•20	Joe Smith		Work	150 \$/h	ו ו	Facilities		
12	Þ	Mike Grabowski		Work	150 \$/h	n I	Building		
14	•20	Pat O'Tormey		Work	150 \$/h	n I	Building		
9	*	Rich Gannon		Work	150 \$/h	ר ו	Building		

Sort Ascending - Sort the resource list by the column selected (A to Z for words, or smallest to largest for numbers);

Sort Descending - Sort the resource list by the column selected (Z to A for words, or largest to smallest for numbers);

Not Sorting - Cancel sorting;

Hide Column - Hide the selected column;

Column Customization - invoke 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.

Resources Context Menu

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

Name	Туре	Cost	Group	
Bob's Excavation	Arial	- 9 -	Excavation	
Surveyor 1	A A AB	ab A.B. Ab 🚍 🍷	Surveyor	
Baker Flooring	Work	140 \$/h	Flooring	
Surveyor 2	🛉 Сору		Surveyor	
Excavator	E Paste		Excavation	
Truck	E Cut		Excavation	
Concrete mixer	E	esource	Flooring	
Bob's Excavation		Resource(s)	Excavation	
Excavator	E Markers		Excavation	
Truck	E		Excavation	
Baker Flooring			Flooring	
Concrete mixer	Equipment	700 \$	Flooring	

Resources List Context Menu

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

project file, use the button **F** on the <u>Home</u> or <u>View</u> tab. It opens the Multiproject window. This window contains a list of projects with their characteristics.

	Home View Share	Settings	_						
Paste	Arial 👻 9 👻	Solutions	🖥 Gantt Chart 茸 Re	esource Usage	Microrepo	orts 👻	🛼 📑 Delete	🖶 Link 🔻	📰 🏧 Do
🕻 Cut	🖶 Wrap Text	4	🛓 Resources 👘 📑 Re	eports			🐺 Add Text Box	🐔 Unlink	
Copy	Ab A A		Hultiproject			1	-		*
lipboard	Format Text		Select View	N	Microrepo	rts	Ge 3	Link 5	Move
#	Project Nemo	Start Date	Finish Date	Budget		3rd Quar	ter 2024	4th Quarter 2024	
·	1	Start Dute	1 man bac	Doogu	Jun	Jul	Aug Sep	Oct Nov	Dec
1 🐓	Construction	6/17/2024	10/17/2024	615,880 \$	-			-	
4	Construction Project	8/7/2024	10/17/2024	245,880\$				John Smit	ħ
3 */	Site Arrangement	6/17/2024	9/13/2024	370,000\$			Tom	Brown	
4 🐓	Renovation	7/30/2024	11/12/2024	430,000 \$					
5 🐦	Lease a New Facility	8/14/2024	11/12/2024	250,000\$				To	om Brown
6 🍫	Kitchen Renovation	7/30/2024	11/4/2024	180,000 \$				John	Smith

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

2. You can set the visual parameters of the multiple project Gantt chart using the <u>Multiproject Settings</u> tab.

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

Also can change the task start/end date, its duration and completion . To change start/end dates move the bar by your mouse. To change the task duration you need to switch to <u>Gantt Chart</u> view.

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

Columns that contains information on the multiple project can be managed using the Project Grid Context Menu.

#		ProjectName		Start Date	Finish Date		Budget	Company	Project Manager
			~	Sort Ascending Sort Descending					
1		Construction					615,880 \$		
2	2	Construction Project		No Sorting	Sorting		245,880\$	ABC Construction	John Smith
e	5	*Kitchen Renovation	_	Hide Column			180,000\$	ABC Construction	John Smith
ε	5	*Lease a New Facility	- 111	Column Customi 8/14/2024	zation 11/12/2024		250,000\$	Constructor Ltd	Tom Brown
4	ł	Renovation		7/30/2024	11/12/2024		430,000 \$		
3	3	Site Arrangement		6/17/2024	9/13/2024		370,000\$	Constructor Ltd	Tom Brown

Sort Ascending - Sort the project outline list by the column selected (A to Z for words, or smallest to largest for numbers);

Sort Descending - Sort the project outline list by the column selected (Z to A for words, or largest to smallest for numbers);

Not Sorting - Cancel sorting;

Hide Column - Hide the selected column;

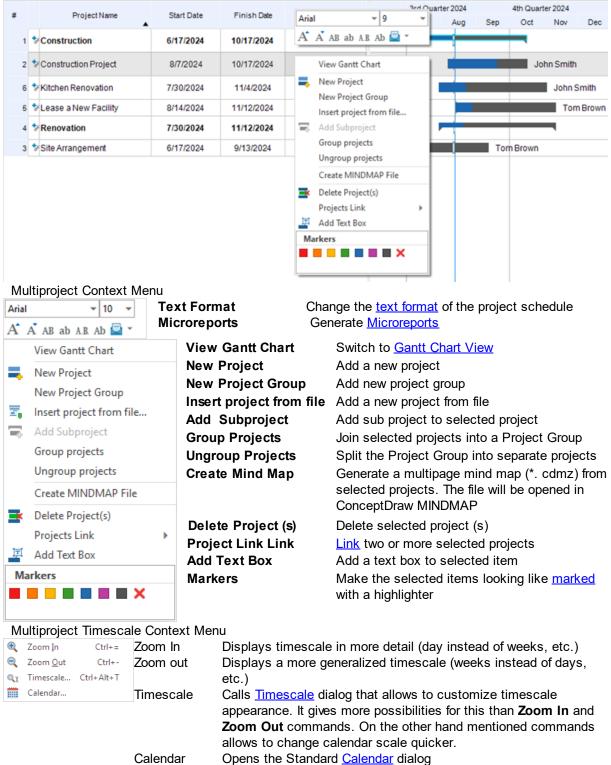
Column Customization - invoke the Column Customization dialog.

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.

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Multiproject Context Menu

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



Calendar

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Multiproject Settings

You can change the visual parameters of the Multiproject View

O 🗂 File	📕 📩 🍋 (~ 🛢 Home View	🕵 Share	Multiproj Settings		[Commercial (
✓ Co	nned Complete mplete Change Value mplete Change Rate Show/hide		cking period	Tasks Completion	on
	Project Name		Start Date	Finish Date	Budget
1	Construction		6/17/2024	10/17/2024	615,880 \$
2	Construction Project		8/7/2024	10/17/2024	245,880\$
6	Kitchen Renovation		7/30/2024	11/4/2024	180,000 \$

Show/hide Planned

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

Nov	Dec	Jan	Feb	Mar	Apr
		50 %))	Brad Pitt	
		100 %	>>>>	Richard M	iller
		j o	% 亘	MaryV	Villiams

0%

Mary Williams

Complete	Show/hide the change of the complete value	Nov	Dec	Jan	Feb	Mar	Apr
change value				50 %))	Brad Pitt	
				100 %	>>>>	Richard Mi	ller

_	30)

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. 	Nov		Jan 50 % 100 %	Feb	Mar Brad Pitt Richard Mi Mary V	ller
Tracking period	Select tracking period Set the frequency of complete values verification	•	Day Week Month Quarter Half year Year				
Task Completion	Show/hide the colored bar representing the situation with the completeness of the project's tasks. You can see the number of completed tasks, the ones in the process, and those that have not been started.	2	8 5 5 1	14 97 14	2 Joh	nn Smith Tom Brow I Joh Tom Brow	n Smith

Resource Usage

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

Name	DeclastName	Eveneration		w36	01 Se	ep 20	24				w37,	08 Se	p 202	4		
Name	Project Name	Expenses	31	01	02	03	04	05	06	07	08	09	10	11	12	13
Bob's Excavation		148,80			200	66	30	200	40			400		500		40
Clearing and Site Grading	Construction	24,000						100%					1	00%		
Excavation	Construction	25,600			1	100%										
Concrete Piles	Construction	16,000												1	00%	
Brick	Construction	40,000					100%						1	00%		
Venting	Construction	8,000 \$							10				100	%		
Design provides Construction	Site Arrangement	17,600 \$														
Design provides Construction	Lease a New Facility	17,600 \$							10				1	00%		
Surveyor 1		19,200					100%					100	%			
Stake lines and grades	Construction	8,000 \$					100%					100	%			
Footings	Construction	11,200														
Baker Flooring		84,480					100)%	40			400		5	00%	
Surveyor 2		21,600												1	00%	

It is a kind of a Gantt Chart which shows you all resources with their usage by tasks and money. 1. You can find out which projects resources are used in, what tasks are assigned to them, and finally, how much it costs.

2. To quickly move to the 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 <u>Timescale</u>, displaying the task start /end time, duration, and percentage of resource working time occupied on a task.

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

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Columns that contains the resources usage information can be managed using the Resource Usage Grid Context Menu.

Name		Project Name	Expenses
"14"" Bulkhead at Kneewall"	✓	Sort Ascending	
"14"" Bulkhead for Crown & Faux"		Sort Descending	
"15"" Deep Wall at Pantry"		No Sorting Hide Column	
2x4 Wall Studs	FT B	Column Customization	
Alarm Rough-In		Kitchen Kenovation	1,200 φ
Architect designs preliminary Space Pl	an	Lease a New Facility	6,000 \$
Baker Flooring			84,480
Beams,Trim, etc.		Kitchen Renovation	1,200 \$
Bob's Excavation			148,80
Brick		Construction	40,000
Brick Hearth & Mantle		Kitchen Renovation	1,200 \$

Sort Ascending - Sort the resource usage list by the column selected (A to Z for words, or smallest to largest for numbers);

Sort Descending - Sort the resource usage list by the column selected (Z to A for words, or largest to smallest for numbers);

Not Sorting - Cancel sorting;

Hide Column - Hide the selected column;

Column Customization - invoke 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.

Filters Mode

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

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

File		Home View Share							[Commercia	al Const	ruction_m	ultiproj	ect_new.co	dpz - (
Gantt		esources Multiproject Resource Reports Usage	e (Out		ale Expa				se Outline		filestones how Phas		► 🗢	× 🖻
Chan		Select View		Tim	escale	G A		xpand/C	ollapse	Level			Filter	s	
			·	~	7										
	Your	r changes are not filtered until you press Refilt	L	-	_	it2023			s	eptember 2	023			October	2023
•	Your	r changes are not filtered until you press Refilt Name	er button	-	Start	;t2023 w32	w33	w34	s w35	eptember 2 w36	023 w37	w38	w39	October w40	2023 w4
	Your		L	v	_		w33 8/7/2023					w38	w39		
		Name	Priorit	•	Start	w32	8/7/2023		w35			w38	w39		
• • 1		Name Construction Contract Award 1	Priori	v 0 0 0 0	Start 8/7/2023	w32	8/7/2023)	w35	w36		w38	w39		

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

File						Commer	cial Const	truction_m	nultiprojec	t_new.cdpa	z - G
	Home View Share										
	😂 📑 🗮 🔟	\odot \bigcirc	- E 🔍		=		T	Ailestones	;	- 😅 🗙	e
_	Resources Multiproject Resource Reports	In Out	Timeline Scale			Collapse Outlin					
Chart	Usage	in out	Timeline Scare	All Al	ll	Level		show Phas	ses 🗹 Sh	ow/Highlig	ght
	Select View	Tim	rescale	r _a	Expand/Colla	pse			Filters		
lter N	Aode: Milestones										
Y Ye	our changes are not filtered until you press Refilt	er button 🔁	•								
				August 2023		-	September	2023		0	octob
	our changes are not filtered until you press Reflit Name	er button	Start	August 2023 w31 w32	w33	w34 w35	September w36	2023 w37	w38	-	
	Name		Start 8/7/2023	-	w33				w38	-	
	Name	Priority		-	8/7/2023				w38	-	
• •	Name Construction Contract Award 1	Priority	8/7/2023	-	8/7/2023	w34 w35		w37	w38 veyor 1	-	
1 2	Name Construction Contract Award 1 Accept Site	Priority	8/7/2023 8/14/2023	-	8/7/2023	w34 w35		w37		-	w40
1 2 2 3 3 3	Name Construction Contract Award 1 Accept Site Stake lines and grades	Priority	8/7/2023 8/14/2023 8/28/2023	-	8/7/2023	w34 w35		w37	veyor 1	w39	w40
1 1 1 2 1 3 1 4 1	Name Construction Contract Award 1 Accept Site Stake lines and grades Clearing and Site Grading	Priority	8/7/2023 8/14/2023 8/28/2023 9/4/2023	-	8/7/2023	w34 w35		w37 Sun	veyor 1	w39	

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Ξ	tt R		In Out	Timeline Scale	
Filter	M	lode: Milestones			
Y	You	ur changes are not filtered until you press Refilter	button 🔽	2	
Y	You				August 2023 September 2023 (
•	You	ur changes are not filtered until you press Refilter Name	button 🔽 Priority	Start	August 2023 September 2023 (w31 w32 w33 w34 w35 w36 w37 w38 w39
Y	You	Name		Start	
* 1 2	*	Name Construction Contract Award 1	Priority	Start 8/7/2023	w31 w32 w33 w34 w35 w36 w37 w38 w39
1	*	Name Construction Contract Award 1 Accept Site	Priority	Start 8/7/2023 8/14/2023	w31 w32 w33 w34 w35 w36 w37 w38 w39
1	*	Name Construction Contract Award 1 Accept Site Exterior Wall Surfaces	Priority	Start 8/7/2023 8/14/2023 8/23/2023	w31 w32 w33 w34 w35 w36 w37 w38 w39
1 2 13	* * *	Name Construction Contract Award 1 Accept Site Exterior Wall Surfaces Exterior Trim Power in Ductwork Plumbing and	Priority	Start 8/7/2023 8/14/2023 8/23/2023 8/23/2023	w31 w32 w33 w34 w35 w36 w37 w38 w39

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

4. You can reverse filtering condition using Invert button.

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	1	🍫 📑 🗮 📓	⊕ ⊝	= 🗨			12	Milestones	- 5	× 🗈
Gant		esources Multiproject Resource Reports Usage	In Out	Timeline Scale	Expand Collapse All All	Expand Collap	se Outline Level*	Show Phas	es 🗌 Show/Hig	hlight
		Select View	Tir	mescale	rs Ex	pand/Collapse			Filters	r
7	Your	r changes are not filtered until you press Refi	ter button 🔽	•						
T	Your				September	2023		October 2023		
T	Your	r changes are not filtered until you press Refi Name	ter button	Start	September w35 w36	2023 w37 w38	w39	October 2023 w40 w41	w42 w43	3 w4
7 #									w42 w43	3 W4
	*	Name	Priority	Start		w37 w38	1			3 w
3	*	Name Stake lines and grades	Priority	Start 8/28/2023		w37 w38 Surveyor	1	w40 w41	Excavator [1]	3 w
3	*	Name Stake lines and grades Clearing and Site Grading	Priority	Start 8/28/2023 9/4/2023	w35 w36	w37 w38 Surveyor	1 Bot	w40 w41	Excavator [1] Surv	

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

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

Milestones	- t × b
Show phases S	how/Highlight
Filters	; T <u>a</u>

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.

Critical Path is defined for each task individually. A task is displayed as Critical if its slack (delay potential) does not exceed the value specified in the Document Properties, <u>Advanced</u> tab and this delay would delay the entire project.

	T 📩 🔿 (* 🛢 🗟			[Co	mmercial Con	struction	_multiproject_new	.cdpz - Gan	tt Chart] - Co	nceptDraw	PROJECT					
File	Home View Share															
Gantt Re	Lesources Multiproject Resource Reports In	•	cale Expand		and Collapse	Dutline Level*	No filter Show Phases		😂 🗙 📄 Highlight]				-	al Path ned Resour Text Boxes
	Select View	Timescale	G.	Expand,	/Collapse			Filters	Fa		T	nemes				Show/Hid
	Name	Start	Finish	Complete		-	st 2023			ber 2023			October			
2 *	Assess Office	0/0/0000			:9 w30	w31	w32 w33	w34	w35 w3	5 w37	w38	w39	w40	w41	w42	w43
-	. level to level	8/6/2023		0 %			8/6/2023									
3 🍾	Stake lines and grades	8/28/2023	9/8/2023	100 %		_		Y								
4 🐓	Clearing and Site Grading	9/4/2023	9/22/2023	67 %				l		-	•					
5 🍫	Utilities	9/11/2023	10/13/2023	100 %									_			
6 🐓	Excavation	8/14/2023	9/4/2023	100 %												
7 🎾	Foundation and Backfill	9/4/2023	10/13/2023	32 %						_	-			_		
8 🍫	Footings	9/18/2023	10/5/2023	0 %							ſ					
9 🍫	Spread Footings	9/4/2023	9/22/2023	53 %						_	<u> </u>	ן 🖡				
10 🐓	Concrete Piles	9/11/2023	9/22/2023	30 %]				
11 🍤	Slab on Grade	9/25/2023	9/26/2023	100 %								•				
12 🍫	Walls	9/25/2023	10/13/2023	33 %								_	_			
13 2/	Exterior Wall Surfaces	8/21/2023	9/22/2023	40 %				-		_						

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

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Gant Char	t F	Resources Multiproject Resource Rep Select View	orts In Or		le Expand Collap: All All	se Expand Collapse (Dutline Level*	No filt		ighlight		Them	4		-	Critical Pa Assigned I Show Text Sh	Resourc
		Project Name	Start Date	Finish Date	Budget	Company	rter 2023 May	Jun	3rd Quarter 2023 Jul Aug	Sep	4th Quarter 2 Oct N	023 lov Dec	1st Quar Jan	ter 2024 Feb	Mar	2nd Qu Apr	arter 202 May
1	•	Construction	7/30/2023	11/15/2023	615,880\$					Ť							
2	÷	Construction Project	7/30/2023	10/13/2023	245,880\$	ABC Construction			6	6	2 John Si	nith					
3	•	Site Arrangement	8/17/2023	11/15/2023	370,000\$	Constructor Ltd			5		14	Tom Brown					
4	*	Renovation	7/28/2023	11/10/2023	430,000 \$						_						
5	*	Lease a New Facility	8/14/2023	11/10/2023	250,000\$	Constructor Ltd			5		14	Tom Brown					
6	*	Kitchen Renovation	7/28/2023	11/2/2023	180,000\$	ABC Construction			28	7	2 J	ohn Smith					

Share

 Image: Image: Im	[Commercial Construction_multiproject_new.cdpz - Gantt Chart] - ConceptDraw PROJECT
Capture Images MS Slide* PowerPoint MINDMAP PDF Presentation ConceptDraw	MS MS Mindjet Text Excel ≠ Project MindManager Outline Exports
Presentation Capture Slic	des
Visible	
🚍 Whole	view
ConceptDrav	PROJECT allows you to make slides for presentation. You can
	from any of <u>project views</u> .
	rom the current project view according to chosen option. The slides the pop-up <u>Slide Preview</u> panel.
	the pop-up <u>Silde Preview</u> panel.
Images: Sav	e slides in PNG format.
MS PowerP	oint: Save slides as MS PowerPoint presentation (PPTX).
ConceptDraw	
DIAGRAM: (Create a Project Management diagram in ConceptDraw <u>DIAGRAM</u>
•	IDMAP: Open the current document in ConceptDraw <u>MINDMAP</u> ,
having closed	d it in ConceptDraw PROJECT.
Exports	

Ехр

PDF
x

Adobe PDF: Export the document to Adobe PDF.

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

MS Project: Export the document to Microsoft Project XML.

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

Text Outline: Export the document to text outline.

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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.

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Capture Images MS DIAGRAM C Slide* PowerPoint	Den in Adobe MS MS Mindjet Text NDMAP PDF Excel≠ Project MindManager Outline	
Presentation ConceptE	Draw Exports	

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

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



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MINDMAP

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File Home View Share		
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	Open in Adobe MS MS Mindjet Text <u>MNDMAP</u> PDF Excel Project MindManager Outline	
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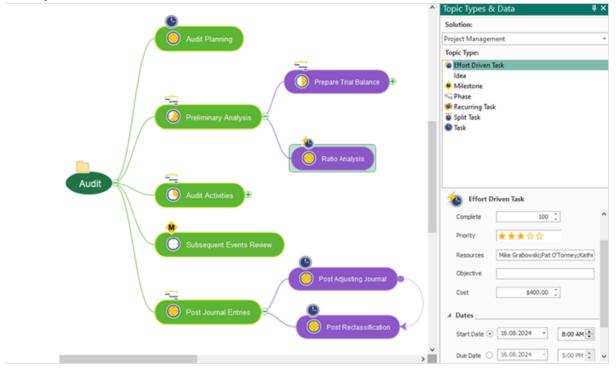
The compatibility between ConceptDraw products allows you to migrate your documents from MINDMAP to PROJECT and vise versa. You can see the project data in a mind map structure by opening your project in ConceptDraw MINDMAP. Mind map will consist from topics of Project Management type, which contain all project information. Project Notes will be opened as Notes to topics. All hyperlinks will be displayed in the Hypernote panel. This way you are switching views without creating extra files. You can see the same file in both applications:

w36, 0' Task ug 2024 w34, 18 Aug 2024 w35, 25 Aug 2024 **4** × 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 01 1 Info Ratio Analys Tom Sheldon; Rich Gannon Name: Days 1 v Duration: ÷ Complete: 100 % Mike Grabowski; Pat O'Tormey; Katherine; Chris Milestone: Priority: ***** Mike Grabowski; Pat O'Tormey; Katherine; Chris; Joe Smith Marker: No marker ~ Costs 8/20/2024; Tom Sheldon; Rich Gannon + 0\$ Baseline: HVAC R Us; Mike Grabowski; Chris 400 \$ HVAC R Us; Mike Grabowsk Actual: Dates 8/20/2024; Tom Sheldon; Rich Gannon Start: 8/16/2024 8:00 AM • 8/20/2024; Tom Sheldon; Denise; Katherine Finish: 8/16/2024 5:00 PM 8/20/2024; Rich Gannon; Tom Sheldon; Ellen; Jennifer 8/16/2024 2:20 PM Deadline: Katherine; Denise; Exteriors Unlimited; Pat O'Tormey Scheduling Rich Gannon; Joe Smith; HVAC R Us; Chris Fixed Units Type: Jane Postal; Denise; Je Effort driven: \square 8/20/2024: Tom Sheldon: Rich Gannon Task types 8/20/2024; Tom Sheldon; Rich Gannon Types: Normal

ConceptDraw PROJECT

Toolbar Tour	Share	MINDMAP	
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ConceptDraw MINDMAP



MS Excel

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File Home View	Share		
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Capture Images MS Slide* PowerPoint	DIAGRAM Open in Add	obe MS MS Mindjet Text DF Excel Project MindManager Outline	
Presentation	ConceptDraw	Exports	

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

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

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

	А	В	С	D	E
1	Name	Start	Finish	Complete	
2	Audit Planning	8/13/2024	8/14/2024	100 %	
3	Preliminary Analysis	8/16/2024	8/19/2024	67 %	
4	Prepare Trial Balance	8/16/2024	8/19/2024	50 %	
5	Test of Transactions	8/16/2024	8/19/2024	50 %	
6	Ratio Analysis	8/16/2024	8/16/2024	100 %	
7	Audit Activities	8/20/2024	8/27/2024	37 %	
8	Cash and Equivalents	8/20/2024		0 %	
9	Accounts Receivable	8/22/2024	<u>8/</u> 26/2024	33 %	
	Multiproject Dashboard Audit - Gantt Chart F	Resource Sheet Reso	ou 🕂 🗄 🔳		

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		В	С				
1	Name		Project Name	Expenses				
30	Mike Grabowski			1,040.00 \$				
31	1 Test of Transactions		Audit	240.00 \$				
32	Ratio Analysis		Audit	1,040.00 \$				
33	Accounts Receivable		Audit	480.00 \$				
34	Inventories		Audit	640.00\$				
35	i Post Adjusting Journal		Audit	80.00 \$				
36	Post Reclassification		Audit	80.00 \$				
37	Jane Postal			160.00 \$				
38	Income T <mark>ax Accrual</mark>		Audit	160.00\$				
	Resource Usage Sheet	+		: 4				

Dialogs

Dialogs are the main means of communication between the program and the user. They are used to set various components and properties of the program. Modal dialogs are mostly called from the menus, or by using the keyboard shortcuts. When this dialog is open, you can't work with other tools.

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

Timescale

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

File Home View Sha	re								
📑 Gantt Chart 🚦 Resource Usage	🔍 In	🖺 Expand All 🛛 🖃 Collapse							
🔩 Resources 🛛 🐺 Reports	🔍 Out 🛛 📆 Scale	📇 Collapse All 🧯 Outline Level							
📑 Multiproject	\Xi Timeline	🛨 Expand							
Select View	Timescale 🕞	Expand/Collapse							
		-							
Timescale	×								
Top Tier Formatting	Top Tier Formatting								
Bottom Tier Formatting	gn: Center 🗸								
Count: 1									
	OK Cancel								

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

Column Customization

All project views: <u>Multiproject</u>, <u>Gantt</u>, <u>Resources</u>, and <u>Resource Usage</u> contain information lists divided into columns. The Column Customization dialogs allow the management of the columns' visibility. The dialogs can be invoked from the context menu of the grid of each view. Also Customize Columns dialog also can be accessed from <u>View</u> tab.

File Home Vi	iew Share					Search
Reports	🔍 🥰 Scale	Collapse	No filter	Theme	Critical Path Baseline	Select 🔻
Select View	Timescale 🕞	Expand/Collapse		Theme	Show Text Boxes Show/Hide	Columns

The most massive is the column customization possibilities of the <u>Gantt Chart</u>. View and edit information to be displayed at the project outline.

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

The Column Customization dialog contains the following columns:

Gantt Chart View					
Baseline Cost	Total planned cost for an task				
Baseline Finish	The planned completion date for a task.				
Baseline Start	The planned beginning date for a task.				
Complete	The current status of task in percentages of the task's duration that has been completed.				
Cost	The total scheduled cost for a task				

Cost to Completion	The piece of total scheduled cost that remains for a task completion.
Cost1	The custom column, user can use to enter any additional information on the task cost
СР	Tasks, marked in this column make a project's critical path.
Custom Mark	Indicates tasks marked to be used in the Timeline from Marked Tasks report.
Custom 1-10	Additional specific information important for a particular project added by user.
Deadline	The target data, indicates when the task should be completed
Duration	The total span of a working time for a task
Early Finish	The earliest date that a task could possibly be completed.
Early Slack	The duration between the Early Start and Early Finish Dates
Early Start	The earliest date that a task could possibly begin.
Finish	The date when a task is scheduled to be completed
Hyperlinks	Add/Edit hyperlinks to a task
Late Finish	The latest date that a task can finish without delaying the finish of the project.
Late Slack	The duration between the Late Start and Late FinishDates
Late Start	The latest date that a task can start without delaying the finish of the project.
Name	Project task name

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Comment you can enter about the current project	
Displays the place of task in the project outline hierarchy.	
The number that displays the associated task's position in the project outline hierarchy.	
The planned task completion status (percentages) at the current date.	
The tasks numbers (#) on which the task depends before it can be started or finished.	
The level of importance given to a task by project manager	
Resources assigned to task	
The date when a task is scheduled to be started	
The tasks numbers (#) that act as successors for the current task (tasks, whose start or finish date is driven by their predecessor task.)	
The total amount of time , scheduled on a task for all assigned resources., or the total amount of time , scheduled for particular resource on a task (<u>Assign Resource</u> panel)	
The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new task is created in the current project.	
Total planned cost for a project	
The planned completion date for a project	
The planned beginning date for a project.	
The budget, allocated to a project.	

Company	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

r

Start Date	The date when a project is scheduled to be started			
Resources View				
Cost	For Work resource displays the cost that accrues every time unit, the resource is used. For a non-human resource displays the cost that accrues at one unit of the resource usage.			
Email	Contact email address assigned to resource			
Group	A customizable field to structure resources into groups			
Hyperlinks	Add/Edit hyperlinks to a resource			
Name	Resource name			
Notes	<u>Comment</u> you can enter about the current resource			
Туре	Type of the resource (work, material, cost, equipment, company)			
Unique ID	The Unique ID field contains the number that ConceptDraw PROJECT automatically designates whenever a new resource is created in the current project.			

Edit Markers

Mark selected item with color. Using color markers is an efficient way to highlight rows on the project timeline and help you position and arrange the project items.

The Edit Markers dialog is called from the Markers group of the <u>Home</u> ribbon.

File	Home View Share								
🔓 Paste	Arial 👻 10 💌	Solutions	📑 🚼 Resource Usage	🔄 Microreports 🔻			T	-	
🔏 Cut	🗐 🛛 Wrap Text		🔩 🐺 Reports						
📄 Сору	Ab [•] A [•] A [•]		Dir Carlos		General	Link	Move	Go to▼	
Clipboard	Format Text		Select View	Microreports					Markers 🖬

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

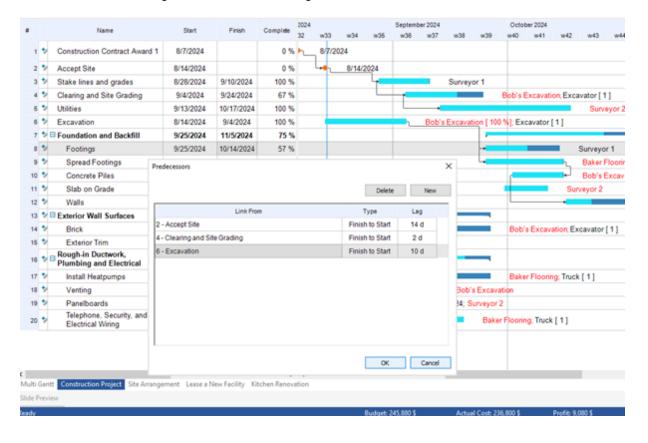
Edit markers			×
Red marker			
Orange marker			
Yellow marker			
Green marker			
Blue marker			
Purple marker			
Black marker			
OF	(Cancel	

Predecessors dialog can be accessed from the <u>Link</u> section in the **Home** tab. The Predecessors settings also available in the <u>Links</u> panel

File	Home View Share					
🔓 Paste	Arial 👻 10 💌	Solutions	📑 Gantt Chart 🛔 Resource Usage	🔄 Microreports 🔻	🔜 📑 Delete	📮 Link 🔻
🔏 Cut	₽7 Wrap Text		🔩 Resources 🛛 📮 Reports		📑 볼 Add Text Box	K Unlink
📄 Сору	Ab A A		📭 Multiproject		-	_
Clipboard	Format Text		Select View	Microreports	General	Link 🕞

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

You can make this using the Predecessors dialog.



Filters

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

File	Home	View	Shar	re							
📑 Gantt Ch	hart ‡ 🗖 F	lesource U	lsage	🔍 In			🖺 Expand All 📃 Collapse	T	No filter	- s x	-
🔩 Resource	es 🛛 🐺 F	Reports		🔍 Out	C Scale		📰 Collapse All 📲 Outline Level	-			
📑 Multipro	oject			\Xi Timeline			🛨 Expand		Show Phases	Show/Highli	ght
	Select Vie	W		Times	cale r	5	Expand/Collapse		Fil	ters	- F 2

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.

Active Tasks	171								
Baseline Finis	sh Violation	Description:	Show tasks th	hat have been st	arted but not completed yet.				
Baseline Start Violation Complete Range Completed Tasks Cost Greater Than Cost Overburget		Column	Edit column	Edit column label	Test	Value	Edit value	Edit value label	Relation
		Complete	No		does not equal	100	No		
Cost Overbudget Critical	Start	No		is less than or equal to	now	No			
Critical Date Range Incompleted Tasks Incompleted Tasks Uate Critical Tasks Late Critical Tasks Late Tasks Milestones Phases Task Range Tasks With Deadlines Tasks With Deadlines Tasks With Overallocated Reso Tasks With Overallocated Reso Completed Tasks V		Finish	No		is greater than or equal to	now	No		and
		0 = Thi	s filter is stan	dard and nonedi	table. You can only duplicate it.				

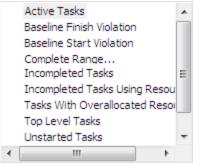
Filters for: Specify the project view, which is filtered by default: Project, Tasks, or Resources.

•

Filters for: Tasks

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



Add Filter: Add new custom filtering conditions. Edit custom filter using editing window. and 🖭 🖃 Add/Remove criteria buttons.

ers for: Tasks	\sim	Name: 8	aker Flooring	2					
Active Tasks Baker Flooring	^	Description: B	aker Flooring	Active Tasks					
Baseline Finish Violation Baseline Start Violation Complete Range		Column	Edit column	Edit column label	Test	Value	Edit value	Edit value label	Relation
Completed Tasks Cost Greater Than		Complete	No		is greater than	0	No		
Cost Greater Than Cost Overbudget		Resources	No		contains	Flooring	No		and
Critical		Resources	No		contains	Truck	No		or
Date Range		Resources	No		contains	Concrete mixer	No		or
Incompleted Tasks Using Late Critical Tasks Late Tasks Milestones Phases Task Range Tasks With Deadlines Tasks With Name Tasks With Overallocate		* -							

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"

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.

	s 📑 Reports 🤅	R In R Out R E Timeline	Scale	Expand Al			Baker Floori		• 🗢 🗙 ow/Highlig		•		. 5			al Path ned Reson Text Boxe		eline	Select *	Panel Wind	
multiproj	Select View	Timescale			ind/Collapse			Filters		- G			hemes		C SHOW	Show			Columns	Panels and	d Windo
r Mod	e: Baker Flooring																				
	a buka mooning		_																		r
Your d	anges are not filtered until you	press Refilter b	utton	\$																	
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12 0	onstruction Contract Awa	rd 1 8/7/2	0.024		0%	11.51	100 100			1.42	1145						1100	191		112	
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	take lines and grades	8/28/		9/10/2024	100 %		Surveyor 1					_									
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5 V U	tilities	9/13/	2024	10/17/2024	100 %						Survey	or 2									
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7 🗸 🖯 Fi	oundation and Backfill	9/4/2	2024	10/7/2024	75 %																
8 2	Footings	9/18/	2024	10/7/2024	100 %					Baker F	looring										
97	Spread Footings	9/4/2	2024	9/24/2024	53 %		t	Bake	r Flooring	Concre	te mixer [1]									
05	Concrete Piles	9/11/	2024	9/24/2024	30 %		•	Bob	s Excavati	on; Con	crete mixe	r[1]									
1 2	Slab on Grade	9/11/	2024	9/12/2024	100 %		Surveyor 2														
21/	Walls	9/11/	2024	10/1/2024	100 %	4			Baker	Flooring	Truck [1]									
3*/⊟E	xterior Wall Surfaces	8/23/	2024	9/26/2024	40 %																
4 7	Brick	8/23/	2024	9/26/2024	40 %	_		Bo	b's Excav	ation; Ex	cavator ['	1]									
6 V	Exterior Trim	8/23/	2024		0 %																
6≯⊟ <mark>R</mark> P	ough-in Ductwork, lumbing and Electrical	9/6/2	2024	9/26/2024	67 %	_															
75	Install Heatpumps	9/6/2	2024	9/26/2024	33 %			Ba	ker Floori	ig: Truck	(1)										
8 🏞	Venting	9/6/2	2024	9/12/2024	100 %		Bob's Exca	vation													
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Options

Can be accessed from the <u>File</u> tab. Allows to configure the default application settings that will be applied to all new documents created in ConceptDraw PROJECT.

General

onceptDraw PROJECT op	tions	;
General Schedule	Appearance	
Autosave	Display on new document: Color scheme:	
Parateria	Gantt dhart 🗸 White	~
	New document view settings:	
	Current Document V Set	
	Font: The Arial	
	Font size: 9 V	
	Currency	
	Currency symbol: \$ ~	
	Currency position: \$ 1.23 ~	
	Decimal digits: 2	
	Behaviour	
	Use smart enter mode	
	Generate deadline Microreports	
	OK Can	cel Apply

Display on a new document: Set up document default view

Color scheme: Set up document color scheme New document view settings: Set up new document view (custom or default) Currency symbol: Set up currency symbol Currency position: Select currency position Decimal digits: Set up amount of decimal digits Behaviour: On/Off the Smart Enter mode On/Off the deadline Mircoreports automatic generation

Calendars:

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

Work units:

Week starts on: Select week start.

Hours per day: Set up working hours amount per day. Hours per week: Set up working hours amount per week.

Day per month: Set up working days amount per month.

Scheduling:

Default task type: Choose what you would like to fix: Units, Duration or Work

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

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

Read more how to use the <u>Effort-Driven Scheduling</u> <u>Method</u>

Schedule

eneral	Calendar						
ichedule	Working weekdays:	Default working	Default working time:				
utosave	☐ Sunday ⊘ Monday ⊘ Tuesday ⊘ Wiednesday	From 8:00 13:00	To 12:00 17:00				
	☑ Thursday ☑ Friday □ Saharday	•					
	Work Units						
	Work Units Week starts on: Sunday	~					
		× •					
	Week starts on: Sunday						
	Week starts on: Sunday Hours per day.	÷					
	Week starts on: Sunday Hours per day: 8 Hours per week: 40	:					
	Week stats on: Sunday Hours per day: 8 Hours per week: 40 Days per month; 20	* * *	~				
	Week starts on: Sunday Hours per day: Hours per week: Days per month; 20 Scheduling	* * *	× ×				
	Week starts on: Sunday Hours per day: 8 Hours per week: 40 Days per month: 20 Scheduling Default task type: Fixed Unit	A V A V A V A V A V A V A V A V A V A V	< < <				

onceptDraw PROJEC	Toptions			>
General Schedule Autosave	Autosave options	sy. 1	🔹 sin	

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

Document Properties

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

General

General tab allows to set the starting points of project calculations.

- 1. Currency section. Here you can define the project currency options.
- 2. Work units section. Here you can set the units of measurement for calculating the costs of employees engaged in the project.
- 3. Fiscal year section. Here you can change a fiscal year beginning date. This date affects the position of quarters/half-years/years on the <u>timeline</u> and the choice of reporting period.

Document Properties	×
General Calendar Access Advanced	
Currency symbol: \$ ~ Currency position: 1\$ ~	_
Decimal digits: 0	
Hours per day: 8	
Hours per week: 40	
Days per month: 20	
Fiscal Year	_
OK	Cancel Apply

Calendar

Calendar tab is used to customize the default project calendar. To make your new calendar available for other projects to use, save the project as a template using the Save as option in the <u>File</u> menu. So the new calendar will be there for every new project created with that template.

D	ocume	ent Pr	opert	ies				×
6	General	Cale	endar	Aco	ess	Advar	nced	
	Setting	gs for	calend	dar:				
	Stand	lard						✓ Reset to default I •
	44 4		{	3-2024	ţ		Þ H	Day working time:
	Su	Мо	Tu	We	Th	Fr	Sa	Nonworking
	28	29	30	31	1	2	3	From To
	4	5	6	7	8	9	10	8:00 12:00 13:00 17:00
	11	12	13	14	15	16	17	15.00 17.00
	18	19	20	21	22	23	24	
	25	26	27	28	29	30	31	\$
	1	2	3	4	5	6	7	
								OK Cancel Apply

You can set up schedule for particular 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.

Docume	nt Pr	opert	ies				×
General	Cal	endar	Acc	ess	Advar	nced	
Setting	s for	calend	dar:				
Stand	ard						✓ Reset to default *
Stand Bob's I Surve Baker Surve Tom S Rich G Joe Sr Tom F Mike G Jane F Pat O' HVAC Exterii	Excav yor 1 Floori yor 2 heldo anno mith arrell Frabo Postal Torma R Us	ing n wski ey	d				orking time: nworking om To :00 12:00 3:00 17:00
25	26	27	28	29	30	31	
1	2	3	4	5	6	7	
,							
							OK Cancel Apply

Access

You can protect your document from unwanted access by setting a password and role-based access to the project file. Role-based access control helps you manage who has access to project files, what they can do, and what project information they can access. The "Protect Document Access" check box allows you to toggle document protection mode on/off.

Document Prope	rties				×
General Calenda	ar Access Advanced				
Protect Acce	ess to Document				
User		Role	Add Use	r	
			Edit Use	r	
			Remove U	ser	
			ОК	Cancel	Apply

- 1. Check the box.
- 2. Enter the username and password. The first user gets the Project Manager role by default.

Docume	nt Propertie	es						\times	
General	Calendar	Access	Advanced						
Prot	tect Access	to Docum	ent						
l	Jser	A	dd Project	Manage	er				\times
				User:	Richard Mil	er			
			Acce	ss type:	Project Mar	nager			\sim
		_	Pa	ssword:	•••••	•			
			Confirm pa	ssword:	•••••	••			
						OF	<	Cancel	
					ОК	Can	ncel	Apply	

3. Add other users by specifying their roles:

Project manager (PM) - full access to all changes in the document. You can add several PM users. Resource manager (RM) - access only to changes in the Resource view, Resource usage, and task assignments.

Viewer (V) - read-only access without the right to save the document.

Add User		×
User:	Tina tilson	
Access type:	Project Manager	\sim
Password:	Project Manager Resource Manager Viewer	
Confirm password:		
	OK Cancel]

Project Manager user can manage access of all users

ocumer)	nt Propertie	25)
General	Calendar	Access	Advanced					
Prot	ect Access	to Docum	ent					
	Jser			Role		Add	User	
	lichard Mille Tina Tilson	r		(PM) (V)		Edit	User	
					_	Remov	/e User	
					_	remov	ie oserini	
					0	ĸ	Cancel	Apply

Login			×
	User:	1	
	Password:		
		OK Cancel	
Login			×
	User:	Richard Miller	
	Password:	•••••	
		OK Cancel	

To access a protected document, one need to enter username and password.

Advanced

Advanced tab allows to set the <u>critical path</u> and critical task parameters.

Docume	nt Properti	es				×
General	Calendar	Access	Advanced			
	Calculate ir		nt critical pa	h project	_	
				OK	Cancel	Apply

Find

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

File	Home View Sh	hare												Search	ň 0 ·
🖺 Paste	Arial 👻 9	-	Solutions	Gantt Chart	Resource Usage	🔄 Microreports 👻	🔜 📑 Delete	🖶 Link 👻	🔁 💶 Down	🔁 Selected		🛄 Calendar	🚰 Save	Find	🔁 Smart Enter
👗 Cut	💬 Wrap Text			🔩 Resources	📑 Reports		📑 볼 Add Text Box	🚛 Unlink	-	╊ Today				Replace	
📄 Сору	Ab A A			📑 Multiproject			-		1		X				
Clipboard	Format Text			Sele	ect View	Microreports	General	Link 😼	Move	Go to	Markers Fa	Calendar	Baseline	E	diting

The Find dialog:

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

Replace

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

	File	Home View Share					Search 🕺 🕈 🖉 🝷
	🏠 Paste	Arial 👻 9 👻 Solution	🗧 🔄 Gantt Chart 🛔 Resource Usage 🛛 🔤 Mic	icroreports 👻 🗮 📑 Delete 🛛 🗮	Link 👻 🚾 💶 Down 🛛 陆 Selected	📕 📕 🧮 🧰 Calendar 🛛 👫 Sav	re 📫 Find 🔁 Smart Enter
3	🕻 Cut	💬 Wrap Text	📤 Resources 🛛 📑 Reports	📑 🔛 Add Text Box 🗧	Unlink 😨 🏾 🍞 Today		*** Replace
	Copy	Ab ĂĂĂ	F Multiproject	=	王		
C	lipboard	Format Text	Select View Micr	croreports General	Link 😼 Move Goto	Markers 🕫 Calendar Baselin	e Editing

The Replace dialog:

Find a	nd Replace	×
Find	Replace	
	Find what:	
Re	place with:	
Look	in column: All Columns	\sim
	Match case	
F	Replace All Replace Find Previous Find Next C	lose

Floating Panels

Some tools and features in ConceptDraw PROJECT are accessible from the floating panels. Floating panels can be accessed from the drop down list of the Panels button on the <u>View</u> tab.

File Home View Sha	re							Search	ň e
Gantt Chart	🔍 In	🔚 Expand All 📃 Collapse	▼ No filter - 😴 🗙 🕫			Critical Path	🗟 Baseline 🛛 👖	Select 👻	📧 Panels
🔩 Resources 🛛 📑 Reports	🔍 Out 🛛 🔯 Scale	🔚 Collapse All 📜 Outline Level		•		Assigned Resources		-	Task
🕨 Multiproject	🔚 Timeline	🛨 Expand	Show Phases Show/Highlight		······································	Show Text Boxes		~	Project
Select View	Timescale 🕞	Expand/Collapse	Filters	G	Themes	Show/Hide		Columns 🗸	Resource
								~	Assign Resource
								~	Solutions
								~	Slide Navigator
								~	Hypernote
								~	Links
								~	Show selected
									Restore All

Task Project Resource Assign Resources Solutions Slide Navigator Hypernote Links

Task

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

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

Task	ų s
Info	
Name:	Brick
Duration:	25 📮 Days 🗸
Complete:	40 %
Milestone:	
Priority:	
Marker:	No marker 🗸
Costs	
Baseline:	40,700 \$
Actual:	40,700 \$
Dates	
Start:	8/23/2024 8:00 AM
Finish:	9/26/2024 5:00 PM
Deadline:	9/20/2023 12:00 AM ~
Scheduling	
Type:	Fixed Units V
Effort driven:	
Task types	
Types:	Normal ~
	Normal
	Split Task Recurring Task
(>

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

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

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

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

Effort - Driven Task

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

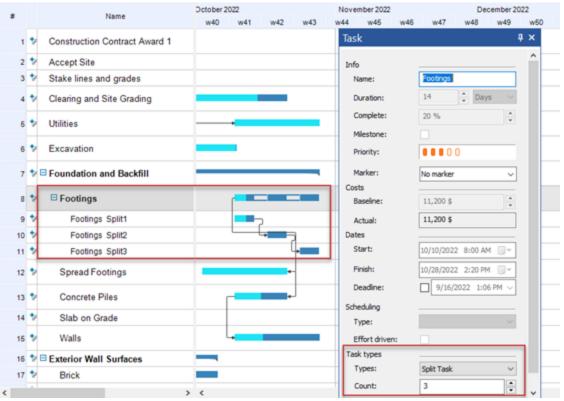
Effort-driven calculation rules are not applied when you change work, duration, and unit values for resources already assigned to a task.

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

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

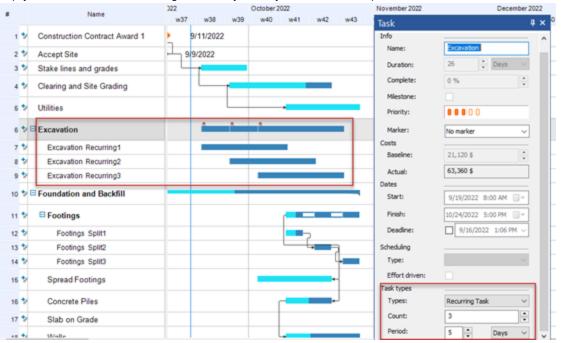
Split a Task

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



Recurring Tasks

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



Project

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

Project	4 ×
Info	
Name:	Kitchen Renovation
Start Date:	7/30/2024 8:00 AM
Finish Date:	11/ 4/2024 8:00 AM
Duration:	69 Days 🗸
Budget:	180,000 \$
Company:	ABC Construction
PM:	John Smith
Site:	www.abcconstruction.com
Objective:	Renovate private kitchen
Priority:	
Marker:	No marker 🗸 🗸

Name - Set up project name
Start Date - Display project start day
Finish Date - Display project finish day
Duration - Display project duration. Select the duration units using the drop-down list.
Budget - Set up project budget
Company - Set up Company name
PM - Set up project manager
Site - Set up project web-site
Objective - Set up project objective
Priority - Specify project priority
Marker - Specify project marker from list

Resource

Resource dialog can be accessed from **Panels** button in the <u>View</u> tab. Resource dialog defines parameters of the project resources and allows you to manage a resource information in the <u>Resources</u> list,

Resource	4 ×	
Info Name: Type: Cost: Group:	Joe Smith Work ✓ 150 \$ ► Per hour ✓ Flooring, Landscape ✓	 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
E-Mail: Marker:	joe_smith@gmail.com	Group - Set up resource group. The resource can participate in several groups E-mail - Set up resource e-mail Marker - Specify resource marker from list

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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.

Assig	n Resources		Į.	×
	Resource	Units	Work	
	Excavation			<u>.</u>
V	Bob's Excavation	50.00 %	64 h	å
V	Excavator	1.00	-	1
	Truck			1
	Bob's Excavation			å
	Excavator			٩
	Truck			٩
🔲 🗆 s	Surveyor			2
	Surveyor 1			å
	Surveyor 2			å
V	Surveyor 2	50.00 %	64 h	å
	Surveyor 1			å
	looring			<u>ئن</u>
	Baker Flooring			4
	Concrete mixer			1
	Baker Flooring			å
1	Concrete mixer	1.00	-	1
ů _o	A .	4		

Resource - Displays the resource name.

Units - Resource utilization for the current task.

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



Add Work resource - Add new human resource into resource pool

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



Move to Resources view - Switch to Resources view

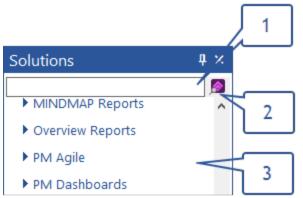


Calendar - Set the specific calendar for Work type resource

Solutions

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

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



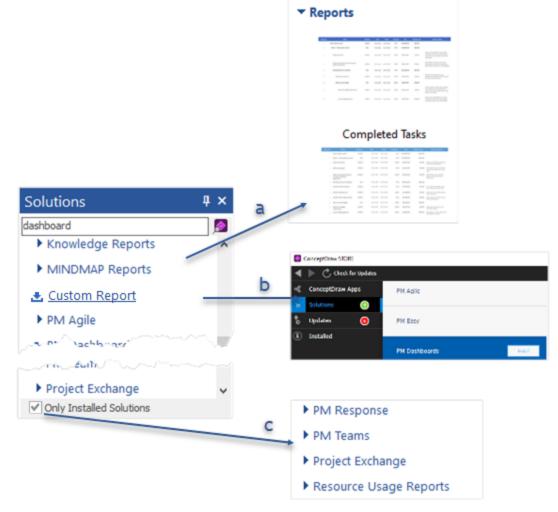
1. **Search window.** You can search for the required reports and examples. Enter the keyword in the search field. The corresponding solutions will be displayed in the panel.



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

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

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



Tabular Reports

Tabular reports in ConceptDraw PROJECT are generated as electronic spreadsheets in MS Excell format (XLSX). This ability is convenient for your own use and for easily sharing the reports with stakeholders, even if they don't have ConceptDraw PROJECT installed. There are more than predesigned 30 tabular reports in ConceptDraw PROJECT. Reports are combined into 7 case-oriented <u>solutions</u> with many kinds of reports. Along with pre-designed tabular reports, ConceptDraw PROJECT users can create <u>custom reports</u> based on a self-designed Excel template. The group of pre-designed Table Reports includes the following types of reports:

- 1. Basic Projects:
 - All Task Statuses report the table of all tasks statuses for each project;
 - Milestones report the table of milestones for each project;
 - Send Task List report the table of tasks for each project;
 - Task and Notes report the table of tasks with start and finish dates and Text Notes.
- 2. Cash Flow Reports:
 - Cash Flow on Projects report the table of daily expenses per project during one month;
 - Cash Flow on Resources report the table of daily labor expenses per employee during one month;
 - Cash Flow on Tasks report the table of daily expenses per task during one month.
- 3. Current Activities Reports:
 - Completed Tasks report the table of completed tasks for each project;
 - Critical Tasks report the table of critical tasks for each project;
 - Overdue Tasks report the table of overdue tasks for each project;
 - Tasks in Progress report the table of tasks in progress with task information for each project;
 - Unstarted Tasks report the table of unstarted tasks with task information for each project.
- 4. Knowledge Reports:
 - Knowledge Schedule report the table of all hyperlinks with dates and associated tasks;
 - Project Knowledge report the table of all project hyperlinks;
 - Resource Knowledge report the table of all resources hyperlinks.
- 5. Overview Reports:
 - Anonymous Project Overview report the table of time, costs, tasks and resources overview without Resource names;
 - Multiproject Overview report the table of time, costs, tasks and resources overview for each project.
- 6. PM Planning:
 - All Tasks All Columns List report the table of entire project schedule including hidden columns;
 - All Visible Columns report the table of project schedule excluding hidden columns;
 - Milestones with Notes and Objectives report the table of milestones with notes and objectives for each project;

- Multiproject Goals report the table of projects objectives for each project;
- Multiproject Managers report the table of projects managers for each project;
- Project Team report the table of project employee including hyperlinks;
- Resource Report report the table of all kinds projects resources for each project;
- Top Level Tasks report the table of project top level phases and tasks with task information for each project.

7. Resource Usage Reports:

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

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

- 1. On the Solutions panel find out the suitable report from the list above.
- 2. Click the report icon to view its preview on the right panel.

lutions 4 ×	The "Comple information r Chart equals changed to a belong, even	ted Tasks earding the project's tasks, to 100%. By default, the rep mother desired one. This rep of these phases are not 100 on, start and finish dates, cos	which are orting per ort include % complet	complet iod is set is the tar- ied, and	ed, i.e. th t as a cur sks with t contains	e task rent w the indi the cor	s which Co eek, but o cation the respondin	plete in a ptionally it phases to g detailed it	a Gantt can be Generate which they	Ste Ar Renovation	uction Project ^
	Unique ID	Reve	Duration	Bat	700A	Complete	Case	Reading Cost	Resource Name	Report Period	Document Timeline •
Completed Tasks		Reg Product Laurch	26.004	10.31,218	No. 25, 214	26.5	\$110,004.00	\$415.00		Start	6/17/2024
		Phase 1 - Planning the Launch	34.6	10.25,202	Mar 25, 2118	365	\$20,004,00	\$453.00		Finish	11/12/2024
		Define the launch	24.354	hin 20, 2018	No. 21, 218	200%	\$49,000.00	\$11.00	Agen (27, Mary Williams, Rohard Miller, Under Devin, Petrosa Intern, Robert Monre, James Saith, Prayras, Wilson, Jahn Brown, Januph Allen	•Units	
Critical Tasks	5	Define launch goals (aunch timing and publicity algorithms)	24.014	Petr 24, 2118	Nor 21, 214	200%	\$34,139.30	522.00	Mary Williams, Farel [12], James Levills, Robert Willer, John Breen, Joseph Klein, Robert Wilces, David Tarris, Laura Rodriguez	Time Unit	Use Current Documen +
	4	Identify partners (Fneeded)	24.4	10.00	No. 15, 218	365	5173,346.00	5487.00			
		stienthy notal partners	24.20.4	hin 20, 2118	We 21, 218	100%	\$10,158.80	\$12.00	William Janes, David Harris, Lauris Rodrigues, Rohard Miller, Paper (32), Fund (31), Sense, Sense, Sense, Sen		
Overdue Tasks	10	Define Lounch Budget	34.6	No. 10, 114	No. 11, 218	300 %	\$82,854.88	SVIN-INF			
	11	Oxformine budget requirments	24.30 d	No. 31, 2118	No.21,213	100 X	\$45,555.80	\$45.00	Andrea Inderson, Robert Wilson, William Janes, Auger [10], Janes Jonis, Jased Harris, Parkata Janes, Robert Moren, Wary Williams, John Brown		
· · · · · · · · · ·	12	Laurch Isolgrispersoal	24.30 d	10.21,212	Mar 21, 2018	100 %	\$16,525.00	5444.00	Withom January, Mark Holomoon, Fund (1), January Tantin, January Mary Williams, Under Dawis, Patricia Janes, Rohard Miller		
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3. Specify the report parameters using the Report Parameters panel.

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- 4. Press **Generate** to create the report.
- 5. The report will be generated and opened in MS Excel.

1	A	В	С	D	E	F	G
1	Unique ID	Name	Duration	Start	Finish	Complete	Cost
2	9	Stake lines and grades	10.00 d	8/28/2024	9/10/2024	100 %	8,000 \$
3	11	Utilities	25.00 d	9/13/2024	10/17/2024	100 %	20,000 \$
4	12	Excavation	16.00 d	8/14/2024	9/4/2024	100 %	26,300 \$
5	13	Foundation and Backfill	24 d	9/4/2024	10/7/2024	75 %	76,020 \$
6	14	Footings	14.00 d	9/18/2024	10/7/2024	100 %	17,920\$
7	17	Slab on Grade	2.00 d	9/11/2024	9/12/2024	100 %	1,600 \$
8	18	Walls	15 d	9/11/2024	10/1/2024	100 %	19,900 \$
9	22	Rough-in Ductwork, Plumbing and Electrical	15 d	9/6/2024	9/26/2024	67 %	41,400 \$
10	24	Venting	5.00 d	9/6/2024	9/12/2024	100 %	8,000 \$
11	25	Panelboards	0 d	9/6/2024	9/6/2024	100 %	0\$
12	26	Telephone, Security, and Electrical Wiring	10.00 d	9/6/2024	9/19/2024	100 %	13,500 \$
13							
14		onstruction Project (+)		: (

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.

tom Excel Report	custom report tem	plate is created in MS Excel as MS Exce	eport based on a custom Excel report temp I book (.xlsx) using special functions. For yo ith ConceptDraw's Custom Excel Report sol	ur Generate	Ste An	uction Project rangement	^
leports	The resulting repor MS Excel.	rt based on this template and Concept	Draw PROJECT file data is automatically op-	ined in		n a New Facity n Renovation	
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Reports							

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

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Start	6/17/2024							
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▼Units								
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- 2. Press **Generate** to create the report.
- 3. The report will be generated and opened in MS Excel.

© 2024 CS Odessa corp.

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.

									2021	-09-01_18-27-56	Project Report_Examp	le 2 - Excel
File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	CD Pro	oject 📿 Te	ll me what you want to	do
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How it works

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

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

CDPRJ_PROJECT_NAME () - displays the name of the Project.

CDPRJ_TASK_DURATION () - displays the duration of the Task.

CDPRJ_RESOURCE_TYPE () - displays the type of the resource.

CDPRJ_TASK_NAME ([PH]) - displays only Phases.

CDPRJ_TASK_NAME ([T]) - displays only Tasks

CDPRJ_TASK_NAME ([M]) - displays only Milestones

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

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

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

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

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

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

Mind Map Reports

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

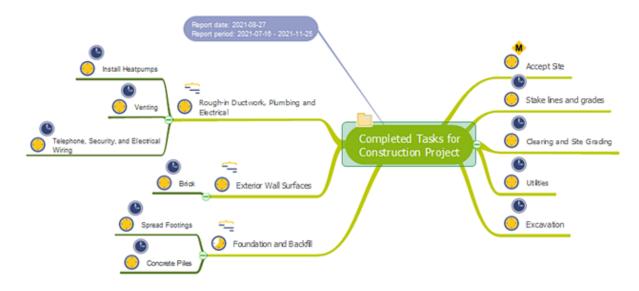
- 1. Find out MINDMAP reports in the Solutions panel.
- 2. Click the report icon to view its preview on the right panel.

Solutions	Completed Tasks The "Completed Tasks" report formed for your project represents the Mind Map composed from the hierarchy of your project tasks which are already completed at the time of the reporting period. By default, the reporting period is a current month, but you can change it to the desired one before generating this report. For the multiproject, a multipage Mind Map document will be created.	Report Parameters # × *Projects Ø Construction Project • B Renovation • Lease a New Facility • Ø Ktchen Renovation •
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3. Specify the report parameters using the Report Parameters panel.

Report Parameters 4									
▼Projects									
 ✓ Construction Project ↑ Site Arrangement □ Renovation □ Lease a New Facility ✓ Kitchen Renovation 									
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Report Period	Document Timeline	-							
Start	6/17/2024								
Finish	11/12/2024								
▼Units									
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- 4. Press **Generate** to create the report.
- 5. The report will be generated and opened in ConceptDraw MINDMAP

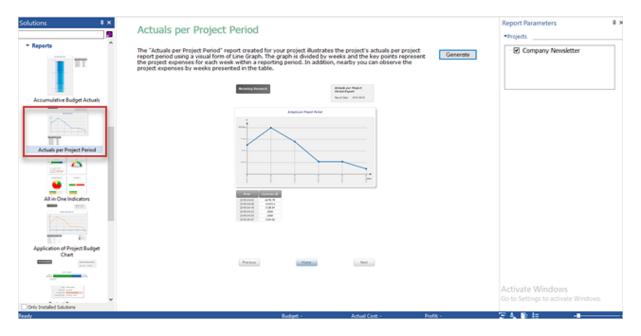


Visual Reports

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



Floating Panels	Solutions	Visual Reports	
			_ 85

Dashboards

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

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

create.

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

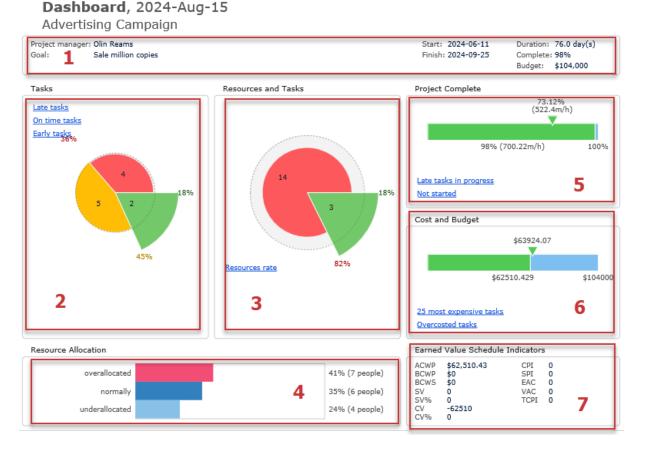
Solutions 4 × PM Dashboards • Examples • Reports	summarizing the information several parts displaying per that are late, on time and e underallocated, as well as l indicators. You can also find of Earned Value Schedule In reports. The usage of sever recognizing whether event This report for a multiprojec summarizing the information	port generated for your project erai information about you rin, the quantitative ratios ite, early and on time reso the bars deputing the dat dicators calculated for you a bright colours provides a bright colours provides and a bright colours provides and a bright colours provides infloating the individual about all projects' comple	ject offers the ConceptDraw state on one page, which is project, the quantitative ra of resources – overallocate and project complete, costs project, and inkis in addition distornal visual assistance in project and in dientification to project and in dientification to project and in dientification to project and in dientification to project and in dientification to the state of t	s divided into tios of project tasks d, normally and key performance and budget, the list hal graphical instantly he problem areas.	Report Parameters ♥ × ♥ Projects Image: Construction Project Image: Design a New Facity Image: Design and the Renovation Image: Design and the Renovation Image: Ste Arrangement
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PM Personal Time					
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- 3. Press **Generate** to create the dashboard.
- 4. <u>Project Dashboard</u>, <u>Radar Chart</u> and <u>Tactical Dashboard</u> will be generated and opened in ConceptDraw DIAGRAM.

Project Dashboard

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

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



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

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

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

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

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

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

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

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

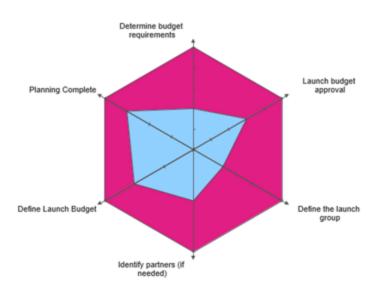
- ACWP (Actual Cost of Work Performed) is calculated as the sum of the products of actual costs of the task on the task complete for all tasks.
- BCWP (Budgeted Cost of Work Performed) is calculated as the sum of the products of baseline costs of the task on the task complete for all tasks.
- BCWS (Budgeted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

Radar Chart

Radar Chart visually shows the degree of project completion. Each axis on the diagram corresponds to one chain of linked milestones, and the number of marks on the axis corresponds to the number of millstones.

#	Name	Duration	Driadh	Start	Finish	1A	Aug 20	24			w33, 11 Aug 2024				
*	Name	Duration	Priority	Start	Finish	6	06	07	80	09	10	11	12	13	14
1	*∕ ⊡ Project	23 d	****	8/6/2024	9/5/202	2									
2	*∕ New Product Launch		★★★☆☆	8/6/2024			<u>^</u> _	8/6	/2024	4					
3	Phase 1 - Planning the Launch		****	8/6/2024			<u>^</u>	8/6	/2024	1					
4	Define the launch group		*****	8/7/2024						8/7/2	2024				
5	✤ Define sales goals		★★★☆☆	8/7/2024				4		8/7/2	2024				
6	 Define launch goals (launch timing and publicity objectives) 		****	8/8/2024					>	8/8	/2024				
7	V Identify partners (if needed)		****	8/8/2024					>	8/8	/2024	ł			
8	V Identify channel partners		★★★☆☆	8/8/2024					<u>></u>	8/8	/2024	1			
9	V Identify retail partners		★★★☆☆	8/8/2024				-	<u>></u>	8/8	/2024				
10	Identify online opportunities		****	8/8/2024					>	8/8	/2024				

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, 2024-Aug-15

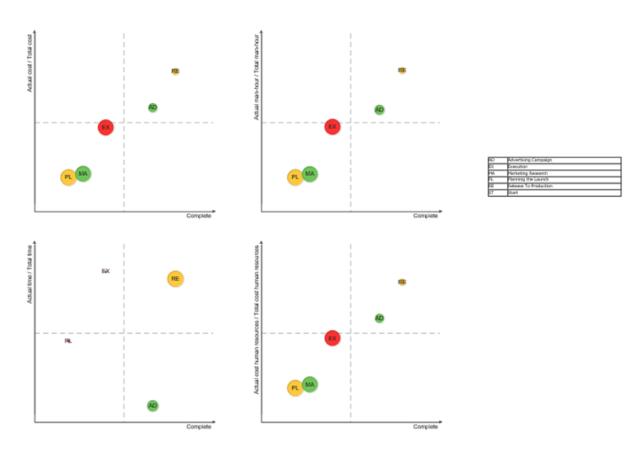
Tactical Dashboard

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.

	News	Chart	Finish		w33,	11 Au	ug 202	24				w34,	18 Au	ig 202	4				w35,
#	Name	Start	Finish	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
1	🛛 🗆 Marketing Research	8/14/2024	8/15/2024					-											
2	Define the launch group	8/14/2024	8/15/2024					(Jame	s Sm	ith;Jo	hn B	rown	Mary	Willi	ams	
3	Define sales goals	8/14/2024	8/15/2024																
4	Define launch goals (launch timing	8/14/2024	8/15/2024								Davio	l; Mik	e; Cla	rc					
5	▷ 🖻 Planning the Launch	8/15/2024	8/16/2024						-										
6	Define the launch group	8/15/2024	8/16/2024									Davio	l; Mik	e; Cla	rc				
7	Define sales goals	8/15/2024	8/16/2024																
8	Define launch goals (launch timing	8/15/2024	8/16/2024									Jame	s Sm	ith;Jo	hn B	rown;	Mary	Willi	ams

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

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

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

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

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

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

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

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

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

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

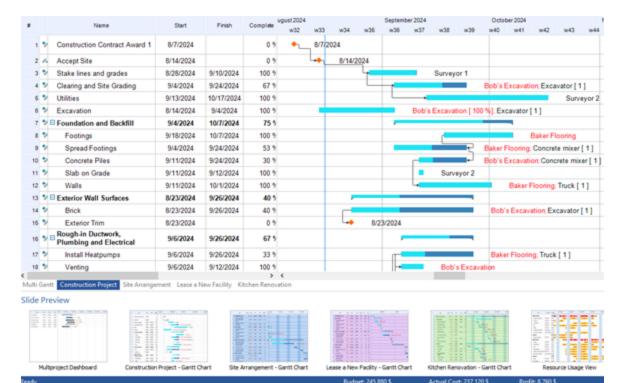
Total time is a project duration, is calculated as difference between project finish and start dates (Total time=Finish date - Start date).

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

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

Slide Navigator

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



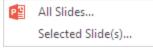
You can manage the slides in the Slide Preview panel using the context menu.



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



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Hypernote panel can be accessed from Panels button	-00	
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Notes - Notes section allows adding text Notes to project tasks, scheduled at the the <u>Gantt chart</u> View. You can edit text Notes both from the Notes panel and the Notes column on the project grid. To display the Notes column on the grid,

use the 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;
- invertink to email address;

hyperlink to other item in the current project file;

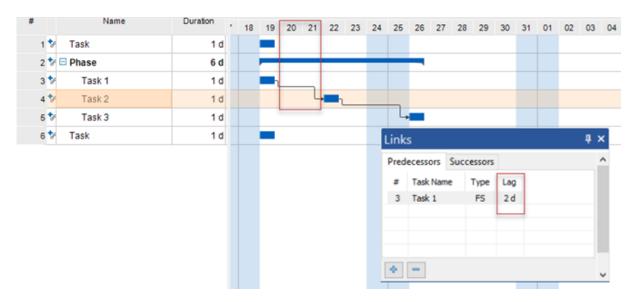
You can add a hyperlink by clicking the Hyperlink icon ¹/₂ in the <u>Gantt view</u> grid. To display the Hyperlink column on the grid, use the <u>Column Customization</u> dialog.

Any item with a hyperlink will be marked with icon:

An item that has multiple hyperlinks will display this icon: This panel brought together the functions of adding text notes and multiple hyperlinks. The earlier versions of ConceptDraw PROJECT had two different panels for these functionalities.

Links

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



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

#	Name	Duration	•	18	19	20	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04
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2	🏞 🖻 Phase	6 d			_																
3	🕈 Task 1	1 d			- ι		_														
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Keyboard Shortcuts and Mouse Actions

Keyboard	Operation
ConceptDraw OFFICE T	ools
Ctrl + Shift + M	Create ConceptDraw MINDMAP file
Documents and Windo	DWS
Ctrl + N	Create a New Document
Ctrl + O	Open a Document
Ctrl + S	Save the active document
Ctrl + Shift + S	Save the active document under a new file name
Ctrl + P	Print Preview
Ctrl + Alt + P	Print the active document
Ctrl + F	Activate the Quick Find tool
Ctrl + Shift + F	Open the Find dialog
Ctrl + H	Open the Replace dialog
Ctrl + F4	Close the active document
Ctrl + W	
Ctrl + Tab	Activate the next window
Ctrl + PageUp, Ctrl + PageDown	Activate the next project in Gantt Chart View
Alt + F4	Quit ConceptDraw PROJECT

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

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Operation
Expand selected phase
Link selected tasks
Unlink selected tasks
Go to selected task
Fast adding of new entities
New project
New project
Delete project
Switch the View
Switch to Gantt Chart View
Switch to Resource List View
Switch to Multiproject Dashboard
Switch to Resource Usage View
Call Reports dialog
Horizontal Scroll
Change zoom level (in cycle)
Scroll up in Print Preview

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