

- o User Interface Reference
- o Keyboard Shortcuts

Welcome to ConceptDraw PROJECT 15 for Windows	1
Toolbar Tour	2
Quick Access	3
File	4
Print Preview	6
Import	7
Export	8
Home	9
Microreports	12
Deadline Reminders.....	13
Project Baseline	15
View	16
Gantt Chart	18
Gantt Chart Context Menu.....	21
Resources	23
Resources Context Menu.....	25
Multiproject Dashboard	26
Multiproject Context Menu.....	28
Multiproject Settings.....	29
Resource Usage	31
Filters Mode	33
Critical Path	35
Share	36
DIAGRAM	37
MINDMAP	38
MS Excel	40
Dialogs	41
Timescale	42
Column Customization	43
Edit Markers	48
Predecessors	49
Filters	50
Options	53
Document Properties	55
Find	63
Replace	64
Floating Panels	65
Task	66
Project	70
Resource	71
Assign Resources	72

Solutions	73
Tabular Reports	75
Custom Repots.....	79
Mind Map Reports	81
Visual Reports	83
Dashboards	86
Project Dashboard.....	87
Radar Chart.....	90
Tactical Dashboard.....	91
Slide Navigator	93
Hypernote	94
Links	95
Keyboard Shortcuts and Mouse Actions	96

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.

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

[Benefits](#)

[ConceptDraw Maintenance Assurance](#)

[Technical Support](#)

Manage Plans, Reports, and Changes

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

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

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

Your Benefits

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

ConceptDraw Maintenance Assurance

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

Technical Support

We offer unlimited free technical support to our users.

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

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

Toolbar Tour



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

[Quick Access](#)

[File](#)

[Home](#)








[View](#)

[Share](#)

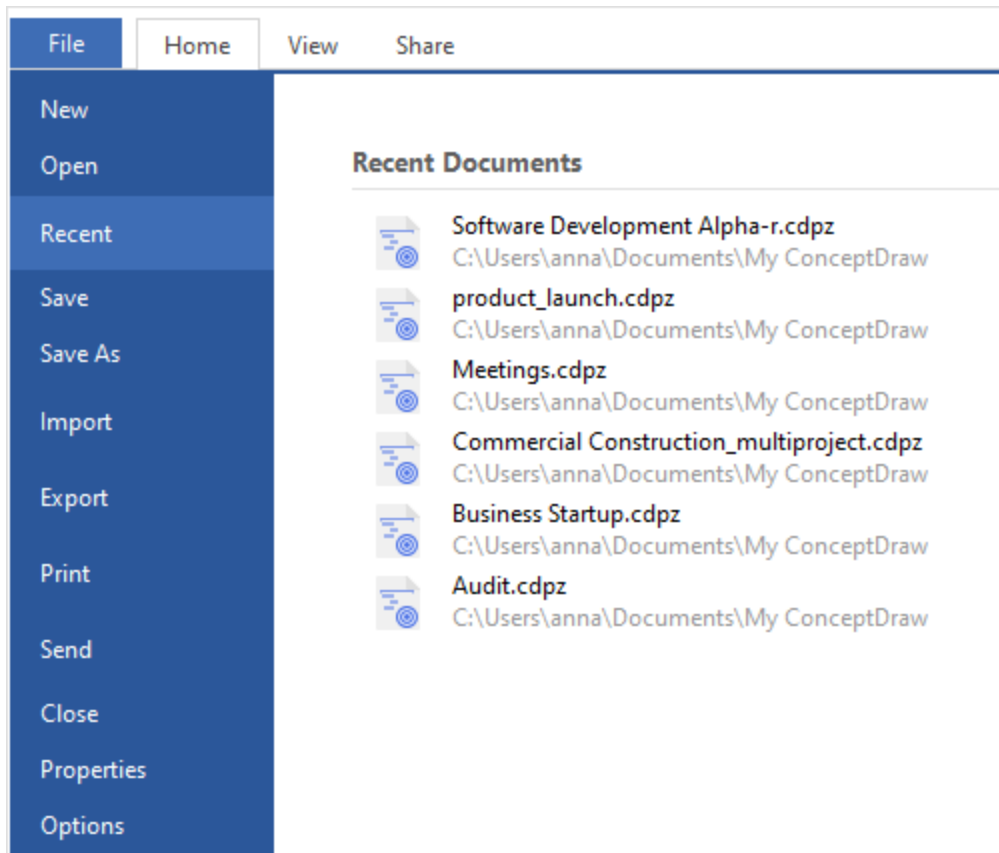
Quick Access



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

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

File



New	Create a new document.
Open	Open an existing project.
Recent	Show recently opened files.
Save	Save the current document.
Save As	Save a copy of the document.
Import	Import the document.
Export	Export the document.
Print	Preview and print the document.
Send	Send a document.
Close	Close ConceptDraw PROJECT.
Properties	Contains options allowing you to configure the parameters of the particular document in the Document Properties dialog.
Options	Allows to configure the application settings in the Options dialog. It allows you to change default application settings that will be applied to all new 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 [View](#) tab to setup the printed document view.



Print Preview

Opens [Print Preview](#) 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](#)

Print Preview

Preview and make changes to pages before printing.



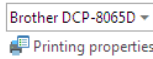
Print



Print the current document

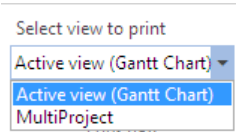


Print to Adobe PDF using the current print settings



Select the printer and set the printer properties

Print View



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

Scaling

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

Grid

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

Timescale

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

Legend



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

Page Setup

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

Preview

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

Import

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



MS Excel - Create project in new document from text outline



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



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



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

Export

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



Adobe PDF - Export the document to Adobe PDF



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



MS Project File - Export the document to Microsoft Project XML



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



Text Outline - Export the document to the text outline

Home



Clipboard



Paste

Paste content from the Clipboard



Cut

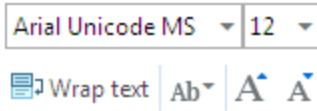
Cut selection and put it into Clipboard.



Copy

Copy the selection and put it into the Clipboard.

Format Text



Font

Select font face

Font size

Select font size

Grow font

Increase font size

Shrink font

Decrease font size

Make upper case

Convert selected to upper case

Make lower case

Convert selected to lower case

Make title case

Convert selected to title case

Make sentence case

Convert selected to sentence case

Wrap text

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

Solutions



Solutions

Activate [Solutions](#) panel

Select View



Gantt Chart

Switch to [Gantt Chart](#) View



Resources

Switch to [Resource](#) list



Multiproject

Switch to [Multiproject](#) Dashboard



Resource usage

Switch to [Resource usage](#) view



Reports

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

Microreports



Microreports

Generate [Microreports](#)

General



Add

Add new item to end



Insert

Inserts new item into selected position



Add sub item

Add sub item to selected item



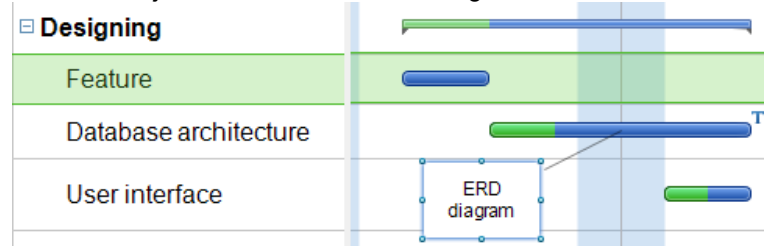
Delete

Delete selection



Add text box

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



Link



Link

Link two or more selected items

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



Unlink

Unlink two or more selected items

Link



Edit button

Edit predecessors using the [Predecessors](#) dialog

Move



Indent

Indent selected item (Move selected item one position right)



Outdent

Outdent selected item (Move selected item one position left)



Up

Move selected item one position up



Down

Move selected item one position down

Go To



Selected

Show selected task on Gantt Chart



Today

Show today's tasks on Gantt Chart view

Markers



Markers

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

Edit Markers button

Opens the [Edit markers](#) dialog

Calendar



Calendar

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

Baseline



Save

Save [Baseline](#) settings for selected tasks

Editing



Find

Activate [Find](#) dialog



Replace

Activate [Replace](#) dialog



Smart Enter

On/Off the **Smart Enter Mode**.


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

Microreports



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

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

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

List of reports available for various project tables:

[Gantt Chart](#)

Phase

1. [Deadline reminder](#) for all projects.
2. [Deadline reminder](#) for the current project.
3. Today tasks list.
4. Critical tasks list.
5. Today tasks list with assigned resources
6. Today resources list

Task

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

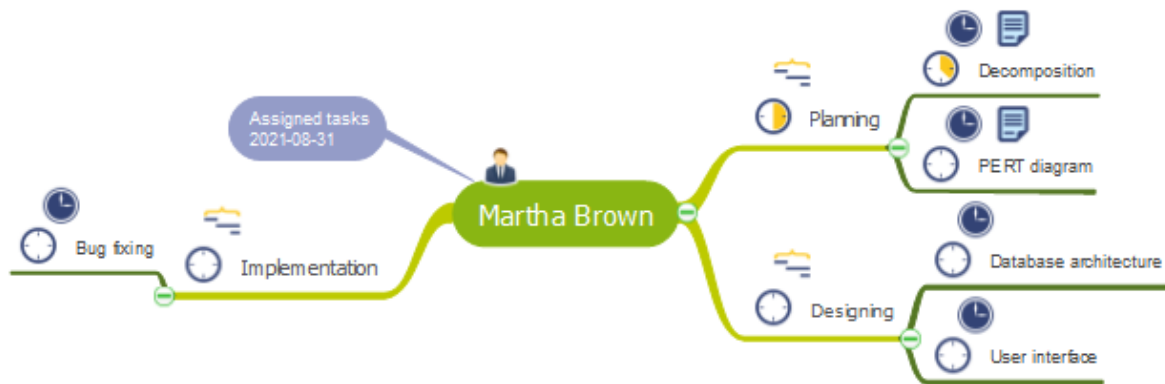
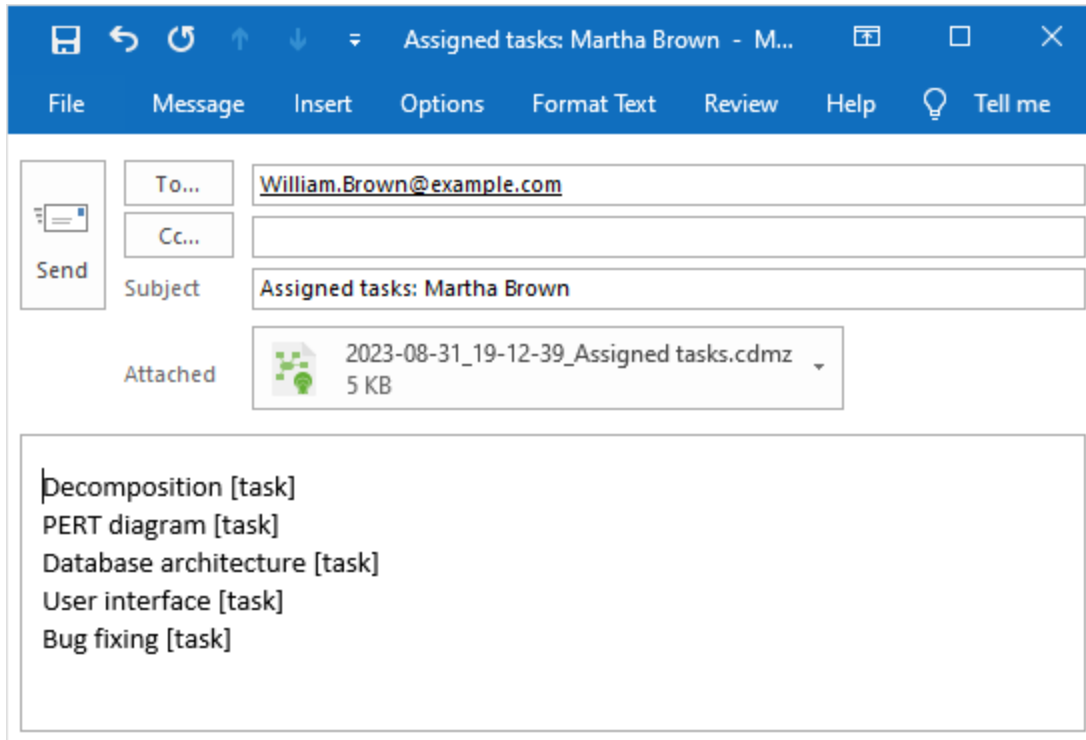
[Resources](#)

1. Today tasks list for all resources.
2. Today tasks list.
3. Milestones.
4. Objectives.
5. Projects list.
6. Next tasks.
7. Assigned tasks.
8. Critical tasks.
9. [Deadline reminder](#) for the selected resource.

[Multiproject Dashboard](#)

1. [Deadline reminder](#) for all projects.
2. Today tasks list.
3. Today resources list.
4. Nearest milestones
5. [Deadline reminder](#) for the current project.

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



Deadline Reminders

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

Select a [project](#), [task](#), or [resource](#). You need to choose the needed type of [Microreport](#) from the drop-down list. Ready-to-send e-mails will be generated. A task is included in the Deadline Reminder if all of the following conditions are met. You can check them on the [Task](#) panel.

1. The task has a Deadline parameter checked.

2. Task completion is less than 100%.

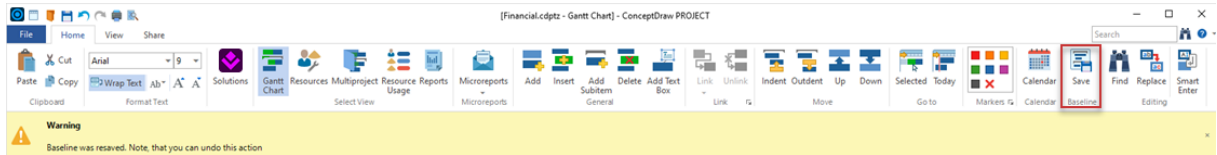
3. The Task Finish date is later than the report date.

Ready-to-send deadline reminders can be created automatically every time you run a project file. Simply check the "Generate deadline Microreports" option in the ConceptDraw PROJECT [Options](#) dialog box.

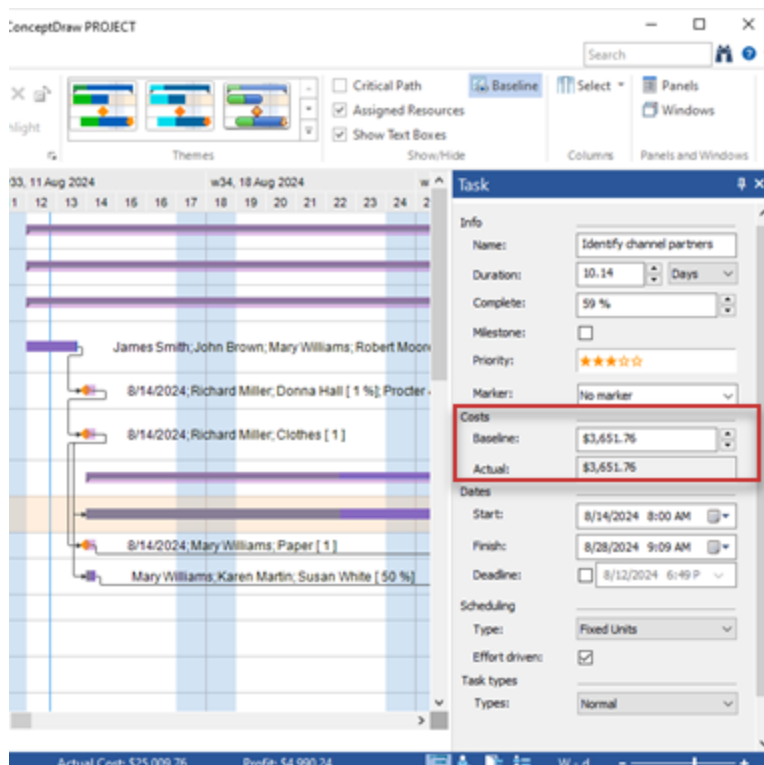
Project Baseline

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

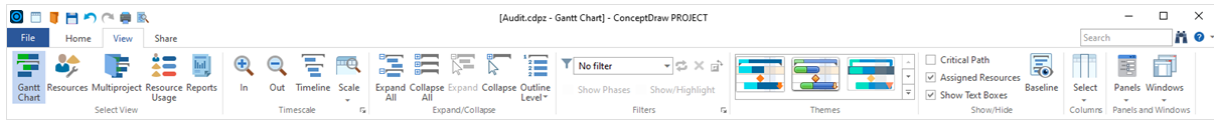
To save a Baseline, click the Save Baseline button  on the Home tab. The following message will appear:



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



View



Select View



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



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



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



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

Timescale



Zoom in



Zoom out



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



Scale: Show the scale choice drop-down list.

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

Expand/collapse



Expand all: Expand all sub items.



Collapse all: Collapse all sub items.



Expand: Expand selected item.

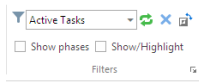


Collapse: Collapse selected item.






Outline level: Show tasks of the certain outline level.

Filters



Select Filter:

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

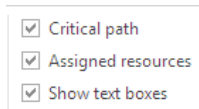
- Show phases:** Show/Hide phases.
- Show Highlight:** Show/Hide Highlight.
- Edit Filter button:** Open the [Filters](#) Dialog.


Themes



Themes: Select the one of the available Gantt chart views

Show/Hide



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

Columns



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


Panels and Windows

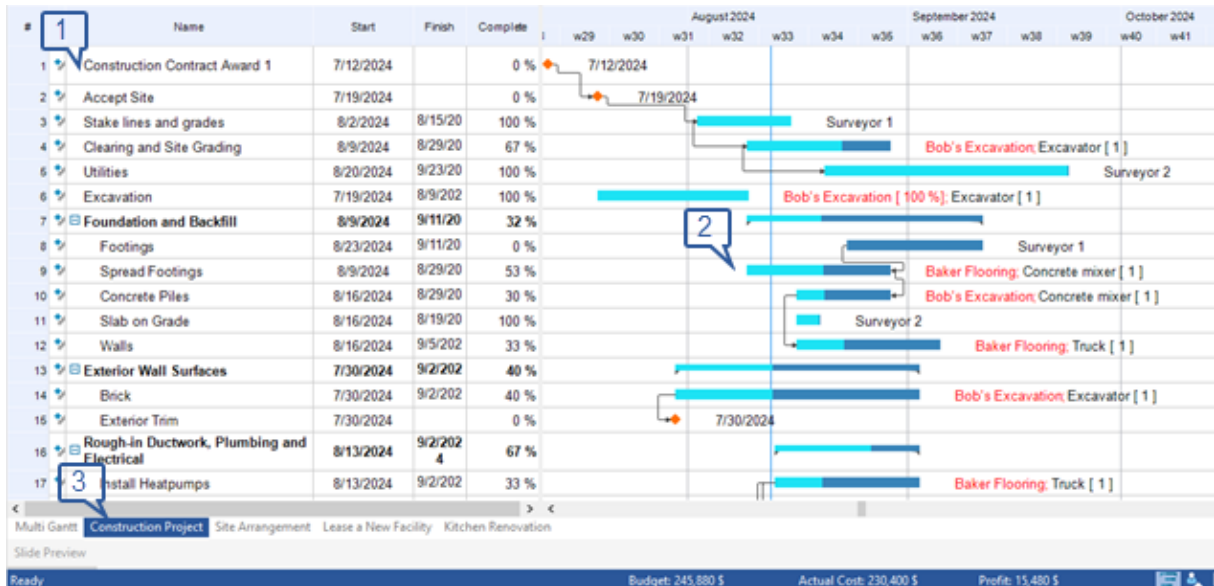


Panels: Manage [Floating panels](#).

Windows: Shows the list of opened windows.

Gantt Chart

Typically each project has tasks and phases. Every task represents a single unit of work — a single step in a multi-step project. A group of related project tasks can be joined into phases. The Gantt chart window consists of two parts: the project outline — a list of the project tasks and phases and its graphic representation — Gantt chart. The Gantt chart is the default view of the project file when you run ConceptDraw PROJECT. Also, it is accessible by the button  on the [Home](#) or [View](#) tab.



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

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

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

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

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

#	Name	Start	Finish	Complete	Cost	Baseline Cost	Resources
2	Accept Site			0 %	0 \$	0 \$	
14	Brick		2024	40 %	40,700 \$	40,700 \$	Bob's Excavation, Excavator
4	Clearing and Site Grad		2024	67 %	24,700 \$	32,700 \$	Bob's Excavation, Excavator
10	Concrete Piles		2024	30 %	16,700 \$	16,700 \$	Bob's Excavation, Concrete mixer
1	Construction Contract Award 1	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 Backfill	9/4/2024	10/7/2024	32 %	69,300 \$	67,700 \$	
17	Install Heatpumps	9/6/2024	9/26/2024	33 %	19,900 \$	19,900 \$	Baker Flooring, Truck
19	Panelboards	9/6/2024		100 %	0 \$	0 \$	Surveyor 2

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.

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

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

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

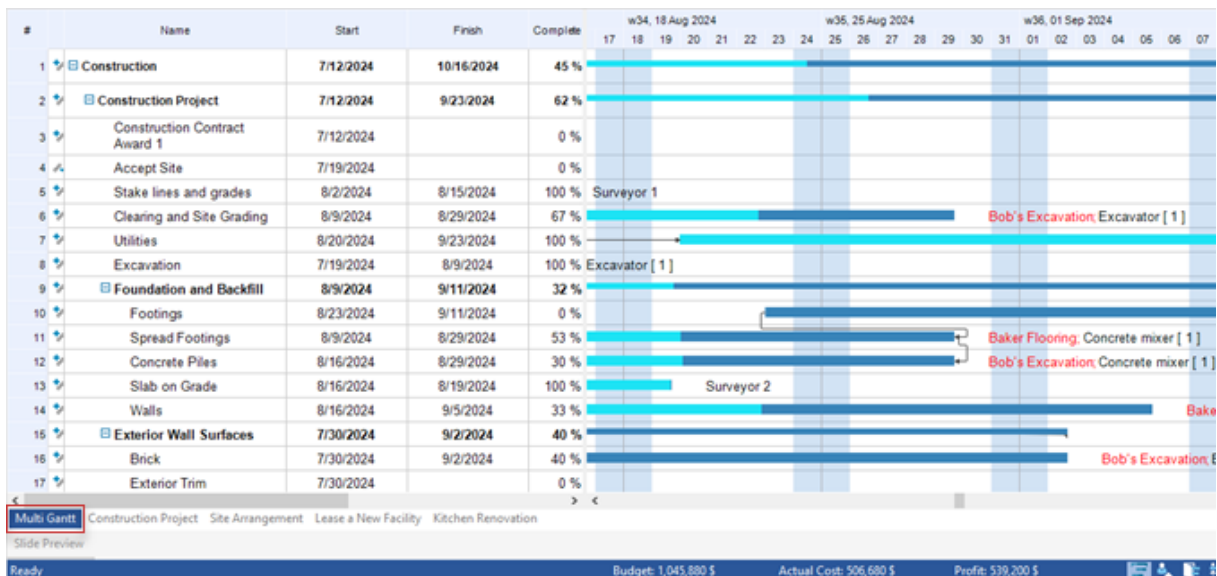
Links between dependent tasks are shown with arrows. The most common link type, **finish to start**, is assigned by the following way: first select the tasks to which you want to assign links, and then use one of the following:

- The **Link** group in the [Home](#) tab
- The context menu of the Gantt chart view

Any link type can be customized using the dialog [Predecessors](#).

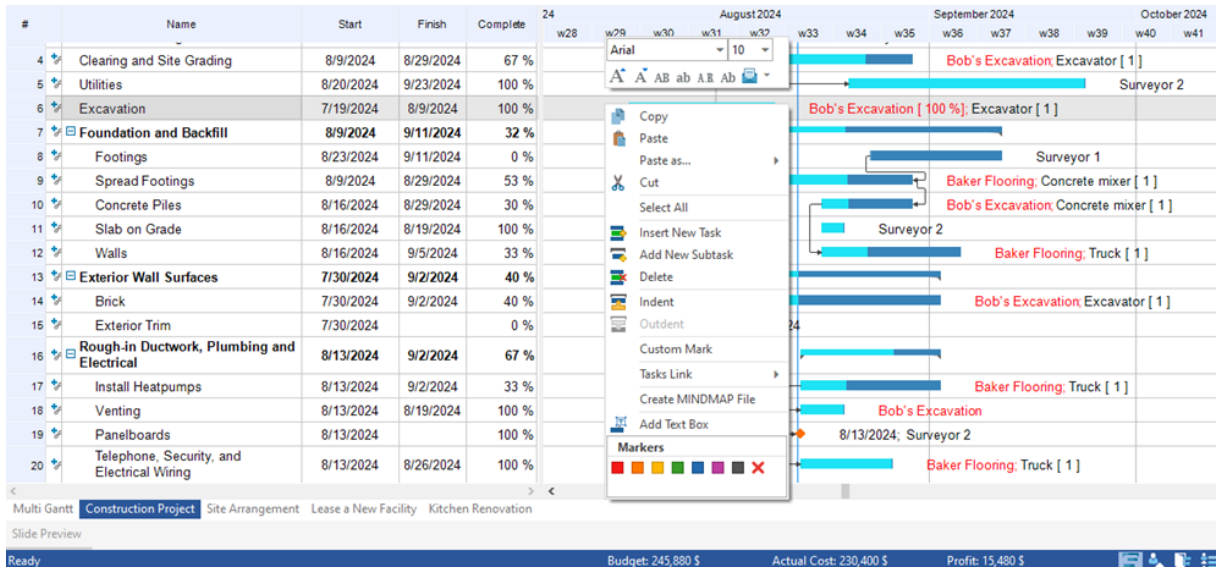
The widths of the text and graphic parts of the diagram can be changed. For this set the cursor on the dividing line and draw to the needed direction.

3. The navigation bar at the bottom of the Gantt chart window allows you to quickly navigate between the multiple projects Gantt windows that your [multiproject](#) contains. Use the "Multi Gantt" option to manage all the projects of a multiproject file from a single window.

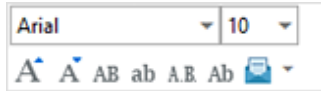


Gantt Chart Context Menu

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

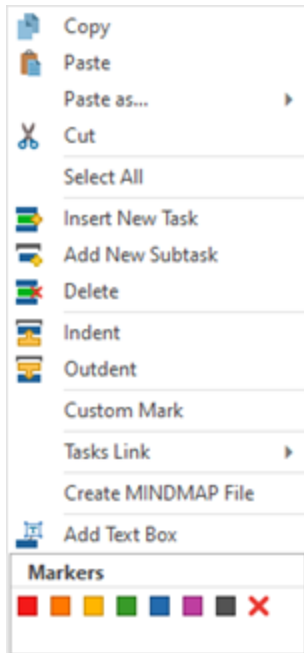


Gantt Chart Context Menu



Text Format

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



Microreports

Generate [Microreports](#)

Copy

Copy the selection and put it into the Clipboard.

Paste

Paste content from the Clipboard.

Paste as

Options for pasting tasks copied to the clipboard.

Cut

Cut selection and put it into Clipboard.

Select All

Select all tasks.

Insert New Task

Inserts new task into selected position.

Add New Subtask

Add sub task to selected task.

Delete

Delete selection.

Indent

Indent selected tasks (Move selected item one position right).

Outdent

Outdent selected tasks (Move selected item one position left).

Custom Mark

Mark the tasks that need to be represented in the diagram.

Task Link

[Link](#) two or more selected items.

Create MINDMAP File

Generate a mind map (*.cdmz) from selected tasks.

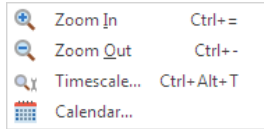
Add Text Box

The file will be opened in ConceptDraw MINDMAP. Add a text box to selected item.

Markers


Make the selected items looking like [marked](#) with a highlighter.

Gantt Chart Timescale Context Menu



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



Resources

By clicking the  button on the [Home](#) or [View](#) 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 [Gantt Chart](#), select a task and then assign resources to task using the [Assign Resources](#) panel.

The information on the resources can be edited in the [Resource](#) panel.

	Name	Type	Cost	Group	E-Mail	Notes
1	Bob's Excavation	Work	165 \$/h	Excavation	bob_excavation@gmail.com	
2	Surveyor 1	Work	100 \$/h	Surveyor	surveyor2@gmail.com	
	Baker Flooring	Work	140 \$/h	Flooring	baker_flooring@gmail.com	
2	Surveyor 2	Work	100 \$/h	Surveyor	surveyor2@gmail.com	
5	Excavator	Equipment	700 \$	Excavation,Landscape		
6	Truck	Equipment	700 \$	Excavation,Landscape		
7	Concrete mixer	Equipment	700 \$	Flooring		
8	Tom Sheldon	Work	150 \$/h	Surveyor,Excavation	tom_sheldon@gmail.com	
9	Rich Gannon	Work	150 \$/h	Surveyor,Flooring	rich_gannon@gmail.com	
10	Joe Smith	Work	150 \$/h	Surveyor,Flooring	joe_smith@gmail.com	
11	Tom Farrell	Work	150 \$/h	Surveyor,Landscape		
12	Mike Grabowski	Work	150 \$/h	Surveyor,hvac		
13	Jane Postal	Work	150 \$/h	Landscape		
14	Pat O'Tormey	Work	150 \$/h	Landscape		
15	HVAC R Us	Company	5,000 \$	hvac		
16	Exteriors Unlimited	Material	5,000 \$	Landscape		

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

2. Resources can be added by pressing **Enter**, or from the [context menu](#) by applying the command **Add Resource**.

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

Work resources – People assigned to complete a task. Has a cost depending on the time unit.

Material resources – Consumables used as project proceeds. Has a cost per unit.

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

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


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

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

5. Group. You can categorize project resources by groups. To add a group name, just click the field and type it. The same resource can be engaged to several groups. Use the [Resource](#) panel for grouping.

Assigning a resource group to a task means assigning all resources included in this group in an equal percentage. Grouping resources allows you to view and report summary information of resources and assignments.

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

7. Click the icon  to open the Work resource individual [calendar](#). You can modify the common working hour schedules individually for each employee.

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

#	Name	Type	Cost	Group	E-Mail
3	Baker Flooring		/h	Flooring	baker_flooring@gmail.com
1	Bob's Excavation		/h	Excavation	bob_excavation@gmail.com
7	Concrete mixer		\$	Building	
5	Excavator		\$	Excavation	
16	Exteriors Unlimited	Work	150 \$/h	Building	
15	HVAC R Us	Work	150 \$/h	Facilities	
13	Jane Postal	Work	150 \$/h	Facilities	
10	Joe Smith	Work	150 \$/h	Facilities	
12	Mike Grabowski	Work	150 \$/h	Building	
14	Pat O'Tormey	Work	150 \$/h	Building	
9	Rich Gannon	Work	150 \$/h	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	Type	Cost	Group
Bob's Excavation		Arial 9	Excavation
Surveyor 1		A A AB ab A.B Ab	Surveyor
Baker Flooring	Work	140 \$/h	Flooring
Surveyor 2			Surveyor
Excavator	E		Excavation
Truck	E		Excavation
Concrete mixer	E		Flooring
Bob's Excavation			Excavation
Excavator	E		Excavation
Truck	E		Excavation
Baker Flooring			Flooring
Concrete mixer	Equipment	700 \$	Flooring

Resources List Context Menu

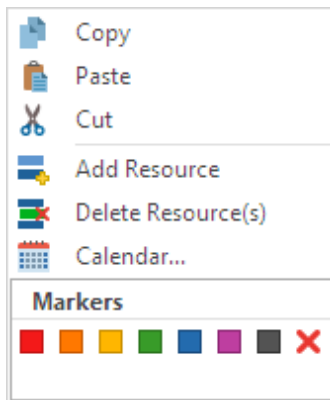


Text Format

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

Microreports

Generate [Microreports](#)



Copy

Copy the selection and put it into the Clipboard

Cut

Cut selection and put it into Clipboard.

Paste

Paste content from the Clipboard

Add Resource

Inserts new resource

Delete Resource(s)

Delete selected resources


Calendar

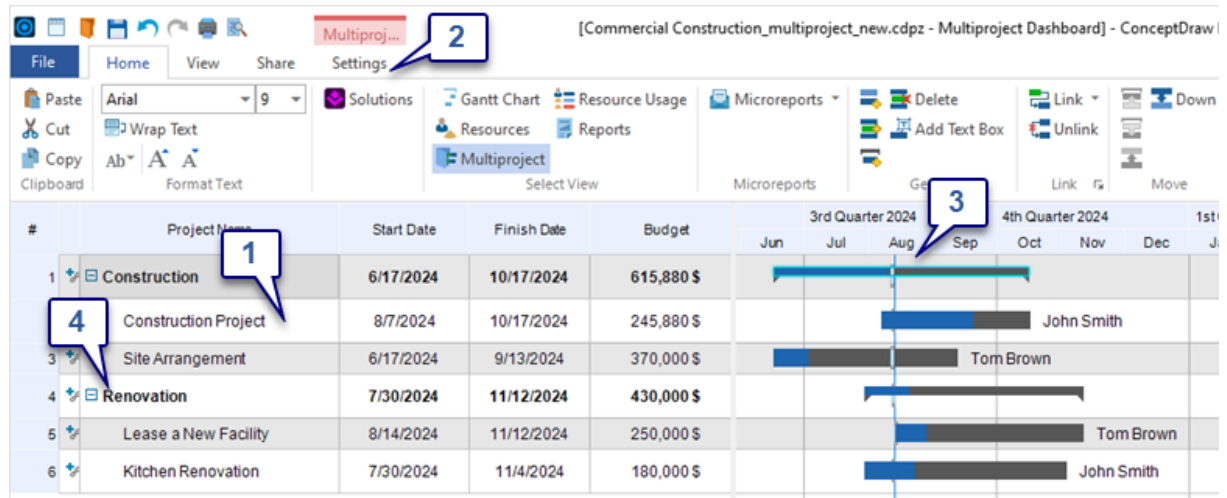
Opens the Standard [Calendar](#) dialog

Markers

Set color markers

Multiproject Dashboard

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



- 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](#).
- You can set the visual parameters of the multiple project Gantt chart using the [Multiproject Settings](#) tab.
- The timescale can be changed. This can be done in the [Timescale](#) dialog, that can be accessed from the [context menu](#).
Also can change the task start/end date, its duration and completion . To change start/end dates move the bar by your mouse. To change the task duration you need to switch to [Gantt Chart](#) view.
- Project Group treats each project similarly to a phase, so all the properties are aggregated from the projects you include. Please note that Project Group only groups projects, so it does not have its own tasks. You can group projects using the [context menu](#) . You can then select a project and use the **Group Projects** command from the context menu or create a **New Project Group** where you can then move your projects to.

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

#	Project Name	Start Date	Finish Date	Budget	Company	Project Manager
1	Construction			615,880 \$		
2	Construction Project			245,880 \$	ABC Construction	John Smith
6	Kitchen Renovation			180,000 \$	ABC Construction	John Smith
5	Lease a New Facility	8/14/2024	11/12/2024	250,000 \$	Constructor Ltd	Tom Brown
4	Renovation	7/30/2024	11/12/2024	430,000 \$		
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;

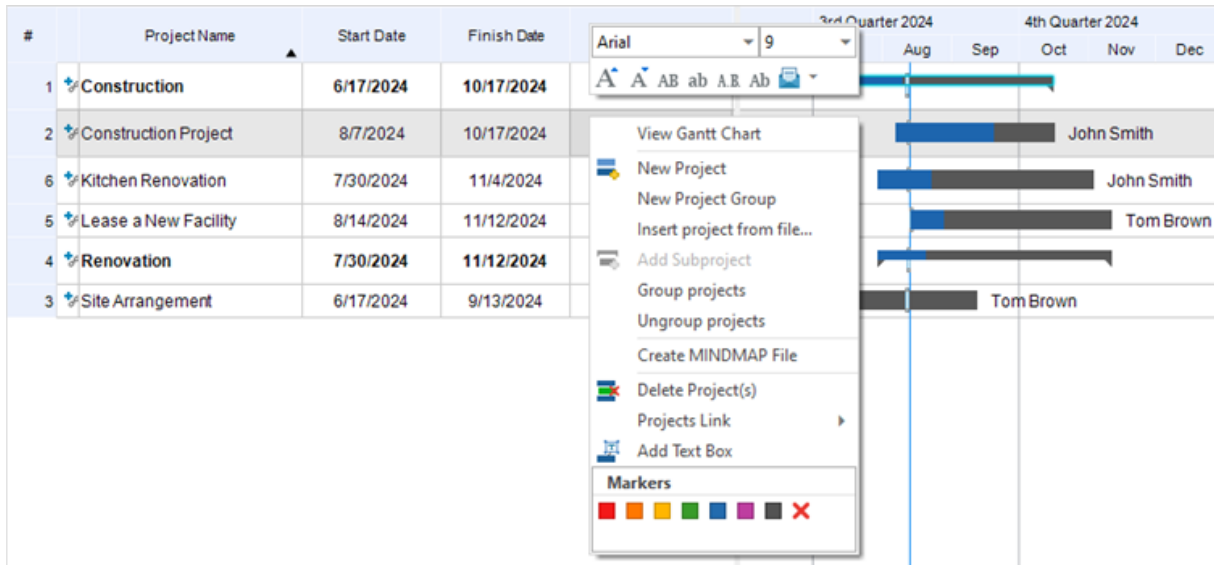
Hide Column - Hide the selected column;

Column Customization - invoke the [Column Customization](#) dialog.

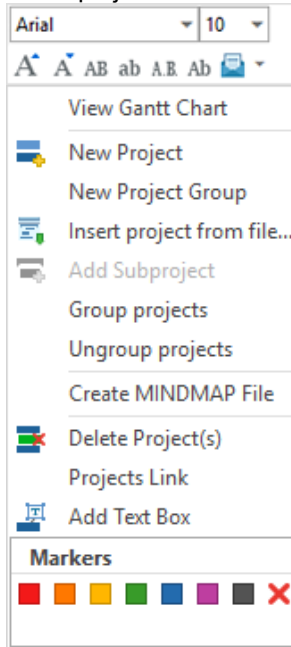
The width of a column can also be changed. For this set the cursor to the right edge of the column (the cursor should turn a double-sided arrow) and drag it to the needed direction.

Multiproject Context Menu

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



Multiproject Context Menu



Text Format Microreports

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

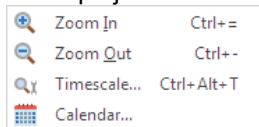
- View Gantt Chart**
- New Project**
- New Project Group**
- Insert project from file**
- Add Subproject**
- Group Projects**
- Ungroup Projects**
- Create Mind Map**

Switch to [Gantt Chart View](#)
Add a new project
Add new project group
Add a new project from file
Add sub project to selected project
Join selected projects into a Project Group
Split the Project Group into separate projects
Generate a multipage mind map (*. cdmz) from selected projects. The file will be opened in ConceptDraw MINDMAP

- Delete Project (s)**
- Project Link Link**
- Add Text Box**
- Markers**

Delete selected project (s)
[Link](#) two or more selected projects
Add a text box to selected item
Make the selected items looking like [marked](#) with a highlighter

Multiproject Timescale Context Menu



- Zoom In**
- Zoom out**
- Timescale**

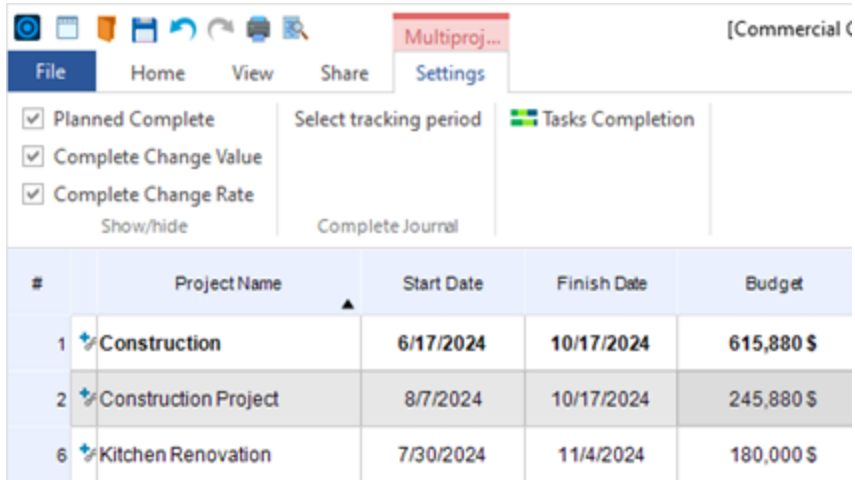
Displays timescale in more detail (day instead of weeks, etc.)
Displays a more generalized timescale (weeks instead of days, etc.)
Calls [Timescale](#) dialog that allows to customize timescale appearance. It gives more possibilities for this than **Zoom In** and **Zoom Out** commands. On the other hand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

- Calendar**

Opens the Standard [Calendar](#) dialog

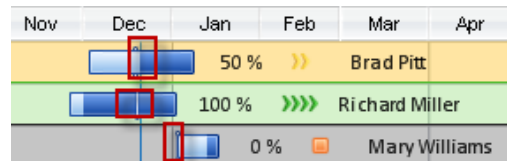
Multiproject Settings

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

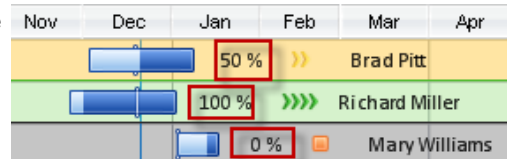


Show/hide

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



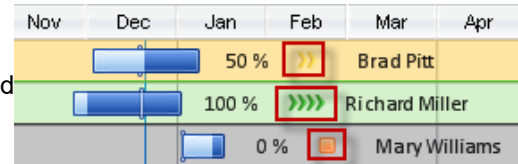
Complete change value Show/hide the change of the complete value



Complete change rate

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

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



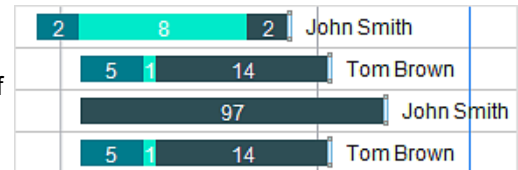
Tracking period

Select tracking period
 Set the frequency of complete values verification


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

Task Completion

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



Resource Usage

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

Name	Project Name	Expenses	w36, 01 Sep 2024							w37, 08 Sep 2024								
			31	01	02	03	04	05	06	07	08	09	10	11	12	13		
Bob's Excavation		148,80																
Clearing and Site Grading	Construction	24,000						100%										100%
Excavation	Construction	25,600				100%												
Concrete Piles	Construction	16,000																100%
Brick	Construction	40,000					100%											100%
Venting	Construction	8,000 \$															10	100%
Design provides Construction	Site Arrangement	17,600 \$																
Design provides Construction	Lease a New Facility	17,600 \$															10	100%
Surveyor 1		19,200																100%
Stake lines and grades	Construction	8,000 \$																100%
Footings	Construction	11,200																
Baker Flooring		84,480																100%
Surveyor 2		21,600																100%

- It is a kind of a Gantt Chart which shows you all resources with their usage by tasks and money.
1. You can find out which projects resources are used in, what tasks are assigned to them, and finally, how much it costs.
 2. To quickly move to the [Resource view](#) just make double-click on a resource name.
 3. To move to the [Gantt chart](#) view make a double-click on a task name.
 4. The graphic part of the diagram displays tasks as bars. Bars are arranged in accordance with the [Timescale](#), displaying the task start /end time, duration, and percentage of resource working time occupied on a task.
 5. If the total resource load currently exceeds 100%, the resource chart bar will show it with a red color.

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"		
"14"" Bulkhead for Crown & Faux"		
"15"" Deep Wall at Pantry"		
2x4 Wall Studs		
Alarm Rough-In	Kitchen Renovation	1,200 \$
Architect designs preliminary Space Plan	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 Descending
- No Sorting
- Hide Column
- Column Customization...

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;

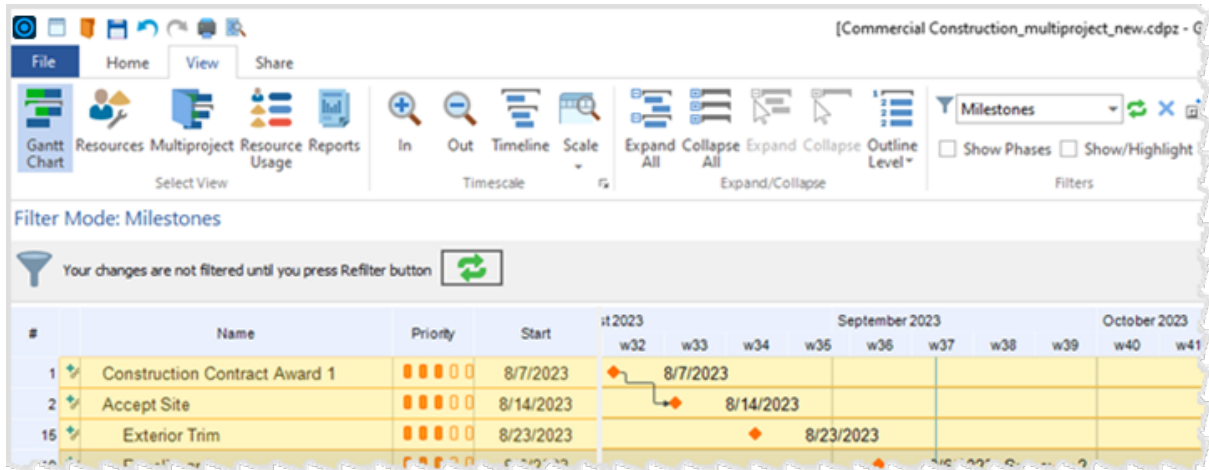
Column Customization - invoke the [Column Customization](#) dialog.

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.

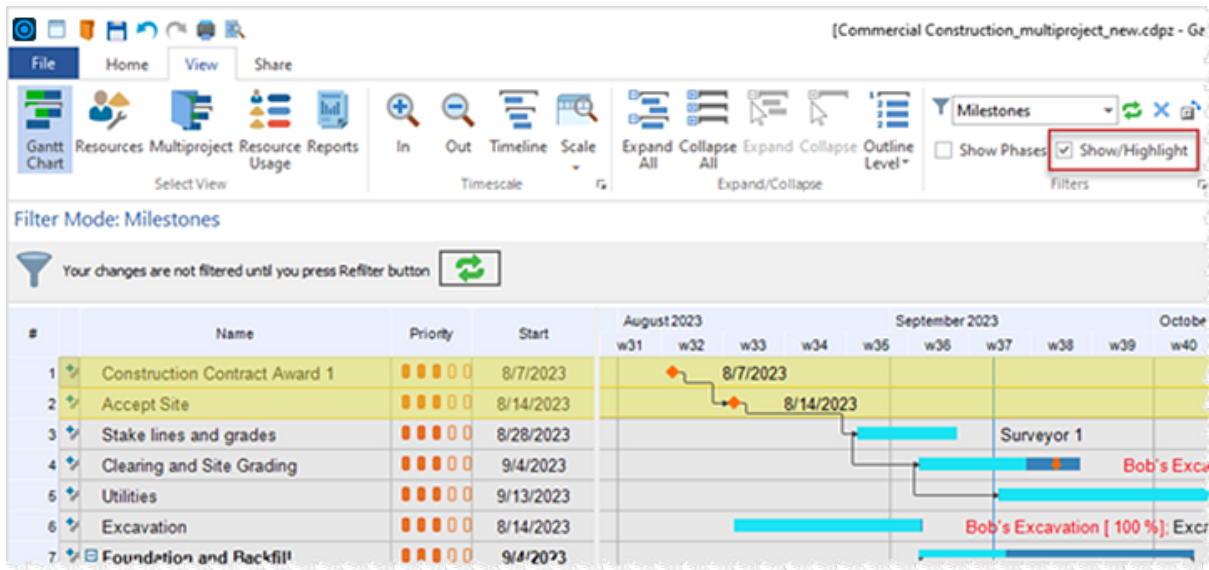
Filters Mode

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 [View](#) tab.

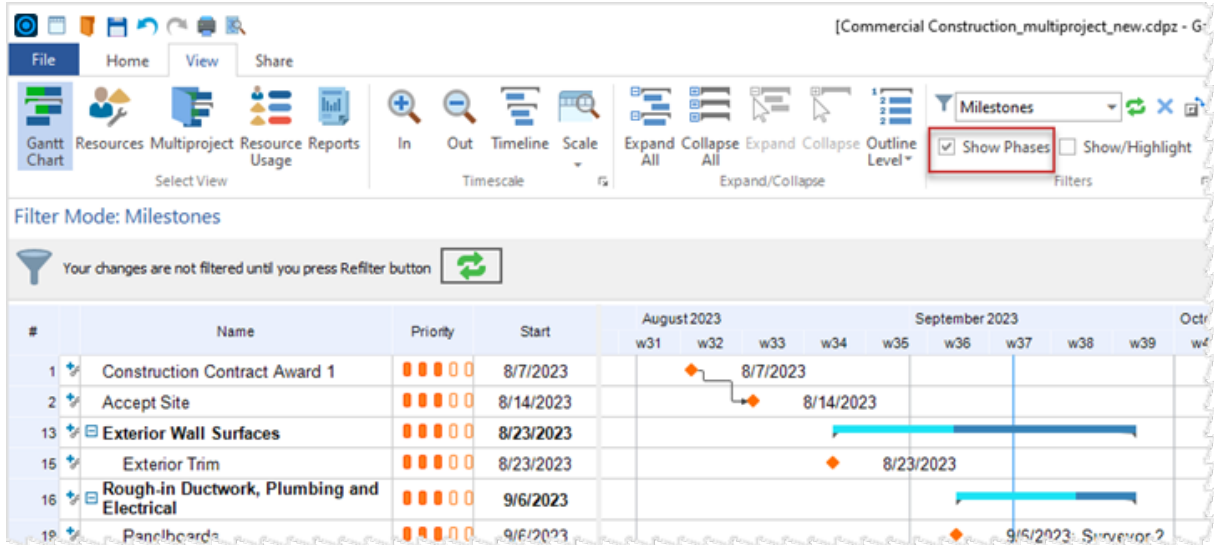
1. Select one of the embedded filters from the drop-down menu.



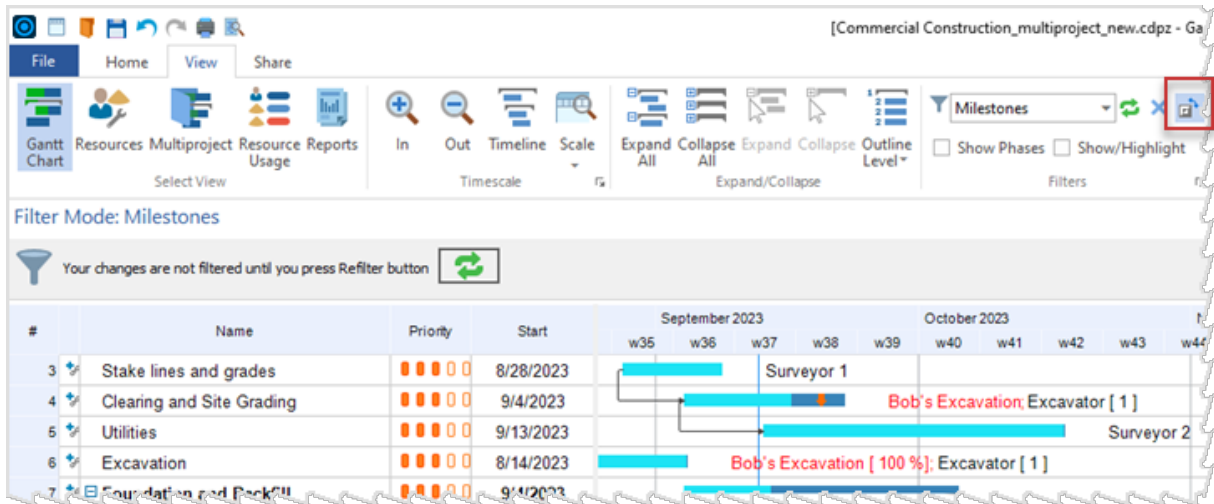
2. Toggle **Show/Highlight** item, to highlight filtered items without hiding the other data.




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

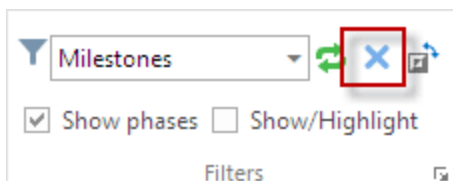


4. You can reverse filtering condition using **Invert** button.



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

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



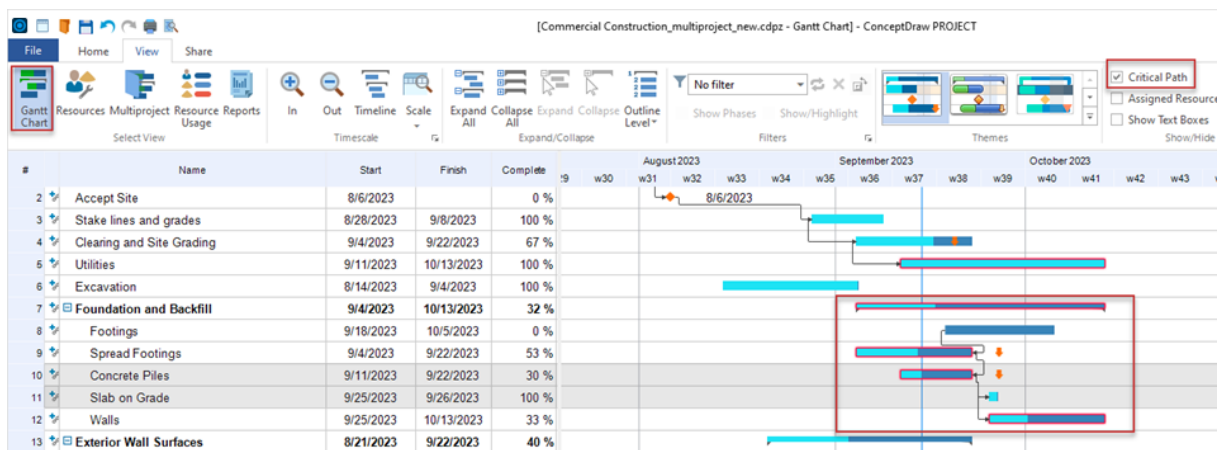
You can customize the filtering options using the [Filters](#) dialog.

Critical Path

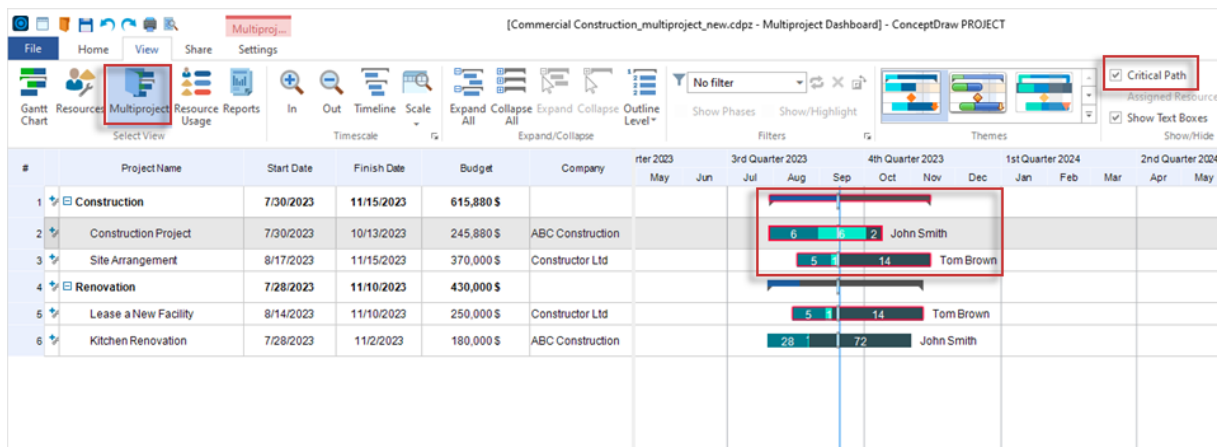
Critical Path Analysis helps identify the minimum length of time needed to complete a project. When you need to run an accelerated project, the critical path will help you identify which project steps you should accelerate to complete the project within the available time. Select the Gantt Chart View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

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

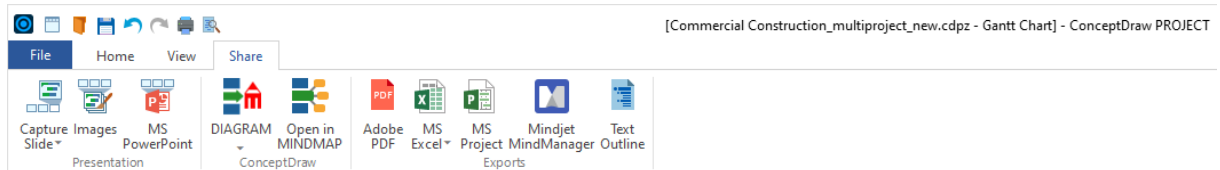
Critical Path is defined for each task individually. A task is displayed as Critical if its slack (delay potential) does not exceed the value specified in the Document Properties, [Advanced](#) tab and this delay would delay the entire project.



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



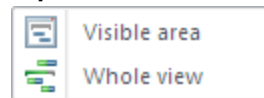
Share



Presentation



Capture Slides



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

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



Images: Save slides in PNG format.



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

ConceptDraw

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

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

Exports



Adobe PDF: Export the document to Adobe PDF.



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



MS Project: Export the document to Microsoft Project XML.



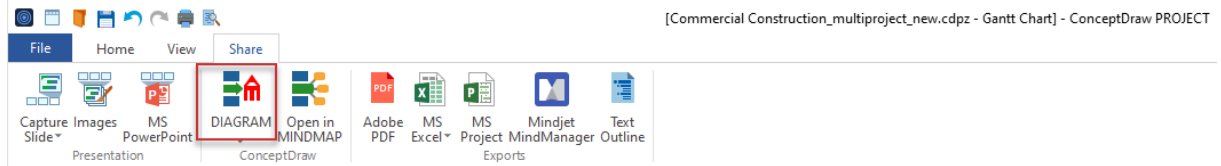
Mindjet MaindManager: Save the document in Mindjet MindManager format (MMA).



Text Outline: Export the document to text outline.

DIAGRAM

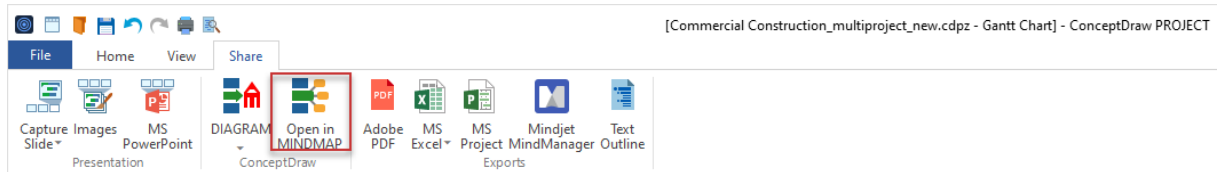
Project management diagrams give you the ability to view at a detailed level project attributes such as project scope, logical connections in the project, critical paths, key events on the timeline, milestones, tasks, calendars for work, and resource utilization. Transforming project data into different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



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

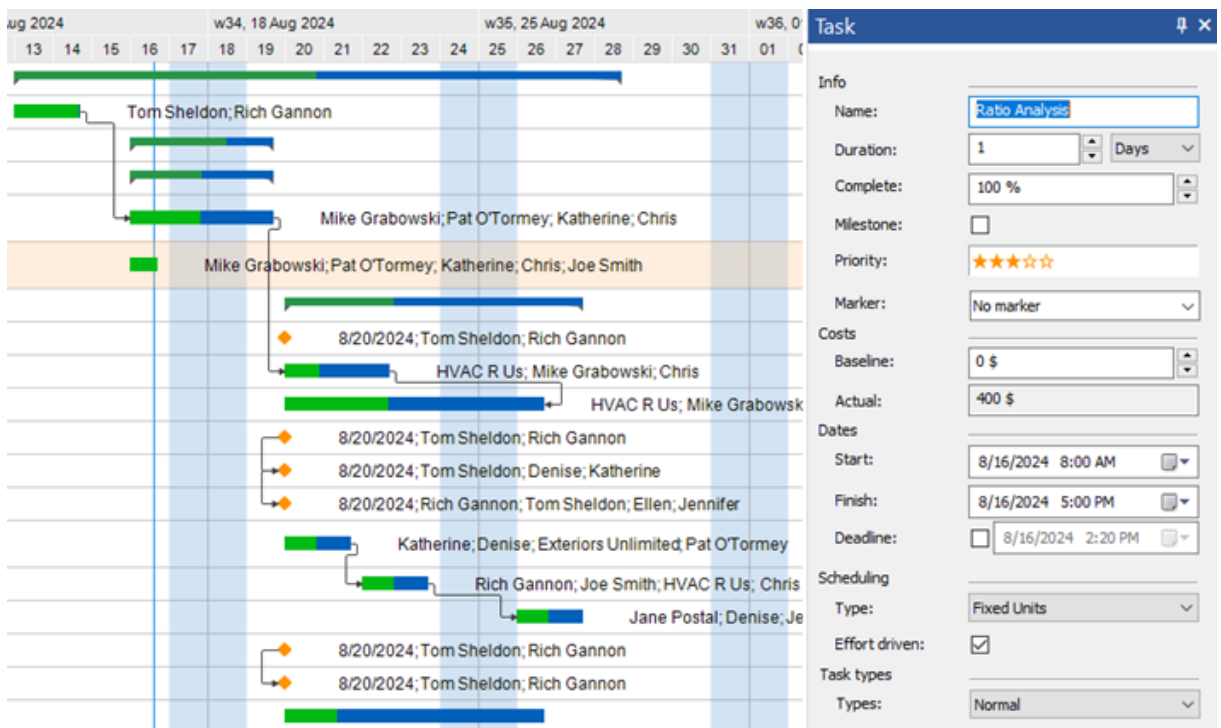
Project Management Diagrams	
	<p>Gantt Chart Create Gantt chart diagram from projects tasks with an outline level equal or less than two</p>
	<p>Milestone Chart Show only linked milestones</p>
	<p>Milestone Chart Extended Show all milestones</p>
	<p>PERT Chart Create Project Evaluation and Review Technique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

MINDMAP



The compatibility between ConceptDraw products allows you to migrate your documents from MINDMAP to PROJECT and vice versa. You can see the project data in a mind map structure by opening your project in ConceptDraw MINDMAP. Mind map will consist from topics of Project Management type, which contain all project information. Project Notes will be opened as Notes to topics. All hyperlinks will be displayed in the Hypernote panel. This way you are switching views without creating extra files. You can see the same file in both applications:

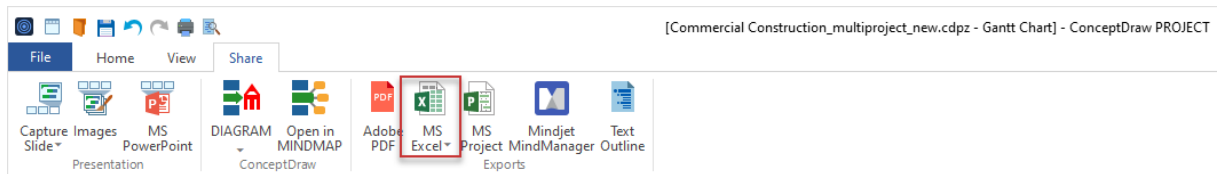
ConceptDraw PROJECT



ConceptDraw MINDMAP

The screenshot displays the ConceptDraw MINDMAP interface. On the left, a mind map is centered on a green oval node labeled 'Audit'. Five main branches extend from 'Audit' to green rounded rectangular nodes: 'Audit Planning', 'Preliminary Analysis', 'Audit Activities', 'Subsequent Events Review', and 'Post Journal Entries'. The 'Preliminary Analysis' node has two sub-branches: 'Prepare Trial Balance' and 'Ratio Analysis'. The 'Post Journal Entries' node has two sub-branches: 'Post Adjusting Journal' and 'Post Reclassification'. A dashed arrow points from 'Post Adjusting Journal' to 'Post Reclassification'. On the right, the 'Topic Types & Data' panel is open. It shows a 'Solution' of 'Project Management' and a 'Topic Type' of 'Effort Driven Task'. Below this, the 'Effort Driven Task' properties are displayed: 'Complete' is set to 100, 'Priority' is 4 stars, 'Resources' are 'Mike Grabowski;Pat O'Tormey;Kathy', 'Objective' is empty, and 'Cost' is '\$400.00'. The 'Dates' section shows 'Start Date' as 16.08.2024 at 8:00 AM and 'Due Date' as 16.08.2024 at 5:00 PM.

MS Excel



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

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

In this case, the Excel file will contain all the tables from the project file. The same function is available in the [Export](#) section of the [File](#) menu under the Export to MS Excel item.

	A	B	C	D	E
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	8/26/2024	33 %	

2. Export table from the current view

In this case, the Excel file will contain a single table - the last one opened before going to the Share tab.

For example, to export the Resources Usage table to MS Excel, the following steps are required:

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

	A	B	C
1	Name	Project Name	Expenses
30	Mike Grabowski		1,040.00 \$
31	Test of Transactions	Audit	240.00 \$
32	Ratio Analysis	Audit	160.00 \$
33	Accounts Receivable	Audit	480.00 \$
34	Inventories	Audit	640.00 \$
35	Post Adjusting Journal	Audit	80.00 \$
36	Post Reclassification	Audit	80.00 \$
37	Jane Postal		160.00 \$
38	Income Tax Accrual	Audit	160.00 \$

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](#)

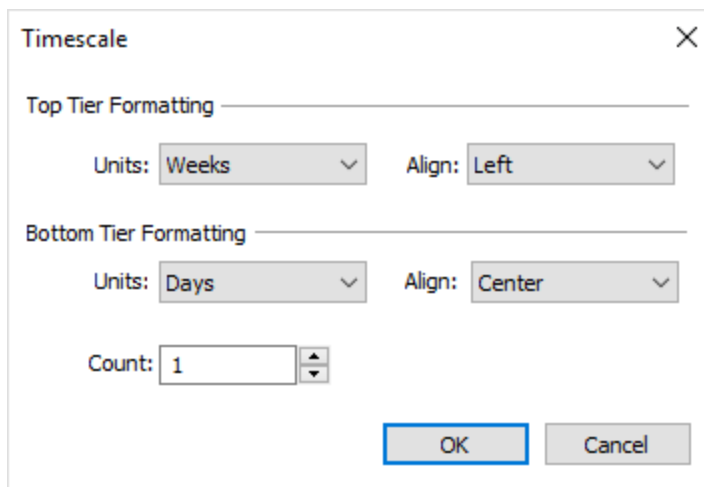
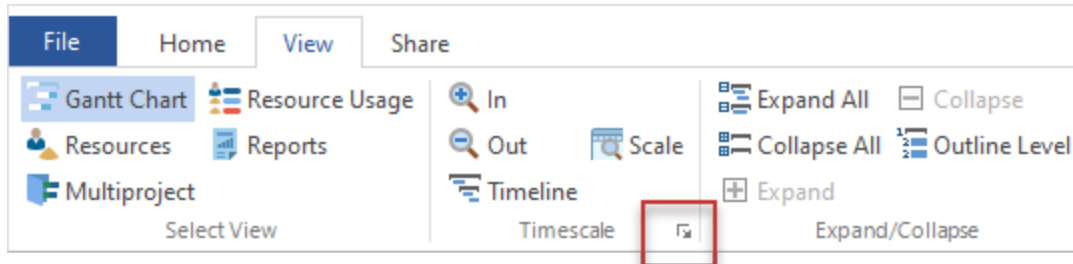
[Document Properties](#)

[Find](#)

[Replace](#)

Timescale

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



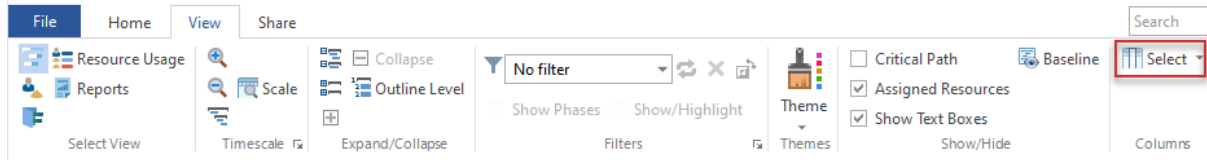
Units - Specify units from units list for large and small scales on Timescale gauge.

Align - Specify text alignment on timescale.

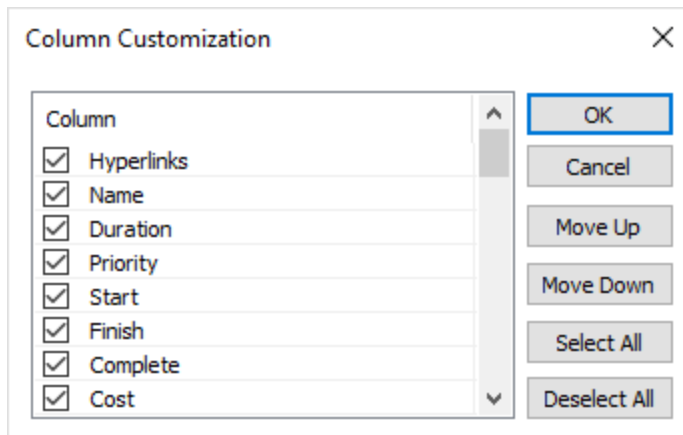
Count - Specify units interval.

Column Customization

All project views: [Multiproject](#), [Gantt](#), [Resources](#), and [Resource Usage](#) 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 [View](#) tab.



The most massive is the column customization possibilities of the [Gantt Chart](#). View and edit information to be displayed at the project outline.



The Column Customization dialog contains the following columns:

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

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

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

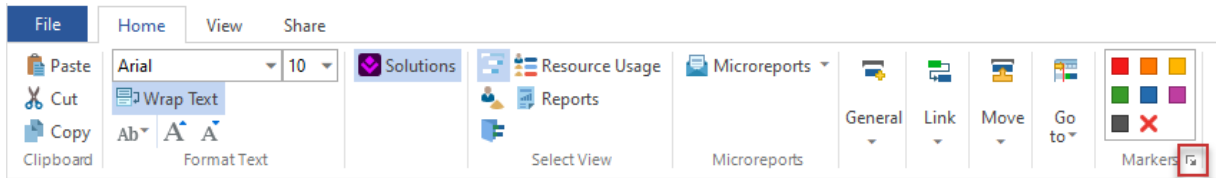
Company	Company Name
Complete	The current status of project in percentages of the project's duration that has been completed.
Complete Increase	Changing of the Complete value between the current and previously saved measured in percent
Complete Increase Rate	Changing of the Complete Increase value between the current and previously saved measured in percent
Cost	The total scheduled cost for a project
Cost to Completion	The piece of total scheduled cost that remains for a project completion
Duration	The total span of a working time for a task
Finish Date	The date when a project is scheduled to be completed
Hyperlinks	Add/Edit hyperlinks to a project
Objective	Project objectives
Planned Complete	The planned project completion status (percentages) at the current date.
Priority	The level of importance given to a project by project manager
Project Description	Short description of the project
Project Manager	Who is project Manager?
Project Name	Project name
Project Site	Url of the corresponding website

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

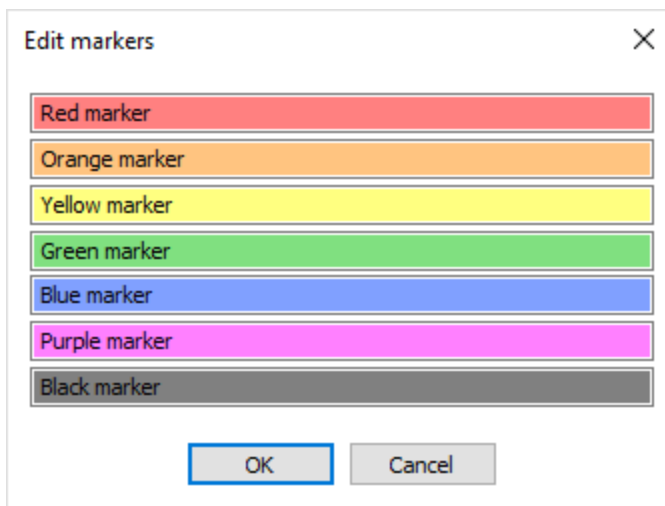
Edit Markers

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 [Home](#) ribbon.

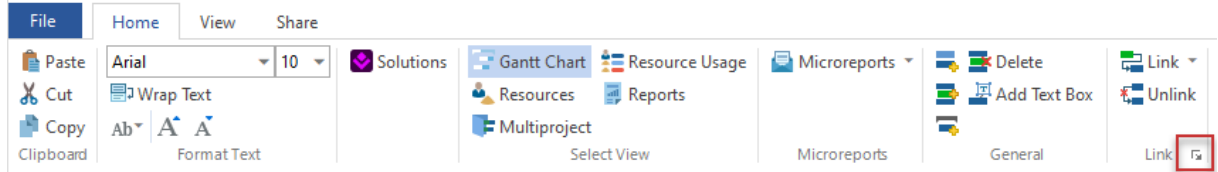


Use the Edit markers dialog to set names for [Markers](#). Just click a marker and start typing.



Predecessors

Predecessors dialog can be accessed from the [Link](#) section in the **Home** tab. The Predecessors settings also available in the [Links](#) panel



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

You can make this using the Predecessors dialog.

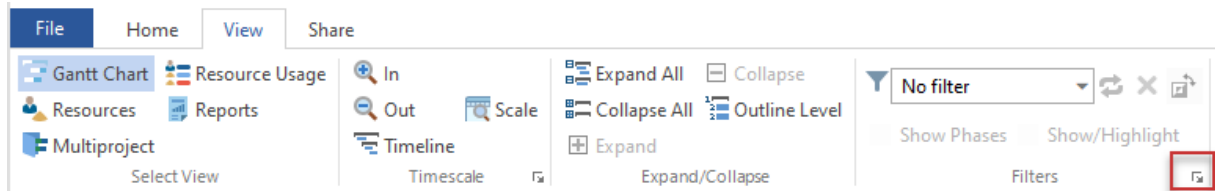
The image shows a Gantt chart interface with a 'Predecessors' dialog box open. The Gantt chart displays a project schedule from August 2024 to October 2024. The 'Predecessors' dialog box contains a table with the following data:

Link From	Type	Lag
2 - Accept Site	Finish to Start	14 d
4 - Clearing and Site Grading	Finish to Start	2 d
6 - Excavation	Finish to Start	10 d

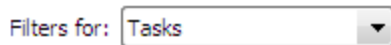
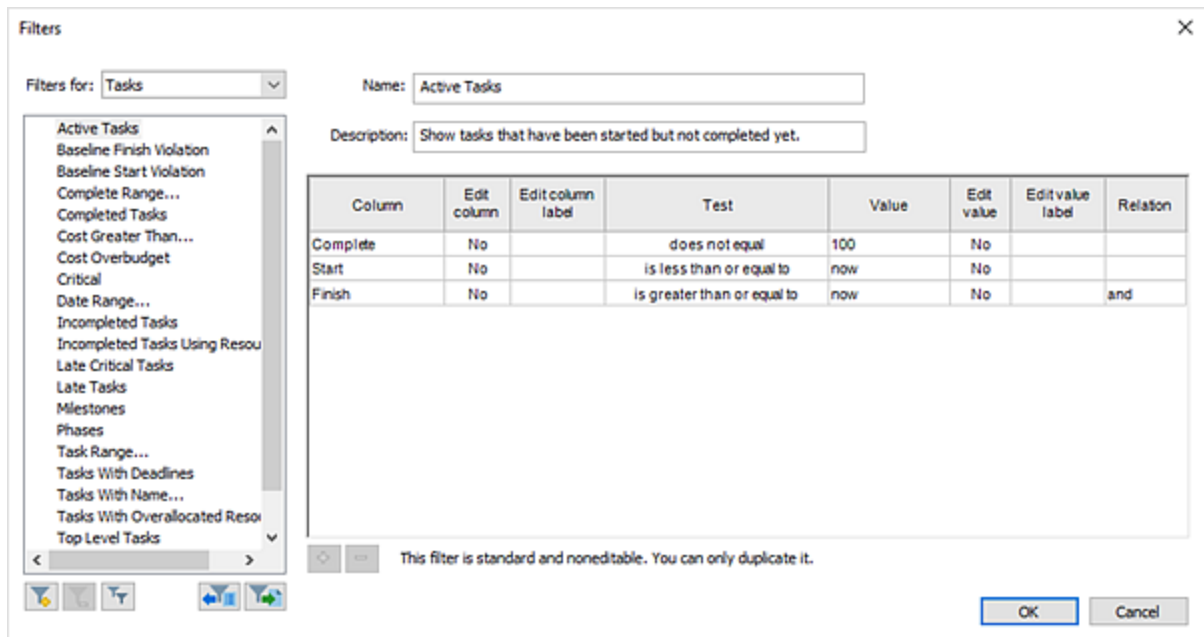
The Gantt chart shows tasks such as 'Construction Contract Award 1', 'Accept Site', 'Stake lines and grades', 'Clearing and Site Grading', 'Utilities', 'Excavation', 'Foundation and Backfill', 'Footings', 'Spread Footings', 'Concrete Piles', 'Slab on Grade', 'Walls', 'Exterior Wall Surfaces', 'Brick', 'Exterior Trim', 'Rough-in Ductwork, Plumbing and Electrical', 'Install Heatpumps', 'Venting', 'Panelboards', and 'Telephone, Security, and Electrical Wiring'. Resources like 'Surveyor 1', 'Surveyor 2', 'Bob's Excavation', 'Excavator', 'Baker Flooring', and 'Truck' are also shown.

Filters

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

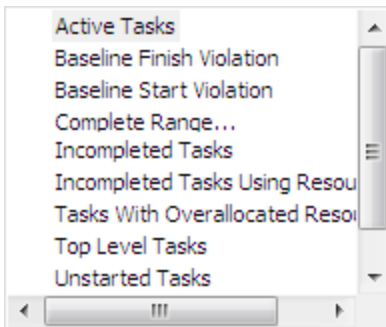




In the left part of the window, you can specify the project view, which is filtered by default. There is also the filters list which contains predefined and user created filtering options.

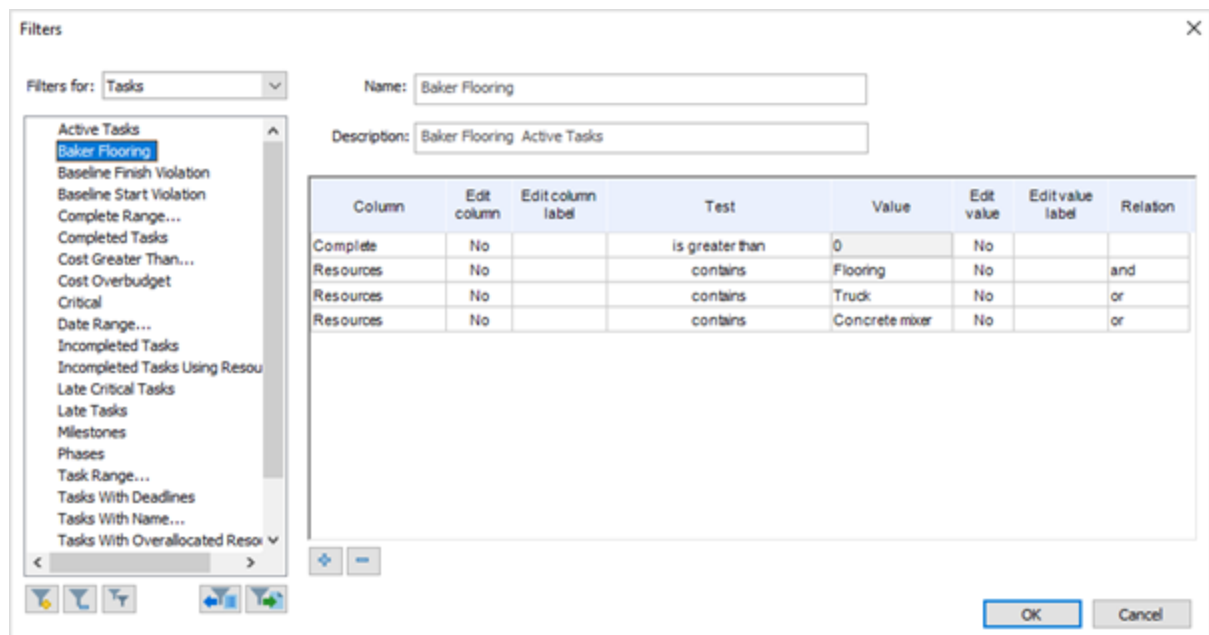


Filters for: Specify the project view, which is filtered by default: Project, Tasks, or Resources.

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




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




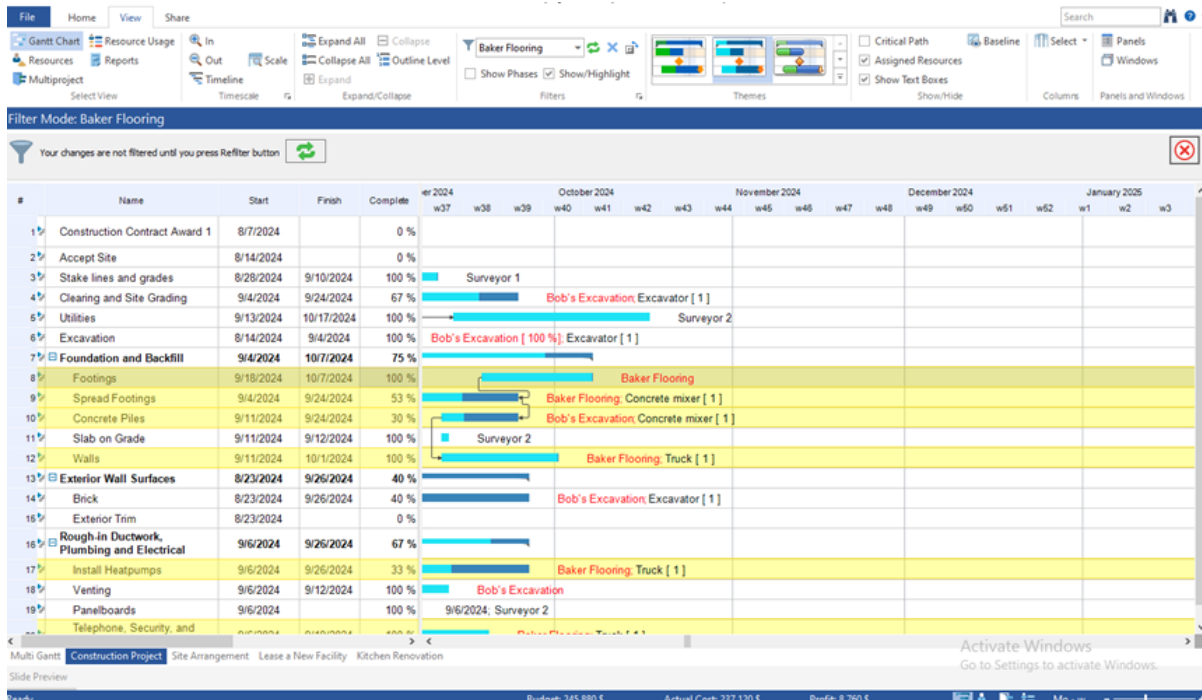
Remove Filter: Remove the selected filters.

**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.

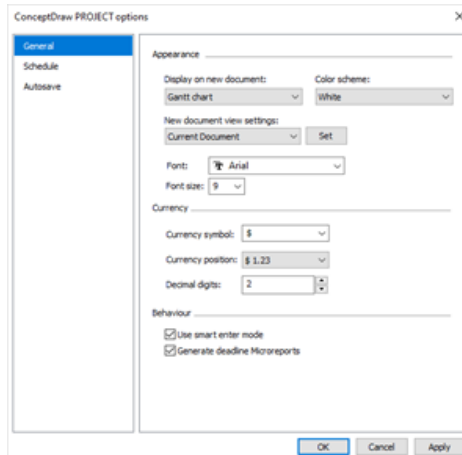
 **Import Filter from File:** This operation allows importing your custom filters from XML file. Thus, the filters will be available on any computer no matter which ConceptDraw PROJECT document you work with.



Options

Can be accessed from the [File](#) tab. Allows to configure the default application settings that will be applied to all new documents created in ConceptDraw PROJECT.

General



Display on a new document: Set up document default view

Color scheme: Set up document color scheme

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

Currency symbol: Set up currency symbol

Currency position: Select currency position

Decimal digits: Set up amount of decimal digits

Behaviour: On/Off the Smart Enter mode

On/Off the [deadline Mircoreports](#) automatic generation

Calendars:

Working week days: Set up working week days.

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

Work units:

Week starts on: Select week start.

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

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

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

Scheduling:

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

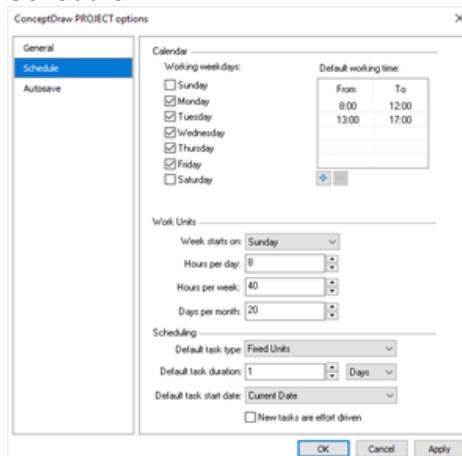
Default task duration: Set up a task duration on default

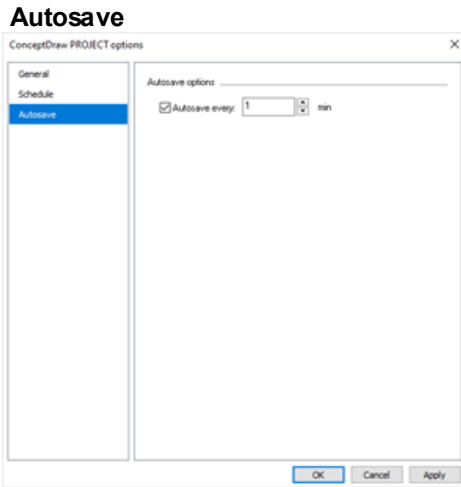
Default task start date : Set up a default start date of the new task

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

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

Schedule





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

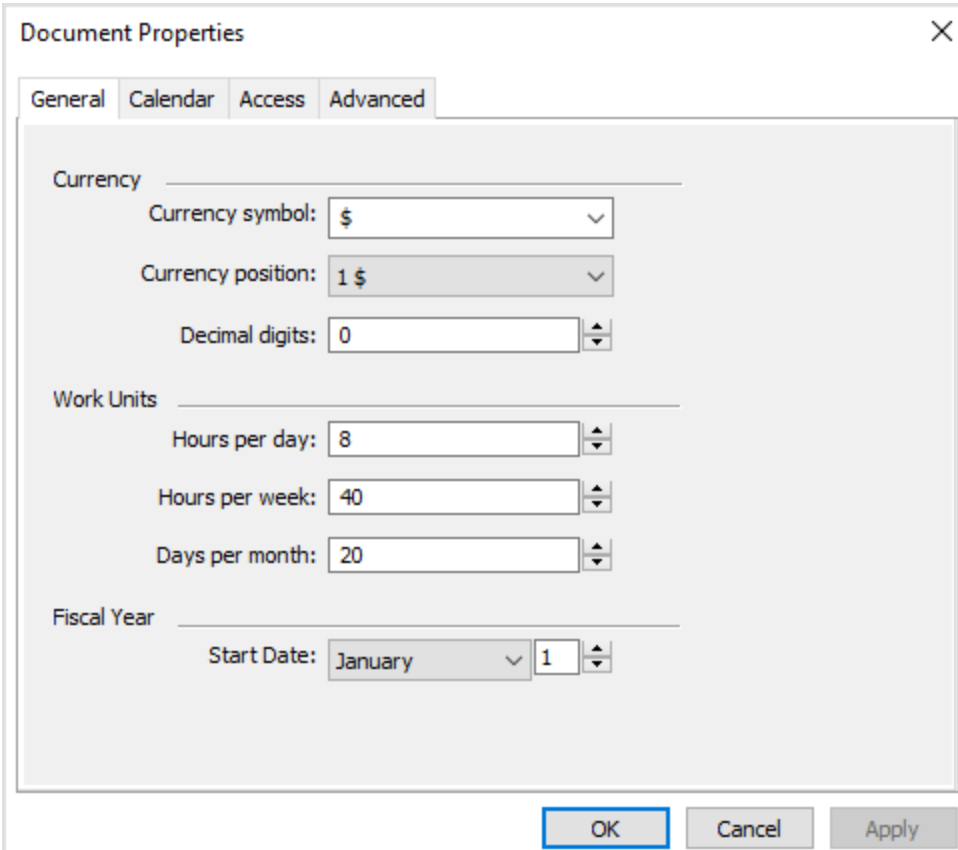
Document Properties

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

General

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

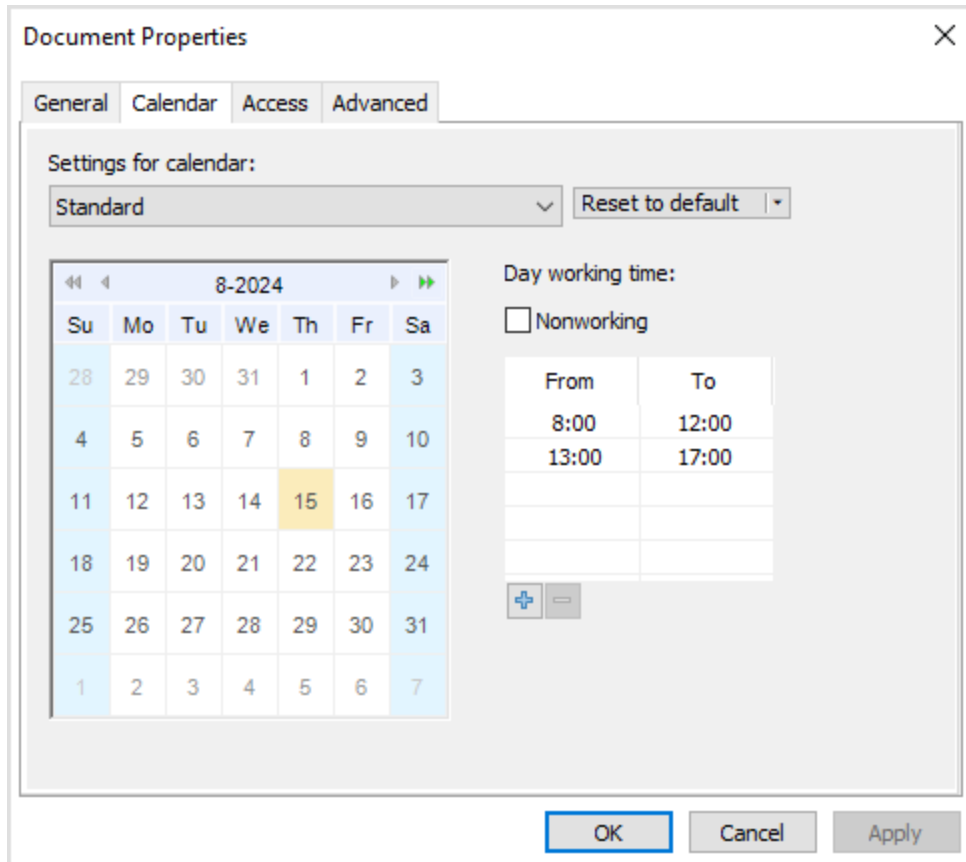
1. Currency section. Here you can define the project currency options.
2. Work units section. Here you can set the units of measurement for calculating the costs of employees engaged in the project.
3. Fiscal year section. Here you can change a fiscal year beginning date. This date affects the position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



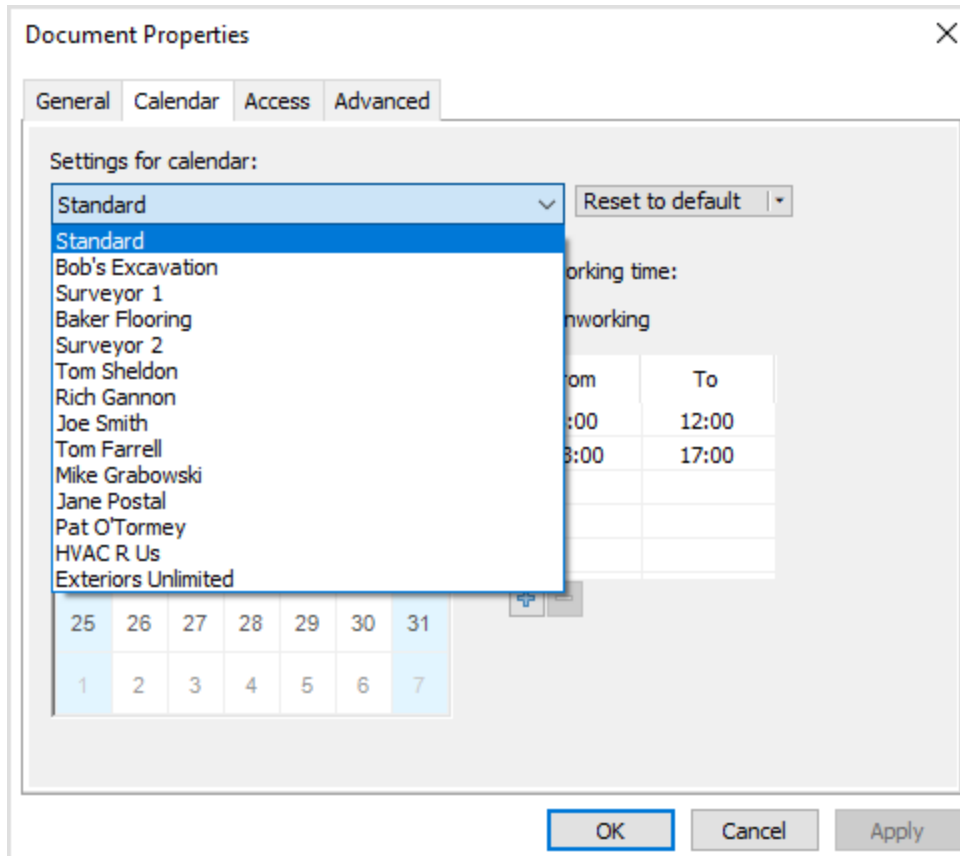
The screenshot shows the 'Document Properties' dialog box with the 'General' tab selected. The dialog has a title bar with a close button (X) and four tabs: 'General', 'Calendar', 'Access', and 'Advanced'. The 'General' tab contains three sections: 'Currency', 'Work Units', and 'Fiscal Year'. The 'Currency' section has three fields: 'Currency symbol' (set to '\$'), 'Currency position' (set to '1 \$'), and 'Decimal digits' (set to '0'). The 'Work Units' section has three fields: 'Hours per day' (set to '8'), 'Hours per week' (set to '40'), and 'Days per month' (set to '20'). The 'Fiscal Year' section has one field: 'Start Date' (set to 'January' and '1'). At the bottom right, there are three buttons: 'OK', 'Cancel', and '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 [File](#) menu. So the new calendar will be there for every new project created with that template.

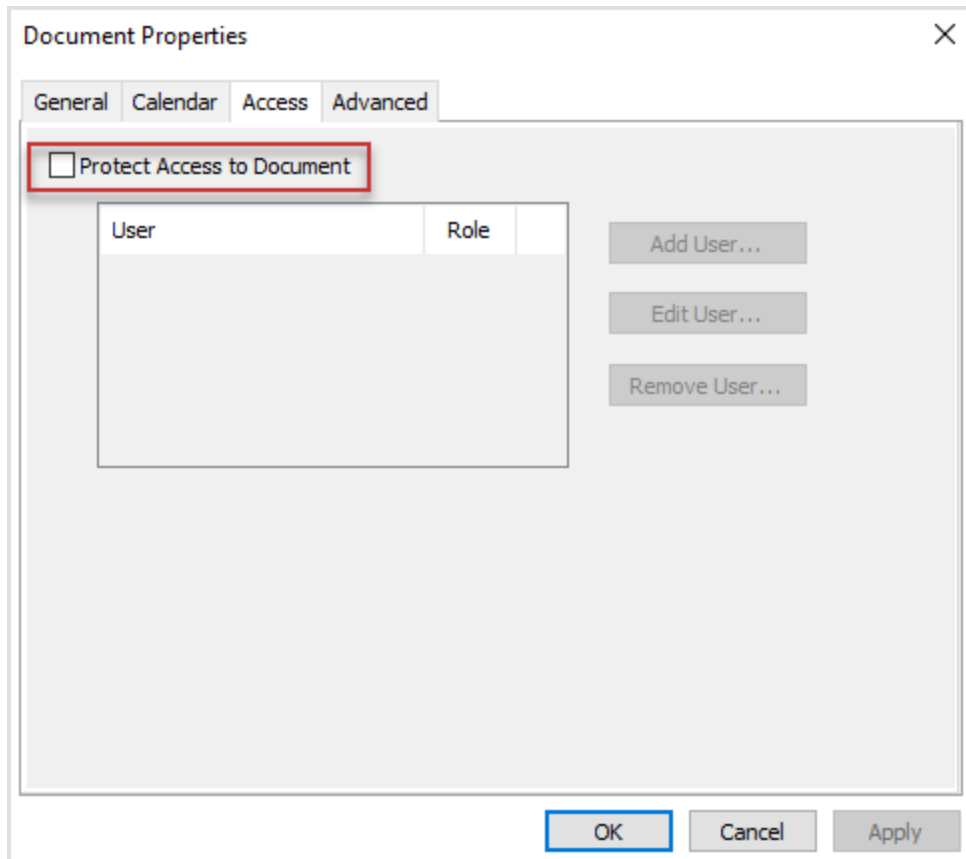


You can set up schedule for particular resources in your project. Select resource from the drop-down list to create a Work resource personal schedule. Selects set of dates to do this. Set up schedule to selected dates. Schedule is presented as set of daily working time intervals. You can set the selected dates as non-working.



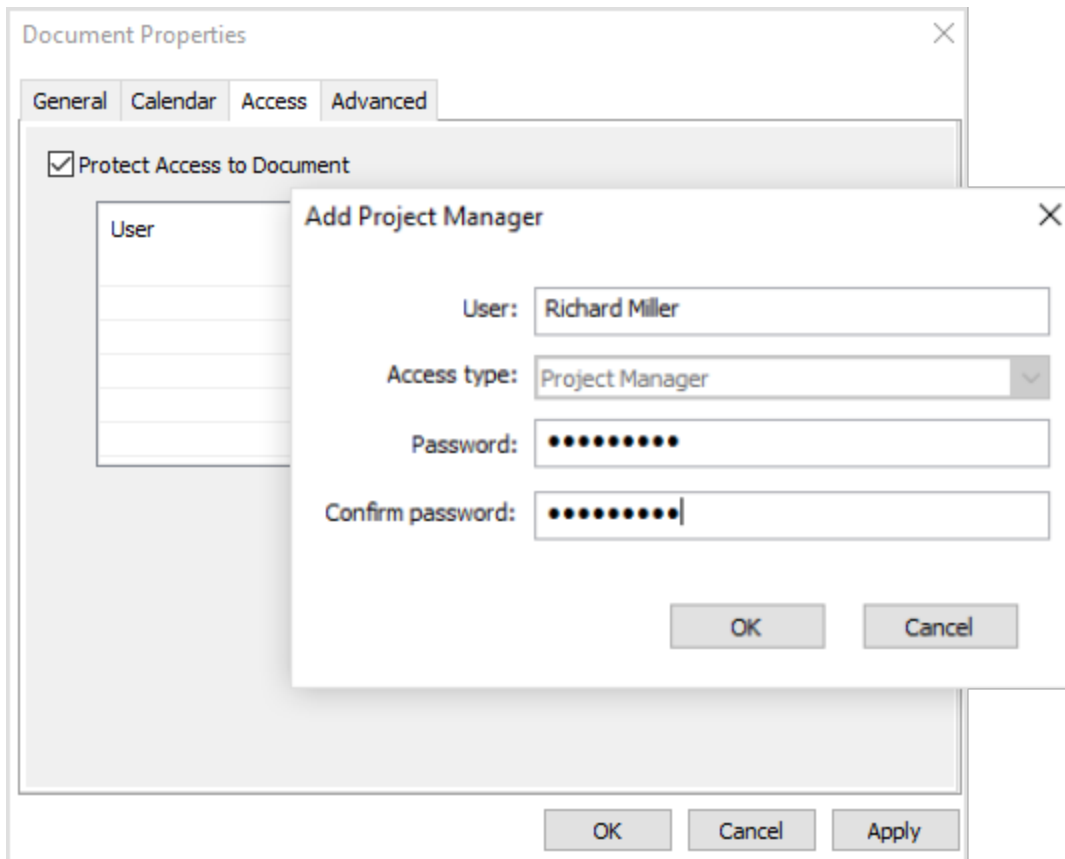
Access

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.



To set up role-based access to a project document, follow these steps:

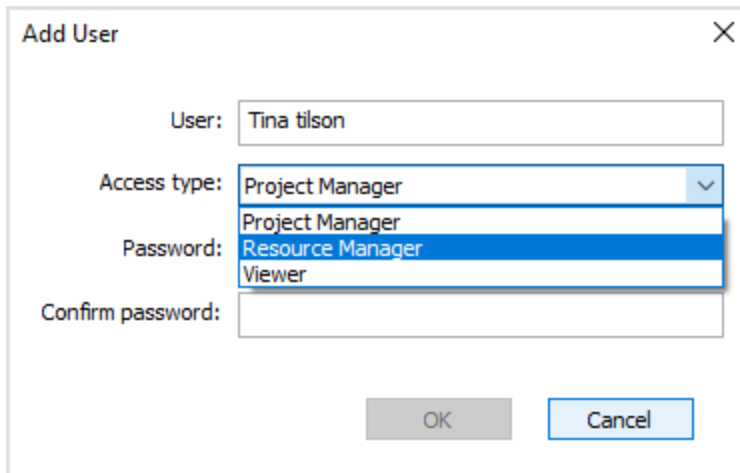
1. Check the box.
2. Enter the username and password. The first user gets the Project Manager role by default.



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.

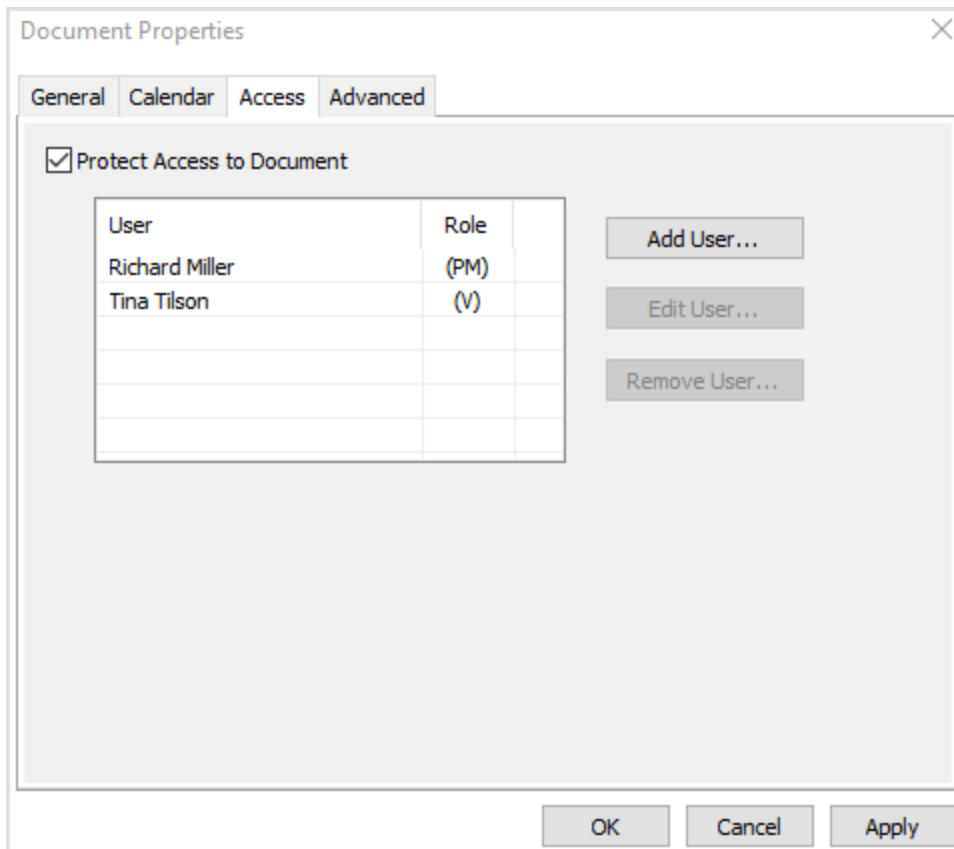
Viewer (V) - read-only access without the right to save the document.



The "Add User" dialog box contains the following fields and controls:

- User:** Text input field containing "Tina tilson".
- Access type:** Dropdown menu with "Project Manager" selected. The dropdown list is open, showing "Project Manager", "Resource Manager", and "Viewer".
- Password:** Text input field.
- Confirm password:** Text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

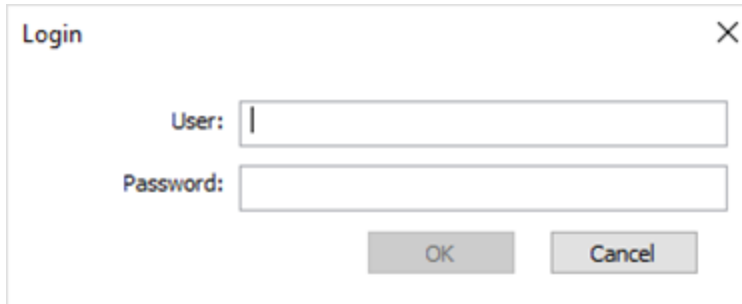
Project Manager user can manage access of all users



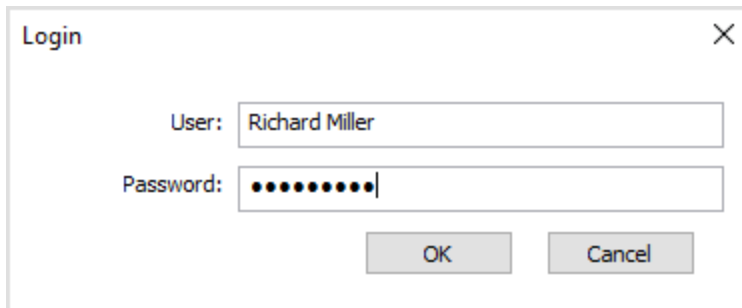
The "Document Properties" dialog box, "Access" tab, shows the following configuration:

- Protect Access to Document
- | User | Role |
|----------------|------|
| Richard Miller | (PM) |
| Tina Tilson | (V) |
| | |
| | |
| | |
- Buttons:** "Add User...", "Edit User...", and "Remove User..." buttons to the right of the table.
- Bottom Buttons:** "OK", "Cancel", and "Apply" buttons.

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



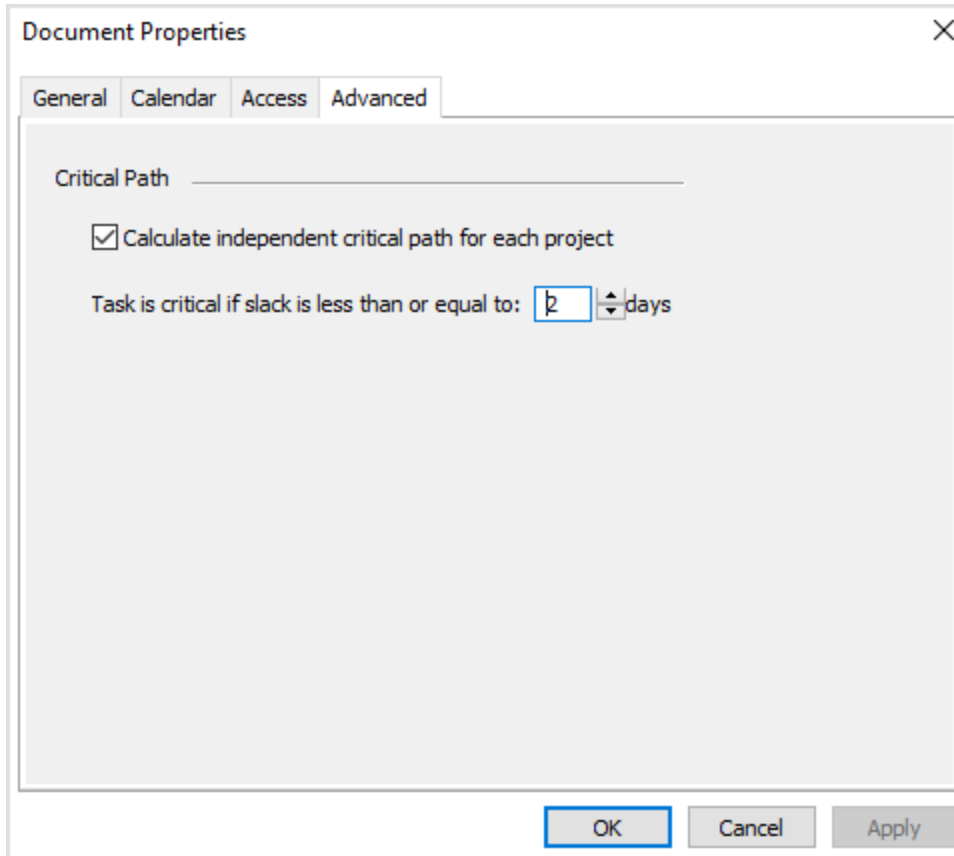
A screenshot of a 'Login' dialog box. The dialog has a title bar with 'Login' on the left and a close button 'X' on the right. Inside, there are two text input fields. The first is labeled 'User:' and is empty. The second is labeled 'Password:' and is also empty. Below the fields are two buttons: 'OK' and 'Cancel'.



A screenshot of a 'Login' dialog box, identical in layout to the one above. The 'User:' field now contains the text 'Richard Miller'. The 'Password:' field contains ten black dots, representing a masked password. The 'OK' and 'Cancel' buttons remain at the bottom.

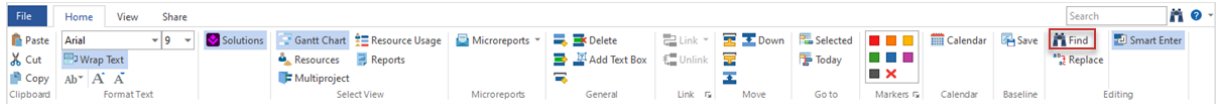
Advanced

Advanced tab allows to set the [critical path](#) and critical task parameters.

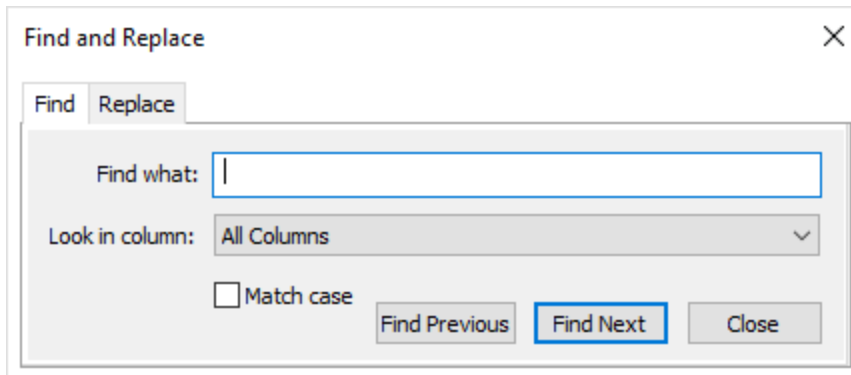


Find

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

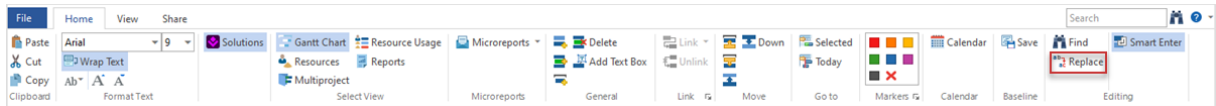


The *Find* dialog:

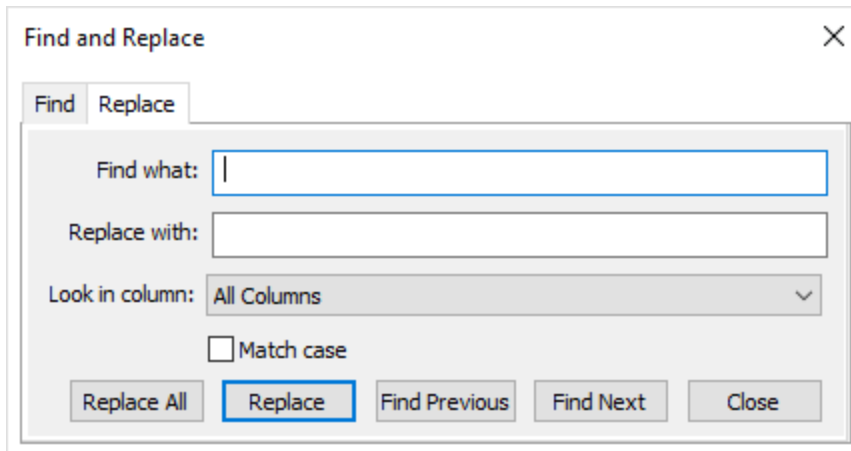


Replace

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

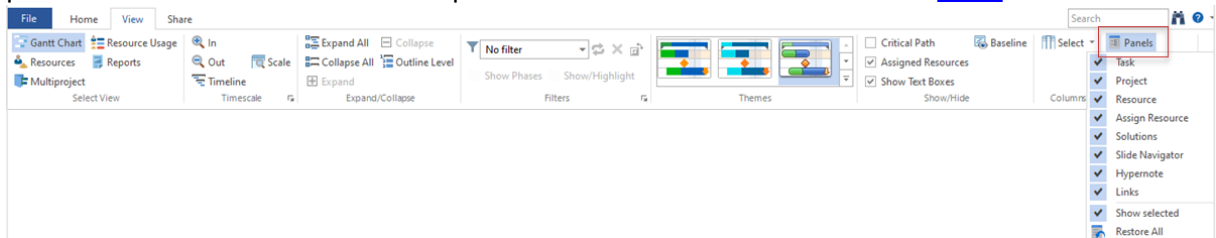


The Replace dialog:



Floating Panels

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

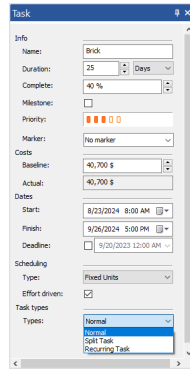


[Task](#)
[Project](#)
[Resource](#)
[Assign Resources](#)
[Solutions](#)
[Slide Navigator](#)
[Hypernote](#)
[Links](#)

Task

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

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



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

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

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

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

Effort - Driven Task

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

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

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

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

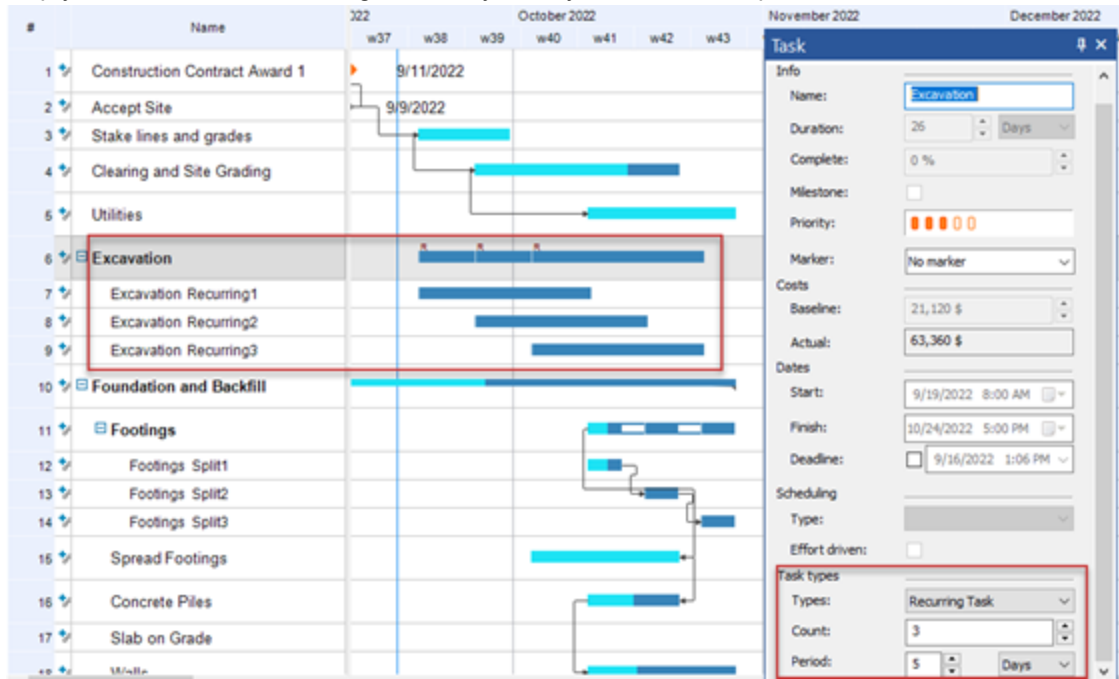
Split a Task

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


The screenshot displays a project schedule from October to December 2022. The task 'Footings' (row 8) is highlighted with a red box and is split into three sub-tasks: 'Footings Split1' (row 9), 'Footings Split2' (row 10), and 'Footings Split3' (row 11). The Gantt chart shows the original task bar and three subsequent bars representing the split sections, with arrows indicating the sequence. A 'Task' floating panel is open on the right, also with a red box around its 'Task types' section. In this panel, the 'Name' is 'Footings', 'Duration' is 14 days, and 'Complete' is 20%. Under 'Task types', the 'Types' dropdown is set to 'Split Task' and the 'Count' is set to 3.

Recurring Tasks

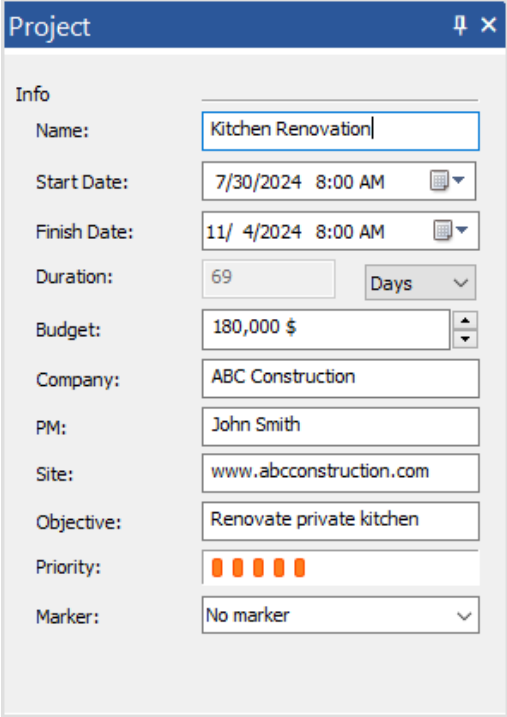
If you have a task that occurs repeatedly during the course of a project, ConceptDraw PROJECT can help you create it as a recurring task, so you only have to set it up once.



Project

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

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



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

Field	Value
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.abconstruction.com
Objective	Renovate private kitchen
Priority	4 (represented by 4 orange dots)
Marker	No marker

Name - Set up project name

Start Date - Display project start day

Finish Date - Display project finish day

Duration - Display project duration. Select the duration units using the drop-down list.

Budget - Set up project budget

Company - Set up Company name

PM - Set up project manager


Site - Set up project web-site

Objective - Set up project objective

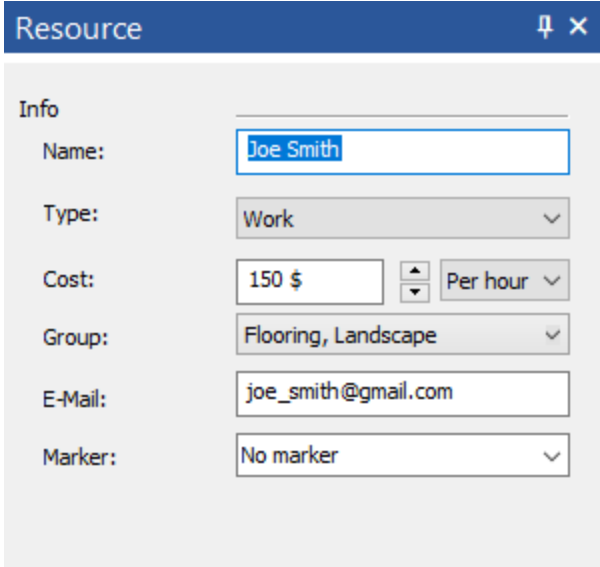
Priority - Specify project priority

Marker - Specify project marker from list

Resource

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

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



Info	
Name:	<input type="text" value="Joe Smith"/>
Type:	<input type="text" value="Work"/>
Cost:	<input type="text" value="150 \$"/> <input type="text" value="Per hour"/>
Group:	<input type="text" value="Flooring, Landscape"/>
E-Mail:	<input type="text" value="joe_smith@gmail.com"/>
Marker:	<input type="text" value="No marker"/>

Name - Set up resource name.

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


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

Group - Set up resource group. The resource can participate in several groups

E-mail - Set up resource e-mail

Marker - Specify resource marker from list

Assign Resources

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

Use Assign Resources dialog to assign resources to project tasks,

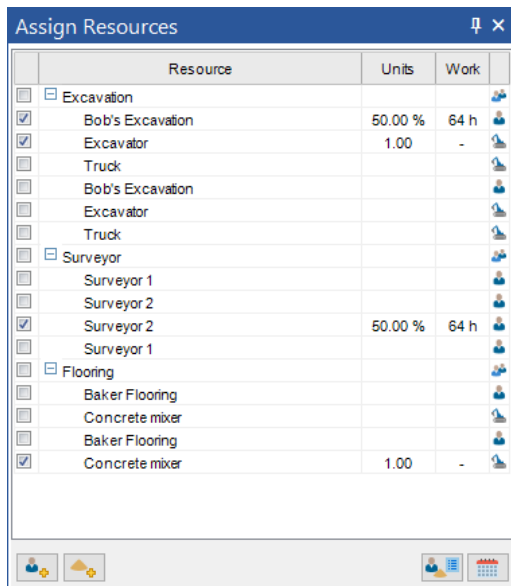
Open [Gantt Chart](#) View and select a task to assign resources.

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

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

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

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



Resource - Displays the resource name.

Units - Resource utilization for the current task.

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



Add Work resource - Add new human resource into resource pool



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




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

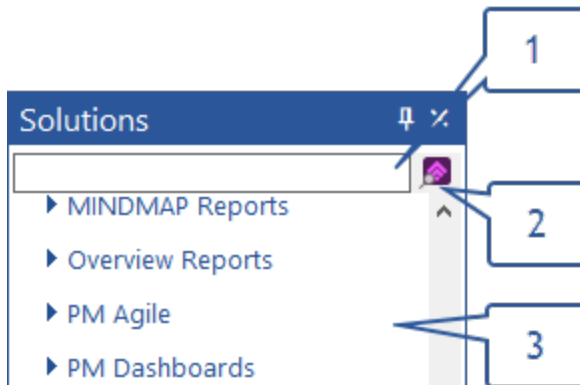


Calendar - Set the specific calendar for [Work](#) type resource

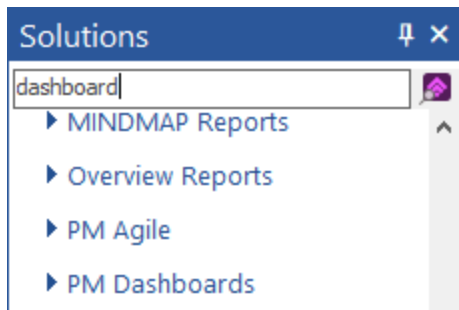
Solutions

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

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



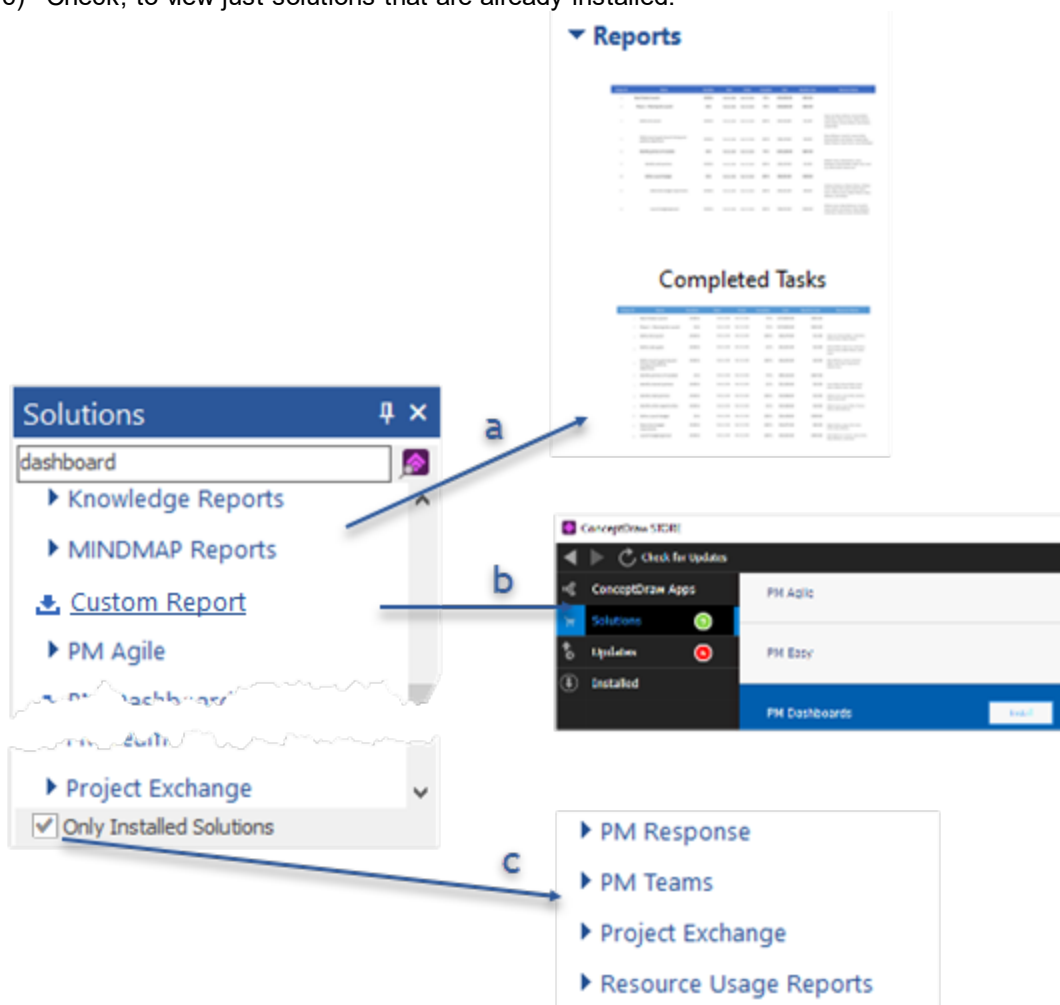
1. **Search window.** You can search for the required reports and examples. Enter the keyword in the search field. The corresponding solutions will be displayed in the panel.



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

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

- 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 pre-designed 30 tabular reports in ConceptDraw PROJECT. Reports are combined into 7 case-oriented [solutions](#) with many kinds of reports. Along with pre-designed tabular reports, ConceptDraw PROJECT users can create [custom reports](#) based on a self-designed Excel template.

The group of pre-designed Table Reports includes the following types of reports:

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

- Multiproject Goals – report the table of projects objectives for each project;
 - Multiproject Managers – report the table of projects managers for each project;
 - Project Team – report the table of project employee including hyperlinks;
 - Resource Report – report the table of all kinds projects resources for each project;
 - Top Level Tasks – report the table of project top level phases and tasks with task information for each project.
7. Resource Usage Reports:
- List of Materials – report the mind map of used materials for each project;
 - Materials Utilization – report the table of material resources utilization by tasks;
 - Over Allocated Resources Details – report the table of overallocation periods with task assignments for each employee;
 - Over Allocated Resources – report the table of workloads per tasks for each employee;
 - Resource Report – report the table of all kinds projects resources for each project;
 - Resource Usage – report the table of resource usage details for the current week;
 - Resource Usage Summary – report the table of workload periods with costs per employee;
 - Who Does What Details – report the table of tasks with statuses per employees for each project for the current week;
 - Who Does What Loading Percent – report the table of employees loading in % during the period for each project;
 - Who Does What Loading – report the table of employees loading during the period for each project;
 - Who Does What When – report the table of daily tasks assignments of employees during current week for each project;
 - Who Does What – report the table of employees workloads by tasks in current month for each project.

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

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

The screenshot displays the 'Completed Tasks' report preview in the center. The report title is 'Completed Tasks'. Below the title is a descriptive paragraph: 'The "Completed Tasks" report generated for your project represents the spreadsheet containing the information regarding the project's tasks, which are completed, i.e. the tasks which Complete in a Gantt Chart equals to 100%. By default, the reporting period is set as a current week, but optionally it can be changed to another desired one. This report includes the tasks with the indication the phases to which they belong, even if these phases are not 100% completed, and contains the corresponding detailed information about duration, start and finish dates, cost, baseline cost and responsible employees.' A 'Generate' button is located to the right of this text.

Below the text is a table with the following columns: 'Unique ID', 'Name', 'Duration', 'Start', 'Finish', 'Complete', 'Cost', 'Baseline Cost', and 'Resource Name'. The table contains 12 rows of task data.

On the right side of the interface is the 'Report Parameters' panel. It includes sections for 'Projects' (with checkboxes for Construction Project, Site Arrangement, Renovation, Lease a New Facility, and Kitchen Renovation), 'Dates' (with Report Period set to Document Timeline, Start date 6/17/2024, and Finish date 11/12/2024), and 'Units' (with Time Unit set to Use Current Document).

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

This is a close-up view of the 'Report Parameters' panel. It shows the 'Projects' section with a tree view containing 'Construction Project' (checked), 'Site Arrangement', 'Renovation' (expanded), 'Lease a New Facility', and 'Kitchen Renovation' (checked). The 'Dates' section shows 'Report Period' as 'Document Timeline', 'Start' as '6/17/2024', and 'Finish' as '11/12/2024'. The 'Units' section shows 'Time Unit' as 'Use Current Document'.

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

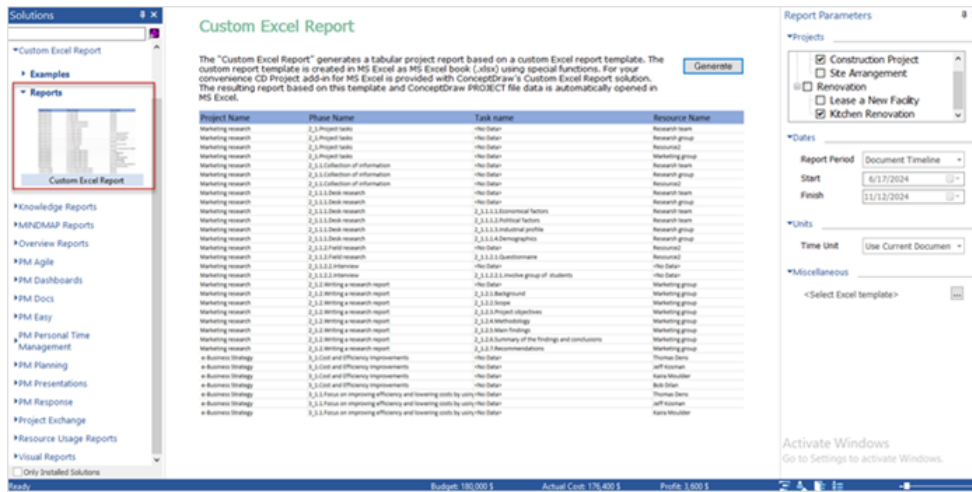
	A	B	C	D	E	F	G
1	Unique ID	Name	Duration	Start	Finish	Complete	Cost
2	9	Stake lines and grades	10.00 d	8/28/2024	9/10/2024	100 %	8,000 \$
3	11	Utilities	25.00 d	9/13/2024	10/17/2024	100 %	20,000 \$
4	12	Excavation	16.00 d	8/14/2024	9/4/2024	100 %	26,300 \$
5	13	Foundation and Backfill	24 d	9/4/2024	10/7/2024	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							

Custom Repots

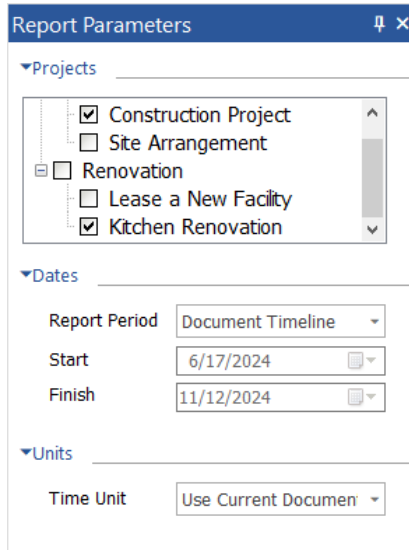
ConceptDraw PROJECT allows you to create a tabular project report based on a custom Excel template. Using the Report Wizard you can generate a custom project status report based on the ConceptDraw PROJECT file data. Use an Excel document to create a report template. With the help of customizable macros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

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

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

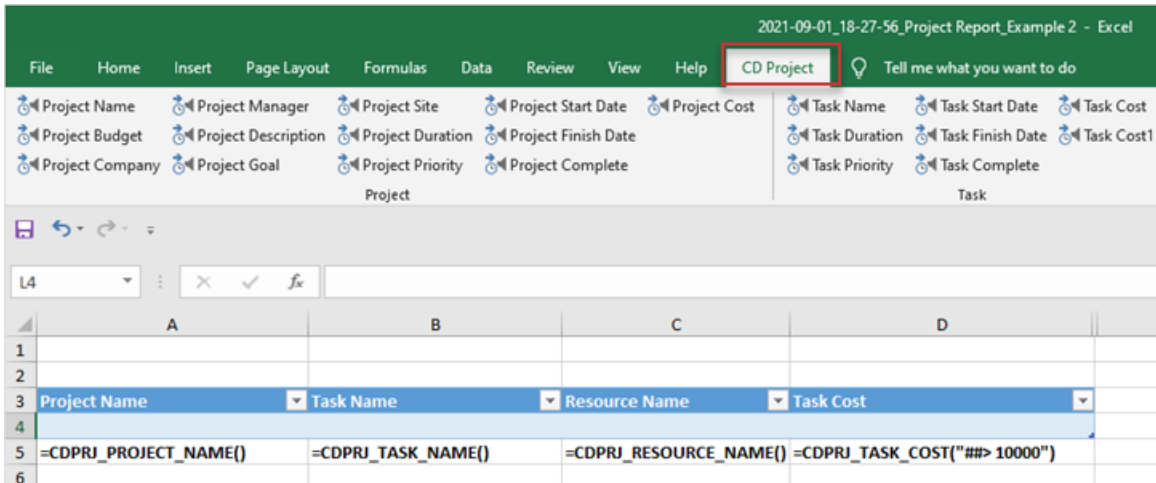


1. Specify the report parameters using the Report Parameters panel.



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

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



How it works

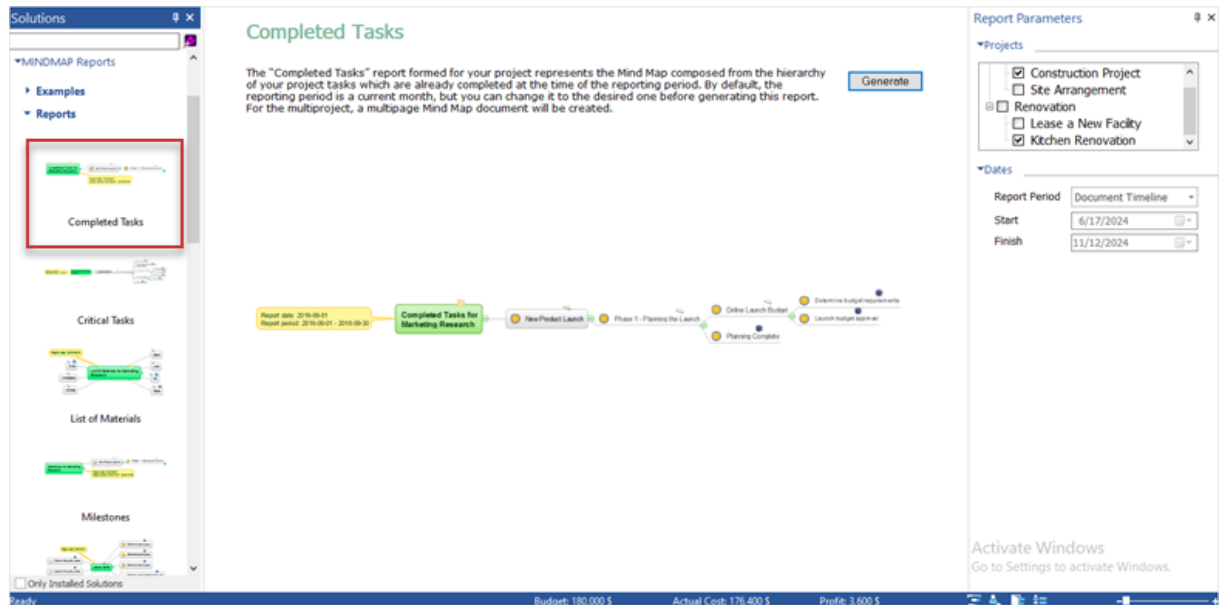
1. Use an Excel blank Workbook to create a report template. With the help of customizable macros, place the necessary data in the required cells.
2. In each line of the Template Sheet, the Report Wizard searches and processes certain macros. For example:
 CDPRJ_PROJECT_NAME () - displays the name of the Project.
 CDPRJ_TASK_DURATION () - displays the duration of the Task.
 CDPRJ_RESOURCE_TYPE () - displays the type of the resource.
 CDPRJ_TASK_NAME ([PH]) - displays only Phases.
 CDPRJ_TASK_NAME ([T]) - displays only Tasks
 CDPRJ_TASK_NAME ([M]) - displays only Milestones
3. Filters by certain conditions can be used as parameters. For example:
 CDPRJ_TASK_NAME (## = " Task1 ") - displays the name of the task if this name is "Task1".
 CDPRJ_TASK_DURATION ("##> 5 & ## <10") - displays the duration of tasks from 5 to 10 units.
4. Use the saved Excel Template to start generating a report from the Report section in the Solutions panel.
5. The Report Wizard loads the Excel Workbook with the report template and creates a new Workbook.

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

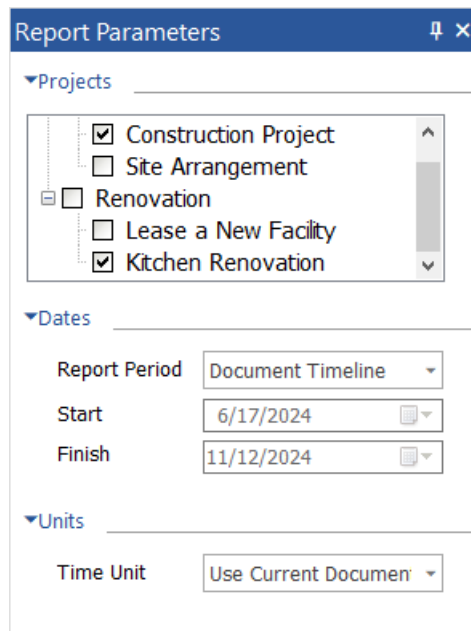
Mind Map Reports

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

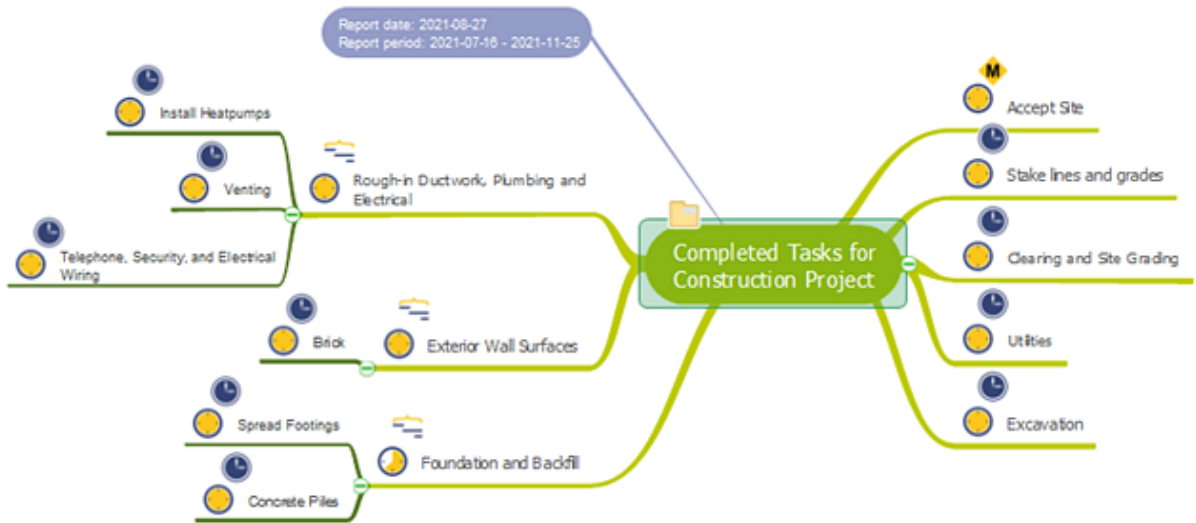
1. Find out MINDMAP reports in the Solutions panel.
2. Click the report icon to view its preview on the right panel.



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



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

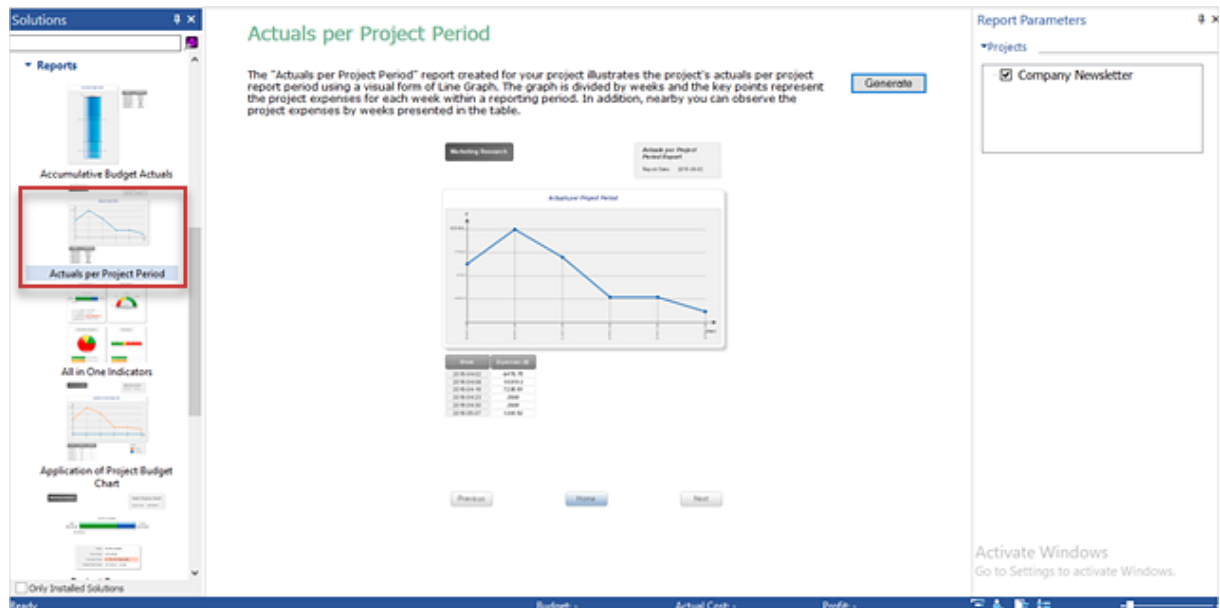


Visual Reports

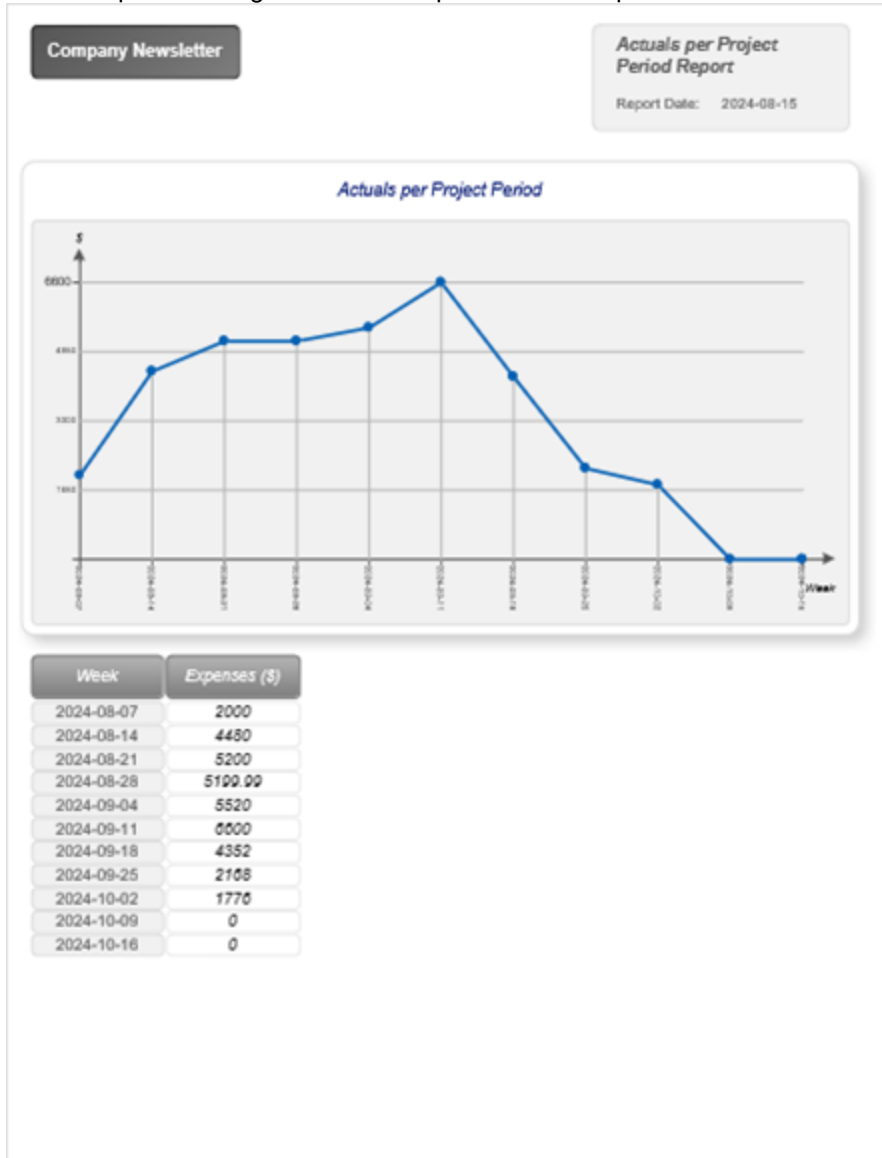
Conceptdraw PROJECT has several types of visual reports that can help assess visually the difference between planned and actual project data. Conceptdraw PROJECT provides user with the possibility to track how the project is going. Project Manager can compare the actual data with the planned and assess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

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

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



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



Dashboards

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

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

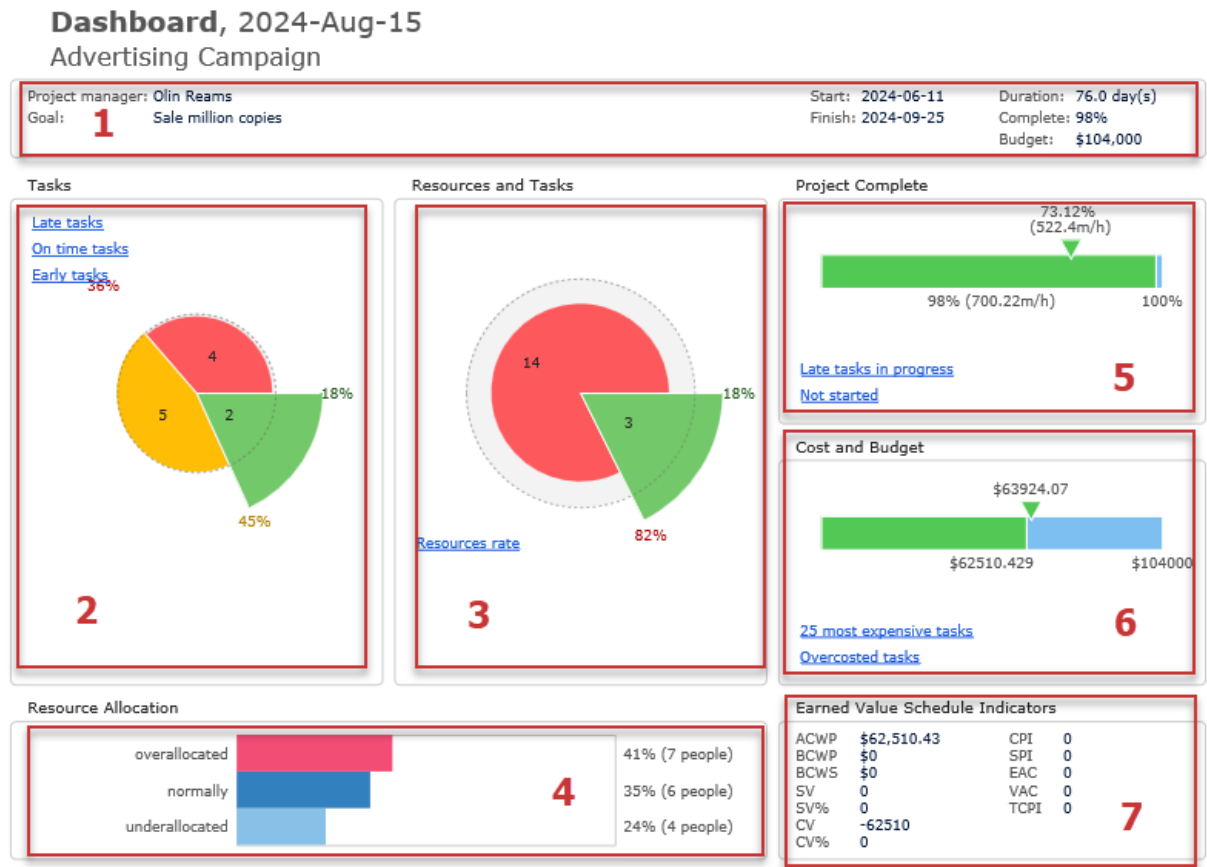
The screenshot displays the ConceptDraw PROJECT software interface. On the left, the 'Solutions' panel is open, showing a tree view under 'PM Dashboards' with sub-items: 'Examples', 'Reports', 'Project Dashboard', 'Radar Chart', and 'Tactical Dashboard'. The 'Project Dashboard' item is selected. In the center, a preview of the 'Project dashboard' report is shown. The report title is 'Project dashboard' and it includes a 'Generate' button. Below the title is a descriptive paragraph about the report's content, followed by a detailed dashboard preview for 'Marketing Research' featuring various charts and tables. On the right, the 'Report Parameters' dialog box is open, showing a list of projects with checkboxes: 'Construction Project', 'Lease a New Facility', 'Kitchen Renovation', and 'Site Arrangement'. The status bar at the bottom shows 'Ready', 'Budget: -', 'Actual Cost: -', and 'Profit: -'.

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

Project Dashboard

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

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



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

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

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

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

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

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

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

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

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

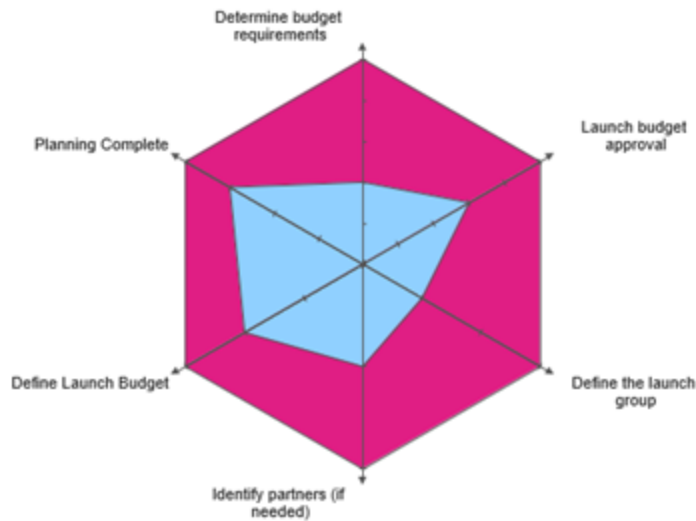
Radar Chart

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

#	Name	Duration	Priority	Start	Finish	i, Aug 2024									
						5	06	07	08	09	10	11	12	13	14
1	Project	23 d	☆☆☆☆☆	8/6/2024	9/5/2024	[Timeline bar]									
2	New Product Launch		☆☆☆☆☆	8/6/2024		[Milestone: 8/6/2024]									
3	Phase 1 - Planning the Launch		☆☆☆☆☆	8/6/2024		[Milestone: 8/6/2024]									
4	Define the launch group		☆☆☆☆☆	8/7/2024		[Milestone: 8/7/2024]									
5	Define sales goals		☆☆☆☆☆	8/7/2024		[Milestone: 8/7/2024]									
6	Define launch goals (launch timing and publicity objectives)		☆☆☆☆☆	8/8/2024		[Milestone: 8/8/2024]									
7	Identify partners (if needed)		☆☆☆☆☆	8/8/2024		[Milestone: 8/8/2024]									
8	Identify channel partners		☆☆☆☆☆	8/8/2024		[Milestone: 8/8/2024]									
9	Identify retail partners		☆☆☆☆☆	8/8/2024		[Milestone: 8/8/2024]									
10	Identify online opportunities		☆☆☆☆☆	8/8/2024		[Milestone: 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



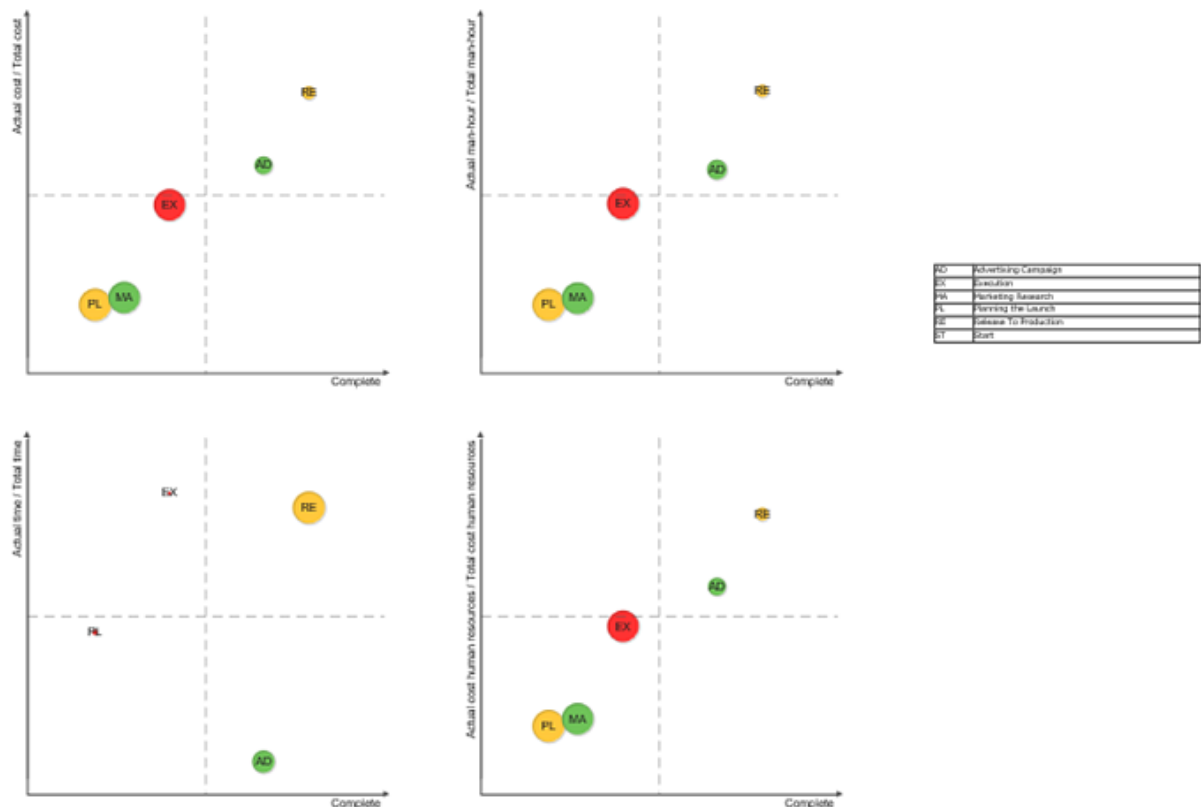
Tactical Dashboard

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.

#	Name	Start	Finish	w33, 11 Aug 2024					w34, 18 Aug 2024					w35									
				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																				
3	Define sales goals	8/14/2024	8/15/2024																				
4	Define launch goals (launch timing	8/14/2024	8/15/2024																				
5	Planning the Launch	8/15/2024	8/16/2024																				
6	Define the launch group	8/15/2024	8/16/2024																				
7	Define sales goals	8/15/2024	8/16/2024																				
8	Define launch goals (launch timing	8/15/2024	8/16/2024																				

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, 2024-Aug-15



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

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

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

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

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

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

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

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

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

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

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

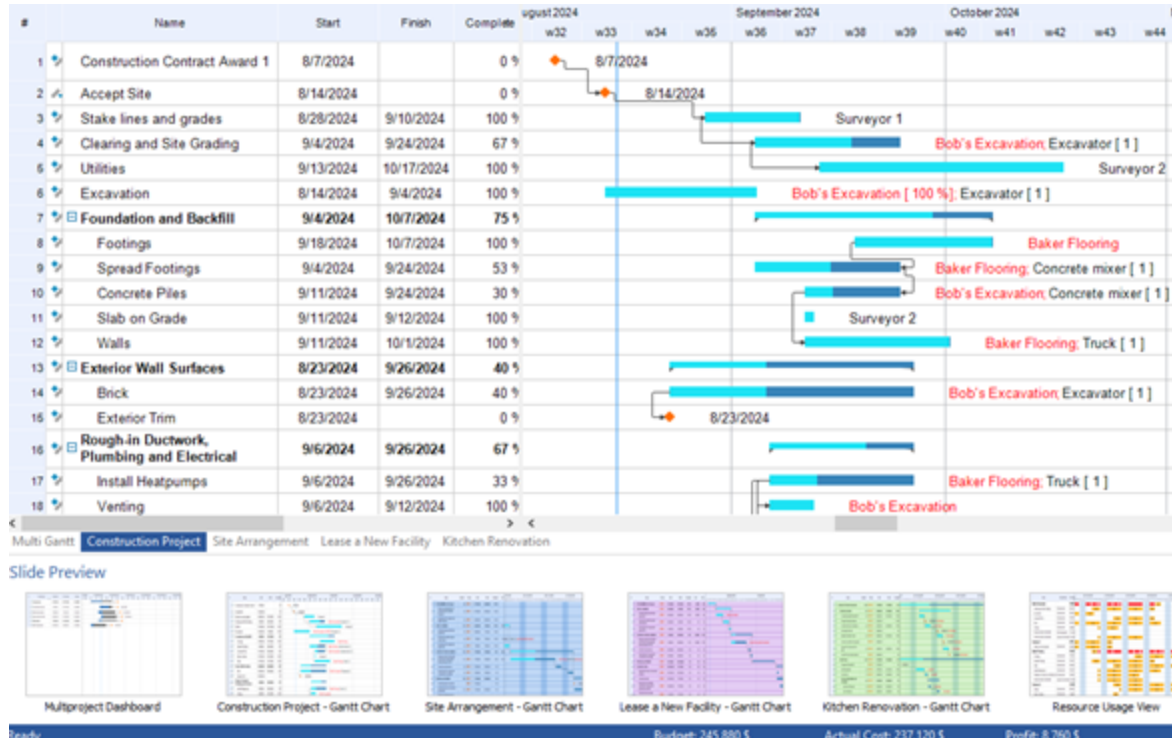
4. Diagram with an estimate by the actual cost of human resources ("Actual cost human resources / Total cost human resources").

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

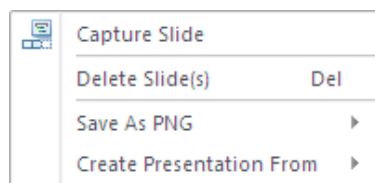
Slide Navigator



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



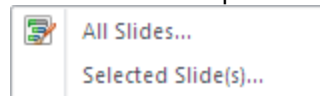
You can manage the slides in the Slide Preview panel using the context menu.



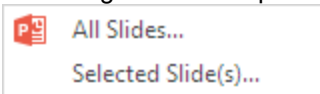
Capture Slide - Capture slide from a visible area of the current project view

Delete Slide(s) - Delete the selected slides

Save as PNG - Export to PNG according to chosen option

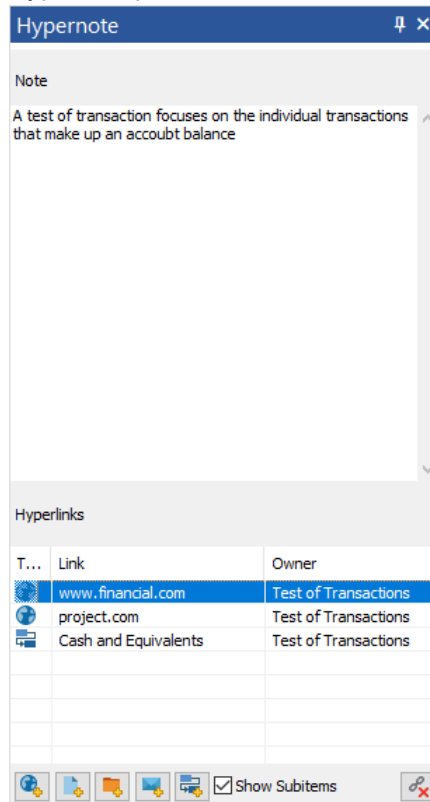


Create Presentation from - Export to PowerPoint Presentation according to chosen options



Hypernote


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




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

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

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


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

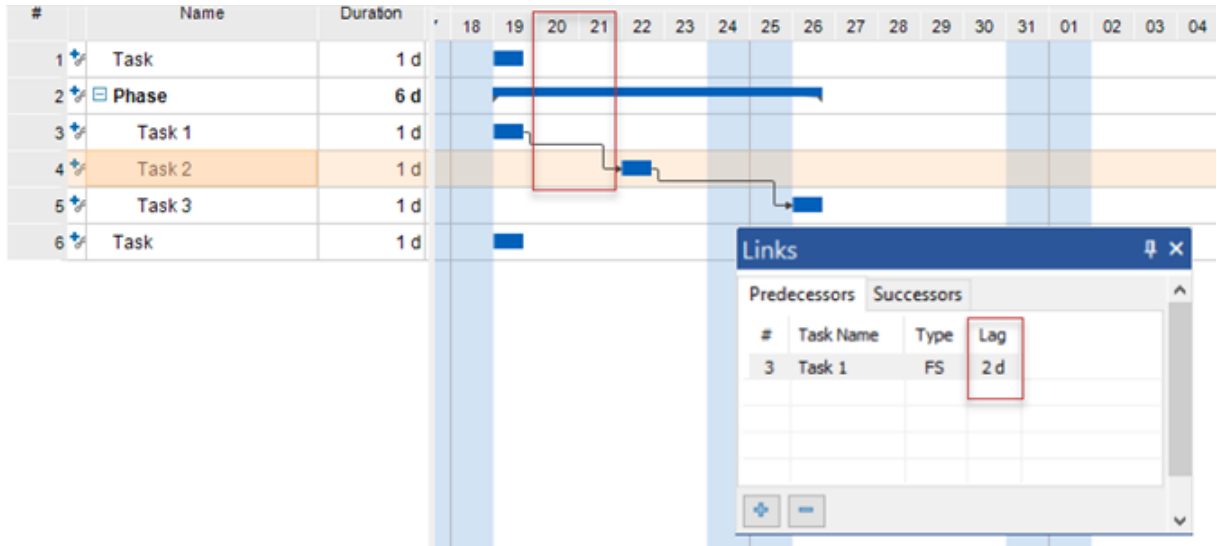
Any item with a hyperlink will be marked with icon: 

An item that has multiple hyperlinks will display this icon: 

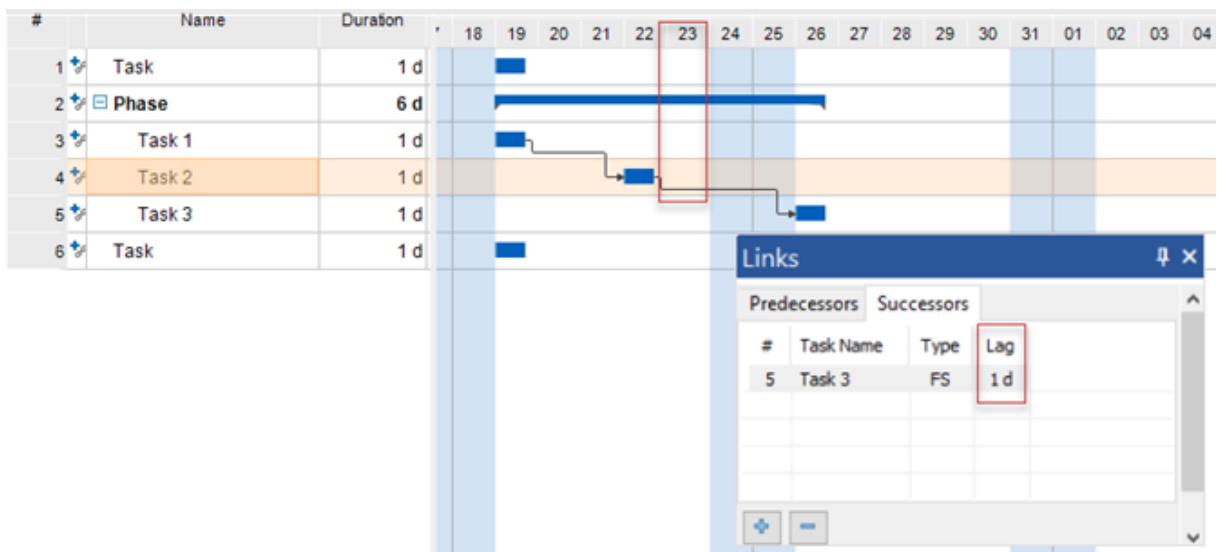
This panel brought together the functions of adding text notes and multiple hyperlinks. The earlier versions of ConceptDraw PROJECT had two different panels for these functionalities.

Links

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



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



Keyboard Shortcuts and Mouse Actions

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

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

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

Keyboard	Operation
Page Down	Scroll down in Print Preview
Editing	
Ctrl + Z	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