

A GUIDE TO MINDMANAGER

# Project Management

Project success depends on both the effective management of information and the efficient coordination of resources and schedules. MindManager can help.

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MindManager Enterprise

MindManager is advanced mind mapping software that represents complex information in an organized, visual format. The latest version of MindManager is the result of years of development based on feedback from people who manage projects. It offers a range of features that can help you at every stage of a project, from brainstorming goals and dependencies, validating requirements, organizing information and analyzing research, to creating detailed schedules and work breakdown structures, and communicating implementation status.

This guide is designed to help you get the most out of using MindManager for project management. If you're not familiar with MindManager yet, the following overview provides a summary of the benefits. You may also want to read our whitepaper "[The Visual Approach to Improving Project Management](#)".



## MindManager Overview

The foundation of MindManager is mind mapping—a way of visually representing ideas and information. Just as geographical maps help people see where they're going and help them anticipate and avoid obstacles, mind maps let people lay out ideas and connect information in a way that helps identify dependencies, connections, and risks. Many people describe MindManager as a virtual whiteboard, where you can visually capture and communicate your best thinking. Using MindManager has six key benefits:

### MINDMANAGER LETS PEOPLE WORK THE WAY THEY THINK

With MindManager, you can brainstorm and capture ideas in freeform, and then add structure and depth. Drag-and-drop editing and markers let you apply order, connect ideas, and group concepts into themes. Built-in templates make it easy to bring clarity to important projects, and completed maps give you a more effective way to communicate.

### MINDMANAGER REDUCES INFORMATION OVERLOAD

MindManager lets you organize ideas and information in a single view so you can see connections and draw conclusions quickly. It's easy to assemble content-rich information maps with attachments and links that let you process information without having to jump between different apps and browsers. You can even import tasks, email, and contacts from Microsoft Outlook to mind maps to better organize your work life.

### MINDMANAGER HELPS STRUCTURE BUSINESS, STRATEGIC, & PROJECT PLANS

MindManager provides deep capabilities for organizing information to drive critical business processes and decision-making. MindManager's advanced features include Guided Brainstorming tools, 2x2 analysis views, budgeting and forecasting tools, and the numerous project management features detailed in the following sections of this guide.

### MINDMANAGER IMPROVES COMMUNICATION

MindManager's visual format lets you show the big picture and then drill down to display details as needed, all in a single view. Improve meetings by quickly capturing discussion notes and follow-up action items in context. Use priority markers, symbols, and embedded images to highlight the most important points.

### MINDMANAGER WORKS WITH YOUR EXISTING TOOLS

MindManager is integrated with Microsoft and Apple productivity apps, including Microsoft Word, PowerPoint, Excel, Outlook, Project, and Apple Keynote and Pages. Individuals can map out their work in MindManager, then publish final reports and proposals in the most appropriate format.

### MINDMANAGER CAN BE USED ACROSS THE ORGANIZATION

MindManager Enterprise extends the value of MindManager, offering integration with Microsoft SharePoint to enable collective information management and collaboration. With MindManager Enterprise, people across the organization can use MindManager's intuitive visual framework to capture and organize information, then share editable maps so teams can solve problems, prioritize strategies, plan projects, and process information together.



## Managing Your Project

The following sections assume that you have basic knowledge of MindManager.

### DEFINING AND VALIDATING REQUIREMENTS

One of the primary reasons projects run into trouble is a failure to gain agreement on expectations from the beginning. MindManager is ideal for creating and validating requirements because its brainstorming tools help you communicate clearly with stakeholders.

Begin by entering basic information about the project, stakeholders and team members. Most importantly, brainstorm on goals, requirements and time frame, and use the project charter as a vehicle to ensure alignment, both with team members and executive sponsors.

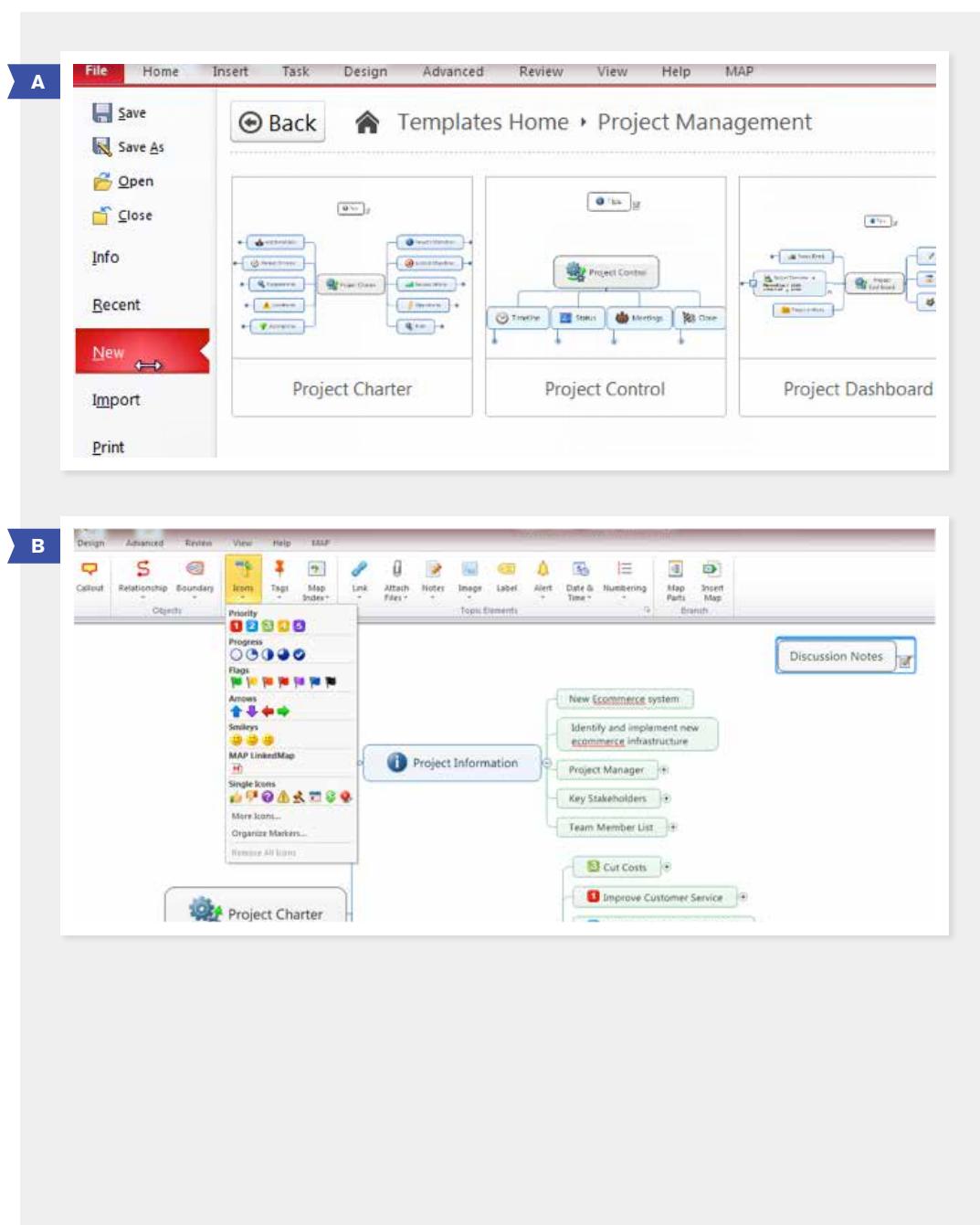
Use MindManager priority markers and other icons to help drive decisions, by drawing attention to items where gaining agreement is essential. Keep notes in a discussion topic for later reference—you can convert the map to a PDF and circulate it as a follow-up to all participants.

FIGURE A

Select the Project Charter template from the New Map menu.

FIGURE B

Go to the Insert menu and click on icons to add priority symbols, completion indicators, and status flags.





## EXPANDING THE PROJECT CHARTER MAP

One of the benefits of working in MindManager is its flexibility. You can expand the project charter map in a couple of ways. The first, is by adding topics and sub-topics that you create.

The other is to use a MindManager map part to add pre-built topics to your map. For example, let's say you want to include getting budget confirmation as part of your requirements definition process. You simply drag the budget map part into your map.

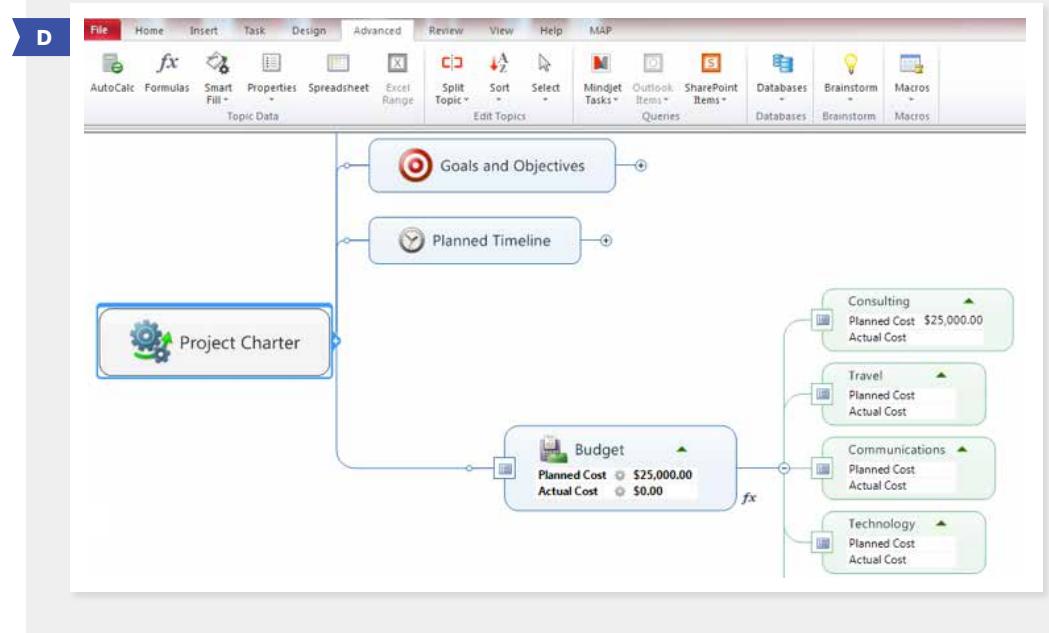
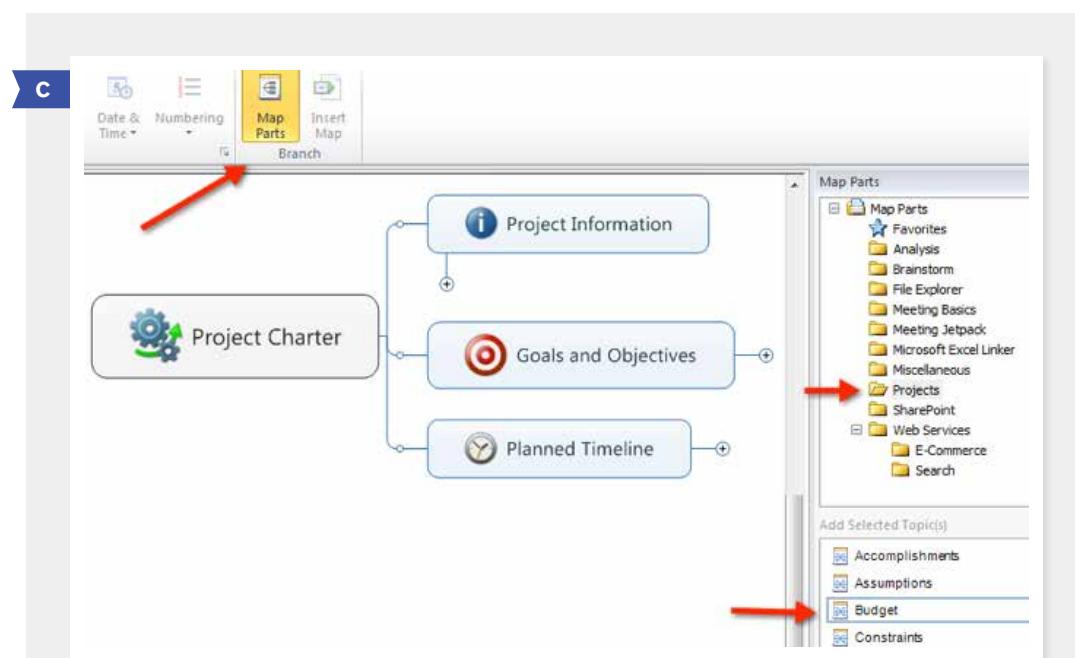
Once you've inserted the Budget topic, you can modify the sub-topics and add the numerical information. The Budget Overview will be automatically calculated as you add data to the subtopics. You may find many of the map parts, such as the analysis and brainstorming topics, useful for your project.

FIGURE C

FROM THE INSERT MENU TAB, SELECT MAP PARTS, THEN SELECT PROJECTS AND YOU'LL SEE BUDGET AS AN OPTION. YOU CAN DRAG THE BUDGET TOPIC INTO YOUR MAP.

FIGURE D

YOU CAN EDIT THE PRE-BUILT BUDGET TOPIC OR USE THE AUTOCALC AND FORMULAS FEATURES UNDER THE ADVANCED MENU TAB TO SET UP CUSTOM CALCULATIONS.





## THE PROJECT DASHBOARD

Once you've confirmed agreement on the project charter, create a project dashboard where you can maintain a single "source of truth" for your project. A Project Dashboard template is included in the template gallery.

At this point, you'll want to start adding attachments and links to relevant information—you can even insert other maps, including the Project Charter, using the Insert Map command. By copying the Project Charter into the Project Dashboard, you'll create a single "source of truth" for all project notes and files.

## LAYING OUT THE PLAN

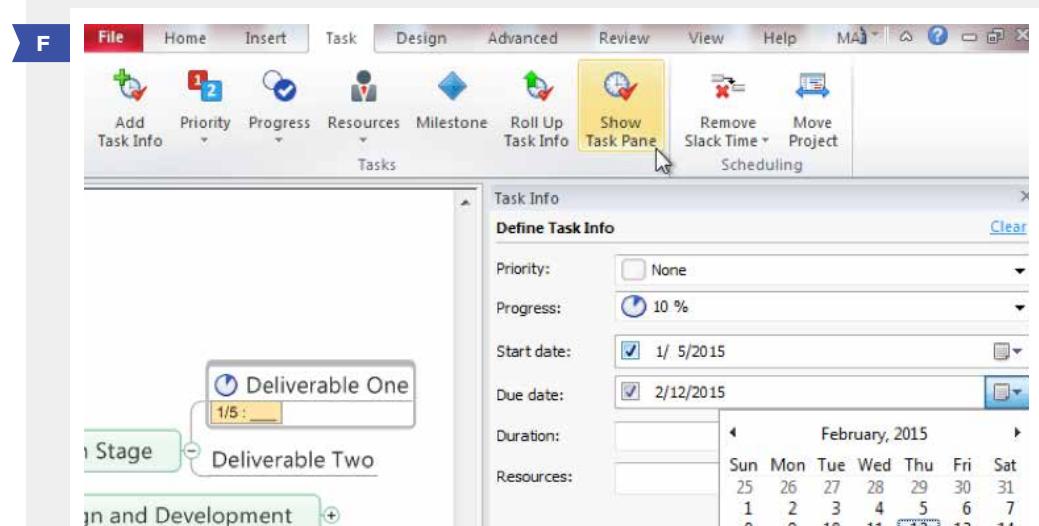
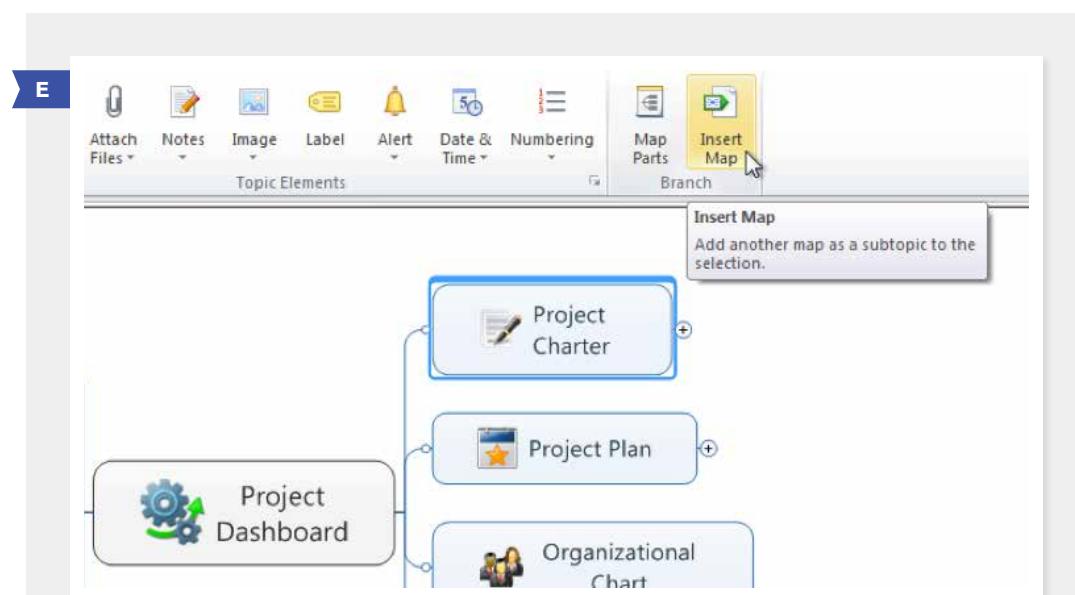
To define deliverables, schedules and resources, start by creating topics and sub-topics for your project's phases and deliverables. Then, select "Show Task Pane" under the Task tab and enter the relevant start dates, due dates, and person responsible for each.

FIGURE E

Attach files, attach notes, insert hyperlinks and even add another map as a subtopic from the Insert menu.

FIGURE F

Click to select progress status, start and end dates, and resources. Duration will be automatically calculated.





## LAYING OUT THE PLAN CONTINUED

Selecting a topic and click on the “Roll Up Task Info” button, will cause the earliest start date in all subtopics to be shown as the start date for the topic, and the latest end date will be shown as the end date.

You can also create dependency relationships between tasks and define how the tasks are related to each other—for example, setting the start date of one task to be dependent on the completion date of the task it's related to.

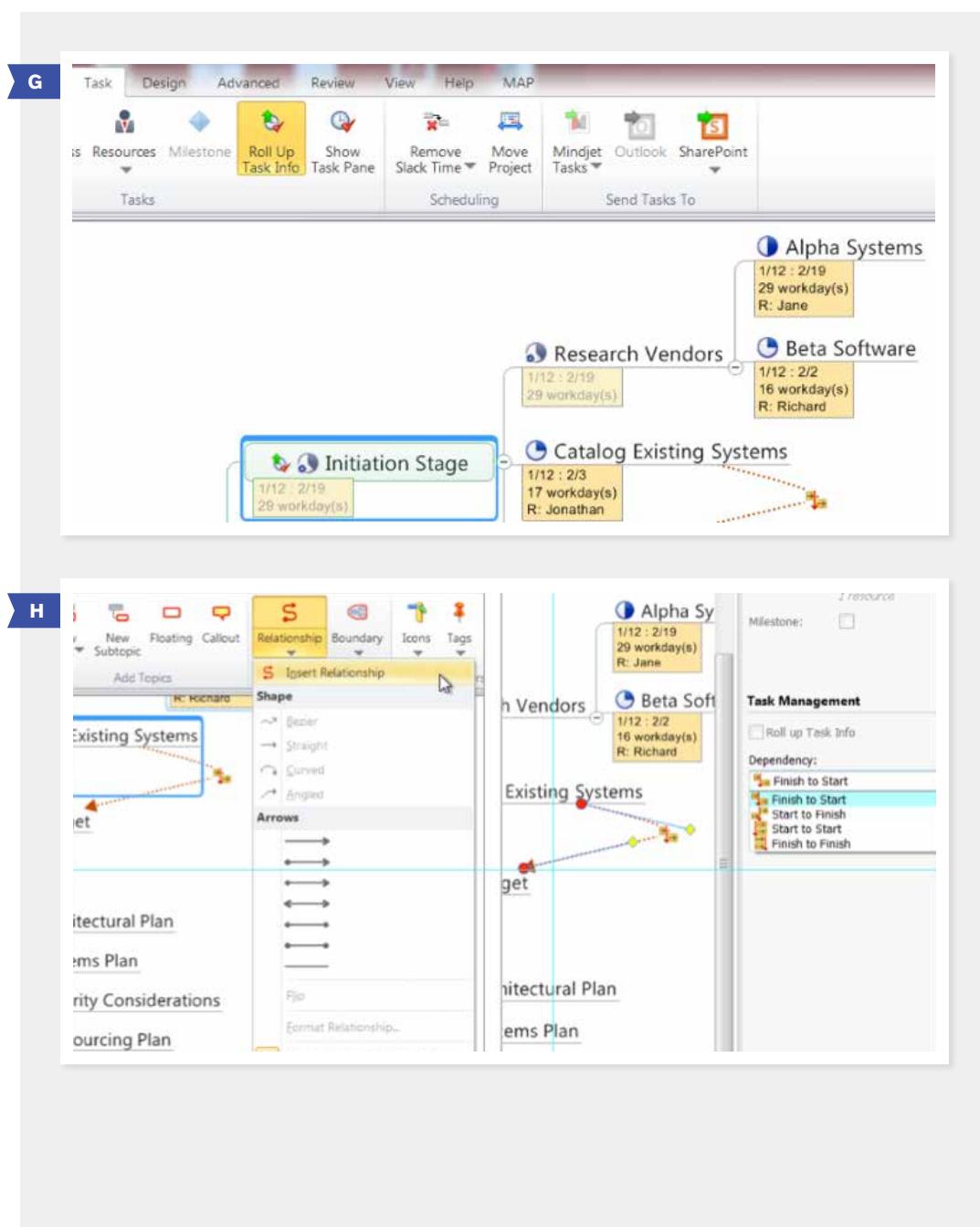
Finally, in the Task Pane, you can define certain topics or sub-topics as milestones, which are used to help keep track of deliverables in larger projects. Continue to define tasks, start and due dates, and dependencies until a full plan is ready to review.

FIGURE G

Select a topic and click on the Roll Up Task Info button to show total time for each project phase.

FIGURE H

Under the Home tab, select relationship to link two topics or sub-topics; then, in the Task Pane, define the timing for the dependency.





## REVIEWING AND OPTIMIZING THE PLAN

Now you're ready to review the detailed plan with the team that will be responsible for implementation. MindManager includes several features that will help with plan refinement, including the ability to move dates, display a timeline (Gantt) view, and filter on key data. The ability to show everyone on the team the impact of changes in assumptions and schedules, and to keep everyone on the same page over the course of a project, is one of the key benefits of MindManager's visual approach to project management.

FIGURE I

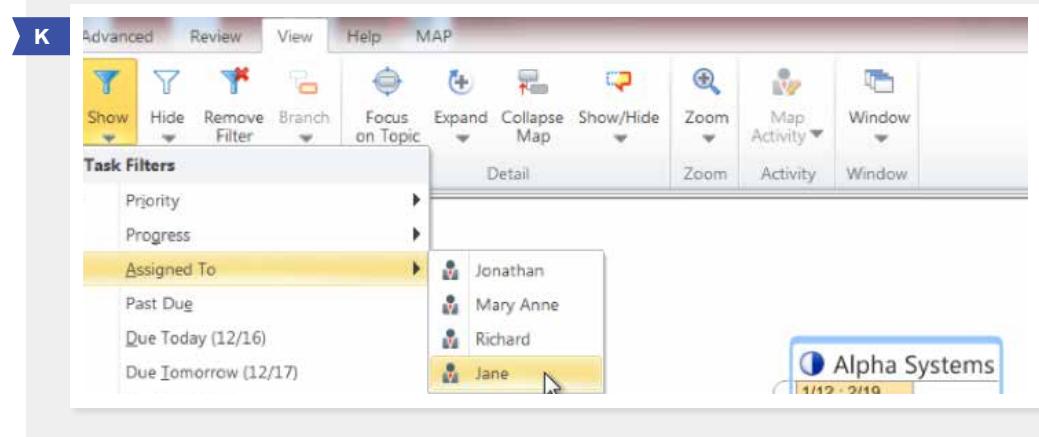
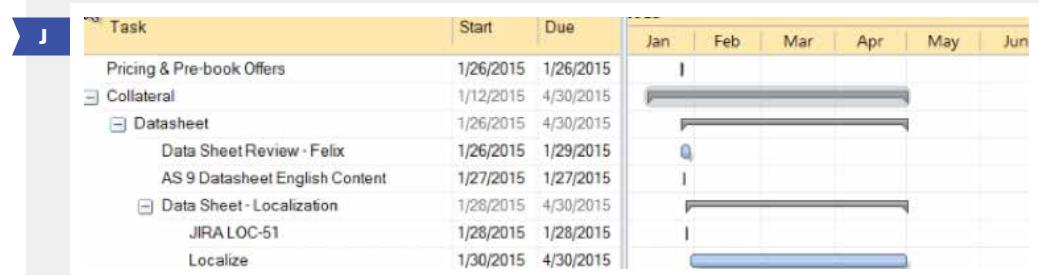
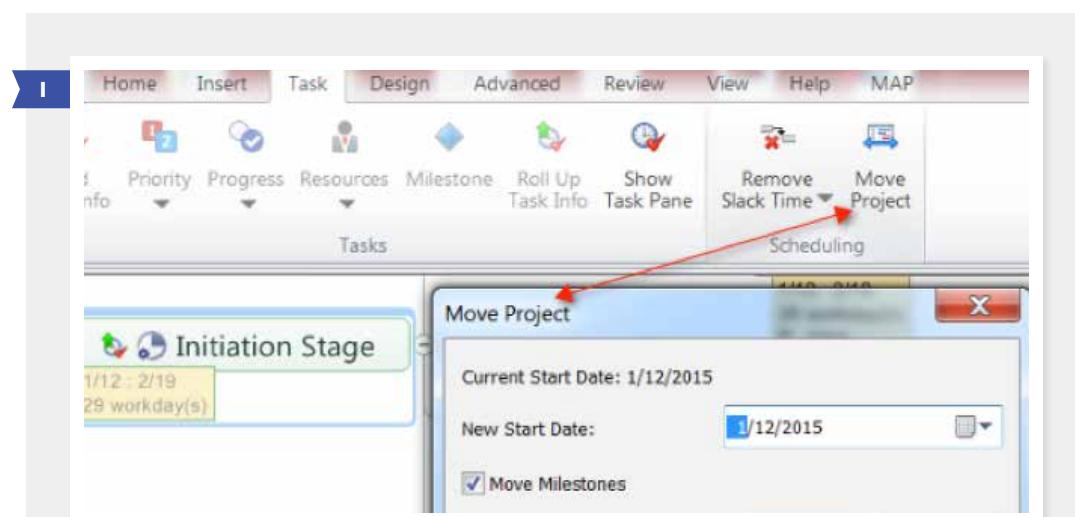
If schedules change, choose "Move Project" to change the earliest start date in that section. All dates will be automatically changed, including the dates of relevant milestones.

FIGURE J

The Gantt chart view (under the View menu tab) shows the project timeline, including dependencies and milestones. Any changes made by dragging the timelines in Gantt view will be reflected in the map.

FIGURE K

Use Filters (under the View tab) to view tasks assigned to certain individuals, in order to assess workloads. You can also apply Filters to other task details.





## NAVIGATING LARGE PROJECT MAPS

In addition to filters, the ability to expand and collapse maps, and the Index function can help you manage map details for complex plans.

FIGURE L

Use the Expand menu (under the View tab) to see the level of detail desired. Collapse map closes sub-topics.

FIGURE M

The Map Index (in Home menu tab) shows a list of each marker or element type. Clicking on the item in the index will cause that topic or sub-topic to be displayed in the map.

The screenshot displays two views of the MindManager application. The top view, labeled 'L', shows the 'View' tab selected with the 'MAP' sub-tab active. A context menu is open over a node in the map, with the 'Expand' option highlighted in yellow. The menu includes options like 'Next Level', 'Collapse Topic', 'Show 1 Level', 'Show 2 Levels', 'Show All Levels', 'Collapse Branch', 'Collapse Map', and 'Focus on Topic'. The bottom view, labeled 'M', shows the 'Home' tab selected. On the left, there's a toolbar with icons for Icons, Tags, Map Index (highlighted in yellow), Link, Attach Files, Notes, Image, Label, Alert, Date & Time, Numbering, Map Parts, and Insert Map. On the right, there's a 'Map Index' pane showing a hierarchical list of project elements. The 'Markers' section lists nodes such as 'Launch Kick-off Meeting (HQ)', 'Launch Kick-off Meeting (EMEA)', 'Development Phases', 'Feature Milestone Schedule', 'Early look', '5/31: Feature Freeze', and '6/17: Code Freeze'. The 'Elements' section shows categories like 'Task Priorities\*', 'Task Complete (%)\*', and various priority levels (Priority 1 to Priority 5) with their respective counts. A blue callout box labeled 'Key Dates' points to the 'Early look' node in the map index.



## WORKING WITH MICROSOFT PROJECT AND OFFICE APPLICATIONS

Once you've completed your detailed project plan, you can continue to update the project dashboard to reflect status and then share the map using the Export to PDF or Export as Image capabilities, found under the File menu in the upper left. You can also use the Presentation features (in the View tab) in MindManager to create slides of your map topics and then export to Microsoft PowerPoint for distribution.

You can also export to Microsoft Excel or Microsoft Project, if you use either for project management.

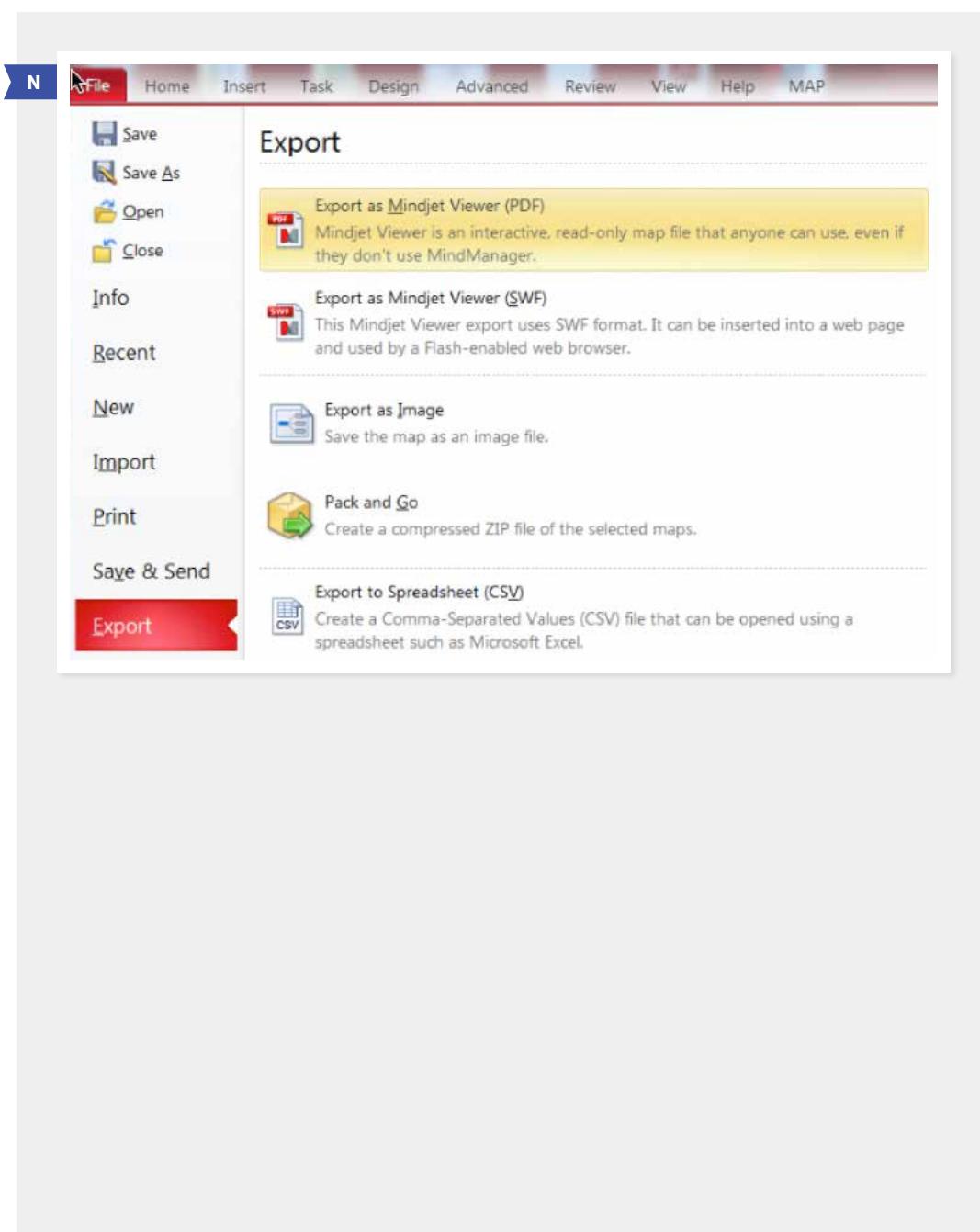


FIGURE N

Export options are shown in the File menu.

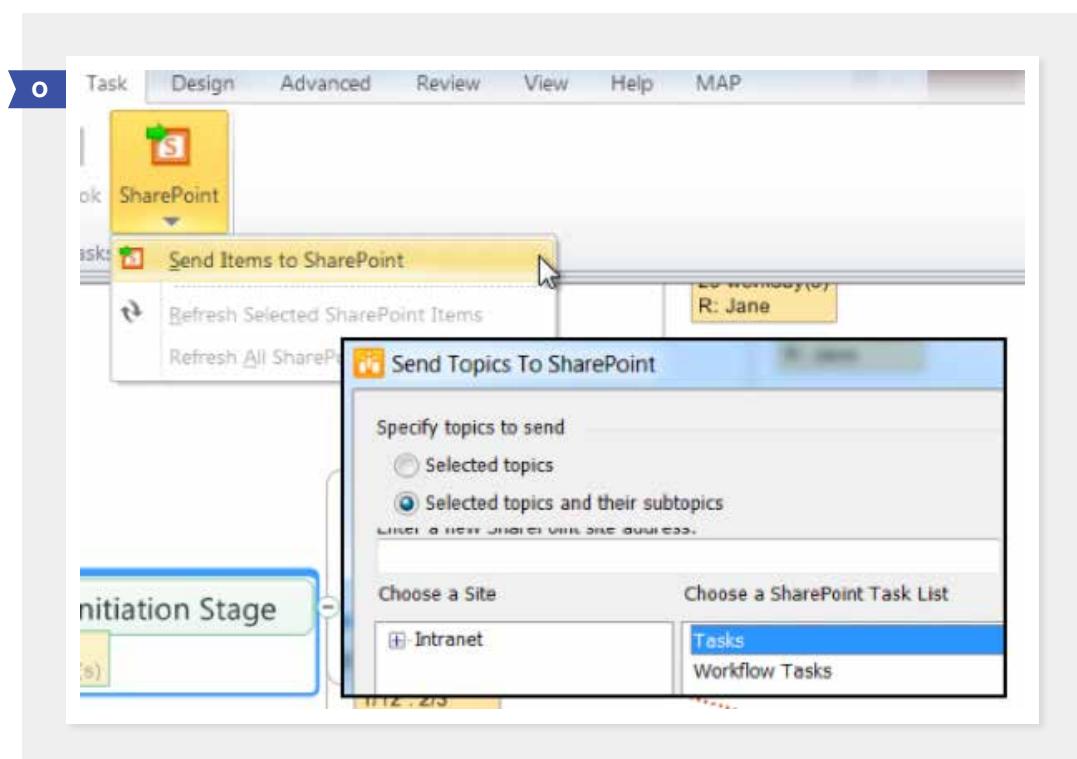


## MINDMANAGER ENTERPRISE

MindManager Enterprise expands the power of visual business mapping to the entire organization, enabling effective collaboration through integration with Microsoft SharePoint (2010 and 2013). If your organization is a MindManager Enterprise customer, you can export tasks to take advantage of SharePoint's collaborative task management capabilities.

FIGURE 0

MindManager Enterprise lets users send tasks to SharePoint. Tasks updated in SharePoint are also updated in the maps.



Start managing your projects with MindManager to drive project success and inspire innovative solutions. MindManager maps have the features you need to coordinate projects and avoid roadblocks. From small projects to complex initiatives, you can create a blueprint for success with MindManager. Haven't tried MindManager? [Start a free trial today.](#)