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Special thanks to Marcia Daniels for helping to create some of the OpenMind curriculum-based templates.

Marcia Daniels is a science and technology teacher with 15 years of public and private school experience, currently teaching at Mill Springs Academy in Atlanta, Georgia, USA.

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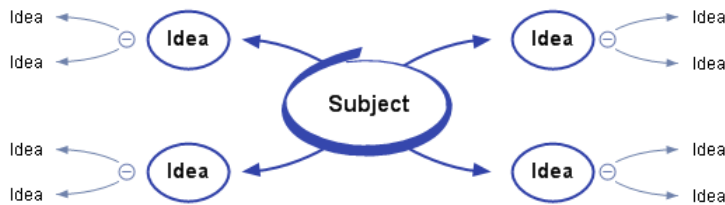
# Introduction

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# Welcome

Welcome to MatchWare® **OpenMind™ Business Edition**, the perfect tool for businesses, educators and students who need to organize information! Easy to learn and easy to use, OpenMind is a highly effective way of **brainstorming, developing and structuring ideas visually**. Ideal for use by individuals, small teams or large groups, OpenMind generates illustrated **Mind Maps®** which you can use in presentations, reports, web sites and more. With a comprehensive range of export options to Microsoft® Office applications, MatchWare® Mediator, HTML and other formats, OpenMind is an effective and versatile concept development tool.

Mind Maps are illustrated frameworks of organized, prioritized, linked ideas that develop or relate to a subject or concept.



Mind Maps have been demonstrated to help individuals and businesses achieve higher levels of performance by increasing productivity and organization skills.

## Outlining written documents

Using the Mind Mapping technique makes it very easy to outline your written documents such as meeting agendas, proposals and marketing plans. OpenMind allows you to brainstorm ideas for your main topics in a completely free and non-linear way. One of the great benefits of using OpenMind, as opposed to brainstorming on a piece of paper, is that OpenMind allows you to reorganize your ideas in the right order by dragging and dropping them in the Mind Map once you have finished listing them.

When you export your Mind Map to **Microsoft® Word**, you can choose from a variety of creative templates designed to give your document a professional look instantly. Main ideas are exported as main headings, sub-ideas are exported as sub-headings and so on. All the text notes, comments, pictures and other elements which you have placed on the Mind Map are also exported. This means that you can actually start writing your report while brainstorming in OpenMind, as the complete text is included in the exported Word document.

Once you start developing your document in Word, you may realize that you have forgotten some key ideas that you would like to brainstorm in OpenMind first. All you need to do in that case is to import your Word document back into OpenMind, add the new ideas to your Mind Map, and then re-export to Word.

## Working with task lists

Use Mind Mapping to brainstorm, visualize and organize your tasks. Then convert your Mind Map into a detailed implementation plan by adding task information such as dates, resources, priorities and completion percentages.

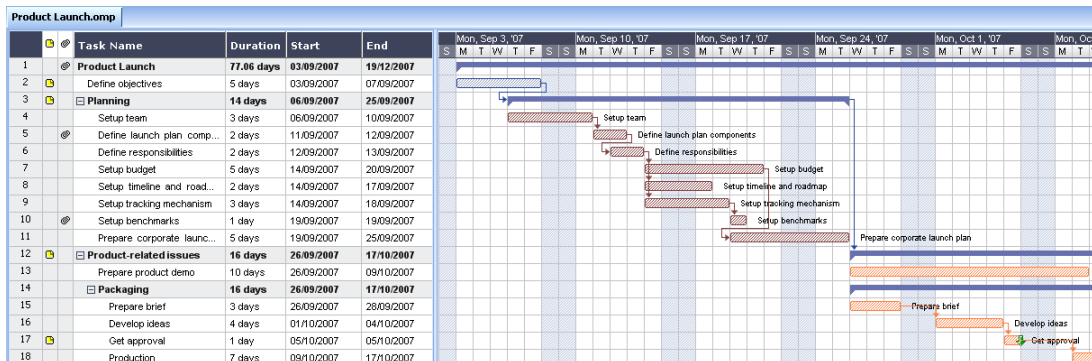
Task lists can be created in an instant and displayed in the Outline view or exported to **Microsoft® Outlook**. You can also import task lists from Outlook and synchronize information between OpenMind and Outlook to eliminate redundancies.

## Working with project plans

The OpenMind Gantt view, specific to the Business Edition, is a specialized view, dedicated to the creation, editing and management of project plans according to the rules of project management.

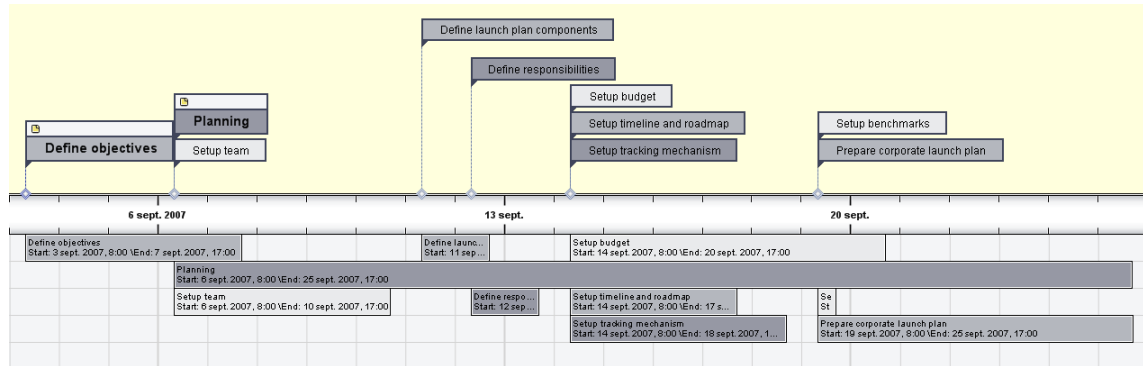
OpenMind lets you build, view and manage complex project plans in the Gantt view. Setup deadlines, milestones and dependencies while keeping an eye on the critical path to ensure your team delivers on time every time.

If necessary, you can easily export your project plan to **Microsoft® Project** to take advantage of its advanced project management capabilities. You can also import existing project plans directly from Microsoft Project or via the Microsoft Project XML format if you prefer to use the easy-to-understand, visual OpenMind interface.



# Working with timelines

The OpenMind Timeline view is a great way of displaying time-related information such as company history, marketing plans, production plans and historical data. Simply add dates or times to your branches and switch to the Timeline view to see the information displayed along a horizontal time axis. Different timescales (for example standard, weekly or daily) let you tailor the timeline to suit your needs. You can zoom in or out, expand or contract the timeline scale, and condense empty stretches of the timeline by inserting break marks. A structured display lets you see one level of branches at a time while accessing the sub-branches through drop-down hierarchical lists.



# Working on presentations and web sites

OpenMind has been optimized for storyboarding and planning web sites and multimedia presentations, which you can then export to **Microsoft® PowerPoint**, **MatchWare® Mediator** or **HTML**:

- When storyboarding presentations, an idea in your Mind Map represents a slide (PowerPoint) or a page (Mediator) in your presentation, a sub-idea represents a sub-page or sub-slide and so on.
- You can attach files to branches (ideas) in the Mind Map, such as Flash files, pictures, text, sounds and videos. These files are included when you export to PowerPoint, Mediator or HTML and displayed on their respective pages.
- OpenMind lets you create hyperlinks, buttons, branch connections and other interactivity that is also included when exporting.
- The Export Wizards include a range of ready-made templates with built-in navigation, which you are free to customize and save for further use.

- OpenMind allows basic web editing during the HTML export. You can for instance place the various elements where required on each individual page. No coding or scripting necessary!
- Once exported, you can import your Mediator or PowerPoint presentation back into OpenMind if you need to storyboard more pages or slides.

## **Using the ready-made templates**

OpenMind provides you with detailed business templates for use in the standard Mind Mapping views, as well as ready-made project plans specific to the Gantt view, covering a range of common business activities.

You can base your own documents on any of these templates, and customize them as required to meet your particular needs. Comments and suggestions for expansion are given in their notes and pop-up comments.

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# What's new in OpenMind 2 Business Edition

OpenMind 2 Business Edition has many new features, which are fully described in the User Guide part of this documentation. Here is a brief description of the most important enhancements.

**Templates:** OpenMind 2 Business Edition includes a number of new business templates, which you can customize as required to meet your particular needs. Ideas and suggestions for expansion are given in their many notes and pop-up comments.

To help you get started, OpenMind also includes various ready-made project plans for common business activities (organizing a tradeshow, producing a publication, launching a product and so on) for use in the new Gantt view. You can use these for training purposes, or as a basis for your own project plans.

- To access a template choose **File | New**, click the **Templates** tab and select the template you want to use from the appropriate category.

**Task Information:** OpenMind 2 Business Edition allows you to add task information to the branches of your Mind Maps in order to create simple task lists. The new Task/Timeline Info panel (which replaces the original Time Info panel) lets you add data such as start and end date, resources, priority and completion level to any branch. See "Inserting task information" for more details.

You can also import task lists from Microsoft® Outlook, or export your own OpenMind task lists to Microsoft Outlook. Finally you can use OpenMind to synchronize between the version of the task list stored in Microsoft Outlook and the version stored in OpenMind.

For more information on the export, import and synchronization possibilities, see "Exporting to Microsoft Outlook" and "Importing from Microsoft Outlook".

**Gantt view:** The OpenMind 2 Gantt view, specific to the Business Edition, is a specialized view, dedicated to the creation, editing and management of project plans according to the rules of project management. The view has two parts, an Outline on the left which represents the project as a hierarchical list of tasks, and a Gantt chart on the right, which shows the tasks as horizontal bars arranged against a background calendar display.

For more information on the Gantt view, see "Using the Gantt view" and the topics that follow it.

OpenMind 2 Business Edition lets you export your project plans to Microsoft® Project for further work. You can also import existing Microsoft Project plans into the Gantt view, directly from Microsoft Project or via the Microsoft Project XML format.

For more information on exporting and importing directly from Microsoft Project, see "Exporting to Microsoft Project" and "Importing from Microsoft Project". For information about exporting and importing Microsoft Project plans via the XML format, see "Exporting to XML" and "Importing from XML".

**Multimedia Catalog:** The Multimedia Catalog contains a new Map Styles category, allowing you to change the look of your Mind Map instantly by simply dragging a style onto your map. You can choose from a variety of professional map styles to apply different branch shapes, branch colors and other coordinated attributes in one step.

See "Using the Multimedia Catalog" for more details.

**Password protection:** OpenMind Business Edition allows you to prevent unwanted access to your documents by encrypting them and protecting them with a password. Password-protected documents cannot be opened without specifying the correct password.

See "Setting a password" for more information.

**Microsoft Outlook Import/Export and Synchronization:** As mentioned above, OpenMind Business Edition lets you import task lists from Microsoft Outlook. You can also export your own OpenMind task lists to Microsoft Outlook, and use OpenMind to synchronize between the version of the task list stored in Outlook and the version stored in OpenMind.

For more information about the procedures involved, see "Exporting to Microsoft Outlook" and "Importing from Microsoft Outlook".

**XML Import/Export:** OpenMind Business Edition allows you to import XML files of various formats, including Microsoft Project XML and MindManager XML. These options are particularly useful if you do not have the relevant software application installed on your computer. You can also export your OpenMind documents as OpenMind XML files or Microsoft Project XML files.

See "Importing from XML" and "Exporting to XML" for more information.

**Microsoft Project Import/Export:** OpenMind 2 Business Edition lets you export your project plans to Microsoft Project, either directly in the Microsoft Project .mpp format or via the Microsoft Project XML format. This is particularly useful when you have created a project plan in the new Gantt view which you want to expand further using the advanced capabilities of Microsoft Project.

You can also import existing Microsoft Project plans into the Gantt view, directly from Microsoft Project or via the Microsoft Project XML format.

For more information on exporting and importing directly from Microsoft Project, see "Exporting to Microsoft Project" and "Importing from Microsoft Project". For information about exporting and importing Microsoft Project plans via the XML format, see "Exporting to XML" and "Importing from XML".

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# Important terms

Many of the terms used in OpenMind belong to the standard Windows terminology. Some terms, however, are specific to OpenMind or related to the Mind Map concept and may be unfamiliar to you.

## **Auto-layout mode**

Normally, OpenMind arranges the branches of your map automatically as you insert them to prevent any overlap. This default mode is called the auto-layout mode. Disabling auto-layout allows you to position the main branches of your map yourself. See "Moving a branch" for more information.

## **Brainstorm mode**

Brainstorm mode lets you enter the main topics (branches) and sub-topics (sub-branches) of your map very fast as you explore all the ideas related to the subject of your map, without worrying about evaluating them or structuring them. See "Using brainstorm mode" for more information.

## **Branch connections**

A branch connection is used to indicate visually that two branches are conceptually related. This relationship is identified on a map by an arrow-headed line joining the source branch to the end branch. See "Creating branch connections" for more information.

## **Comments**

Comments are short notes that you can add to the root of your map, to a branch or to the workspace itself. See "Inserting comments" for more information.

## **Document**

The command File | New creates an OpenMind document, which opens in a separate tab bearing the name of the document. An OpenMind document can contain several maps. You can also keep several documents open at the same time in OpenMind. OpenMind documents are saved with the extension .omp. See "Creating a Mind Map" for more information.

## **Export**

Once you have finished the design of your document, you can export it to other formats, such as a Microsoft® PowerPoint presentation, a Microsoft® Word or .RTF document, a Microsoft® Project document, a Microsoft® Outlook task list, a MatchWare Mediator document or a picture. You can also export to HTML and XML. See the section "Exporting" for more information.

## **Gantt view**

The OpenMind Gantt view, specific to the Business Edition, is dedicated to the creation, editing and management of project plans according to the rules of project management. The Gantt view is made of two parts, an Outline on the left which represents the project plan as a hierarchical list of tasks, and a Gantt chart on the right, which shows the tasks as horizontal bars arranged against a background calendar display.

See "Using the Gantt view" for more information about project plans and project management. See also the definition of a project plan in this topic.

## **Import**

Not only can you export your document to PowerPoint, Word, Outlook, Microsoft Project or Mediator, but you can re-import the exported document into OpenMind as a new document, while preserving much of the additional work you might have done on the document in these external applications. You can also import into OpenMind documents originally created in PowerPoint, Word, Microsoft Project or Mediator as well as task lists from Outlook and XML documents. See the section "Importing" for more information.

## **Icons**

OpenMind has an Icon palette containing various icons which you can attach to the branches of your Mind Map. Using icons, you can for instance represent visually the status of a particular topic, its importance, and so on. See "Inserting icons" for more information.

## **Left/Right view**

This view represents your Mind Map as a list of topics placed either on the right of the root (Right view) or on the left of the root (Left view). It is a good choice when you need to present data in a list form and want to be able to fully explore each point in the list before going on to the next point. See "Using different views" for more information.

## **Links**

OpenMind allows you to create links between particular branches of your Mind Map and external elements, such as files or web pages. To do this, you first need to attach a hyperlink object, a button or a picture to the branch in question. You then specify the type of link you require. You can follow these links in OpenMind by activating the corresponding object. Once your map is exported, for instance to HTML or Mediator, all you have to do to activate the link is to click the button, picture or hyperlink. See "Creating links" for more information.

## **Main branch**

The main branches are the branches that are directly connected to the root. They represent the main topics related to the subject of your Mind Map. See "Inserting branches" for more information.

## **Mind Map**

A Mind Map is made up of its root, all its branches and sub-branches and all inserted elements (icons, comments, text notes and so on) and attached objects (text files, picture files, video files and so on). Note that OpenMind allows you to create several different maps in the same document.

## **Mind Map view**

This is the default view when creating a new Mind Map. It represents the map with the root in the center, and all the main branches radiating from it in a clockwise direction. This is a good view to use in Brainstorm mode, when collecting all the ideas related to the subject of the map without worrying about evaluating or structuring them. See "Using different views" for more information.

## **Objects**

OpenMind allows you to attach various objects to the root or branches of your Mind Map, such as text documents, pictures, videos, sounds, Flash™ files or links to external elements. These objects are listed in the OpenMind Object list, and can all be exported when exporting your map to a different format. See "Attaching objects" for more information.

## **Outline view**

The Outline view represents the map as a hierarchical list which you can expand and collapse as required. It allows easy navigation through the document from top to bottom and gives you another way to brainstorm ideas. For detailed information about working in the Outline view, see "Using the Outline view".

## **Pack & Go**

This feature allows you to distribute your Mind Map to other users very easily. With just one mouse click, you can create an output folder containing your map and all the external files it references, ready to be accessed over the network, or a zipped output folder to be distributed by email or otherwise. See "Pack & Go" for more information.

## **Pre-branch**

A pre-branch is a branch that you insert before the currently selected branch. See "Inserting branches" for more information.

## **Project plan**

A project plan is a series of interdependent tasks that need to be performed in a particular order. A project plan has a specific start date, corresponding to the start of the first task, and a specific end date, corresponding to the end of the last task and the completion of the project. If one task runs late, all the tasks that are dependent on the delayed task are affected and their dates are automatically recalculated. OpenMind lets you build, view and manage complex project plans in the Gantt view. See "Using the Gantt view" for more information about project plans and project management.

OpenMind also supports the creation of task lists, which are much simpler than project plans. See the definition of a task list in this topic.

## **Properties**

Many OpenMind components, including the document itself, the root, the branches and all attached objects have their own properties, displayed in the Properties dialog. See "Using the Properties dialog" for more information.

## **Root**

The root is the central block that appears when you create a new Mind Map or choose the Insert | New Map command in the main menu. It represents the subject of your Mind Map. Any branch that you attach directly to the root is a main branch. See "Entering the subject" for more information.

## **Sub-branch**

Any branch belonging to a main branch is called a sub-branch. Each sub-branch can have its own sub-branches. Sub-branches represent various levels of sub-topics. See "Inserting branches" for more information.

## **Task list**

A task list is a series of individual tasks which are not connected to each other. If one task is delayed, this has no effect on any of the other tasks. OpenMind lets you add task information such as dates, priorities and resources to the branches of your document in order to create simple task lists. See "Inserting task information" for more details.

OpenMind also lets you build and manage project plans, which are more complex than task lists. See the definition of a project plan in this topic.

## **Templates**

OpenMind comes with a large number of educational, business and personal templates on which you can base your own Mind Maps. You can also save your own Mind Maps as templates for future use. See "Saving a Mind Map" for more information. Templates are saved with the extension .omt.

**Text notes**

Text notes, unlike comments, are comprehensive notes that you can enter using the Text Note editor and associate with the root or any branch of your map. See "Inserting text notes" for more information.

**Timeline view**

The Timeline view lets you see all the branches of your Mind Map that contain time information displayed in chronological order along a horizontal time axis. Different timescales (for example standard, geological and historic) let you tailor the timeline to suit your needs. For more information on the Timeline, see "Using the Timeline view".

**Top Down view**

This view represents your Mind Map as a hierarchical pyramid, with the root at the top, the main branches underneath, the sub-branches below the main branches and so on. It is a useful representation for structured data which needs to be viewed in a hierarchical manner, in other words from the higher level to the lowest levels. See "Using different views" for more information.



# Installation

---

# OpenMind Installation

## Stand-alone installation

- Insert the CD-ROM in the CD-ROM drive.
- Follow the instructions on the screen when the OpenMind Install program starts.

If the OpenMind Install program does not start automatically:

- Choose Start - Run.
- Type the following:

`X:\start.exe`

where X represents the CD-ROM drive letter.

## Administrative installation (system administrators only)

The Windows® Installer can perform an administrative installation of an application or product to a network for use by a workgroup. An administrative installation installs a source image of the application onto the network that is similar to a source image on a CD-ROM. The administrative installation package can then be pushed by system administrators to client computers in a domain via Group Policies. This is only possible from Windows 2000 Server onwards.

To find out more about Windows® Installer and administrative installations, please refer to the Microsoft web site.

## Creating an administrative installation

Administrators can create an administrative installation from the command line by using the /a command line option.

- Choose Start - Run.
- Type the following:

`msiexec.exe /a X:\install\setup.msi`

where X represents the CD-ROM drive letter.

(please check the location of the setup.msi on the CD-ROM)

- Specify the following in the dialog that appears:
  - Where you want to unpack the .msi file
  - The user name and company name to use as default
  - The serial number
- (optional) Check 'Force activation when OpenMind is run' if you want OpenMind to be automatically activated the first time the program runs.
- (optional) Check 'Automatically activate during installation' if you want to activate OpenMind during installation.



These two activation options are "silent" (i.e. they do not display any messages).



*The above options are stored in a file called "admin.ini" in the destination folder. You can edit this file using a text editor like Notepad if you want to change the options without making a new administrative installation.*

## Applying a patch package to an administrative installation

- Choose Start - Run.
- Type:

```
msiexec.exe /p <path to .msp file> /a <path to administrative .msi file>
```

Members of the workgroup using OpenMind must then reinstall the application from the new administrative source image to receive the update.

To completely reinstall the application and cache the updated .msi file on their computer, users may enter either of the following commands:

- `msiexec.exe /fvomus //server/<administrative .msi file>`
- `msiexec.exe /I //server//<administrative .msi file> REINSTALL=ALL REINSTALLMODE=vomus`

## Troubleshooting

### Changing the location of the activation file

By default, the activation data is stored in:

C:\Documents and Settings\All Users\Application Data\mwas\OpenMind2.0be.mwas

In some rare situations, client computers may be setup with restricted access to the above folder, and this will cause the activation file not to be saved. If you have a client server system setup in this way, you can move the activation file to another location by adding an entry to the admin.ini file as follows:

```
[Activation]

mwas=c:\different folder with write access\OpenMind2.0be.mwas
```

## Storing several activation files on the server

You can store several activation files in the same folder of the server by adding an entry to the admin.ini file as follows:

```
[Activation]

mwas=\\server\activations\OpenMind2.0be_%COMPUTERNAME%.mwas
```

Where:

server = the name of the server

activations = the share name on the server

%COMPUTERNAME% will be replaced with the client computer name

## Problem applying a patch

Q. Nothing happens when I double-click the patch file (ex. patch.msp).

A. The .msp file extension may be allocated to an application other than the Windows installer.

In this case, you can apply the patch as follows:

➤ Chose Start - Run.

➤ Type the following command:

```
msiexec.exe /p c:\temp\patch.msp
```

(assuming that you have copied the .msp file to c:\temp)

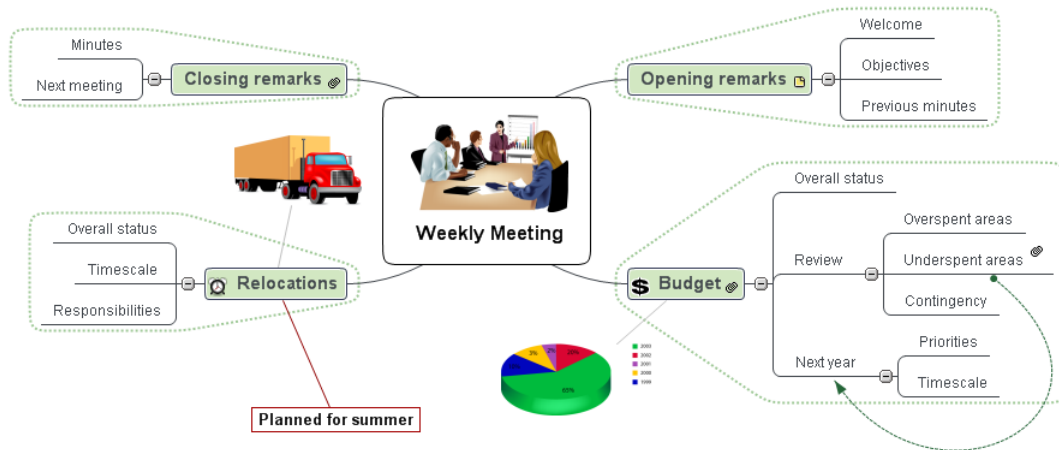


# Quick Start

# Quick Start

This Quick Start takes you through all the basic steps required to build a Mind Map from scratch and enhance it with colors, icons, comments, pictures, links and so on.

The map we are going to create here is about planning a weekly meeting.



The complete Mind Map, "Weekly Meeting.omp", can be found in the OpenMind program folder, in "...\\MatchWare\\OpenMind 2.0 BE\\QuickStart".

---


# First step: Creating the Mind Map

In this first step of our Quick Start example, we are going to create all the branches we require for our meeting agenda.

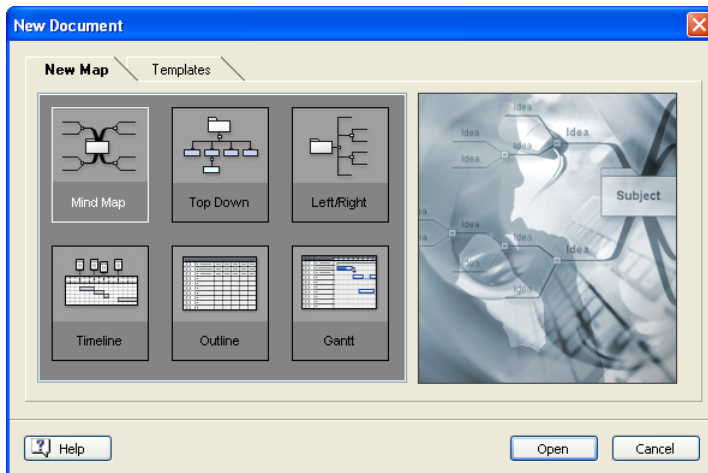
We start by creating a new OpenMind document.

- Start OpenMind and choose 'New document' in the Welcome dialog.



If you have closed the Welcome dialog, create a new document by clicking the New Document icon .

The New Document dialog opens.



In this Quick Start, we will use the Mind Map view, which is the default OpenMind view.

- On the New Map tab, select the Mind Map thumbnail and click Open.

Your new map appears with the root block ready for you to fill in.



## Entering the subject

- Type "Weekly Meeting" and press Enter.

Weekly Meeting

The default file name "Weekly Meeting" is now shown on the document tab **Weekly Meeting\***. The asterisk to the right of the name indicates that the document contains changes which have not yet been saved.

## Inserting the main branches

We are now going to insert a few branches, corresponding to various topics we would like to include in our agenda, namely:

- A section for the opening remarks
- A section on budget issues
- A section on the upcoming office relocations
- A section for the closing remarks

Let's start by inserting the first branch.

➤ Press Enter.

The first branch is now visible. Its default label is "Idea".

➤ Type "Opening remarks" and press Enter.

➤ Press Enter again to insert the second branch.

➤ Type "Budget" and press Enter.

➤ Insert two more branches by pressing Enter and label them "Relocations" and "Closing remarks".

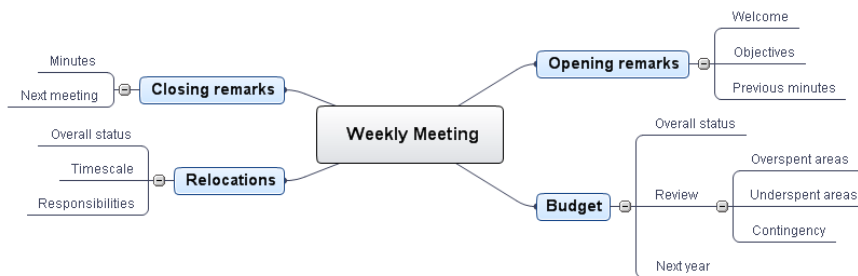
As you can see, branches are inserted in a clockwise direction around the root.



## Inserting the sub-branches

We now want to insert some sub-branches, corresponding to the sub-topics of our main topics.

- To add the first sub-branch to the Opening remarks topic, click the corresponding branch to select it and press Insert.
- Type "Welcome" and press Enter.
- Press Enter again to add the second sub-branch.
- Type "Objectives" and press Enter.
- Type "Previous minutes" and press Enter.
- Now select the "Budget" branch and press Insert to add its first sub-branch.
- Continue in the same way until you have added all the other sub-branches shown below.



To correct typing errors, click the branch label and press F2. Then place the cursor at the required position, press Delete or Backspace to remove the incorrect characters, type the correct ones and press Enter.

Let us save the work we have done so far before going on to the second step.

- Click the Save Document icon .

In the Save As dialog that opens, choose a folder, enter a file name for your new Mind Map and click Save. The default file name, derived from the subject of the map, is "Weekly Meeting.omp".

---

## Second step: Enhancing the Mind Map

In this second step of our Quick Start example, we are going to enhance our meeting agenda by adding a variety of visual elements and multimedia objects to it.

### Inserting icons

- Click the **Multimedia** tab on the right of the workspace to open the panel containing the Multimedia Catalog and the Icon palette.
- Select the Budget branch.
- Click the dollar sign icon in the **Icon palette**.



The icon now appears next to the branch label name.



- Select the Relocations branch and add the clock icon to it to indicate that the deadline for the office move is approaching.

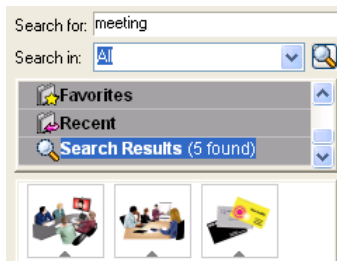


### Inserting pictures

It is good Mind Mapping practice to insert a picture in the root block to illustrate the theme of the map, so we are going to do just that:

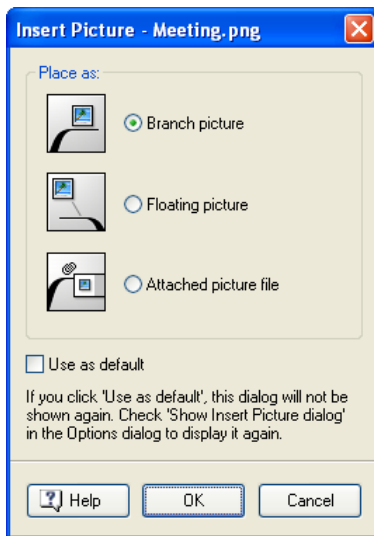
- Click the 'Search for' field of the **Multimedia Catalog** and type "meeting".

Various pictures appear in the Multimedia Catalog display area.



- Drag the picture of the meeting over the root block and let go of the mouse button.

The Insert Picture dialog appears.



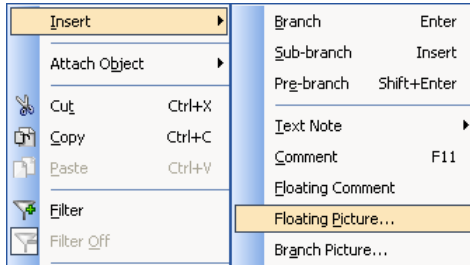
- Check the 'Branch picture' option and click OK.

The root block now contains a picture of a meeting.



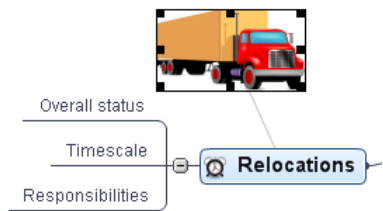
We also have a picture of a removal truck which we are going to use to illustrate the Relocations branch.

- Right-click the Relocations branch and choose the Insert command in its local menu.
- Choose Floating Picture in the sub-menu that appears.



- Browse to "...\\MatchWare\\OpenMind 2.0 BE\\QuickStart" in the Program Files folder, select the file "Truck.png" and click Open.

A picture of a truck now appears on the map. You can move this picture wherever convenient by dragging it with the mouse. Note that a thin line connects it to the branch to which it belongs.



## Attaching a hyperlink object

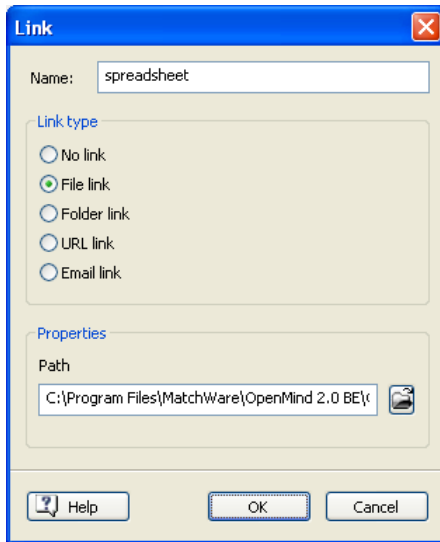
Since we have developed a spreadsheet to help us plan next year's budget, we are going to include it as a link on our map.


- If it is not already visible, display the Object toolbar by choosing **View | Toolbars | Objects**.
- Click the Budget branch to select it.
- Click the Attach Hyperlink icon in the Object toolbar.



The Link dialog opens.

- Fill in the Name field, browse to "...\\MatchWare\\OpenMind 2.0 BE\\QuickStart" as shown below, select "Budget.xls" and click OK.



A paperclip icon  now appears to the right of the Budget branch label, indicating that this branch contains attached objects.

- To view the hyperlink, move the pointer over the paperclip icon.

The object pop-up list appears.



Assuming Microsoft® Excel is installed on your computer, all you have to do to view the spreadsheet is to click the hyperlink in this list.

The hyperlink is also listed in the Object list for the branch.

If the Object list is not already visible, click the General tab on the right of the workspace to open the corresponding panel.

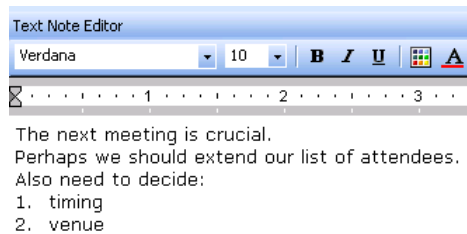


## Inserting a text note

The OpenMind Text Note editor lets you add comprehensive text notes to any branch of your map.

We want to add a note to the Closing remarks branch to explain why we might want to broaden the list of attendees for the next meeting.

- If it is not already visible, display the Text Note editor by choosing **View | Panels | Text Note Editor**.
- Select the Closing remarks branch and type the following text (or any other) in the Text Note editor.

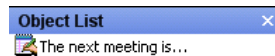


- Format the text to your liking and click outside the Text Note editor.

As earlier, a paperclip icon now appears to the right of the Closing remarks branch label, indicating that it contains an object.



The Text Note also appears in the Object list for the branch.



## Creating a branch connection

Since we want to consider this year's underspent areas when planning next year's budget, we want to create a visual link between the two topics on the map.

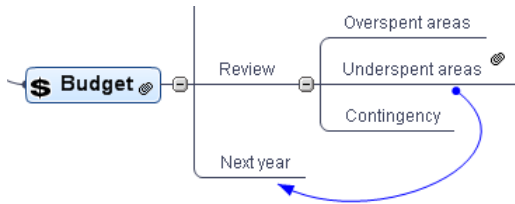
- Click the **Branch Connection** icon in the Display toolbar.



The mouse pointer changes shape.

- Move the mouse pointer to the Underspent areas branch, click it, drag the pointer to the Next year branch until it gets highlighted and let go of the mouse button.

A line now joins the Underspent areas branch to the Next year branch, indicating that the two branches are related.



The paperclip icon appears to the right of the Underspent areas branch, denoting the presence of the branch connection.

If you select the Underspent areas branch again, you will notice that the branch connection is also listed in its Object list. By default, it bears the name of the branch where the connection ends.



## Inserting comments

Finally we would like to insert a couple of comments in our map.

We start by adding a "floating comment" to the Relocations branch to indicate that the planning deadline is approaching. Floating comments stay visible on the screen at all times.

- Right-click the Relocations branch and choose the Insert command in its local menu.
- Choose Floating Comment in the sub-menu that appears.

A floating comment box opens with the default text "Insert comment".

- Enter the text of the floating comment as shown below and press Enter.
- (optional) Move the floating comment by dragging it wherever convenient.

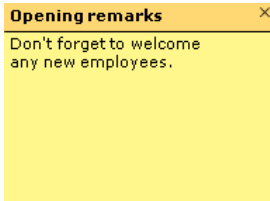



We are now going to insert a "pop-up" comment in our Opening remarks branch as a reminder to welcome new staff. Pop-up comments are normally hidden.

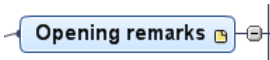
- Select the Opening remarks branch. This time, rather than choosing Insert and then Comment in the local menu, which you could do, press F11 (OpenMind's more commonly used commands have function key equivalents).

A yellow comment box opens.

- Enter the text of the comment as shown below and click outside the yellow box.



The comment box disappears, but a yellow comment icon  now appears next to the branch label, indicating that this branch contains a pop-up comment. You can view the comment at any time by moving the mouse pointer over the icon, and edit it by clicking the icon.



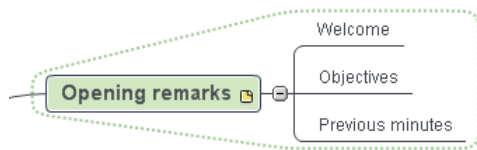
## Customizing the map

In the final map, we have applied a different style from the Multimedia Catalog and added boundaries around the main branches.

- To apply a different map style to the map, open the Multimedia Catalog, click the Map Styles category to display its contents and drag one of the map styles onto the workspace.

You can customize the properties of a branch by selecting it and choosing the required attributes in its Properties dialog, as shown below.

- If the Properties dialog is not already visible, click the General tab on the right of the workspace to display it.
- To apply a boundary, just check the Boundary property and set the boundary attributes required.



Properties	
General	Text
Name	Opening remarks
Line color	
Branch color	
Branch background color	
Branch background color 1	
Boundary	<input checked="" type="checkbox"/>
Boundary color	
Boundary fill color	
Boundary dash style	Dot
Boundary line width	2
Boundary line roundness	25
Include branch and subs in exp	<input checked="" type="checkbox"/>

- Click the Save Document icon  to save the map.

Our simple Quick Start example is now complete. In a very short time you have created and enhanced your first OpenMind Mind Map. You have also learnt the most common operations in OpenMind. Please refer to the User Guide for more information about any of the features described here.





# User Guide

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# Setting up


## Setting up your workspace

The OpenMind window is made up of a menu bar, various toolbars, a workspace area displaying your Mind Map and several panels, which together give you a complete overview of the Mind Map.

Three panels are permanently displayed on the right of the workspace unless you close them:

- **General**
- **Multimedia**
- **Task/Timeline Info**

➤ To open one of these panels, just click the relevant tab.

➤ To close them, click the Close icon  on the top right of the panel, or click the tab name again.

The **General** panel contains the following elements:

- The **Object list**

This lists all the objects placed on the currently selected branch of your map.

See "Using the Object list" for more information.

- The **Properties dialog**

This dialog shows the properties of the OpenMind component currently selected, for example the root, a branch or an attached object. If nothing is selected the properties of the document itself are shown.

See "Using the Properties dialog" for more information.

The **Multimedia** panel contains the following elements:

- The **Multimedia Catalog**

This catalog contains an extensive collection of high quality clipart pictures which you can add to your map, as well as different map styles and root shapes you can choose from.

See "Inserting pictures" and "Using the Multimedia Catalog" for more information.

- The **Icon palette**

This palette contains various icons which you can place on the branches of your Mind Map to attract attention or illustrate a particular idea.

See "Inserting icons" for more information.

The **Task/Timeline Info** panel lets you enter dates, times and other information on the branches of your Mind Map to create complete timelines, task lists or project plans.

For more information on this panel, see "Inserting timeline information" and "Inserting task information".

In addition, OpenMind includes two more panels which you can display or hide using the **View | Panels** command.

- The **Text Note editor**

The Text Note editor, which is placed by default at the bottom of the workspace, lets you associate comprehensive notes to the root or any branch of your map.

See "Inserting text notes" for more information.

- The **Overview panel**

The Overview panel allows you to bring the different parts of your map into view.

See "Using the Overview panel" for more information.

## Customizing the workspace

The **View | Toolbars** and **View | Panels** commands allow you to customize the OpenMind window by hiding or showing the various toolbars and panels. A checkmark next to the name of a toolbar in the menu means that the toolbar in question is currently open and visible on the screen.

All the OpenMind toolbars are floating toolbars, which means that you can detach them, move them on the workspace and resize them as necessary.

You can increase or decrease the width of the OpenMind panels displayed on the right of the workspace as follows:

- Move the mouse pointer over the left edge until it changes to a double arrow.
- Click the edge and drag with the mouse until the panel reaches the required size while keeping the left mouse button down.
- Release the mouse button.

You can also increase or decrease the height of individual panels by dragging their horizontal separators up and down in the same way.

## Advanced docking

By default, the main panels are anchored (docked) to the right of the workspace.

You can however move any of the panels freely on the workspace or dock them to a different position by enabling Advanced docking. You will need to restart OpenMind before this feature can take effect.

- Choose **Tools | Options** and check **Enabled advanced docking** at the bottom of the dialog.
- Click OK in the message dialog that appears.
- Click Apply, then close and restart OpenMind.

You can now turn any of the panels into floating windows that you can place freely on the workspace. There are two ways to do this:

- Double-click the required panel tab or title bar and move the floating window obtained to your preferred position, or
- Click the panel tab or title bar and drag it to your preferred position.

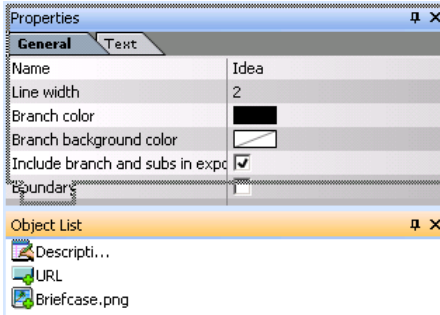
To redock a floating panel, just double-click its title again.

You can also dock a panel at a different position:

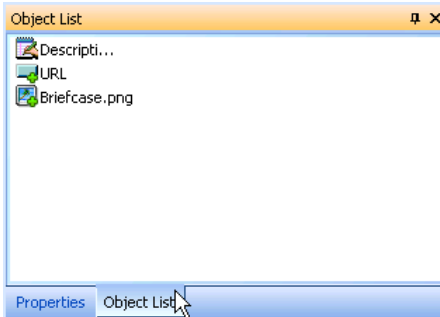
- Drag the panel's tab or title bar until it reaches the edge of the workspace or the edge of another panel. When you see the outline of the panel "snap" to one of these edges, either release the mouse button if you are happy with the new position of the panel, or continue dragging it until it snaps to the required position.

Finally you can dock a panel in such a way that it becomes a tab of another panel:

- Click the panel tab or title bar and drag it under the target panel. Keep moving the mouse pointer upwards until it reaches the title bar of the target panel. When you see the outline of your tabbed panel or when the name of your tab appears at the bottom of the target panel, release the mouse button. In the example below, the Object list is being made a tab of the Properties dialog.



- To release a panel docked in this way, drag it by clicking its tab, not its title bar. To separate the Object list from the Properties dialog in the example below, you would therefore click the Object List tab.



## Resetting panels to their default position

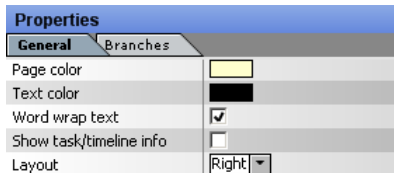
- To reset all the panels to their default position, choose **Tools | Reset Interface**.

Note that this also restores other defaults such as the positions of the toolbars and the list of recently opened files.

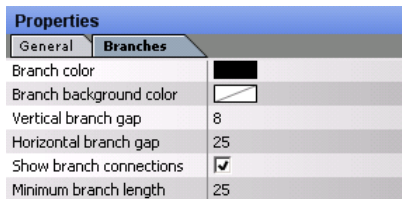
## Document properties

As most OpenMind components, the document has its own properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to the global document parameters, as described in "Using the Properties dialog".

See "Document properties: General tab" in the Reference section for a detailed description of the general properties applicable to the document.



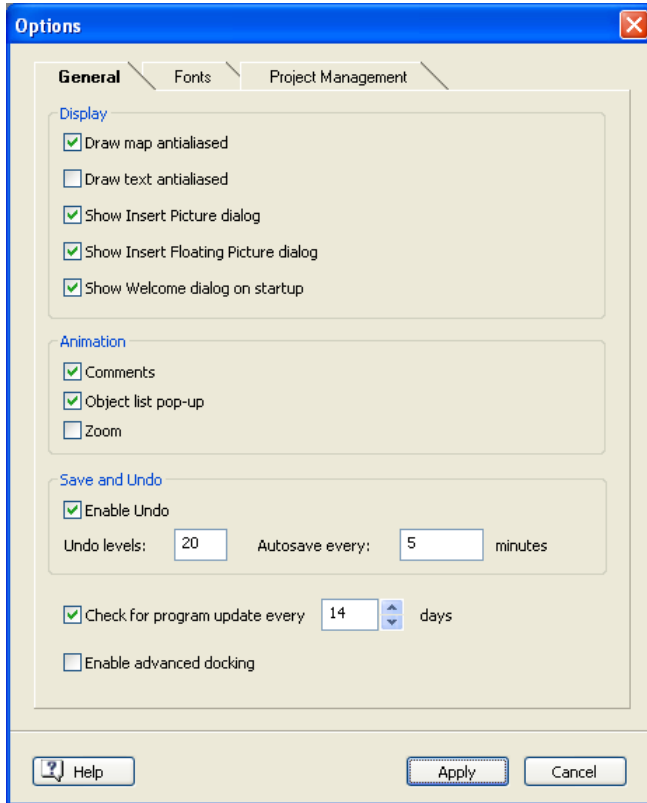
For a description of the default properties applicable to branches, see "Document properties: Branches tab".



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

# Setting up your preferences

The Options dialog (**Tools | Options**) lets you define global preferences:



## Display options

**Draw map antialiased:** Antialiasing improves the appearance of your map by smoothing its edges. This option is checked by default. However, antialiasing makes a heavy use of the computer resources. If your computer is not very powerful, you might prefer to disable this option to speed up the display of the map.

**Draw text antialiased:** This option is unchecked by default. However, text looks smoother when it is antialiased. Enable this option if your computer resources allow it.



**Show Insert Picture dialog:** Remove the checkmark to disable the display of the Insert Picture dialog, or check this option to display it again. See "Dragging a picture from the Multimedia Catalog or Windows" in the topic "Inserting pictures" for more information.

**Show Insert Floating Picture dialog:** Remove the checkmark to disable the display of the Insert Floating Picture dialog, or check this option to display it again. See "Dragging a picture from the Multimedia Catalog or Windows" in the topic "Inserting pictures" for more information.

**Show Welcome dialog on startup:** If you disable this option, OpenMind displays an empty workspace when starting rather than the Welcome dialog. See "Creating a Mind Map" for more information.



## Animation options


These options allow you to disable the animation effects used by OpenMind if your computer is not powerful enough to produce a good result. If the animation effects appear slow and jerky rather than fast and smooth, you can disable the following options:

- **Comment:** This relates to the way the comment window opens when you insert or edit a yellow pop-up comment .
- **Object list pop-up:** This relates to the way the Object list pop-up opens when you move the mouse pointer over the paperclip icon  shown next to the label of any branch containing attached objects.
- **Zoom:** This relates to the way the map is displayed by increments when zooming in and out.

## Save and Undo options

**Enable Undo:** Check this box if you want to be able to undo any operation you have performed on your map. This gives you the freedom to experiment, as you can easily undo the last change made by using Edit | Undo (Ctrl + Z), and reapply the change if necessary with Edit | Redo (Ctrl + Shift + Z or Ctrl + Y).

Note that you can also use the Undo icon  to undo the last change, or click the arrow to the right of the Undo icon to select a number of changes to undo. Similarly, the Redo icon  allows you to redo the last change or changes undone.

**Undo levels:** This field lets you specify the maximum number of changes that you want to be able to undo. If for instance you set the number of Undo levels to 5, you will be able to reverse up to 5 changes by selecting the changes in the Undo list  or choosing Edit | Undo (Ctrl + Z) several times. Note that increasing the number of undo levels increases the amount of memory used.

**Autosave every:** OpenMind automatically saves a copy of your open documents at regular intervals in a temporary backup file. If a problem occurs that prevents OpenMind from closing properly, you can choose to auto-recover your file from this backup file when next starting OpenMind. This field allows you to set the interval between automatic saves.

## Program updates

**Check for program update every:** This option allows OpenMind to check automatically for program updates on the MatchWare web site when OpenMind starts. You can set the frequency of the checks in the time field, or disable the feature by removing the check mark.

## Advanced docking

**Enable advanced docking:** By default, the main panels are anchored (docked) to the right of the workspace. You can however move any of the panels freely on the workspace or dock them to a different position by enabling this feature. You will need to restart OpenMind before it can take effect.

To restore all the panels and toolbars to their default positions, choose **Tools | Reset Interface** in the main menu.

For more information about advanced docking, see "Setting up your workspace".

## Text Note editor

**Fonts:** The Fonts tab of the Options dialog lets you specify a default font, text size and color for all the text notes you enter using the Text Note editor. You can of course change these settings for individual text notes when working in the editor. For more information about the Text Note editor, see "Inserting text notes".

## Project management

This tab is only relevant if you intend to create project plans for use in the Gantt view. It lets you modify the default calendar settings which provide the basic information about working and non-working time used by OpenMind to schedule the tasks of a project plan.

For details about how to use this dialog, see "Defining calendar settings" in the "Gantt view" chapter. For general information about the Gantt view, see "Using the Gantt view".

---

# Basic tasks

## Creating a Mind Map



Although the topics in the "Basic tasks" and "Further tasks" sections of this documentation assume that you are using one of the standard Mind Mapping views, namely Mind Map, Top Down or Left/Right, most of the procedures they describe apply equally to *all* OpenMind views. Procedures that are specific to the Outline, Timeline and Gantt view are described in the topics dealing with these views.

When you start OpenMind, the first screen you see is the Welcome dialog.



### Welcome dialog

Here you can select to:


- Create a new document
- Open an existing document
- Open a recently used document



You can check 'Do not show this dialog again' to bypass this dialog next time you start OpenMind. If you want to show the Welcome dialog again at a later stage, click 'Show Welcome dialog on startup' in **Tools | Options**.

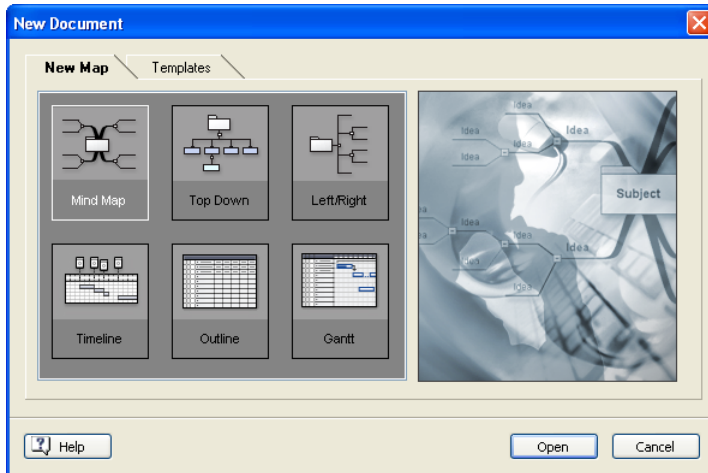
- Click 'New document' to create a new Mind Map document.

If you have closed the Welcome dialog, you can create a new document by:

- Clicking the **New Document** icon , or
- Choosing **File | New**, or
- Pressing **Ctrl + N**.

## New Document dialog

The New Document dialog appears.



It contains two tabs:

- **New Map**

This allows you to create an empty document based on one of the six views provided, namely Mind Map, Top Down, Left/Right, Timeline, Outline and Gantt. See "Using different views" for more information about these views.

Note that you can go from one view to another at any time by choosing **View | View Map As** in the main menu or by right-clicking the workspace and choosing that same command in the local menu.

Going from one view to another only affects the way the Mind Map is displayed. The contents of the Mind Map are not modified, unless you edit them yourself while working in the new view.

The only exception to this rule is the Gantt view. Going to the Gantt view automatically enables project management features. This may have consequences for your data. See "Using the Gantt view" for more information.

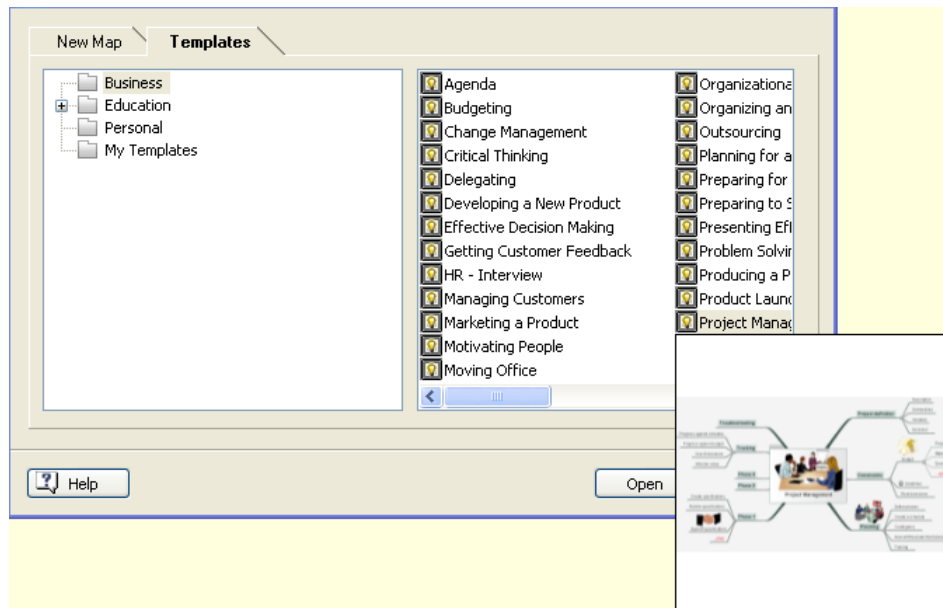
- **Templates**

This allows you to create a document based on one of over 100 educational, business and personal templates included in OpenMind. The curriculum-aligned educational templates cover a range of learning levels and are supported by over a thousand high quality clipart images created specifically to match all areas of the curriculum. OpenMind also includes various ready-made project plans for common business activities (organizing a tradeshow, producing a publication, launching a product and so on) for use in the Gantt view. You can use these for training purposes, or as a basis for your own project plans.

Once you have created your Mind Map from one of these templates, you can easily tailor it to meet your particular needs. Ideas and suggestions for expansion are given in text notes and pop-up comments.

If you have already created and saved your own templates, you can base your new Mind Map on one of them by selecting it in the My Templates category. See "Saving a Mind Map" for more information on how to save templates.

You can see a preview of each template by moving the pointer over its name on the right part of the dialog.



- Click one of the thumbnails or templates.
- Click **Open**.

The map appears with the root block ready for you to fill in.




See "Entering the subject" to find out how to do this.

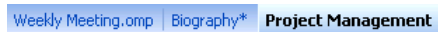
## Opening a Mind Map

When you start OpenMind, the first screen you see is the Welcome dialog. This dialog lets you browse for an existing document or select a recently used document.

If you have closed the Welcome dialog, you can open an existing document by:

- Clicking the **Open Document** icon , or
- Choosing **File | Open**, or
- Pressing **Ctrl + O**.

Note that you can open several Mind Maps in OpenMind at the same time. Each one is displayed in a separate tab in the OpenMind view and is treated as a separate document.



An asterisk on the right of the document name indicates that you have made changes to the document which you have not yet saved.



*You can easily go from one document to the other by clicking the relevant tab or pressing **Ctrl + Tab**.*



The **File | Open** command also lets you open MindManager® files (with extension .mmap) from versions X5 and 6.

## Opening documents created with previous versions of OpenMind

OpenMind 2 Business Edition lets you open documents created with OpenMind 1. However once you make changes to the document and save it with OpenMind 2 Business Edition, the document is no longer compatible with the previous version.

For this reason, OpenMind 2 Business Edition starts by making a copy of the old document, saving it with the suffix `_v1`.

If your OpenMind 1 document was particularly large, you may find that its branches are arranged slightly differently in OpenMind 2 Business Edition. All you need to do if this happens is to adjust them manually.

OpenMind 2 Business Edition lets you open and save documents created with OpenMind 2 Pro normally. However to open in OpenMind 2 Pro a document created with OpenMind 2 Business Edition, you will need to make sure you have applied the relevant Service Pack to your version of OpenMind 2 Pro.

For more information about the latest Service Packs available, see:

<http://www.matchware.net/en/downloads/default.htm>

## Entering the subject

By default, any root you create contains the label "Subject".

### Replacing the default label

- Just click the root to select it and start typing.
- When you have finished, press **Enter** or click outside the root.



To enter several lines of text:

- Type each line, then press **Ctrl + Enter** to start the next line.
- Press **Enter** when you have finished typing.



*Your map will be clearer if you keep your root and branch labels short. If you need to enter longer notes, use the Text Note feature. You can also enter Comments to serve as reminders while you build up your map. See "Inserting text notes" and "Inserting comments" for more information.*

### Changing the map style

You can change the look of your map instantly by applying a different map style to it. This will apply different branch shapes, branch colors and other coordinated attributes to your Mind Map in one single step.

- If the Multimedia Catalog is not visible, click the Multimedia tab on the right of the workspace to open the corresponding panel.

- Open the **Map Styles** category and drag the required map style onto the workspace.

For more information about the Multimedia Catalog, see "Using the Multimedia Catalog".

## Editing the root

You can perform various operations on the root, such as editing or formatting its label, moving it to a different location in your map or cutting and pasting it. In this respect, the root behaves exactly like any branch or sub-branch.




See "Editing a root or branch" for more information.

You can also replace the default root shape by one of the other root shapes provided in the Multimedia Catalog as follows:

- If the Multimedia Catalog is not visible, click the Multimedia tab on the right of the workspace to open the corresponding panel.
- Open the **Root Shapes** category and drag the new shape to the root of your map.

## Root properties

As most OpenMind components, the root has its own properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to the root, as described in "Using the Properties dialog".

Properties	
General	Text
Name	Project Management
Line color	
Root background color	
Root background color 1	
Show task/timeline info	<input checked="" type="checkbox"/>

See "Root properties: General tab" in the Reference section for a detailed description of the general properties applicable to the root and "Root properties: Text tab" for a description of the properties applicable to the root label.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

# Inserting branches

OpenMind lets you insert main branches, sub-branches and pre-branches:

- A **main branch** is a branch directly connected to the root.  
Main branches represent the main topics related to the subject of your Mind Map.
- A **sub-branch** is a branch belonging either to a main branch or to a sub-branch of higher level.  
Sub-branches represent the various levels of sub-topics in your Mind Map.
- A **pre-branch** is a branch you insert before a sub-branch.

OpenMind automatically arranges the main branches, sub-branches and pre-branches as you insert them to prevent any overlap. You can however choose to reposition the main branches yourself after their insertion by disabling Auto-layout mode. See "Moving a branch" for more information.

As soon as you add a branch, sub-branch or pre-branch, the new branch appears with the default label "Idea". This label is selected automatically, so that you can replace it straight away by overwriting it. The procedure for entering a branch label is the same as for the root. See "Entering the subject" for more information.

## Inserting a main branch

This can be done in several ways.

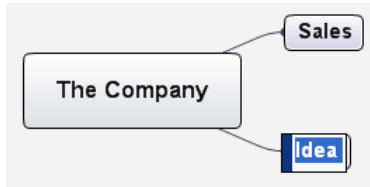
- **Double-click** the root, or
- Click it once to select it and press **Enter** or **Insert**, or
- Click it once to select it and choose **Insert | Branch** or **Insert | Sub-branch** in the main menu, or
- Right-click it and choose **Insert | Branch** or **Insert | Sub-branch** in its local menu.



## Inserting a branch at the same level as another branch

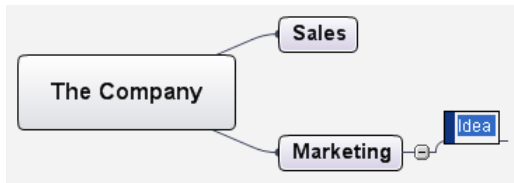
- Click the required branch to select it and press **Enter**, or
- Click it once to select it and choose **Insert | Branch** in the main menu, or

- Right-click it and choose **Insert | Branch** in its local menu.



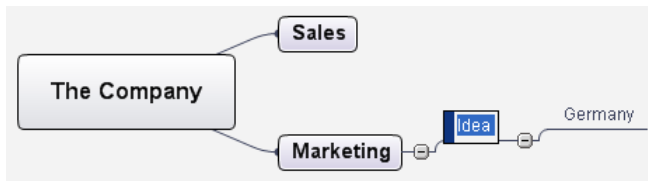
## Inserting a sub-branch on an existing branch

- **Double-click** the branch, or
- Click it once to select it and press **Insert**, or
- Click it once to select it and choose **Insert | Sub-branch** in the main menu, or
- Right-click it and choose **Insert | Sub-branch** in its local menu.



## Inserting a pre-branch on an existing branch

- Click the required branch to select it and choose **Insert | Pre-branch** in the main menu, or
- Click it once to select it and press **Shift + Enter**, or
- Right-click it and choose **Insert | Pre-Branch** in its local menu.





## Copying and pasting branches from an external application



You can easily create a branch structure with main branches and sub-branches by copying several lines of text from an external document, such as a Microsoft Word document, a Notepad text file or a Microsoft Excel spreadsheet, and pasting them into your OpenMind document. Any line indented with spaces or tabs in the external application will be inserted as a sub-branch of the higher level line.

Similarly, you can copy an OpenMind branch structure to another application by copying it from OpenMind and pasting it in the external application.

## Expanding/Collapsing a branch


As soon as you add a sub-branch to a main branch or to another sub-branch, a small minus sign  appears between it and the higher-level branch. This allows you to hide the newly inserted sub-branch and any further sub-branches or objects you might add to it if you want to concentrate on the higher-level branches. There are several ways to do this:

- Click the minus sign , or
- Click the higher-level branch and choose **View | Collapse** in the main menu, or
- Right-click the higher-level branch and choose **Collapse** in its local menu, or
- Press **Ctrl + Shift + "-"**.

The sub-branch is now hidden, and the minus sign  changes to a plus sign .

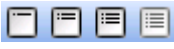



To show again the sub-branch and all its further sub-branches and attached objects, do one of the following:

- Click the plus sign , or
- Click the higher-level branch and choose **View | Expand** in the main menu, or
- Right-click the higher-level branch and choose **Expand** in its local menu, or
- Press **Ctrl + Shift + "+"**.



## Expanding/Collapsing several branch levels

The **Detail level** icons  of the Filter toolbar let you collapse the entire Mind Map to just one level of branches, two levels, three levels or four levels. To show all levels, click the **All Levels** icon .



*You can also press **Ctrl + 1** to display just one level of branches, **Ctrl + 2** to show two levels etc. **Ctrl + 5** shows all levels.*



If the Filter toolbar is not visible, choose **View | Toolbars | Filter** in the main menu to display it.

## Navigating between branches

To select a branch, all you need to do is click its label.

The following keyboard shortcuts allow you to navigate easily from one branch to the other:

- |              |  |
|--------------|--|
| <b>Up</b>    | Select the branch placed above the currently selected branch.    |
| <b>Down</b>  | Select the branch placed below the currently selected branch.    |
| <b>Left</b>  | Select the branch to the left of the currently selected branch.  |
| <b>Right</b> | Select the branch to the right of the currently selected branch. |


## Deleting a branch

There are several ways of doing this:

- Click the branch you want to delete and press **Delete**, or
- Click the branch and choose **Edit | Delete** in the main menu, or
- Right-click the branch and choose **Delete | Entire Branch** in its local menu.

If a branch contains sub-branches, you can delete it without deleting its sub-branches by choosing **Delete | Branch Section** in its local menu. This causes the sub-branches to move up one level in the hierarchy to become sub-branches of the parent branch.





*Remember that if you delete a branch by accident, you can always cancel the deletion by clicking the Undo icon  or choosing **Edit | Undo** (**Ctrl + Z**).*

## Editing a branch

You can perform various operations on a branch, such as editing and formatting its label, moving it to a different location in your map or cutting and pasting it. Most of these editing operations can be applied to several branches at once.



See "Editing a root or branch" and "Moving a branch" for more information.

## Filtering a branch








As your map grows, you might find it useful to concentrate on a particular area by viewing only a chosen branch or set of branches. The Filter icon  of the Filter toolbar  allows you to restrict the display to a particular branch. See "Filtering a branch" for more information.

## Branch properties

Branches have default properties, defined in the Properties dialog of the document. You can use this Properties dialog to make any necessary changes to the default properties of branches. See "Document properties: Branches tab" in the Reference section for a detailed description of these default properties and "Using the Properties dialog" for a general description of the Properties dialog.

Properties	
General	Branches
Branch color	
Branch background color	
Vertical branch gap	8
Horizontal branch gap	25
Show branch connections	<input checked="" type="checkbox"/>
Minimum branch length	25

In addition to these default properties, each branch has its own properties. You can use the Properties dialog of a particular branch to make any necessary changes to the branch.

Properties	
General	Text
Name	Constraints
Branch color	
Border color	
Branch background color	
Branch background color 1	
Boundary	<input checked="" type="checkbox"/>
Boundary color	
Boundary fill color	
Boundary dash style	Dot 
Boundary line width	1
Boundary line roundness	25
Show task/timeline info	<input checked="" type="checkbox"/>
Include branch and subs in e	<input checked="" type="checkbox"/>

See "Branch properties: General tab" in the Reference section for a detailed description of the general properties applicable to a branch and "Branch properties: Text tab" for a description of the properties applicable to the branch label.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

## Navigating a Mind Map

As your map grows, parts of it may fall outside the display area and no longer be visible.

You can use the **scroll bars** or your **mouse scroll button** to bring them back into view:

- To scroll your map vertically, use the vertical scroll bar or the scroll button of your mouse.
- To scroll your map horizontally, use the horizontal scroll bar or press Ctrl while using the scroll button of your mouse.



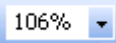





You can also **pan the view** to reach different areas as follows:

- Press the **Shift** key and drag the area of the view that you want to reposition within the workspace.

When you pan the view in this way, you will notice that the shape of the mouse pointer changes from an arrow to a hand.



You can also easily move the map within the workspace by dragging its root to the position of your choice.

There are other navigation options available to you:

- The **Zoom** icons    of the Display toolbar let you change the level of magnification of your map. See "Zooming in and out" for more information.
- The **Overview** panel allows you to concentrate on particular areas of your map. See "Using the Overview panel" for more information.
- The **Detail level** icons     of the Filter toolbar let you collapse the entire Mind Map to just one level of branches, two levels, three levels or four levels. To show all levels, click the **All Levels** icon .



*You can also press Ctrl + 1 to display just one level of branches, Ctrl + 2 to show two levels etc. Ctrl + 5 shows all levels.*


- The **Filter** icon  of the Filter toolbar  allows you to restrict the display to a particular branch or set of branches. See "Filtering a branch" for more information.
- You can view the map in **Full Screen** mode by choosing View | Full Screen Mode or pressing F9. To return to normal viewing mode, choose Exit in the floating Full Screen toolbar, press Esc or press F9 again.

## Using brainstorm mode

When working in Mind Map, Top Down or Left/Right view, the brainstorm mode lets you enter the main topics (branches) and sub-topics (sub-branches) of your map very fast as you explore all the ideas related to your theme. Using brainstorm mode, you can record your thoughts as they occur, leaving the task of structuring them and analyzing them in detail for later.

### Activating brainstorm mode

You can activate brainstorm mode in several ways:

- Click the **Brainstorm Mode** icon , or
- Choose **View | Brainstorm mode**, or
- Press **F3**.

As soon as brainstorm mode is activated, OpenMind inserts a branch in your map, with the default label "Idea". The position of the new branch in the hierarchy is determined by the position of the branch that is selected when you activate brainstorm mode.

- If the root is selected, the branch is added as a main branch.
- If a main branch is selected, the branch is added as a sub-branch of the selected branch.
- If a sub-branch is selected, the branch is added as a sub-branch of the selected sub-branch.

Type a label for the new branch and press **Enter**. Every time you press Enter, a new branch is added at the same level, ready for you to replace its default label. Just continue entering your ideas and pressing Enter until you have created all the topics you require at a given level.


To start adding sub-branches to a different branch (or the root), just select the branch in question (or the root).



As the Formatting toolbar is disabled in brainstorm mode, you cannot apply any formatting attributes to the branches or their labels in that mode. Similarly, it is not possible to insert elements such as icons, comments, pictures and so on or attach objects while in brainstorm mode.



## Deactivating brainstorm mode

You can leave brainstorm mode in several ways:

- Click anywhere outside a branch, or
- Press **Esc**, or
- Click the **Brainstorm Mode** icon  again, or
- Choose **View | Brainstorm mode** again, or
- Press **F3**.

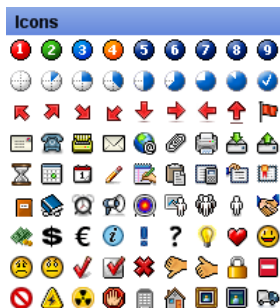
## Inserting icons

OpenMind comes with an **Icon palette** containing various icons which you can place on the branches of your Mind Map to attract attention or illustrate a particular idea.

You could for instance use the Conference icon  for all the topics of your map involving a discussion with others, or the Alarm-clock icon  for all topics associated with a deadline. Make sure however that you use such icons consistently and sparingly to avoid overloading the map.

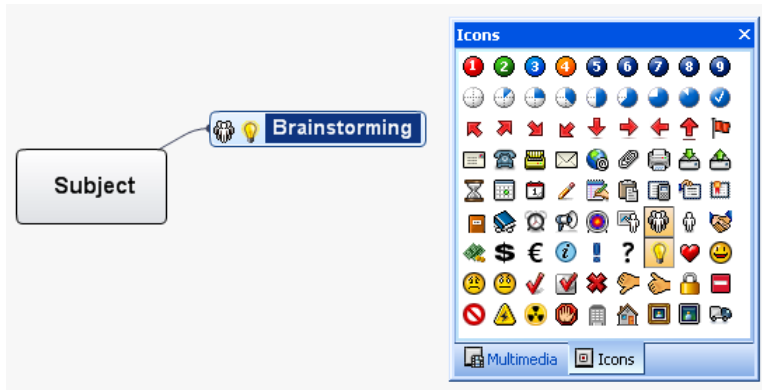
## Inserting an icon on a branch

- Select the branch to which you want to add an icon.
- Click the Multimedia tab on the right of the workspace to open the corresponding panel.
- Click the required icons in the Icon palette.



The selected icons appear on the left of the branch name.

They are also highlighted in the Icon palette.



## Deleting an icon

You can either:

- Click the branch from which you want to delete an icon and click the icon in the Icon palette to deselect it, or
- Right-click the branch and choose **Delete | Icons** in its local menu. Then select the icon to be deleted or choose All to delete all the icons inserted on the branch.



## Undocking the Icons palette

To ensure that the various OpenMind panels occupy as little space as possible, they are normally anchored (docked) to the right of the screen.

You can however move any of the panels freely on the workspace or dock them to a different position by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

# Inserting pictures

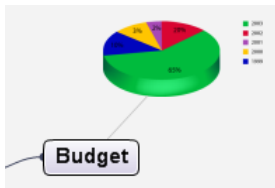
OpenMind lets you add pictures to the workspace itself, the root and any branch or sub-branch.

As all the research done in this area indicates that the use of pictures significantly enhances memory retention, you should try to use pictures wherever possible to illustrate your map.

Three different types of pictures are available:

- **Floating pictures**

A floating picture is visible on the screen at all times and can be moved wherever convenient. You can add as many floating pictures as you like to the workspace, the root or a particular branch.



- **Branch pictures**

A branch picture is also visible on the screen at all times, but it "sits" on the root or branch to which it belongs. You can only add one branch picture to a particular root or branch.

It is considered good practice to insert a branch picture on the root to illustrate the subject of a map, as shown below.



- **Attached picture files**

OpenMind allows you to attach various objects to the root and branches of your map, such as text files, picture files, video files, Flash files and so on. Not only can you activate these objects from within OpenMind, but you can also choose to include them when exporting your map to a different format, such as HTML or Mediator. See "Attaching objects" for more information on attached picture files.

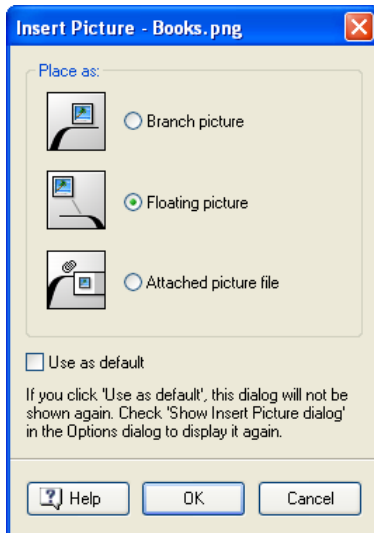
You can add these different types of pictures by dragging the relevant picture from the Multimedia Catalog, Windows® Explorer or the Windows® Desktop, or by using the OpenMind menus. These methods are all described below. For a full description of the Multimedia Catalog, see "Using the Multimedia Catalog".

## Dragging a picture from the Multimedia Catalog or Windows

You can insert a picture on a root or on a branch by dragging it from the Multimedia Catalog, Windows Explorer or the Windows Desktop. Extensions recognized by OpenMind are .bmp, .jpg, .gif, .png, .wmf and .emf.

- Drag the relevant picture onto the root or branch and drop it once the root or branch is highlighted.

The following dialog appears, letting you choose the type of picture you want to add.

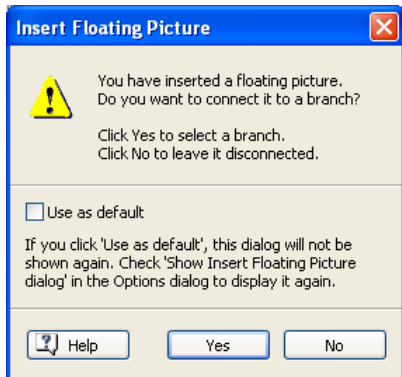


- Choose the type of picture you want to add and click OK.



If you drag several pictures together from Windows Explorer or the Windows desktop, the Insert Picture dialog appears for every picture, letting you choose how you want to add it to the map. The name of the picture is indicated in the title bar of the dialog.

You can also insert a floating picture by dragging it directly onto the workspace rather than on a root or branch. As soon as you drop the picture, the following dialog appears.



- To insert the floating picture on the workspace, click No.
- To insert the floating picture on a branch, click Yes. The mouse pointer then changes to a cross, letting you select the branch to which the floating picture should be added.
- (optional) Resize the picture by moving the mouse pointer on the required edge until it changes to a double arrow and drag with the mouse until the picture reaches the correct size. You can also move the picture to a more convenient place by dragging it with the mouse or by using the arrow keys of the keyboard.



You can choose a default action and disable the display of either or both of these dialogs by clicking 'Use as default'. If at a later stage, you want OpenMind to display the dialogs again, check the 'Show Insert Picture dialog' and/or 'Show Insert Floating Picture dialog' options in the Options dialog. See "Setting up your preferences" for more information.

## Inserting a picture using the OpenMind menus

### Inserting a floating picture on a root or branch

- Select the root or branch to which you want to add a floating picture and choose **Insert | Floating Picture** in the main menu or in the local menu.
- Choose the picture required in the Open dialog.

The picture appears on the screen, scaled down from its original size if necessary.

- (optional) Resize the picture by moving the mouse pointer on the required edge until it changes to a double arrow and drag with the mouse until the picture reaches the correct size. You can also move the picture to a more convenient place by dragging it with the mouse or by using the arrow keys of the keyboard.

A thin gray line now connects your new picture with the root or branch you attached it to.

## Inserting a floating picture on the workspace

- Right-click the workspace and choose **Insert | Floating Picture** in its local menu.
- Choose the picture required in the Open dialog.

When you add a floating picture to the workspace in this way, the picture is not attached to anything and no connecting line is visible.

If necessary, you can then move your floating picture by dragging it with the mouse or by using the arrow keys of the keyboard. You can even connect it to a particular branch by moving it on top of the branch.

## Inserting a branch picture on a root or branch

- Select the root or branch to which you want to add a branch picture and choose **Insert | Branch Picture** in the main menu or in the local menu.
- Choose the picture required in the Open dialog.

The picture is now inserted over the root or branch label.

- (optional) Resize the picture as necessary by moving the mouse pointer on the required edge until it changes to a double arrow and drag with the mouse until the picture reaches the correct size.

## Detaching a floating picture

If you have attached a floating picture to the root or to a branch of your map, you can detach it by choosing **Edit | Detach** in the main menu or by right-clicking it and choosing **Detach** in its local menu. The picture now belongs to the workspace itself rather than to the root or any of its branches.

## Deleting a floating picture

To delete a floating picture, select it and do one of the following:

- Press **Delete**, or
- Choose **Edit | Delete** in the main menu, or
- Choose **Delete** in its local menu.

## Detaching a branch picture

- To detach a branch picture, select the branch to which it belongs and choose **Detach | Branch Picture** in its local menu.

## Deleting a branch picture

- To delete a branch picture, select the branch to which it belongs and choose **Delete | Branch Picture** in its local menu.



*If you press the Delete key by mistake, the whole branch will be deleted. You can restore it by choosing Edit / Undo or pressing Ctrl + Z.*

## Picture properties

Floating pictures have their own properties, which you can edit with the Properties dialog. See "Floating picture properties: General tab" and "Floating picture properties: Picture tab" for a detailed description of the properties applicable to floating pictures and "Using the Properties dialog" for a general description of the Properties dialog.

Branches containing branch pictures have an extra Picture tab in their Properties dialog, which you can use to edit their path name, width or height. See "Branch properties: Picture tab" for a detailed description of the properties applicable to branch pictures.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.





## Attaching objects






One of the strengths of OpenMind is that it allows you to attach objects to the root or any branch or sub-branch of your Mind Map. This means that you can enhance your map with a variety of multimedia features, such as sounds, video sequences or Flash animations.

Not only can you activate these objects from within OpenMind, but you can also choose to include them when exporting your map to a different format, such as a web site or a Mediator document.

OpenMind lets you attach the following objects to the root or to any branch of your map:


-  Text file (extension .doc, .rtf, .txt, .htm or .html)
-  Picture file (extension .bmp, .jpg, .gif, .png, .wmf or .emf)
-  Video file (extension .avi, .mpg, .wmv or .mov)
-  Sound file (extension .wav or .mp3)

-  Hyperlink
-  Button
-  Flash file (extension .swf)

The Hyperlink and Button objects allow you to create links between a specific branch and external elements, such as a file, a URL, a folder or an email address. Once these objects are inserted, activating them automatically opens the viewer associated with the linked element (e.g. text editor, web browser, email program and so on). Note that links can also be associated with picture files. See "Creating links" for more information on links.


## Attaching an object to a root or branch


There are several ways of attaching an object:

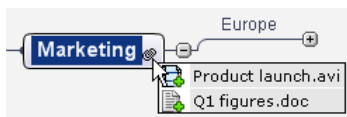
- You can click an object in the Object toolbar to attach it to the selected root or branch.
-  If the Object toolbar is not visible, choose **View | Toolbars | Objects** in the main menu.
- You can select the required root or branch, choose **Insert | Attach Object** in the main menu or **Attach Object** in the local menu, and select the object you want to add to the branch.
- You can also drag a file with a known file extension from Windows Explorer and drop it on the required root or branch.

Note that if the file extension is not recognized on your system, OpenMind creates instead a hyperlink pointing to the file.

An Open dialog appears to let you choose the file you want to attach. You can preview picture files and video files by clicking the Preview option on the right side of the dialog.

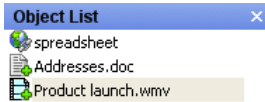
 If you are creating a Hyperlink or a Button, instead of displaying the Open dialog, OpenMind shows the Link dialog. See "Creating links" for more information on how to fill in this dialog.

As soon as you add an object to a root or branch, a paperclip icon  appears to the right of its label to indicate the presence of the attached object. Moving the mouse pointer over this paperclip icon displays a pop-up list of all the objects attached.



## Viewing the Object list

The Object list gives you a complete overview of the objects you have attached on a particular branch.




See "Using the Object list" for more information.



If the Object list is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

## Activating an object

Once attached, there are several ways to activate an object:

- **Double-click** the object in the Object list, or
- Select the object in the Object list and choose **Execute** in its local menu, or
- Display the object pop-up list by moving the mouse pointer over the paperclip icon  and click the object required.


These actions all activate the object, which is then displayed in the viewer associated with its extension type. For instance, if the attached object is a Word document, it will open in Microsoft® Word. If it is a video, it will open in the video playing software installed on your computer, and so on.

## Deleting an object

To delete an object, select it in the Object list and do one of the following:

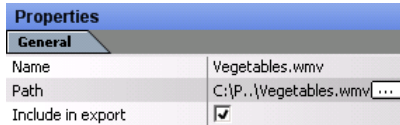
- Press **Delete**, or
- Choose **Delete** in its local menu.



*Remember that if you delete an attached object by accident, you can always cancel the deletion by clicking the Undo icon  or choosing Edit | Undo (Ctrl + Z).*

## Object properties

Each object has its own properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to the object, as described in "Using the Properties dialog".




See the Reference section for a full description of the properties applicable to each type of object.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

## Inserting text notes

The OpenMind Text Note editor is a powerful tool which lets you add comprehensive text notes to the root and any branch or sub-branch of your map. You can add as many different text notes as you like to any of these elements.

If the Text Note editor is not open, choose **View | Panels | Text Note Editor** in the main menu or click the Toggle Text Note Editor icon  in the Display toolbar.



*You can resize the Text Note editor window by placing the mouse pointer on one of its edges until it changes to a double arrow and dragging with the mouse.*




In addition to text notes, you can also associate brief comments to the branches of your map. For more information on comments, see "Inserting comments". You can also attach an entire text file to a branch by using the Attach Object command. For more information on attaching text files, see "Attaching objects".

## Creating a text note

The easiest way to add a text note to a root or branch is as follows:

- Select the root or branch to which you want to add a text note.
- Enter the text in the Text Note editor (see the next section, "Using the Text Note editor").

As soon as you select another branch or element in the map, the text note is automatically saved and added to the Object list of the root or branch. A paperclip icon  also appears to the right of the root or branch label to indicate the presence of an attached object. Moving the mouse pointer over the icon displays a pop-up list of all the objects attached.

You can also enter a text note by selecting the root or branch to which you want to add a text note and choosing **Insert | Text Note | New** in the main menu or local menu.

## Adding further text notes

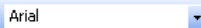














You can attach additional text notes to a root or branch as follows:





- Select the root or branch and choose **Insert | Text Note | New** in the main menu or local menu.



## Using the Text Note editor

You can use the editing features of the Text Note editor toolbar to format your text, change the font or point size, choose a color for the text or the background and so on.



- To see what a toolbar icon does, move the mouse pointer over it to display a descriptive label.
- To see the editor's local menu, right-click anywhere in the editor.
- To change font, select the text and choose the appropriate font and/or font size   on the toolbar. Note that you can set a default font, text size and color for all the text notes you enter by choosing **Tools | Options** and clicking the **Fonts** tab.
- To apply (or remove existing) bolding, italics, underlining   , superscripts or subscripts  , select the text and click the appropriate icon(s). If you do not select any text the attributes are applied to the text you type next. Click the icon(s) again to switch the attributes off.
- To right-align or center text, put the cursor in the relevant paragraph (which may be empty) and click the appropriate icon  . Clicking the icon again, or clicking the left-align icon  reverts to left alignment.
- To adjust margins and indents, click the **Ruler** icon  (if the ruler is not already displayed). Drag the margin markers   at the left and right ends of the ruler to change the left and right margins. Drag the indent marker (which by default is shown directly below the left margin marker on the ruler) to set the indent margin. To indent an entire paragraph (including the first line), set the indent marker to the required position and type a tab character at the beginning of the paragraph. You can insert standard tab stops by clicking on the ruler and then dragging them into position. To remove tab stops, drag them away from the ruler.
- To create a numbered or bulleted list item, put the cursor in the relevant paragraph (which may be empty) and click the appropriate icon  . Clicking the icon again removes the formatting. To use a style of numbers or bullets other than the default, choose **Bullets and Numbering** in the local menu rather than the bullet or number icon. You can change the bullet or number style of existing bulleted or numbered items, by first selecting them and then using this option.


- To check the spelling in your text, click the **Check Spelling** icon  or choose **Spelling** in the local menu. See "Using the Spellchecker" for more information about this feature.
- To insert a picture, click the **Insert Picture** icon .
- To create a hyperlink, for example to a web page, select the text and click the **Hyperlink** icon  or choose **Hyperlink** in the local menu. See "Creating links" for information about the Link dialog box.
- To create a table, move the cursor to the location in the text where you want the table inserted, click the **Table** icon  and select the required initial number of rows and columns (you can add more later). Then type your text in the table cells. You can use the toolbar icons to apply formatting.
- To change the height of table rows, or the width of table columns, drag the row or column dividers.
- To delete a table row or column, put the cursor into the row or column to be deleted and choose **Table | Delete Row** or **Table | Delete Column** in the local menu. To delete the entire table, put the cursor somewhere in the table and choose **Table | Delete Table**.
- To add a table row or column, put the cursor into the row or column next to the one to be added and choose one of the **Table | Insert** options from the local menu.
- To merge cells in a table, select them and choose **Table | Merge Selected Cells** in the local menu.
- To split a cell in a table, put the cursor into the cell and choose **Table | Split Selected Cell** in the local menu.
- To change the background colors or borders of cells in a table, select the cells and choose **Table | Borders and Shading** in the local menu. You can assign a background color to all the cells in the table or to the selected cells only. You can also assign a border width and color to the left, right, top or bottom edges of the entire table or to each of the selected cells. To keep the current border width, just leave the Width field empty. Similarly, to keep the current colors, leave the Color field(s) unchanged (diagonal line on a white background).

In addition, there is an **Undo** icon  to correct mistyping or wrong selections, and a **Redo** icon  to re-apply changes removed by Undo.

## Editing an existing text note

If there is only one text note attached to a root or branch, OpenMind displays it automatically in the Text Note editor as soon as the root or branch is selected.

If the root or branch contains several text notes, you first need to select the text note you want to edit:

- Click the required text note in the Object list of the root or branch, or
- Move the mouse pointer over the paperclip icon  to the right of the root or branch label and click the required text note in the pop-up list.

If the Text Note editor is not open, you can open it as follows:

- **Double-click** the required note in the Object list, or
- Right-click the required text note in the Object list and choose **Execute** in its local menu.


This opens the Text Note editor and displays the text note, ready for editing.

## Deleting a text note

To delete a text note, select it in the Object list and do one of the following:

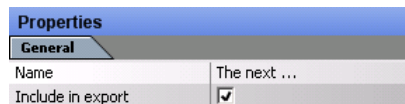
- Press **Delete**, or
- Choose **Delete** in its local menu.



*Remember that if you delete a text note by accident, you can always cancel the deletion by clicking the Undo icon  or choosing Edit / Undo (Ctrl + Z).*

## Text note properties

Each text note has its own properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to the text note, as described in "Using the Properties dialog".



See "Text note properties: General tab" in the Reference section for a detailed description of the properties applicable to a text note.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

## Undocking the Text Note editor

The Text Note editor window is normally anchored (docked) at the bottom of the workspace.

You can however turn it into a floating window that you can place at the position of your choice on the workspace. There are two ways to do this:

- Double-click the top of its frame and move the floating window obtained to your preferred position, or
- Click the top of its frame and drag it to your preferred position.

To redock a floating Text Note editor window, just double-click the top of its frame again.

You can also dock the window at a different position:

- Click the top of its frame and drag it until you reach one of the edges of the workspace. When you see the outline of the frame "snap" to one of these edges, either release the mouse button if you are happy with the new position of the window, or continue dragging it until it snaps to the required position.

Finally you can dock the Text Note editor in such a way that it becomes a tab of another panel by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

## Inserting comments

OpenMind lets you associate comments with the elements of your map, including the workspace itself, the root and any branch or sub-branch. There are two kinds of comments:

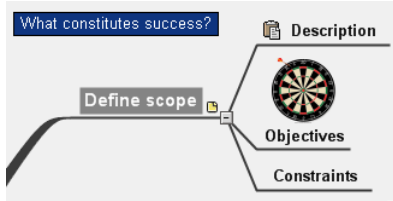
- Floating comments
- Pop-up comments



In addition to these types of comments, you can also associate longer text notes with the branches of your map. For more information on text notes, see "Inserting text notes".

### Floating comments

Floating comments are brief notes that stay visible on the screen at all times. You can add as many floating comments as you like to the workspace itself, the root or any branch of your map.



## Inserting a floating comment on a root or branch

- Select the root or branch to which you want to add a floating comment and choose **Insert | Floating Comment** in the main menu or local menu.

A small window opens to let you type your comment.



- Once you've finished typing, press **Enter** or click outside the comment window.

You can see that a thin gray line now connects your new comment with the root or branch you attached it to.

If necessary, you can move your comment to a more convenient place by dragging it with the mouse or by using the arrow keys of the keyboard.

You can use the commands of the Formatting toolbar to format your comment, change its font name or point size or choose a different background or text color. Note that any such change you make applies to the whole comment.



You can also format the comment, change the color and size of the connecting line or add a frame around the comment box with its Properties dialog. See "Floating comment properties: General tab" and "Floating comment properties: Text tab" in the Reference section for a detailed description of the properties applicable to a floating comment. For a general description of the Properties dialog, see "Using the Properties dialog".

## Inserting a floating comment on the workspace

- Right-click the workspace and choose **Insert | Floating Comment** in its local menu.

When you add a floating comment to the workspace in this way, the comment is not attached to anything and no connecting line is visible.

If necessary, you can then move your comment by dragging it with the mouse or by using the arrow keys of the keyboard. You can even connect it to a particular branch by moving it on top of its label.

## Editing a floating comment

- To replace the existing comment, just click it to select it and start typing the new comment.

You can also edit the existing comment. As for branch labels, there are several ways of entering Edit mode:

- Click the comment once to select it and press **F2**, or
  - Click the comment once to select it and click it again after a short time, or
  - Click the comment and choose **Edit | Edit Text** in the main menu, or
  - Right-click the comment and choose **Edit Text** in its local menu.
- Place the cursor at the required position to edit the existing comment.
  - When you have finished, press **Enter** or click outside the comment window.



Pressing **Esc** while in Edit mode will leave the existing comment unchanged.

## Detaching a floating comment

If you have attached a floating comment to the root or to a branch of your map, you can detach it by choosing **Edit | Detach** in the main menu or by right-clicking it and choosing **Detach** in its local menu. The comment now belongs to the workspace itself rather than to the root or any of its branches.

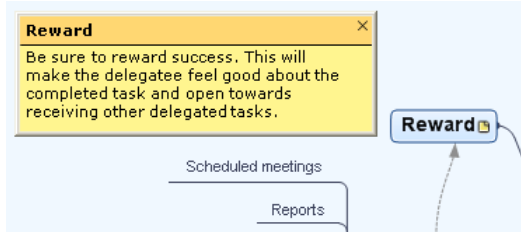
## Deleting a floating comment

To delete a floating comment, select it and do one of the following:

- Press **Delete**, or
- Choose **Edit | Delete** in the main menu, or
- Choose **Delete** in its local menu.

## Pop-up comments

By contrast with floating comments, pop-up comments are normally hidden. You can add a pop-up comment to the root or to any branch of your map, but not to the workspace itself. This type of comment can be very useful as a "designer note" while you build your map. You could for instance insert a pop-up comment on a branch to list all the elements that you still need to add to that branch.




## Inserting a pop-up comment

- Select the root or branch to which you want to add a pop-up comment and press **F11** or choose **Insert | Comment** in the main menu or local menu.

The comment window opens to let you type your comment.

- (optional) Resize the comment window by placing the mouse pointer on one of its edges or corners and dragging in the required direction.
- Once you've finished typing, press **Esc**, click outside the comment window or click the **Close** icon in the top right corner of the comment window.

A yellow comment icon  now appears next to the branch name, indicating that there is a comment associated with this branch. Moving the mouse pointer over this yellow comment icon re-opens the comment window so that you can read the comment. As soon as you move the mouse pointer away from it, OpenMind hides the comment window again.

If necessary, you can easily move your comment to a more convenient place by dragging its title bar with the mouse.

## Editing a pop-up comment

There are several ways of entering Edit mode:

- Click the yellow comment icon on the right of the root or branch name, or
  - Move the mouse pointer over the yellow comment icon and click the comment window, or
  - Select the root or branch containing the pop-up comment and press **F11** or choose **Insert | Edit Comment** in the main menu or in the local menu.
- Place the cursor at the required position to edit the existing comment.
  - (optional) Resize the comment window by placing the mouse pointer on one of its edges or corners and drag in the required direction.
  - When you have finished, press **Esc**, click outside the comment window or click the **Close** icon.

## Deleting a pop-up comment

There are two ways of doing this:

- Right-click the branch containing the comment and choose **Delete | Comment** in its local menu.
- Right-click the title bar of the comment window and choose **Delete** in its local menu.

## Inserting task information

OpenMind Business Edition lets you enter task and time-related information on any of the branches of your Mind Map in order to create different types of documents, such as timelines, task lists and project plans.

This topic explains how to enter task information on the branches of your document to create a simple task list or a project plan. For information about entering time data for a timeline, see "Inserting timeline information".

Although you can also enter task information directly in other views such as the Outline view (task lists and project plans) and the Gantt view (project plans only), the **Task/Timeline Info** panel described here allows you to enter task information on your branches while brainstorming your document in one of the standard Mind Mapping views.

## Building a task list

- Click the **Task/Timeline Info** tab on the right of the workspace to open the panel.
- Make sure the document type is set to **Task management**.
- Select a branch for which you want to add task information.
- (optional) Enter a **Start date**.
- (optional) Enter an **End date**.
- (optional) Choose a **Priority** level.
- (optional) Choose a percentage value to indicate how far the task has progressed to **Completion**.
- (optional) Assign **Resources** to the task by typing their names separated by semi-colons.

You can also click the Resources button to the right of the field to open the Task Resources dialog. See "Assigning resources" in the "Gantt view" chapter for details about using this dialog and information on how to create a global resources list.

- Repeat the procedure to add task information to other branches.

**Task/Timeline Info**

**Document type**

Task management

Suitable for creating task lists and project plans (timescale from 1984 to 2049).

**Time information**

Start date: 06/12/2007

End date: 12/12/2007

Delete Times

**Task information**

Priority: Normal

Completion: 0%

Resources: Office management

☐ Show info on branches

Enable Project Management...

- (optional) To display, directly on the branches of the Mind Map, the task information you just entered, check **Show info on branches**.

You can delete the time information inserted on a branch at any time by selecting it and clicking the **Delete Times** button.

Once you have finished brainstorming your task list, you can display it in grid format in the Outline view for a better overview and faster editing. You can also obtain a chronological display of the tasks along a horizontal axis by switching to the Timeline view. See "Using the Outline view" and "Using the Timeline view" for more information on these two views.

You can also import an existing task list from Microsoft Outlook or export your task list to it, as well as synchronize different versions of the same task list stored in both programs.

For more information on the procedures involved, see "Exporting to Microsoft Outlook" and "Importing from Microsoft Outlook".

## Building a project plan

A project plan is a series of interdependent tasks that need to be performed in a particular order.

The OpenMind Gantt view, specific to the Business Edition, is dedicated to the creation, editing and management of project plans according to the rules of project management. It is the best view to use when working on a project plan, since it allows you to visualize immediately the consequences on the overall plan of any changes you make.

There are two important differences between the way in which OpenMind handles a simple task list and the way in which it handles a project plan:

- In a project plan, all parent branches become summary tasks. The start dates, end dates and durations of summary tasks are calculated automatically from their sub-tasks and cannot be edited.
- In a project plan, tasks are only scheduled during working time, as defined by the project calendar.

For a full description of the Gantt view, including how to set up, create and manage a project plan, see "Using the Gantt view" and the topics that follow it in the "Gantt view" chapter.

The Task/Timeline Info panel described here gives you an alternative way of viewing and editing the information associated with the tasks of your project plan. It is useful if you want to brainstorm your project plan in one of the standard Mind Mapping views rather than using the Gantt view. Once you have finished brainstorming, switching to the Gantt view will enable you to take advantage of the full capabilities of the project management features offered by OpenMind.

- Click the **Task/Timeline Info** tab on the right of the workspace to open the panel.
- Make sure the document type is set to **Task management**.

There are now two possibilities:

- If you want to create a new project plan, click the **Enable Project Management** button at the bottom of the panel. This not only enables project management but also automatically converts any existing task list data to conform to the rules of project management, as described above.
  - If you are working on an existing project plan, project management will already be enabled. In that case, the button is labeled 'Disable Project Management'. It allows you to convert your project plan back to a simple task list.
- Select a branch for which you want to add task information.
  - (optional) Enter a **Duration**.

For detailed information about the different ways of entering a duration and how OpenMind uses this value to schedule tasks in a project plan, refer to the paragraph "Entering a task duration" in "Entering and editing tasks" (Gantt view).

Although you can add start dates and end dates to your project tasks, it is not recommended unless you understand the implications of doing so. It is normally better to let OpenMind calculate the start and end dates of the tasks automatically with reference to the project start date, the task durations, and the task links that you might have set up in the Gantt view. For detailed information about how OpenMind handles start and end dates in a project plan, refer to the paragraph "Specifying start and end dates" in "Entering and editing tasks" (Gantt view).

- (optional) Choose a **Priority** level.
- (optional) Choose a percentage value to indicate how far the task has progressed to **Completion**.
- (optional) Assign **Resources** to the task by typing their names separated by semi-colons.

You can also click the Resources button to the right of the field to open the Task Resources dialog. See "Assigning resources" (Gantt view) for details about using this dialog and information on how to create a global resources list.

- Repeat the procedure to add task information to other branches.

The screenshot shows the 'Task/Timeline Info' dialog box with the following fields and options:

- Document type:** A dropdown menu set to 'Task management'. Below it, a note states: 'Suitable for creating task lists and project plans (timescale from 1984 to 2049).'.
- Time information:**
  - Duration:** A dropdown menu set to '8 days'.
  - Start date:** A date picker set to '13/12/2007'.
  - End date:** A date picker set to '24/12/2007'.
- Task information:**
  - Priority:** A dropdown menu set to '500'.
  - Completion:** A dropdown menu set to '0%'.
  - Resources:** A text field containing 'IT management' and a button with a person icon.
- ☐ Show info on branches
- Disable Project Management...

- (optional) To display, directly on the branches of the Mind Map, the task information you just entered, check **Show info on branches**.

OpenMind lets you export your project plans to Microsoft Project for further work. You can also import existing Microsoft Project plans into the Gantt view, directly from Microsoft Project or via the Microsoft Project XML format.

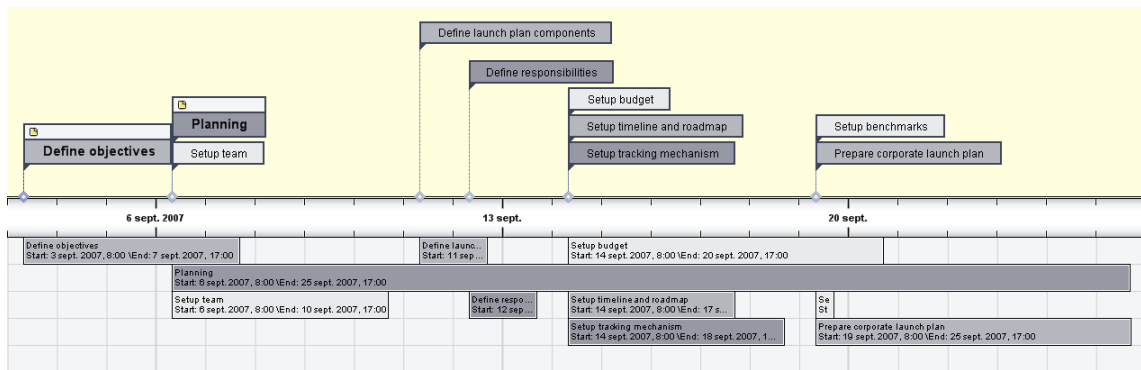
For more information on exporting and importing directly from Microsoft Project, see "Exporting to Microsoft Project" and "Importing from Microsoft Project". For the export and import options using the XML format, see "Exporting to XML" and "Importing from XML".

## Inserting timeline information

OpenMind Business Edition lets you enter time-related information on any of the branches of your Mind Map in order to create different types of documents, such as timelines, task lists and project plans.

This topic explains how to enter time information on the branches of your document in order to create a timeline. For information about how to enter time information for a task list or a project plan, see "Inserting task information".

Entering time information on the branches of your document allows you to display these branches as chronological events along a horizontal axis in the Timeline view, as shown here:



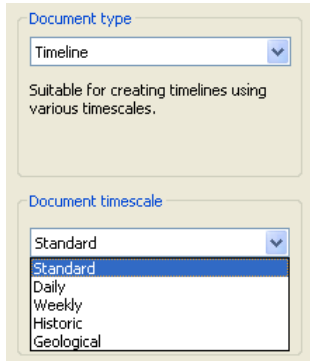
For a full description of the Timeline view, see the topic "Using the Timeline view". This topic also explains how you can present and export your timelines.

Although you can work directly in the Timeline view when creating a timeline, the **Task/Timeline Info** panel described here allows you to enter time information on your branches while brainstorming your document in one of the standard Mind Mapping views.

## Choosing a timescale

Regardless of whether you are working in one of the Mind Mapping views or in the Timeline view, the first thing you need to do when you are creating a timeline is to define the timescale of your document.

- Click the **Task/Timeline Info** tab on the right of the workspace to open the panel.
- Choose the document type **Timeline** in the first field.
- Select a **timescale** for the document. The default timescale is Standard.



The image shows two panels from a software interface. The top panel, titled 'Document type', has a dropdown menu with 'Timeline' selected. Below the dropdown is the text 'Suitable for creating timelines using various timescales.' The bottom panel, titled 'Document timescale', has a dropdown menu with 'Standard' selected. Below the dropdown is a list of options: 'Standard', 'Daily', 'Weekly', 'Historic', and 'Geological'.

OpenMind lets you choose between several timescales to cater for different timeline projects:

**Standard:** Use this timescale for normal dates and times. It is also suitable for historical times where you do not need to show BC dates. You can specify the year, month, day and time. The range is 1 AD to 3,000 AD.

**Daily:** Use this timescale to plot time by day number, without reference to specific dates or days of the week. For example, you could use it to chart the life cycle of an insect or to map out a process. You can specify day number and time: Day 1 is the first day, Day 17 the seventeenth, Day -3 the third day before the first day, and so on. The range is  $\pm 1,000,000$ .

**Weekly:** Use this timescale to plot time by week number, without reference to specific dates. You can specify week number, day (Monday to Sunday) and time. The range is  $\pm 100,000$ .

**Historic:** Use this timescale for historical dates. You can specify the year (BC or AD), month and day (not the time). The range is 5,000,000 BC to 3,000 AD.

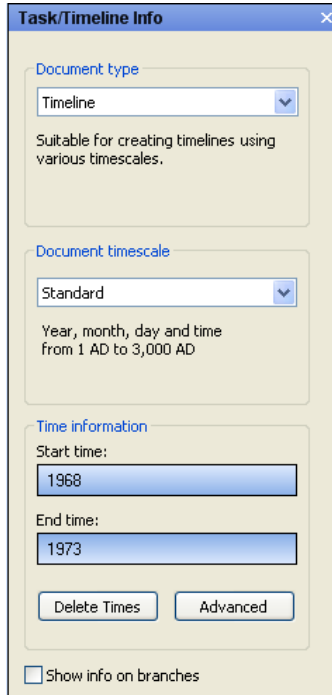
**Geological:** Use this for plotting astronomical, geological or prehistoric events. You can specify dates in thousands or millions of years. Decimal numbers are allowed. The range is  $\pm 20,000,000,000$ .



*It is worth taking trouble to choose the timescale that is most appropriate for your subject. If you change the timescale later, you will have to re-enter the time information on all the branches.*

## Entering dates and times

- Select a branch for which you want to add time information.
- Click the **Start time** field in the Task/Timeline Info panel (or press **F12**).



The image shows a 'Task/Timeline Info' dialog box with a close button (X) in the top right corner. It contains three main sections: 'Document type' with a dropdown menu set to 'Timeline' and a description 'Suitable for creating timelines using various timescales.'; 'Document timescale' with a dropdown menu set to 'Standard' and a description 'Year, month, day and time from 1 AD to 3,000 AD'; and 'Time information' with 'Start time' and 'End time' text boxes containing '1968' and '1973' respectively. Below these are 'Delete Times' and 'Advanced' buttons. At the bottom is a checkbox labeled 'Show info on branches' which is currently unchecked.

- Specify a **Start time** for the event in the dialog that opens. You do not have to make selections in all the boxes. For example, if you are using the Standard timescale, you can choose just a year, or just a year and month, without specifying an exact date or time.

If you make a mistake or enter a date that in hindsight is too specific for your needs, you can click **Reset** one or more times to undo your choices one by one. If for instance, you specify a date by selecting '2001', 'January' and '22', clicking Reset will remove the information about the day to leave the date as 'January 2001'.

- Click OK.
- If necessary, you can specify an **End time** by clicking the End time field or pressing **Ctrl + F12**. You do not need to specify an end time if your event has no extended duration. For example, to enter the date of an event that happened on a particular day, all you need to do is to specify the date as the Start time.
- Repeat the procedure to add time information to other branches.

- (optional) To display, directly on the branches of the Mind Map, the time information you just entered, check **Show info on branches**.

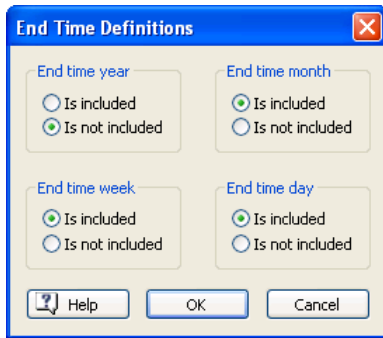
You can delete the time information inserted on a branch at any time by selecting it and clicking the **Delete Times** button.



As well as using this Task/Timeline Info panel, you can also enter time information on branches from the Outline view or from the Timeline Outline panel shown in the Timeline view. Just double-click the relevant Start Time or End Time cell and fill in the time picker as described above.

## Advanced options

The **End Times Definitions** dialog which opens when you click the Advanced button in the Task/Timeline Info panel allows you to specify the way OpenMind should handle end times. These settings are only relevant when viewing the document in the Timeline view.

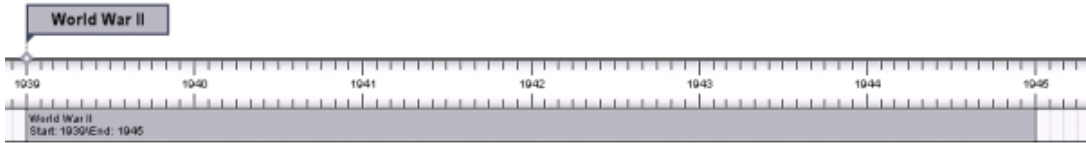


The simplest way to explain how this works is by means of an example. Suppose you are entering dates for a branch concerning World War II. As start date you specify 1939, so the branch displayed on the timeline will start at the beginning of 1939. As end date you enter 1945. There are now two possibilities:

- If the setting for **End time year** on this dialog is set to **Is included**, the end time will be the *end* of 1945. In other words the duration bar for the World War II branch will stretch from the beginning of 1939 to the end of 1945.



- If the setting for **End time year** on this dialog is set to **Is not included**, the end time will be the *beginning* of 1945. In other words the duration bar will stretch from the beginning of 1939 to the beginning of 1945.



The settings for the other time periods, namely month, week and day, work in the same way.

**Important:** The choices you make in this dialog will apply *only* to the end times you insert from now on, and *only* for the current timeline. The next time you create a timeline, the settings of this dialog will revert to their default values. You are therefore free to choose different options for different timelines.

## Printing a Mind Map

- To print your map, click the **Print** icon , choose **File | Print** or press **Ctrl + P**.

This opens the Print Preview dialog, which shows you what your map will look like on paper.

The preview of the map immediately reflects the changes you make in this dialog, allowing you to experiment with the various settings.

## Using the Print Preview dialog buttons and options

The Print Preview dialog contains the following buttons and options:

The image shows a print dialog box with the following sections and controls:

- Buttons:** Print, Print Setup, Fit to Page, Actual Size, Cancel, and Help.
- Orientation:** Radio buttons for Portrait (selected) and Landscape.
- Page spread:** Spinners for Horizontal (set to 1) and Vertical (set to 1).
- Print:** Radio buttons for Entire map (selected) and Filtered map.
- Number of copies:** Spinner for Count (set to 1).
- Document information:** A checkbox for Show document info (unchecked) and an Edit... button.

**Print:** Click to print the entire map or the filtered branches only as shown in the Preview area.

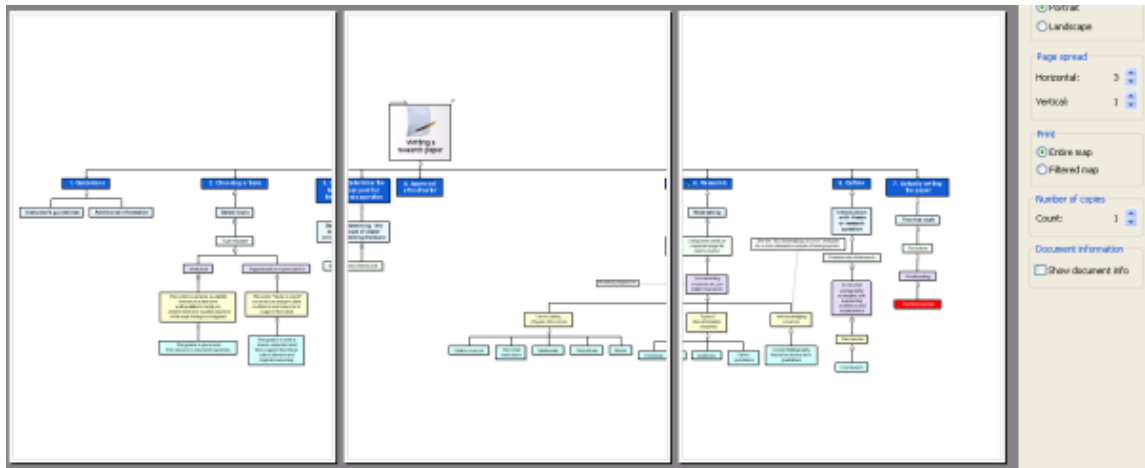
**Print Setup:** Click to choose a different printer and set the usual printing parameters, such as paper size, print quality and so on.

**Fit to Page:** Click to resize the map so that its entire contents fit on the single page or page spread chosen.

**Actual Size:** Click to print the map at its actual size. If your map is large, this may mean that some part of it will be outside the print area.

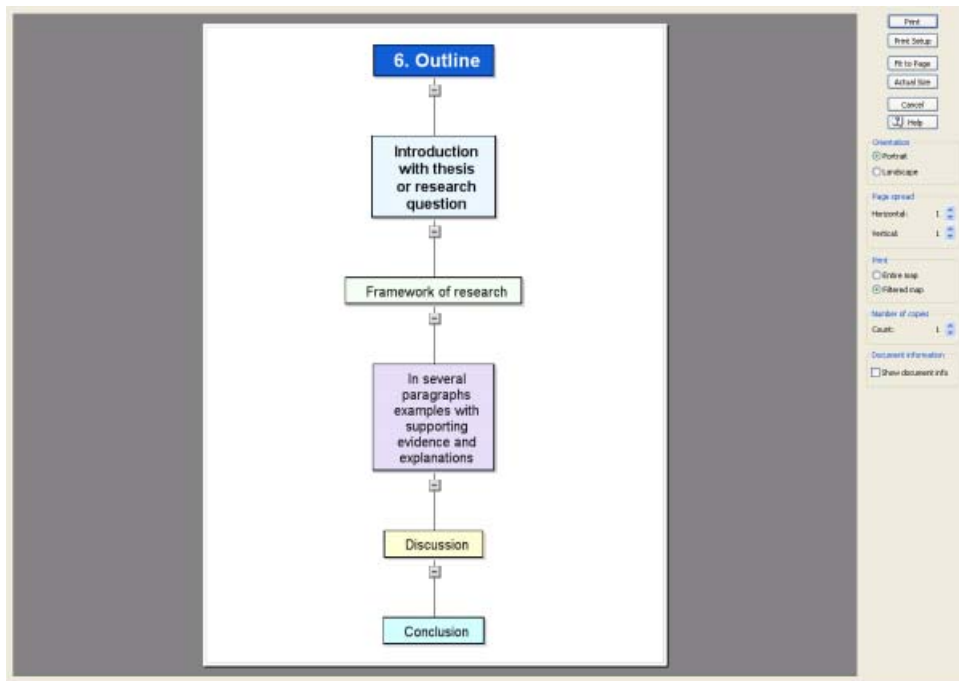
**Orientation :** Choose Portrait to print your map vertically or Landscape to print it horizontally.

**Page spread:** These options allow you to spread your map on several pages. This is very useful for large maps. If for instance your map is quite wide (as may be the case in Top Down view), you can increase the horizontal page spread number to ensure that its entire contents will be printed.



**Print entire map:** This option allows you to print the entire map.

**Print filtered map:** Check this box if you have restricted the display of your map to a particular branch or set of branches with the Filter icon (see "Filtering a branch") and only want to print that particular branch or set of branches.

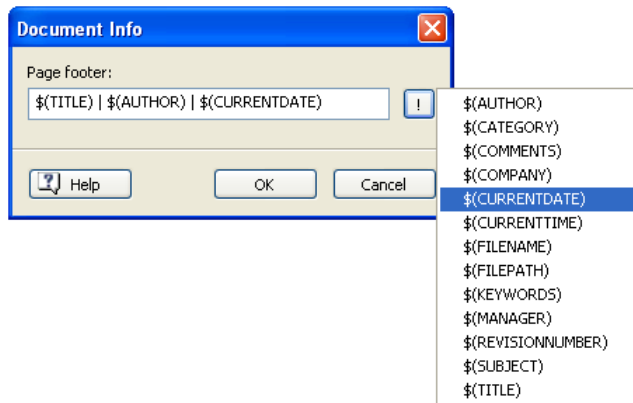


**Number of copies:** Specify how many copies of your map you would like to print.

**Show document info:** Check this box to display the title of the document, the name of the author and the current date in the lower right corner of the printed page. If you are using the 'Page spread' option to print the map on several pages, this information is shown on the last page in the range.

You can customize this footer as follows:

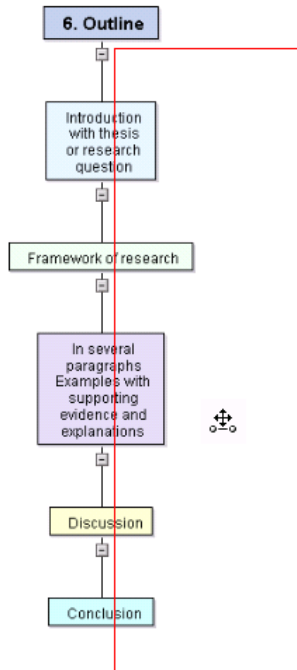
- Click the **Edit** button.
- Click the down arrow on the right of the 'Page footer' field to choose the data you want to display in the footer.



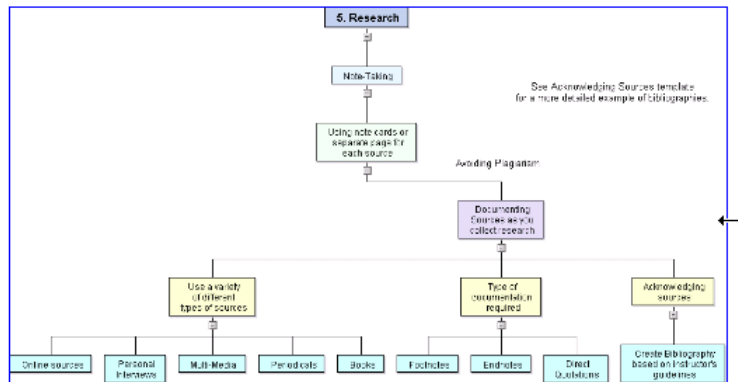
Each new piece of information is added to the right of the footer string. You can however rearrange the parameters as you wish, and even enter your own free text to separate the parameters. Note that most of the parameters are taken from the data shown in the File Properties dialog (choose File | Properties).

## Moving or resizing the map within the Preview area

When moving the mouse pointer over the map in the Preview area, a red outline appears around it. You can move the map within the page or page spread by dragging the outlined area with the mouse.




You can also resize the map within the page or page spread by moving the mouse pointer to one of its edges until it becomes a double arrow (the red outline becomes a blue outline), and dragging the edge in the direction required.



# Saving a Mind Map

You can save your Mind Map in several ways:

- Click the **Save** icon .
- Choose **File | Save** or press **Ctrl + S** to save your Mind Map under its existing name and continue working in OpenMind.
- Choose **File | Save as** to save your Mind Map under a different name. This is also a way of creating a copy of your document.



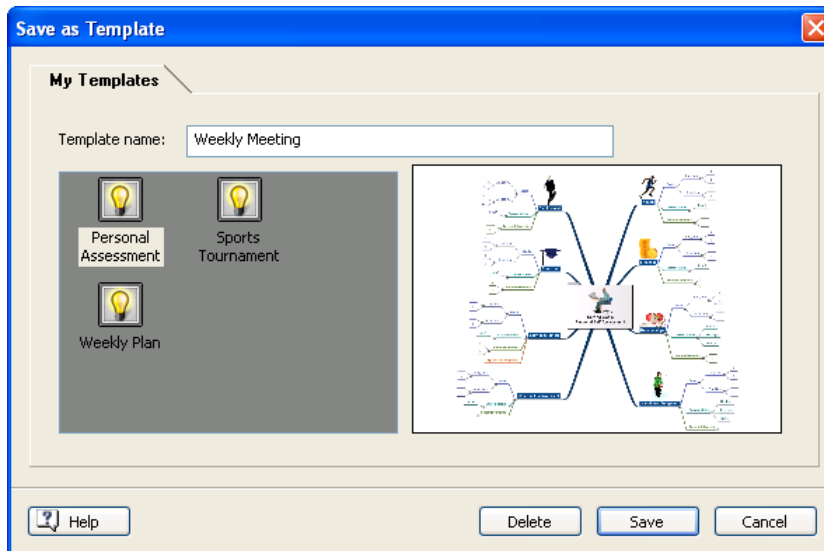
The first time you save a new document, choosing File | Save opens the Save As dialog to allow you to enter a file name for your new document.

## Saving your map as a template

You can also save your map as a custom template for future use. This allows you to create new Mind Maps on the basis of your existing Mind Maps. To do this:

- Choose **File | Save as Template**.

The Save as Template dialog appears. Its left part contains a list of the templates you've already saved. Clicking one of these templates gives you a preview of it on the right part of the dialog.



To create a new template:

- Enter the name of your new template and click **Save**.

To overwrite an existing template:

- Select an existing template and click **Save** to overwrite it with your new template.

To delete an existing template:

- Select an existing template and click **Delete**.



Custom templates are saved with the extension .omt in your Document and Settings folder.

## Setting a password

OpenMind helps you to prevent unwanted access to your documents by protecting them with a password. Password-protected documents are also automatically encrypted. Longer passwords give a stronger level of encryption.

- Choose **File | Set Password**.

The Set Password dialog appears.

A screenshot of the 'Set Password' dialog box. It has a blue title bar with the text 'Set Password' and a red close button. The dialog contains two text input fields: 'Password:' and 'Confirm password:'. Below the fields are three buttons: 'Help' (with a question mark icon), 'OK', and 'Cancel'.

- Enter the password in the top field.
- Click the bottom field and enter exactly the same password. Confirm by clicking OK.

From now on, OpenMind will prompt you to enter the password every time you try to open the document.

You can change the password by entering a new password in the dialog.

To remove the password, clear both fields and save the document.



**Do not lose your password!** It is not possible to open a password-protected OpenMind document without entering the correct password.

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## Further tasks

### Editing a root or branch

OpenMind lets you perform different operations on the root of your map or any of its branches, such as editing their label, choosing a different color for the text, changing the color of the background and so on.

Most of these operations can be applied to several branches at once. All you need to do is to start by selecting all the branches you want to modify, as described further down.

### Editing a label

➤ To replace the existing label, just click it to select it and start typing the new label.

You can also edit the existing label. There are several ways of entering Edit mode:

- Click the label once to select it and press **F2**, or
  - Click the label once to select it and click it again after a short time, or
  - Click the label and choose **Edit | Edit Text** in the main menu, or
  - Right-click the label and choose **Edit Text** in its local menu.
- Place the cursor at the required position and start typing.
- When you have finished, press **Enter** or click outside the label.



Pressing **Esc** while in Edit mode will leave the existing label unchanged.



*Remember that your map will be clearer if you keep the branch labels short. If you have additional information to enter, create a text note rather than trying to fit it on the label. You can also enter comments to serve as reminders while you build up your map.*

### Selecting several branches

Selecting several branches at once allows you to apply the same change to all of them simultaneously.

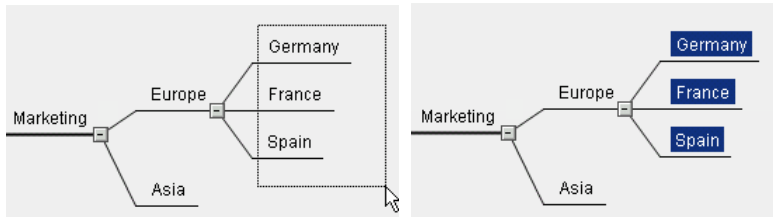
You can select several branches in the same way as you select several files in Windows Explorer:

- Click the first branch, then press and hold down the **Ctrl** key while clicking the other branches one by one.

Each of the branches you click becomes highlighted to indicate that it is selected.

- To deselect one or more branches simply click them again while holding down the Ctrl key.

You can also select several branches by drawing a small frame around them with the mouse. All the branches contained within the frame become selected.



*Press Ctrl + A to select all branches.*

## Formatting a label

You can use the commands of the Formatting toolbar to apply formatting attributes to a root or branch label, change its font name or point size or choose a different background or text color. Note that any such change you make applies to the whole label.



*You can also define these formatting attributes using the Properties dialog of the relevant root or branch, as described in "Root properties: Text tab" and "Branch properties: Text tab".*

## Formatting a branch

There are many formatting options available to modify the appearance of a branch, thus adding visual interest to your map. You can for instance increase the width of the branch line, change its color, change the color of the background, define a boundary for the branch, change the color of the text and so on.

In way of example, the graphic below shows a branch where the branch color has been changed to green and the background color has been made yellow. In addition, the font size has been changed from Arial 9 Regular to Arial 11 Bold, the text color has been changed to white and the text background to orange.





You can also define these options using the *Properties dialog of the branch*. See "*Branch properties: General tab*".

## Moving a branch

As your map grows and you start analyzing its various topics, you may realize that some of them don't in fact belong to the branch you first allocated them to, but should be moved to a different branch.

This topic describes how to perform the following operations:

- Moving a main branch or a sub-branch and inserting it at a different hierarchical level in the Mind Map
- Moving a main branch manually to a different position by disabling the Auto-layout mode
- Cutting, copying and pasting a branch in the same document or in another document

These operations can be applied to several branches at once. All you need to do is to start by selecting all the branches you want to modify, as described in the paragraph "Selecting several branches" of the topic "Editing a root or branch".

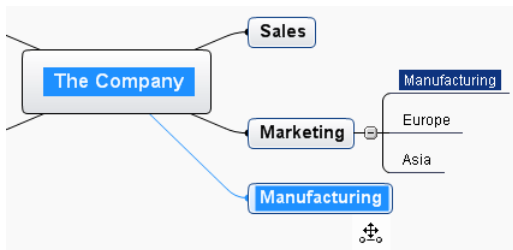
### Moving a main branch or a sub-branch and inserting it at a different level

You can move an entire branch, including any sub-branches and objects attached to it, to a different branch of your map. As you work on organizing your ideas, you can for instance decide to convert a sub-topic to a main topic by moving the corresponding sub-branch to the root, or allocate a sub-topic to a different main topic by moving the corresponding sub-branch to a different main branch.

- Select the branch you want to move to a different location by clicking it with the left mouse button.
- While keeping the left mouse button down, drag the branch to the required location.

The mouse pointer changes to a different shape and a blue line shows you where the branch will be inserted when you let go of the mouse button.

- Release the mouse button to insert the branch at the required location.





*If you are viewing your map in the Mind Map or Left/Right views, you can also use the Ctrl + Up and Ctrl + Down keyboard shortcuts to move the currently selected branch up or down in the map. Similarly, the Ctrl + Right and Ctrl + Left keyboard shortcuts allow you to move a branch right or left in the Top Down view.*

## Moving a main branch to a different position by disabling Auto-layout


By default, OpenMind automatically arranges the main branches as you insert them to prevent any overlap. You can however choose to reposition the main branches yourself after their insertion by disabling Auto-layout mode.

- To disable Auto-layout mode, choose **View | Auto-layout** in the main menu to remove the tick mark next to the command name.

You can now position the main branches of your map as you wish by dragging them with the mouse.

Note that this only applies to main branches. OpenMind always arranges sub-branches automatically.

**Important:** If you re-enable Auto-layout mode at any point by choosing View | Auto-layout again while still working on your map, the main branches you repositioned will be placed back in their default

position. You can however use the Undo feature  to cancel the re-enabling of Auto-layout and revert the display of the main branches to your own positioning.

## Cutting, copying and pasting a branch

You can apply the standard Cut, Copy and Paste Windows functions to any branch of your Mind Map. This allows you to copy or move an entire branch, including all its sub-branches and attached objects, to a different part of your map, at the same hierarchical level or at a higher or lower level, in the same document or in a different document.

You can also apply the Cut, Copy and Paste functions to the root itself. This allows you for instance to copy an entire map from one document and add it as a main branch or a sub-branch in a different document. This is a very useful feature if you need to consolidate several different documents into a master document, as described in "Pack & Go".

- To cut a root or a branch with all its sub-branches and attached objects to the clipboard (in other words to place the root or branch on the clipboard while removing it from your map), you first need to select it. You can then either:
  - Choose **Edit | Cut** in the main menu, or
  - Choose **Cut** in the local menu of the branch, or
  - Press **Ctrl + X**.

- To copy a root or a branch and all its sub-branches and attached objects to the clipboard (in other words to place the root or branch on the clipboard while leaving it in place in your map), you first need to select it. You can then either:
  - Choose **Edit | Copy** in the main menu, or
  - Choose **Copy** in the local menu of the branch, or
  - Press **Ctrl + C**.
- To paste a root or a branch and all its sub-branches and attached objects, you first need to select its new location, either in the same document or in a different document. You can then either:
  - Choose **Edit | Paste** in the main menu, or
  - Choose **Paste** in the local menu of the destination branch, or
  - Press **Ctrl + V**.

The clipboard root or branch is added as a sub-branch of the destination branch you selected.




If you cut and paste a branch that is the starting point of a branch connection (see "Creating branch connections"), the branch connection will be moved with the branch. However if you cut and paste a branch that is the end point of a branch connection, the branch connection is not kept.

## Filtering a branch





As your map grows, you might find it useful to concentrate on a particular area by viewing only a chosen branch or set of branches. This also gives you more workspace to add comments, text notes, icons, objects and so on to the particular branch or set of branches you are viewing.

To restrict the display to a branch or set of branches, you use the Filter toolbar .

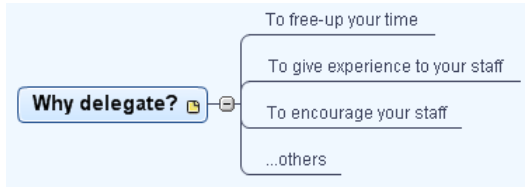


If the Filter toolbar is not visible, choose **View | Toolbars | Filter** in the main menu.


- Click a branch of your map to view only that branch together with any sub-branches it may have.
- Click the **Filter** icon  in the Filter toolbar.

The Filter icon  is now highlighted, reminding you that you are now viewing only part of the map.

Note that when restricting the display in that way, any branch connections leading to branches outside the area shown will not be represented.





To display the entire map again, you can either:

- Click the **Remove Filter** icon , or
- Right-click the workspace and choose **Filter Off** in its local menu

You can also filter a branch by right-clicking it and choosing **Filter** in its local menu. Choose **Filter Off** to remove the filter.

If you decide to print your map (choose File | Print or press Ctrl + P) while a branch is filtered in this way, the default action is to print only that branch together with its sub-branches. See "Printing a Mind Map" for more information.



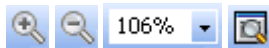
You can also collapse the entire Mind Map to just one level of branches, two levels, three levels or four levels by using the **Detail level** icons  of the Filter toolbar. The **All Levels** icon  expands the Mind Map so that it shows all its branches down to the last level.




*You can also press Ctrl + 1 to display just one level of branches, Ctrl + 2 to show two levels etc. Ctrl + 5 shows all levels.*

## Zooming in and out

The zoom features let you change the level of magnification of your Mind Map.




### Zooming in the area currently shown by one level

- Click the **Zoom In** icon , or
- Choose **View | Zoom In**, or
- Press **Ctrl + "+"**.



The maximum zoom factor is 400%.


## Zooming out the area currently shown by one level

- Click the **Zoom Out** icon , or
- Choose **View | Zoom Out**, or
- Press **Ctrl + "-"**.

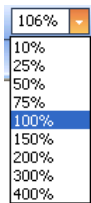


The minimum zoom factor is 5%.


## Selecting a specific zoom factor

You can also choose a predefined zoom factor or enter your own zoom factor with the **Zoom Specific** icon  as follows:

- Click the arrow to the right of the Zoom Specific icon and choose one of the predefined zoom factors in the pull-down menu, or
- Click the Zoom Specific icon and enter your own value.



## Fitting the map to the dimensions of the screen

- Click the **Fit to Screen** icon , or
- Choose **View | Fit to Screen**, or
- Press **F4**.

## Viewing the map in Full Screen mode

- Choose **View | Full Screen Mode**, or
- Press **F9**.

All the toolbars and panels are now hidden, giving your map as much screen space as possible.

- To return to normal viewing mode, choose **Exit** in the floating Full Screen toolbar, press **Esc** or press **F9** again.

## Using the Multimedia Catalog

The Multimedia Catalog, which is displayed by default on the right of the OpenMind workspace, contains a vast collection of high quality clipart pictures organized in many different categories or themes.

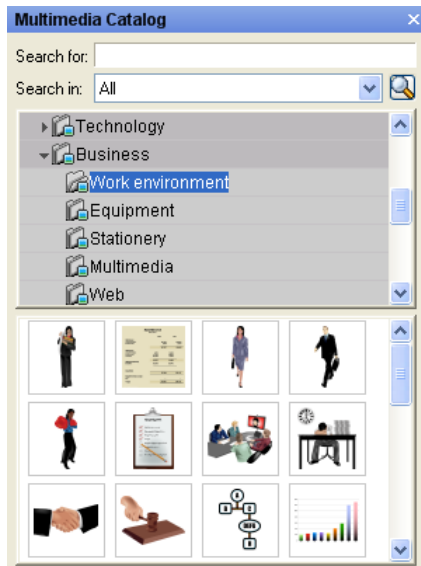
As well as business and web-related pictures, the Multimedia Catalog contains a large number of pictures created specifically to support both the curriculum-aligned templates included in OpenMind and your own curriculum-based Mind Maps.

All the Multimedia Catalog elements are free for you to use in your Mind Maps.

You can also store your own elements in the Multimedia Catalog. This enables you to re-use them whenever needed by dragging them from the Multimedia Catalog into your Mind Maps.

Finally, you can connect one or more of your User Area categories to one of your hard disk folders or to a shared network folder in order to view and use their contents. This feature is particularly useful when several users want to make use of the same multimedia elements stored on a shared network folder.

You can for instance connect one of your user categories to a folder containing different types of elements, such as videos, sounds or Flash files, which you can then drop onto your branches as attached objects.





If the Multimedia Catalog is not visible, click the **Multimedia** tab on the right of the workspace to open the corresponding panel.



*You can resize the Multimedia Catalog window by placing the mouse pointer on one of its edges until it changes to a double arrow and dragging with the mouse.*

## Overview of the Multimedia Catalog

- **User Area:** This area is reserved for your own use. You can add or drag any element to it, create as many sub-categories as needed and even connect one or more of your user categories to an external folder. See "Adding elements to the Multimedia Catalog" below for more information.
- **Clipart:** Contains more than 1500 high quality illustrations covering many different educational fields, as well as business and web-related illustrations.
- **Map Styles:** This category contains a variety of map styles which let you change the look of your map instantly. Just drag one of the map styles onto the workspace to apply different branch shapes, branch colors and other coordinated attributes to your Mind Map in one single step.

Map styles are only available when viewing your document in Mind Map view.

- **Root Shapes:** This category contains different root shapes which you can choose from to replace the default root shape of your map.

Root shapes are only available when viewing your document in Mind Map view.

- **Favorites:** Place in this category any element you want to be able to find again quickly.
- **Recent:** When you add a Multimedia Catalog element to your document, this element is automatically copied to the Recent category. This allows you to quickly find recently used multimedia elements in case you want to use them again.
- **Search Results:** This category only appears once you have done a search in the Multimedia Catalog. It shows all the elements of the catalog that correspond to your search criteria.

## Undocking the Multimedia Catalog

To ensure that the various OpenMind panels occupy as little space as possible, they are normally anchored (docked) to the right of the screen.

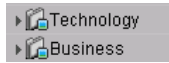
You can however move any of the panels freely on the workspace or dock them to a different position by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

## Browsing the Multimedia Catalog

- To see the contents of a category, select it by clicking it or by pressing the up or down arrow key on the keyboard.

A small right-pointing arrow next to a category name indicates that this category contains sub-categories.

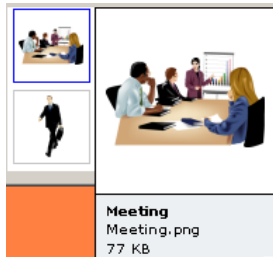
- Click this arrow or press the right arrow key on the keyboard to show the list of sub-categories.



You can collapse a category again by clicking its arrow or by pressing the left arrow key on the keyboard.

- To examine a particular multimedia element more closely, place the mouse pointer over it.

This shows an enlargement of the element as well as relevant information such as its name and size.



- To insert a Multimedia Catalog element in your Mind Map, just drag it from the catalog.

## Using the Favorites category


If you often use the same elements, placing them in the Favorites category allows you to find them again very quickly. You can do this in two ways:

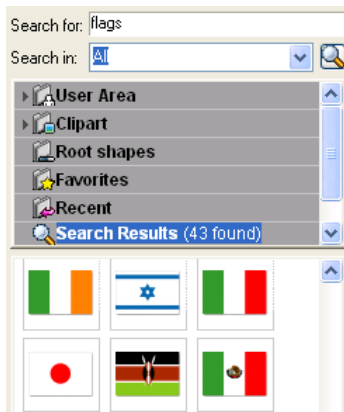
- Right-click the relevant element and choose **Add to Favorites** in its local menu.
- Drag the element from one of the Multimedia Catalog categories to the Favorites category.


The element is now copied to the Favorites category. If you want to remove it from this category at a later stage, right-click it again and choose **Remove from Favorites** in its local menu.

## Searching the Multimedia Catalog

If you need a picture related to a particular theme (for instance Europe), you can search the entire catalog for that theme:

- Type a search word in the **Search for** field. For instance, if you are working on a map describing various countries and want to insert their flags on the map, start typing the word "flags". As soon as you enter the 3rd character (i.e. the letter "a"), pictures of flags appear in the Search Results category.
- (optional) If you want to restrict the search to a particular category, select this category in the **Search in** field and click the Search icon  to restart the search.
- Scroll down the Search Results category until you find the flag you require.



*During a search, the Search icon changes to . You can interrupt a search at any time by clicking this icon.*

Searches in the Multimedia Catalog are keyword-based. Many different keywords have been associated with the Multimedia Catalog elements to help you find rapidly what you need. By way of example, here is a small selection of the many different keywords you can search for:

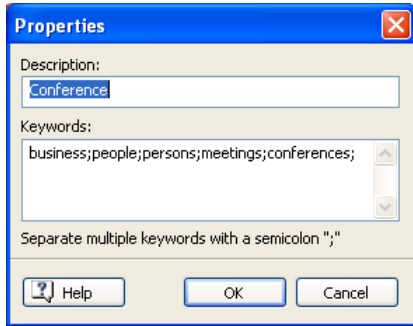
people, men, women, children, buildings, symbols, countries, maps, flags, animals, plants, computing, transport

When you enter the first few characters of a word or a full word in the 'Search for' field, OpenMind goes through all the keywords that have been associated with the Multimedia Catalog elements. All the elements which have one or more keywords containing the characters you entered appear in the Search Results category.

You can view the keywords associated to a particular element and even add your own as follows:

- Right-click the element in the Multimedia Catalog display area.
- Choose **Properties** in its local menu.

The Properties dialog appears.



- Type the new keywords you want to associate with this element, separating them with semi-colons.



The Properties dialog also lets you edit or remove unwanted keywords or change the description that appears when you view an enlargement of the element.

## Adding elements to the Multimedia Catalog

You can keep your own elements in the Multimedia Catalog for future use, either in an existing category or in the User Area. You are also free to create your own categories within the User Area, rename them or delete them.

- Any element you add to one of the existing categories of the Multimedia Catalog is identified by a small shortcut icon, indicating that the element is not actually copied to the Multimedia Catalog, but only inserted as a link to the actual element.



- Any element you add to one of the User Area categories is identified by a small gray arrow.



There are different ways of adding an element to the Multimedia Catalog. Here is one of them:

- Select the category to which you want to add the element.
- Right-click the category and choose **Add Element** in its local menu.
- Choose the required element in the Open dialog.

You can also add elements by dragging them from the Windows Explorer or the desktop.

## Renaming an element

You can give relevant names to all the elements you add to the Multimedia Catalog or rename existing elements as follows:

- Right-click the element you wish to rename and choose **Properties** in its local menu.
- Enter a new description for the element.

The new description will appear whenever you view the enlargement of the element.

## Deleting an element

You can delete any element you have added to the Multimedia Catalog as follows:

- Right-click it and choose **Delete** in its local menu or select it and press Delete.

## Creating a category within the User Area

You can create your own categories within the User Area as follows:

- Right-click the User Area or the sub-category of the User Area in which you want to create a category.
- Choose **Create Category** in the local menu.
- Type the new category name in the white box that appears.



You can also rename or delete any category in the User Area by right-clicking it and choosing **Rename Category** or **Delete Category** respectively in its local menu.

## Connecting a category to an external folder within the User Area

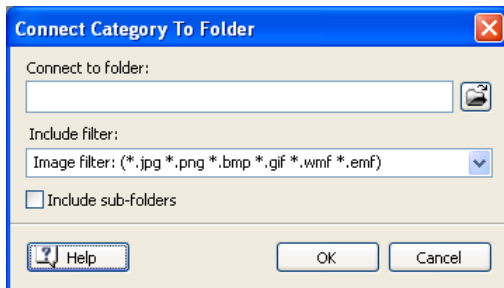
OpenMind allows you to connect one or more of your user categories to one of your hard disk folders or a shared network folder. This feature is particularly useful when several users want to make use of the same multimedia elements stored on a shared network folder.


You could also connect one of your user categories to a folder containing different types of elements, such as videos, sounds or Flash files, which you can then drop onto your branches as attached objects.

- Right-click the main User Area or one of its sub-categories.

- Choose **Connect to Folder** in its local menu.

The Connect Category to Folder dialog appears.



- Type the path of the folder you want to connect to or use the Browse button  to locate it.
- Choose the required filter. If for instance you only want to view the available videos, choose the Video filter.

Note that you can also type your own filter, such as \*.bmp; \*.jpg (separating the formats with a semi-colon as shown here) to see only pictures using these file formats or \*.\* to view all the files contained in the connected folder.

- (optional) Check the 'Include sub-folders' option if you also want to see the contents of all the sub-folders of the connected folder.

A new category is now created within the User Area, filled with all the contents of the connected folder that match the filter you specified. The new category takes the name of the folder that you connected it to. It is identified by a special icon to show that it is a connected category.



If the contents of the connected folder are likely to change while you are working with the Multimedia Catalog, for instance if the connected folder is a shared network folder to which other users have access, you can refresh the connected category to make sure you see the latest contents.

- Right-click the connected category and choose **Refresh** in its local menu.

Note that you can also refresh any of the sub-folders of the connected category.



*If the connected folder is very large, the Refresh operation may take a long time. You can interrupt it by right-clicking the connected category and choosing Stop Refresh in its local menu.*

Finally you can change the filter used to view the contents or even change the connection by connecting to a different folder as follows:

- Right-click the connected category and choose **Modify** in its local menu.

- Choose a different path and/or a different filter in the Connect to Category Folder dialog as described above.

You can disconnect a connected category at any time as follows:

- Right-click the connected category and choose **Disconnect** in its local menu.



Disconnecting a connected category removes the link between your User Area and the folder you connected to, but does not affect the external folder or its contents in any way.

## Resetting the Multimedia Catalog

You can restore the original contents of the Multimedia Catalog at any time by choosing **Tools | Reset Multimedia Catalog** in the main menu.

This will leave your User Area untouched, but will remove all the elements you might have added to any other category.

## Using the Overview panel

The Overview panel gives you a miniature view of your entire document.

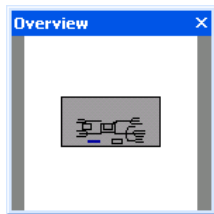
- To display the Overview panel, choose **View | Panels | Overview** in the main menu or click the **Toggle Overview Panel** icon  in the Display toolbar.



The Overview panel is not available in the Outline view or the Gantt view.



*You can resize the Overview panel by placing the mouse pointer on one of its edges until it changes to a double arrow and dragging with the mouse.*



If your map is very large, the Overview panel can be a very useful tool to reach its different areas.

- Move the mouse pointer over the gray rectangle contained in the Overview panel until it takes the shape of a hand.
- Drag it in the direction of the map you want to explore and release the mouse button.

The main view changes to reflect the new position of the gray rectangle. Note that the positions of the elevators in the workspace scroll bars also change accordingly.



You can achieve the same effect by using the workspace scroll bars, but the Overview panel has the advantage of giving you a complete representation of your map.

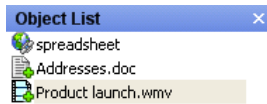
## Using the Object list

The Object list gives you a complete overview of the objects you have placed on the branch currently selected. It allows you to perform various operations on the objects, such as selecting them, activating them, deleting them or displaying their properties.



If the Object list is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

Each object listed in the Object list is identified by its name and represented by the same icon as in the Object toolbar.



*You can resize the Object list by placing the mouse pointer on one of its edges until it changes to a double arrow and dragging with the mouse.*

## Manipulating objects in the Object list

The Object list allows you to perform the following operations:

- Select an object by clicking its name.

The contents of the Properties dialog immediately changes to reflect the properties of the selected object, which you can then edit as required.

- Activate an object by double-clicking its name or choosing **Execute** in its local menu.
- Delete an object by choosing **Delete** in its local menu.
- If the object contains a link (e.g. Hyperlink, Button or Picture), change the link type or its properties by choosing **Edit Link** in its local menu. See "Creating links" for more information.

## Undocking the Object list

To ensure that the various OpenMind panels occupy as little space as possible, they are normally anchored (docked) to the right of the screen.

You can however move any of the panels freely on the workspace or dock them to a different position by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

## Using the Properties dialog

Many OpenMind components, such as the document itself, the root, the branches, attached objects, text notes and so on have specific properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to these elements.

### Notes:

- If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.
- The properties described are not always applicable to all views. The Properties dialog only lists the properties applicable to the current view.



*You can resize the Properties dialog by placing the mouse pointer on one of its edges until it changes to a double arrow and dragging with the mouse.*

The Properties dialog shown below illustrates the general properties applicable to a branch. To see the properties applicable to the branch label, you would click its Text tab.

For a complete description of all the Properties dialogs available, see the Reference section.


Properties	
General	Text
Name	Constraints
Branch color	
Border color	
Branch background color	
Branch background color 1	
Boundary	<input checked="" type="checkbox"/>
Boundary color	
Boundary fill color	
Boundary dash style	Dot
Boundary line width	1
Boundary line roundness	25
Show task/timeline info	<input checked="" type="checkbox"/>
Include branch and subs in e	<input checked="" type="checkbox"/>

You can make the same change to several elements at once by selecting all the elements required first. Let's suppose for instance that you want to change the branch color of three of your 10 branches. All you have to do is to select the three branches before choosing the color with the 'Branch color' property.

Note that if you select several elements of different type, only the properties that are common to all of them are listed in the Properties dialog. If for instance you select a floating picture and a floating comment together in order to edit their properties, you will only be able to modify their 'Line color' and 'Line width' properties from within the Properties dialog.

## Editing properties in the Properties dialog

The way you edit a property depends on its type as follows:

- **Label:** Type in the new name or edit the existing name in the input field.
  - **Number:** Type in the new value in the input field.
  - **Check box:** Click the box to select it, click it again to deselect it.
  - **Path:** Type in a new folder and/or file name or edit the existing one, or click the Browse button  on the right side of the input field.
  - **Color:** Click the small rectangle and choose the new color in the Windows Color dialog. The upper left corner of the dialog shows all the predefined colors. To define your own color, click the required area of the color matrix on the right and use the slider on the extreme right of the dialog to adjust the color attributes. You can also enter the RGB values (Red, Green, Blue) or the Hue, Saturation and Luminosity values manually. The easiest way to experiment with different colors is to press and hold the mouse button and move the mouse pointer around the color matrix. To save a color for future use, click Add to Custom Colors.
  - **Font:** Click the font name and choose a new font, font style and point size in the Windows Font dialog.
  - **Alignment:** Click the input field and select Left, Right or Center.
- Once you have made the required change, press Enter to save the edited property.

Note that you can also use the up and down arrow keys to move between properties and press Enter to start editing.

The Tab key allows you to move from one tab to the other.

## Undocking the Properties dialog

To ensure that the various OpenMind panels occupy as little space as possible, they are normally anchored (docked) to the right of the screen.

You can however move any of the panels freely on the workspace or dock them to a different position by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

## Finding and replacing text

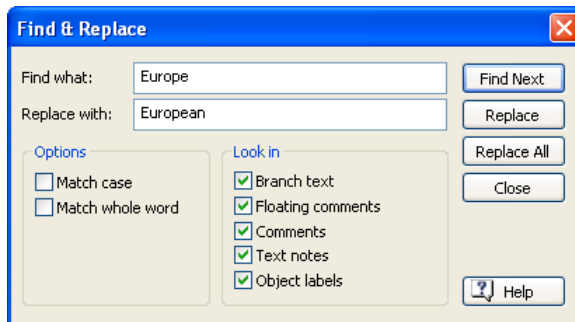
OpenMind lets you search for every occurrence of a specific word or phrase and replace these automatically with a new word or phrase you specify.

You can find and replace text in the following elements:

- Branch names
- Floating comments
- Pop-up comments
- Text notes
- Object names

### Finding text

- Choose **Edit | Find/Replace** or press **Ctrl + F**.



- Enter the text that you want to search for in the **Find what** field of the Find dialog.
- Select the search options required in the **Options** group.
- Select the elements that you want OpenMind to search in the **Look in** group.
- Click **Find Next**.

OpenMind goes through your document, looking for the text you specified in the elements you selected. As soon as it finds an occurrence of the text, it selects the element containing the text and highlights it.

You can now:

- Close the Find dialog and continue your work.
- Look for the next occurrence of the text by clicking **Find Next**.
- Replace the text with another word or phrase you specify in the Find dialog.

## Replacing text

- Type the replacement text in the **Replace with** field.
- Click **Replace** to replace the current occurrence only or **Replace All** to replace all occurrences throughout the document.



To cancel a search in progress, press Esc.

## Creating branch connections

OpenMind allows you to indicate visually that two or more branches of your map are conceptually related by adding branch connections between them.

You can create two types of branch connections:

- **Internal branch connections**, which connect two branches of the same map, or
- **External branch connections**, which connect two branches belonging to two different maps.



To create an external branch connection, both maps must be open. You must also save first the map where you want the connection to end.

## Creating a branch connection

- Click the **Branch Connection** icon .

The mouse pointer changes to a different shape.

- Click the branch or sub-branch you want the connection to start from.

A thin line appears connecting the branch you selected and the mouse pointer.


- Click the branch where you want the connection to end.

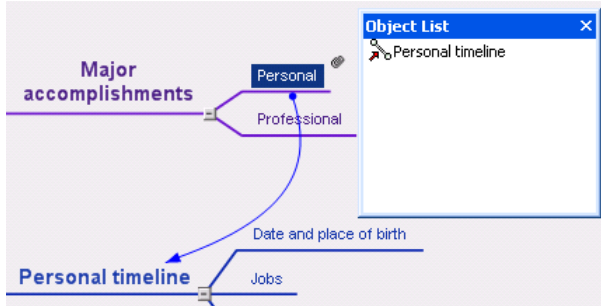
If you are creating an external branch connection, you will first need to click the tab of the second map in order to display it.

A dotted line ending with an arrow now connects your start branch with your end branch.



*You can also just highlight the start branch and drag the mouse to your end branch while keeping the left mouse button down.*

The branch connection appears in the Object list of the start branch. By default, its name is the name of the end branch. A paperclip icon  also appears to the right of the start branch label to indicate the presence of an attached object. Moving the mouse pointer over this paperclip icon displays a pop-up list of all the objects attached.



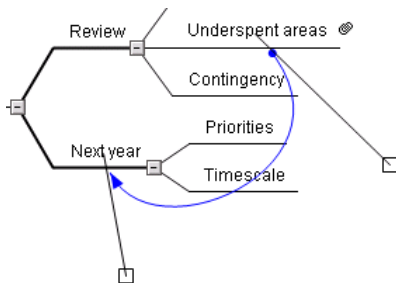
*To create several branch connections quickly, keep the Ctrl key down while connecting the various branches.*

## Changing the curve of a branch connection

You can change the curve of a branch connection as follows:

- Click the branch connection to select it, either directly on the map or in the Object list of the start branch.

A handle appears at each end of the connection, made up of a straight line and a square.



- Click the square of one of the handles and start dragging it.

The shape of the branch connection changes as you move the handle. As you extend the handle, the branch connection becomes more curved. Conversely, if you reduce the length of the handle, the branch connection becomes flatter.

- Move each handle in turn until you are satisfied with the shape of the branch connection curve.

## Activating a branch connection

If you have selected a branch that has a branch connection leading to another branch, you can quickly select that other branch as follows:

- **Double-click** the branch connection in the Object list, or
- Select the branch connection in the Object list and choose **Execute** in its local menu.

If the connection ends in a different map, OpenMind opens it automatically in a separate tab.

## Making a branch connection start or end on a different branch

You can easily change the start or end point of a branch connection without having to delete the existing branch connection and create a new one. To do this:


- Click the branch connection to select it, either directly on the map or in the Object list of the start branch.
- To make the branch connection start from a different branch, drag the dot placed at the start of the connection to the new start branch.
- To make the branch connection end on a different branch, drag the arrow placed at the end of the connection to the new end branch.

## Deleting a branch connection

To delete a branch connection, select it in the Object list and do one of the following:

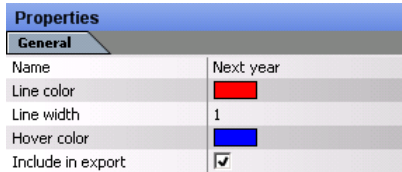
- Press **Delete**, or
- Choose **Delete** in its local menu.



*Remember that if you delete a branch connection by accident, you can always cancel the deletion by clicking the Undo icon  or choosing Edit / Undo (Ctrl + Z).*

## Branch connection properties

A branch connection has its own properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to the branch connection, as described in "Using the Properties dialog".





See "Branch connection properties: General tab" in the Reference section for a detailed description of the properties applicable to a branch connection.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

## Creating links



The Hyperlink and Button objects   allow you to create links between a particular branch of your map and external elements, such as a file, a URL, a folder or an email address. Once the hyperlink or button is inserted, activating it will automatically open the viewer associated with the linked element on your computer (for instance your default text editor, browser or email program).

Hyperlinks and buttons are listed in the Object list of the branch they belong to, but are not represented visually on the branch. This means that unless you intend to export your map to another format, it does not matter whether you choose to host your link on a hyperlink or a button.

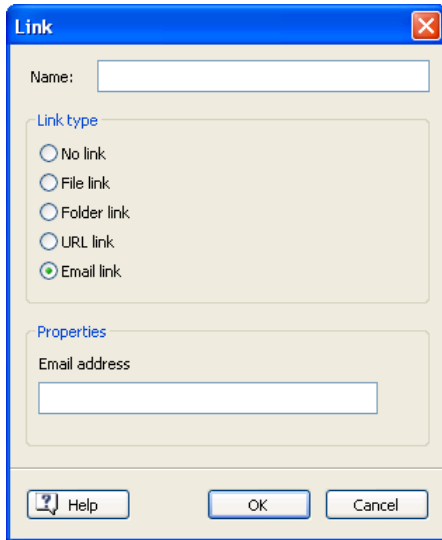
If however you decide to export your map to another format such as HTML, the hyperlink or button will be represented visually on the page, and you will be able to click either of them directly in order to view the linked element. Note that you can also associate such links with attached picture files, as described below.

## Inserting a Hyperlink or Button on a branch

You can do this in two ways. Start by selecting the required branch, and then:

- Click the **Hyperlink** icon  or the **Button** icon  in the Object toolbar, or
- Choose **Insert | Attach Object** in the main menu or **Attach Object** in the local menu, and select **Hyperlink** or **Button**.

A dialog appears to let you choose the element to link to.



The 'Link' dialog box is shown with the following fields and options:

- Name:** A text input field.
- Link type:** A group box containing five radio buttons:
  - ☐ No link
  - ☐ File link
  - ☐ Folder link
  - ☐ URL link
  - ☒ Email link
- Properties:** A group box containing one text field:
  - Email address:** A text input field.
- Buttons:** 'Help' (with a question mark icon), 'OK', and 'Cancel'.

- Type a name for your hyperlink or button. If you intend to export your map, this is the text that will make up the hyperlink or appear on the button.
- Choose one of the link types described below.



You can open this dialog again at any time to change its settings by choosing **Edit Link** in the object's local menu.

### No link

Use this option if you intend to export your map to a different format (for instance as a web site or a Mediator document) but prefer not to define the link in OpenMind. This way, you can create various hyperlinks and buttons in OpenMind, but only determine their functionality later, using for instance FrontPage® or Mediator.

### File link

This allows you to link a file to your hyperlink or button. When you activate the link, the file specified will automatically open in the viewer associated with its extension type on your computer.

- Type the name of the file to link to in the Path field (or click the Browse button).

### Folder link

This allows you to create a link to a folder of your hard disk. When you activate the link, Windows Explorer will open the folder specified.

- Type the path for the folder to link to in the Path field (or click the Browse button).

## URL link

This allows you to link a web page to your hyperlink or button. When you activate the link, the web page specified will be automatically displayed in your default web browser.

- Type the URL of the web page to link to in the Path field.


## Email link

This allows you to specify an email address to link to your hyperlink or button. When you activate the link, a new message window will automatically open in your default email program, with the address supplied below already filled in.

- Type the email address to link to in the Address field.

## Activating a Hyperlink or Button

There are several ways of activating a link from within OpenMind:

- **Double-click** the hyperlink or button in the Object list, or
- Select the hyperlink or button in the Object list and choose **Execute** in its local menu, or
- Display the object pop-up list by moving the pointer over the paperclip icon  and click the object required.

These actions all activate the linked element, which is then displayed in the viewer associated with its extension type.

## Inserting a link to a Picture object on a branch

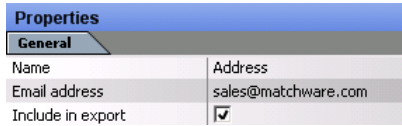
With OpenMind, it is also possible to add any of the link types described above to a picture object attached to a branch. Note however that you will not be able to display the linked element in OpenMind by activating the picture object, as this displays the picture itself. For this reason, adding a link to a picture object is only useful if you intend to export your map to a different format, such as HTML or Mediator.

To add a link to a picture object:

- Select the picture object in the Object list.
- Choose **Edit Link** in its local menu.
- Fill in the Link dialog as described above.

## Object properties

Hyperlinks, buttons and picture objects have their own properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to the object, as described in "Using the Properties dialog".



See the Reference section for a full description of the properties applicable to each type of object.



If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.

## Inserting a new map

OpenMind allows you to create several maps in the same view by inserting several roots in it. This can be useful if, while working on your map, you have ideas as yet unrelated to your existing topics (i.e. branches). Once you have decided how they should be related, you can convert your new maps into branches of your existing map, or even move them to new documents altogether, as described below.



This procedure is only relevant to the standard Mind Mapping views, namely Mind Map, Top Down and Left/Right.

### Inserting a new map in the view

You can do this in two ways:

- Choose **Insert | New Map** in the main menu, or
- Right-click the workspace and choose **Insert | New Map** in its local menu.



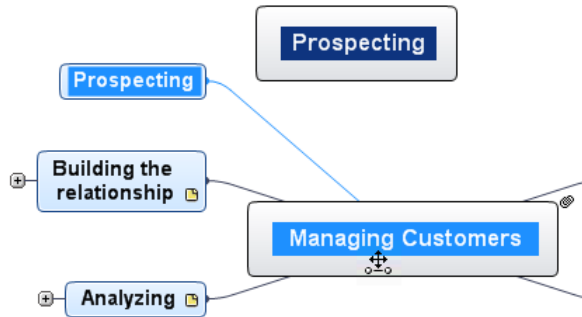
You can also create a new map by detaching a branch of your existing map, either to the same document or to a new document. See "Detaching a branch" for more information.

### Attaching a newly created map to an existing map

If you have created a second map, you can integrate it to your original map as follows:

- To attach it as a main branch, drag its root to the original root.

- To attach it as a sub-branch, drag its root to the branch or sub-branch you want to attach it to.



## Moving a newly created map in a separate document

- Select the root of your new map and choose **Cut** in its local menu or **Edit | Cut** in the main menu (or press **Ctrl + X**).
- Create a new document (**File | New** or **Ctrl + N**).
- Once the new document tab opens, right-click the workspace and choose **Paste** in its local menu or **Edit | Paste** in the main menu (or press **Ctrl + V**).
- (optional) Delete the default root created automatically in the new document.

## Detaching a branch

OpenMind allows you to create several maps in the same view by inserting several roots, as described in "Inserting a new map". You can also create a second map by detaching an existing branch of your Mind Map, either to the same document, or to a new document. This can be useful when you realize that one of your existing topics (i.e. branch) does not in fact belong to your map, or if you want to consider a particular branch as the source of a new map.



This procedure is only relevant to the standard Mind Mapping views, namely Mind Map, Top Down and Left/Right.

## Detaching a branch to the same document

- Select the branch you want to detach, then either:
  - Choose **Edit | Detach** in the main menu, or
  - Choose **Detach | Branch** in its local menu.

## Detaching a branch to a new document

- Select the branch you want to detach, then either:
  - Choose **Edit | Detach Branch as New Document** in the main menu, or
  - Choose **Detach | Branch as New Document** in its local menu.

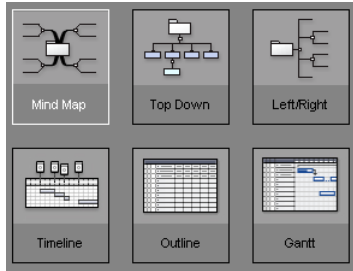
In both cases, the selected branch and all its sub-branches, inserted elements and attached objects becomes a new Mind Map.

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# Views

## Using different views

OpenMind allows you to view your Mind Map in different ways, depending on your personal preference, the nature of your data and the use you want to make of it.



The choice of views available in the **View | View Map As** menu are:

- **Mind Map view:** This view represents the map with the root in the center, and all the main branches radiating from it in a clockwise direction. See "Using the Mind Map view" for more information.
- **Top Down view:** This view represents your map as a hierarchical pyramid, with the root at the top, the main branches underneath, the sub-branches below the main branches, and so on. See "Using the Top Down view" for more information.
- **Left/Right view:** This view represents your map as a list of topics placed either on the right of the root (Right view) or on the left of the root (Left view). See "Using the Left/Right view" for more information.
- **Timeline view:** This view lets you display the branches of your map that contain time information in chronological order on a horizontal time axis. See "Using the Timeline view" for more information.
- **Outline view:** The Outline view represents the map as a hierarchical list which you can expand and collapse as required. See "Using the Outline view" for more information.
- **Gantt view:** The Gantt view is dedicated to the creation, editing and management of project plans according to the rules of project management. See "Using the Gantt view" and all the topics that follow it for more information.

Going from one view to another only affects the way the Mind Map is displayed. The contents of the Mind Map are not modified, unless you edit them yourself while working in the new view.

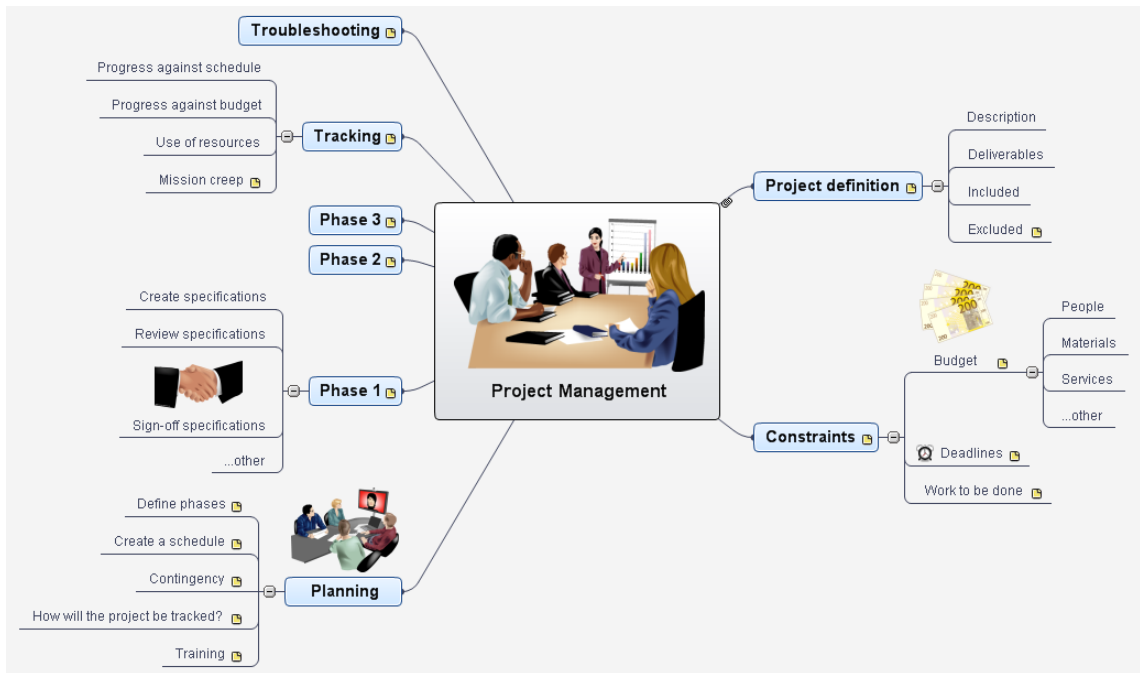
The only exception to this rule is the Gantt view. Going to the Gantt view automatically enables project management features, which may have consequences for your data.



*You can also change from one view to the other by right-clicking the workspace and choosing View Map As in its local menu.*

# Using the Mind Map view

This view represents the map with the root in the center, and all the main branches radiating from it in a clockwise direction. This is a good view to use in Brainstorm mode, when collecting all the ideas related to the main subject of the map without worrying about evaluating them or structuring them. See "Using brainstorm mode" for more information about brainstorming.



- To display your Mind Map in this view, choose **View | View Map as Mind Map** in the main menu or right-click the workspace and choose that same command in the local menu.

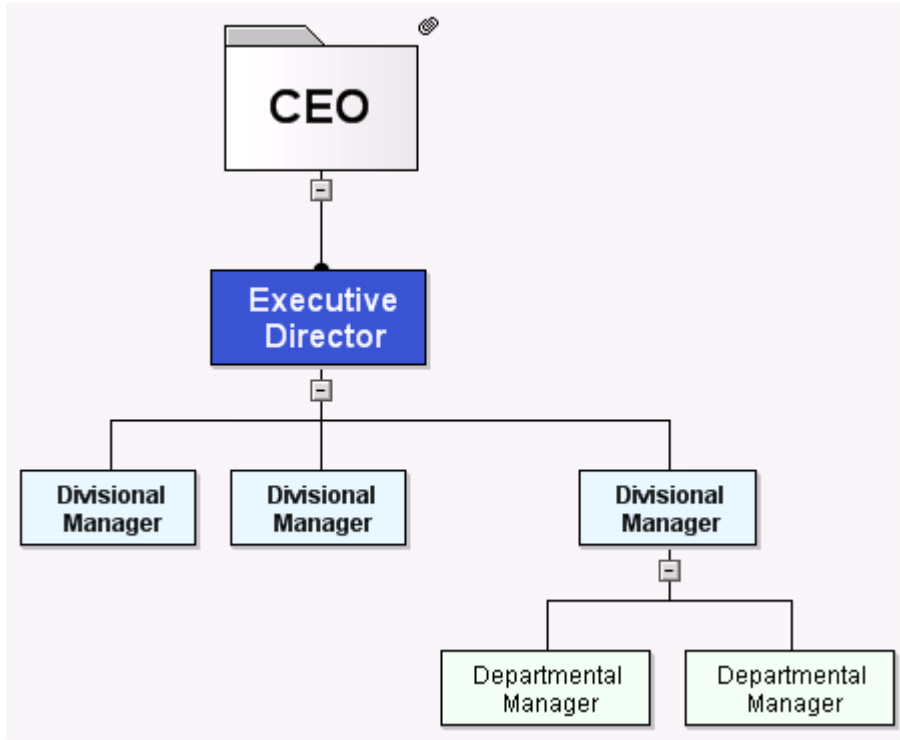


Most of the procedures described in the "Basic tasks" and "Further tasks" sections of this documentation assume that you are using this view, the Top Down view or the Left/Right view.

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## Using the Top Down view

This view represents your map as a hierarchical pyramid, with the root at the top, the main branches underneath, the sub-branches below the main branches, and so on. It is a useful representation for structured data which needs to be viewed in a hierarchical manner, in other words from the higher level to the lowest levels. OpenMind uses different colors to represent each level, which allows you to identify quickly all the points listed at a particular level.



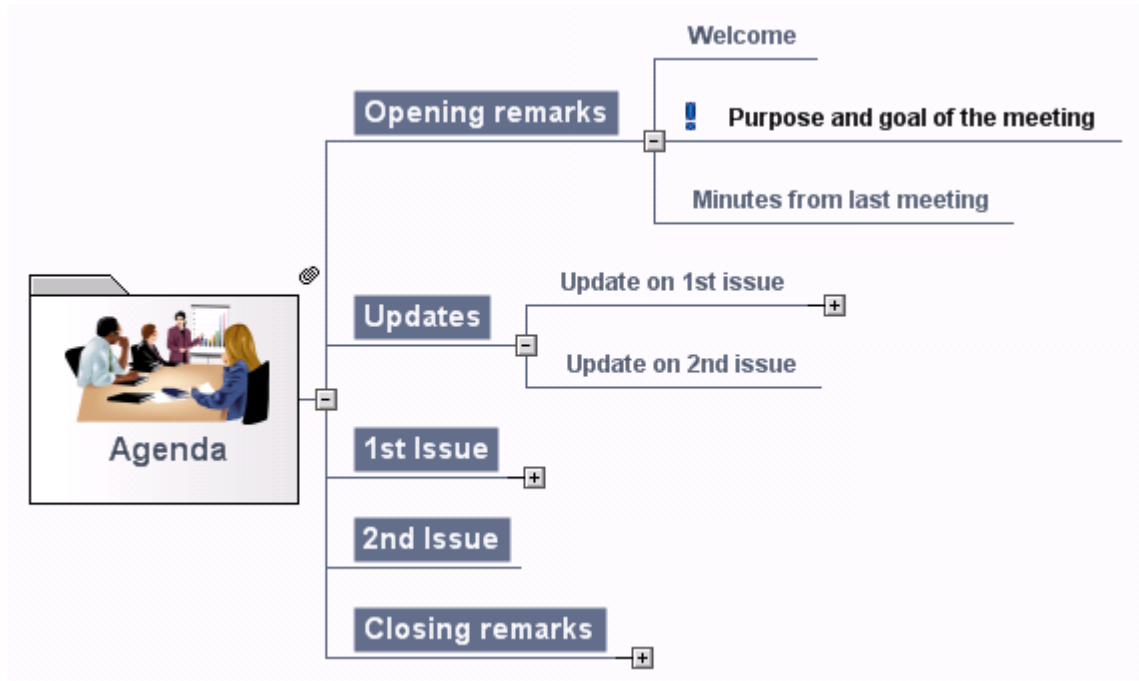
- To display your Mind Map in this view, choose **View | View Map as Top Down** in the main menu or right-click the workspace and choose that same command in the local menu.



Most of the procedures described in the "Basic tasks" and "Further tasks" sections of this documentation assume that you are using this view, the Mind Map view or the Left/Right view.

# Using the Left/Right view

This view represents your map as a list of topics placed either on the right of the root (Right view) or on the left of the root (Left view). It is a good choice when you need to present structured data in list form (for instance a list of steps) and want to be able to fully explore each point in the list before going on to the next point.



- To display your Mind Map in this view, choose **View | View Map as Left/Right** in the main menu or right-click the workspace and choose that same command in the local menu.

While in that view, you can change the display from Right to Left and vice-versa by using the Layout property on the General tab of the document. See "Document properties: General tab" for more information.



Most of the procedures described in the "Basic tasks" and "Further tasks" sections of this documentation assume that you are using this view, the Mind Map view or the Top Down view.

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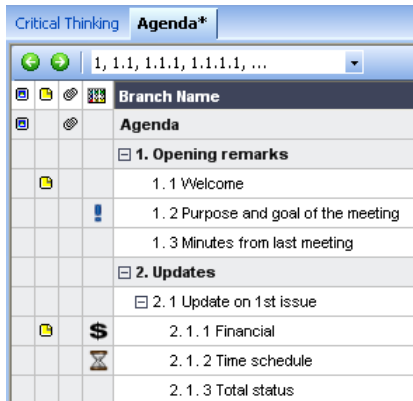
# Using the Outline view

The Outline view represents the map as a hierarchical list which you can expand and collapse as required. It allows easy navigation through the document from top to bottom and gives you another way to brainstorm ideas.

It is particularly useful when building a task list, as you can view all the task properties in one glance and edit them quickly by clicking the relevant cell.


Going to the Outline view from another view only affects the way the Mind Map is displayed. The contents of the Mind Map are not modified, unless you edit them yourself while working in the Outline view.

- To display your Mind Map in outline form, choose **View | View Map as Outline** in the main menu or right-click the workspace and choose that same command in the local menu.



The Outline view is made up of several columns:

- A **picture icon** in the first column denotes the presence of a branch picture. Just move the pointer over the icon to see a preview of the picture. Double-click the icon to display the picture in the image viewer associated with its file extension on your computer.
- A **yellow comment icon** in the next column indicates that the corresponding branch contains a pop-up comment. Just move the pointer over the icon to open the comment window.

- A **paperclip icon**  in the third column indicates that the corresponding branch contains attached objects (text notes, text files, video files and so on) or that it is linked to another branch via a branch connection. To view an attached object, move the pointer over the icon to display the pop-up list of attached objects and click the required object to open it in the associated viewer.
- If you have inserted one or more **icons** from the Icon palette on the corresponding branch, these are shown in the last column before the branch name.



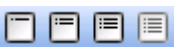

The columns on the right of the view depend on the type of document you are working on:

- By default, they show the **Start** and **End** dates you can associate with the branch to describe a task, as well as its **Priority**, **Completion** level and **Resources**. See "Inserting task information" for details about these fields.
- If you are working on a project plan, a **Duration** column also appears. See "Using the Gantt view" for more information about project plans.
- If you are working on a timeline, the columns show the **Start Time** and **End Time** associated with each timeline event. See "Inserting timeline information" for details about these fields.



*You can hide any of these columns by right-clicking the Branch Name header at the top of the Outline view and deselecting the unwanted columns in the local menu.*

## Inserting and deleting branches

- You can **add** and **delete** main branches, pre-branches and sub-branches in the Outline view in just the same way as in the Mind Map view.
- You can also **expand** or **collapse** a particular branch or set of branches by clicking the small plus  and minus  signs on the left of the branch name or by pressing the keys Ctrl + right arrow to expand and Ctrl + left arrow to collapse.
- As in all the other views, the **Detail level** icons  of the Filter toolbar let you collapse the entire outline to just one level of branches, two levels, three levels or four levels. To show all the branches down to the last level, click the **All Levels** icon .



*You can also press Ctrl + 1 to display just one level of branches, Ctrl + 2 to show two levels etc. Ctrl + 5 shows all levels.*

- You can also use the **Filter** icon  of the Filter toolbar  to restrict the display to a particular branch. Click the **Remove Filter** icon  to view the entire outline again.



If the Filter toolbar is not visible, choose View | Toolbars | Filter in the main menu to display it.



For further information about any of these procedures, see the topic "Inserting branches" in the "Basic tasks" section.

## Moving a branch

You can move an entire branch, including any sub-branches and objects attached to it, to a different branch of your outline. As you work on organizing your ideas, you can for instance decide to convert a sub-topic to a main topic by moving the corresponding sub-branch to the root, or allocate a sub-topic to a different main topic by moving the corresponding sub-branch to a different main branch.

- Select the branch you want to move to a different location by clicking it with the left mouse button.
- While keeping the left mouse button down, drag the branch to the required location.

The mouse pointer changes to a different shape to show you where the branch will be inserted when you let go of the mouse button.

- A small right arrow ➡ indicates that the branch will become a sub-branch of the branch containing the arrow.
- A small up arrow ↑ indicates that the branch will be inserted above the branch containing the arrow, at the same level.
- A small down arrow ↓ indicates that the branch will be inserted below the branch containing the arrow, at the same level.
- Release the mouse button to insert the branch at the required location.
- You can also click the **Indent** icon  to move the selected branch or branches to the next level down in the hierarchy, so that they become sub-branches of the preceding branch in the Outline.
- Conversely, clicking the **Outdent** icon  moves the selected branch or branches to the next level up in the hierarchy.

## Cutting, copying and pasting branches

You can apply the standard Cut, Copy and Paste Windows functions to any branch or set of branches of your outline. You can for instance copy or move an entire branch or set of branches, including all their sub-branches and attached objects, to a different part of the outline, at the same hierarchical level or at a higher or lower level.

- To copy or cut a branch with all its sub-branches and attached objects, you first need to select it. You can then either:
  - Choose **Edit | Copy** or **Cut** in the main menu, or
  - Choose **Copy** or **Cut** in its local menu, or
  - Press **Ctrl + C** or **Ctrl + X**.
- To paste the copied branch, you first need to select the branch to which it should now belong. You can then either:
  - Choose **Edit | Paste** in the main menu, or
  - Choose **Paste** in the local menu of the destination branch, or
  - Press **Ctrl + V**.

To perform these operations on a set of branches, you first need to select them:

- To select a range of branches listed one after the other, select the first branch, press and hold down the **Shift** key and select the last branch in the range.
- To select several isolated branches, select the first branch, press and hold down the **Ctrl** key and select the other branches one by one.

## Adding objects and elements

You can add branch pictures, icons, text notes and pop-up comments on a branch in the same way as in the Mind Map view. For more information on these procedures, see the topics "Inserting pictures", "Inserting icons", "Inserting text notes" and "Inserting comments" in the "Basic tasks" section.

You can also attach objects such as text files, video files, sound files, buttons and so on just as in the Mind Map view. For more information, see "Attaching objects".

There are however some limitations that apply when you work in the Outline view:

- You cannot add or view floating pictures.
- You cannot add or view floating comments.
- You cannot create branch connections, although existing branch connections are listed in the pop-up list identified by the paperclip icon and can be activated from that list.

## Properties


When you are working in the Outline view, the Properties dialog displayed in the General tab placed on the right of the workspace only shows the properties that are relevant to that view.

In particular, since it is not possible to see the effect of these parameters in the Outline view, the formatting properties normally available when viewing the document in one of the Mind Mapping views are not accessible.

For more information about the Properties dialog in general, see "Using the Properties dialog".

## Printing the outline

You can print your outline in one of the following ways:

- Click the **Print** icon , or
- Choose **File | Print**, or
- Press **Ctrl + P**.

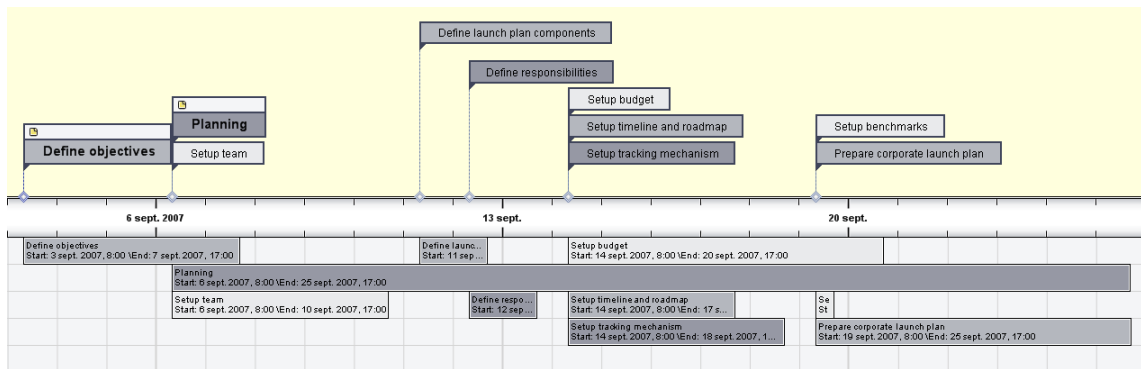
For a full description of the printing options available, see "Printing a Mind Map".

# Using the Timeline view

The Timeline view displays all the branches of your document that contain time information in chronological order along a horizontal time axis. The different timescales available (standard, daily, weekly, historic and geological) let you represent a variety of different events, such as the planning of a product launch, the life cycle of a bee or the rise and fall of an ancient civilization.



The date formats you see in OpenMind will depend on your computer's settings. In this documentation we use the most common international format, putting the day first, for example 1-Sept-2007, or 01/09/07.



## Accessing the Timeline view

You can access the Timeline view in two ways:

- By choosing **File | New** and clicking the **Timeline** thumbnail to create a new timeline.
- By choosing **View | View Map as Timeline** in the main menu to display an existing document in the Timeline view.

You can also right-click the workspace and choose that same command in the local menu.

Going to the Timeline view from another view only affects the way the Mind Map is displayed. The contents of the Mind Map are not modified, unless you edit them yourself while working in the Timeline view.

## Elements of the Timeline view

As all the other views, the Timeline view is made up of several components:


- **The Timeline Outline**

This panel, which is displayed by default on the left of the Timeline view, shows all the branches of your map as a hierarchical list which you can expand and collapse as required.

All the branches are listed, including those that do not contain time information.

Timeline Outline				
	Branch Name	Duration	Start	End
	Product Launch	77.06 days	03/09/2007	19/12/2007
	Define objectives	5 days	03/09/2007	07/09/2007
	Planning	14 days	06/09/2007	25/09/2007
	Setup team	3 days	06/09/2007	10/09/2007
	Define launch plan...	2 days	11/09/2007	12/09/2007
	Define responsibilit...	2 days	12/09/2007	13/09/2007
	Setup budget	5 days	14/09/2007	20/09/2007
	Setup timeline and...	2 days	14/09/2007	17/09/2007
	Setup tracking me...	3 days	14/09/2007	18/09/2007
	Setup benchmarks	1 day	19/09/2007	19/09/2007
	Prepare corporate...	5 days	19/09/2007	25/09/2007
	Product-related iss...	16 days	26/09/2007	17/10/2007
	Prepare product d...	10 days	26/09/2007	09/10/2007
	Packaging	16 days	26/09/2007	17/10/2007
	Prepare brief	3 days	26/09/2007	28/09/2007

The Timeline Outline works exactly as the main Outline view.

You can close the Timeline Outline by clicking its Close icon . To re-open it, click the **Timeline Outline** tab on the left side of the workspace.

- **The Timeline**

The Timeline area shows all the branches of your map that contain time information, arranged in chronological order along a time axis.

By default, the timeline is shown in a **Flat Display**, meaning that all the branches and sub-branches that contain time information are represented, regardless of the hierarchical structure of the map.

Note that if none of your branches contain time information when you switch to Timeline view, the timeline will be empty.

- **The Task/Timeline Info Panel**

This panel is displayed on the right of the workspace. It lets you define the timescale of your document and enter time information on its branches.

Both of these operations are described in detail in the topic "Inserting timeline information".

As well as using the Task/Timeline Info panel, you can also enter time information for your branches directly in the Timeline Outline or in the main Outline view.

If the Task/Timeline Info panel is not visible, click the **Task/Timeline Info** tab on the right of the workspace.

- **The Timeline Toolbar**



This toolbar appears as soon as you switch to the Timeline view. It contains icons that are specific to the timeline. These icons are described in detail below.

## Undocking the panels

The Timeline Outline is anchored (docked) by default to the left of the workspace, while the Task/Timeline Info panel is anchored to the right.

You can however move these panels freely on the workspace or dock them to a different position by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

## Using the Timeline Outline

The Timeline Outline shows all the branches of your map, including those that do not contain time information. The timeline itself however only shows the branches containing time information.

The branches are listed in the Timeline Outline in their order of creation. This means that if you created them in another view such as the Mind Map view, they will be listed in the Timeline Outline in the same order as in the Mind Map view (going clockwise from the top right), rather than in chronological order.

Selecting a branch in the Timeline Outline automatically selects it on the timeline. If necessary, the timeline is scrolled to bring the branch into view. Conversely, selecting a branch on the timeline selects it in the Timeline Outline.

The Timeline Outline looks and works exactly as the main Outline view. When working in the Timeline Outline, you can for instance:

- Add, delete, move, cut, copy and paste branches in exactly the same way as in the main Outline view.
- Add branch pictures, icons, text notes and pop-up comments to any of your tasks.
- Attach objects such as text files, video files, sound files, buttons and so on.

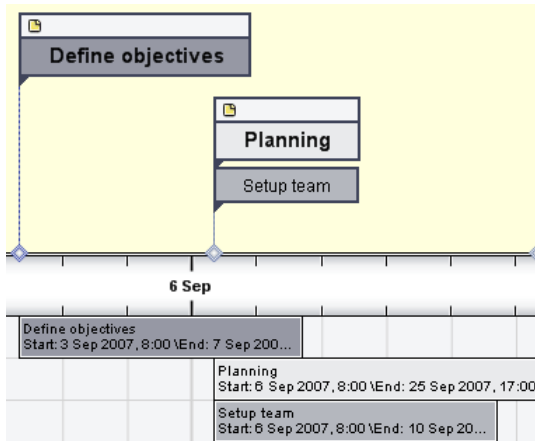
For a description of the Outline view and how to perform these operations, see "Using the Outline view".

You can enter time information on a branch from the Timeline Outline by double-clicking the relevant Start Time or End Time cell (or pressing **F12** or **Ctrl + F12** respectively) and filling in the time picker as described in "Inserting timeline information".



Any change you make in the Timeline Outline is immediately reflected on the timeline itself.

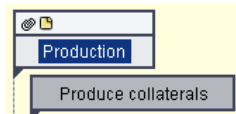
## Viewing the Timeline

By default, the timeline shows all the branches of your map that contain time information arranged in chronological order along a time axis. If you have entered both a start time and an end time for a particular event, the duration of this event is shown as a bar below the time axis.





If you don't want to see these duration bars under the time axis, you can disable them by unchecking the 'Show duration bars' property for the Document. See "Document properties: General tab" in the Reference section for more information about the general properties applicable to the timeline.

You can view pop-up comments and attached objects by clicking the comment icon  or paperclip icon  just as in all the other views.



## Zooming in and out


You can change the level of magnification of your entire timeline as follows:

- Click the **Zoom In** icon  of the Display toolbar  to increase the level of magnification of your timeline.

When you zoom in, everything gets bigger, including the text, the boxes and the pictures included on your timeline.

- Click the **Zoom Out** icon  to decrease it.

When you zoom out everything gets smaller.

- Click **Fit to Screen**  to see the entire timeline.

See "Zooming in and out" for more information on zooming.

## Full screen mode




You can also view your timeline in Full Screen mode, to give it as much screen space as possible:

- Choose **View | Full Screen Mode**, or
- Press **F9**.

To return to normal viewing mode, choose Exit in the floating Full Screen toolbar, press Esc or press F9 again.

## Expanding and compressing

You can also increase or decrease the level of detail on the time axis as follows:

- To increase the scale on the time axis, click the **Expand** icon  of the Timeline toolbar .
- To decrease the scale, click the **Compress** icon .

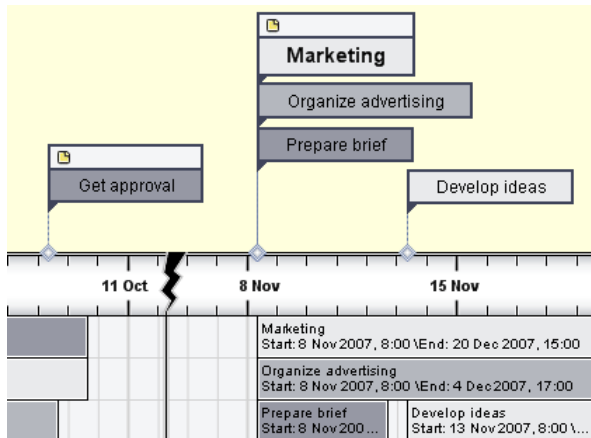
Expanding the scale makes the timeline less crowded as a given period of time occupies more horizontal space. As a result, you may start seeing more detail on the time axis. For instance, instead of having ticks every 5 years, you might now have a tick for every year. As you continue expanding the scale, you might see months and days appear on the time axis.

Events on the timeline do not change size when you expand the scale: they move apart horizontally, and they may also move vertically nearer the time axis as more space becomes available. Contracting the scale has the reverse effect.

## Inserting time breaks

You can also replace empty space on the time axis with one or more break marks by clicking the **Time Breaks** icon  of the Timeline toolbar .

This optimizes the use of the horizontal space when events are not evenly distributed along the timeline.



- To remove these time breaks, just click the icon again.

## Filtering the timeline

As in the other views, you can concentrate on a particular area by viewing only a branch or set of branches.

- Select the branch you want to isolate by clicking it either in the Timeline Outline or in the timeline itself.


- Click the **Filter** icon  in the Filter toolbar .




You can also right-click the branch and choose Filter in its local menu.

The Timeline Outline and the timeline itself now show only the branch you selected together with any sub-branches it may have.

**Caution:** If the branch you selected does not have any sub-branches, or if its sub-branches do not contain time information, the timeline will be empty.

The Filter icon  is highlighted, reminding you that you are now viewing only part of the map.

To display the entire map again, you can either:

- Click the **Remove Filter** icon , or
- Right-click the workspace and choose **Filter Off** in its local menu, or
- Right-click the filtered branch and choose **Filter Off** in its local menu.

## Timeline viewing modes

All timelines can be viewed in two different display modes, described below. These modes only affect the way the timeline is represented, and have no effect on its contents. You can therefore go from one display mode to the other at any time.



### Flat display

This is the default display. In this mode, all the branches and sub-branches that contain time information are represented on the timeline, regardless of the hierarchical structure of the map.

This display is well suited to timelines which do not have many levels of branches and sub-branches.

### Level display

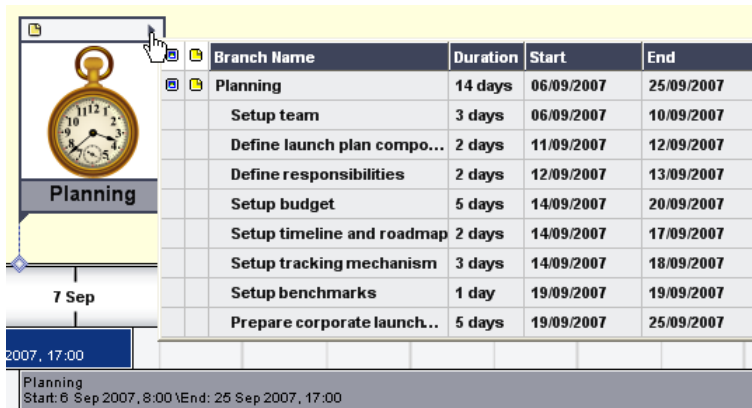
In this mode, the branches are shown on the timeline in more detail, one level at a time.

- To view your timeline in the Level mode, click the **Level Display** icon  in the Timeline Toolbar
- 

The timeline now only shows the main branches of your map. Main branches that do not contain time information are not represented.

**Caution:** If none of the main branches contain time information, the timeline will be empty.

Main branches that contain sub-branches are identified by an arrow icon ► on their top right. Clicking this arrow opens a hierarchical list giving you access to all the sub-branches of the branch in question, *including* those that have no time information.





Branch Name	Duration	Start	End
Planning	14 days	06/09/2007	25/09/2007
Setup team	3 days	06/09/2007	10/09/2007
Define launch plan compo...	2 days	11/09/2007	12/09/2007
Define responsibilities	2 days	12/09/2007	13/09/2007
Setup budget	5 days	14/09/2007	20/09/2007
Setup timeline and roadmap	2 days	14/09/2007	17/09/2007
Setup tracking mechanism	3 days	14/09/2007	18/09/2007
Setup benchmarks	1 day	19/09/2007	19/09/2007
Prepare corporate launch...	5 days	19/09/2007	25/09/2007

You can use this hierarchical list exactly as the Timeline Outline to view the comments and pictures attached to the sub-branches and even add or modify their time information.

To move to the next level of branches, you use filtering:

- Right-click the main branch that you wish to explore either in the timeline itself or in the Timeline Outline and choose **Filter**.

All the sub-branches of the filtered branch are now shown on the timeline, provided that they contain time information. You can now continue to explore further sub-levels in the same way, or remove the filter by clicking the **Remove Filter** icon  and explore another branch by applying a new filter to it.

- To view the timeline in Flat mode again, click the **Flat Display** icon .

## Working on the Timeline

When working in the Timeline view, you can add icons, pictures, text notes, comments and branch connections on any of the branches displayed in the timeline, just as in all the other views. You can also attach objects such as text files, video files, sound files and buttons.

- Select the required branch on the timeline.
- Choose the relevant command, using either the main menu or the local menu of the branch.

For more information on these procedures, see the topics "Inserting icons", "Inserting pictures", "Inserting text notes", "Inserting comments", "Attaching objects" and "Creating branch connections".

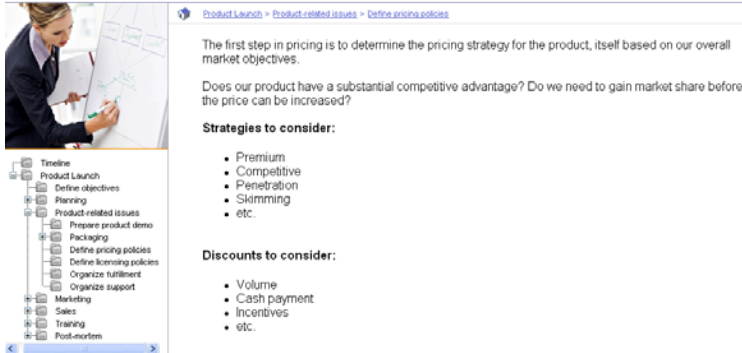
## Exporting the Timeline

When working in the Timeline view, the only export methods available are:

- **Export to HTML**

This export method works in exactly the same way as when you export the document from one of the standard Mind Mapping views. The only difference is that the Home page of your web site contains an interactive view of the timeline, allowing you to display each of its pages with a simple click wherever the mouse pointer changes to a hand. A Timeline button is inserted in all the pages of the site to let you return quickly to this interactive view.

## Define pricing policies



The screenshot shows the OpenMind software interface. On the left is a tree view of the timeline, with 'Define pricing policies' selected. The main content area has a title bar 'Product Launch > Product-related issues > Define pricing policies'. Below the title bar, there is a paragraph: 'The first step in pricing is to determine the pricing strategy for the product, itself based on our overall market objectives.' followed by a question: 'Does our product have a substantial competitive advantage? Do we need to gain market share before the price can be increased?'. Below this, there are two sections: 'Strategies to consider:' with a bulleted list (Premium, Competitive, Penetration, Skimming, etc.) and 'Discounts to consider:' with a bulleted list (Volume, Cash payment, Incentives, etc.).

For more information about this export method, see "Exporting to HTML".

- **Export to Microsoft Outlook**

For more information about this export method, see "Exporting to Microsoft Outlook".

- **Export to XML**


For more information about this export method, see "Exporting to XML".

- **Export to picture**

For more information about this export method, see "Exporting as picture".

## Printing the Timeline

You can print your timeline in one of the following ways:

- Click the **Print** icon , or
- Choose **File | Print**, or
- Press **Ctrl + P**.

OpenMind enables you to spread your printout on several pages, which is very useful in the case of timelines. Increasing the horizontal page spread number, for instance, will allow you to create a legible printout of your entire timeline, spread over several pages.

For a full description of the printing options, see "Printing a Mind Map".

# Using the Gantt view

The OpenMind Gantt view is dedicated to the creation, editing and management of project plans according to the rules of project management.

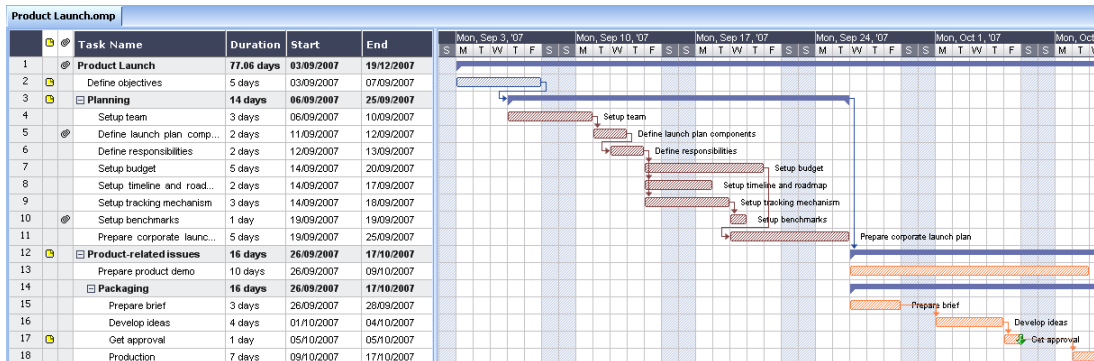
A project plan is a series of interdependent tasks that need to be performed in a particular order. When moving into a new office for instance, you cannot start redesigning the office space before the lease agreement has been signed. Project plans have a specific start date, corresponding to the start of the first task (for instance defining the requirements for the new office), and a specific end date, corresponding to the end of the last task (for instance moving in).

Any change in the timing of a task affects all the tasks that depend on it. If a task runs ahead of schedule, OpenMind automatically recalculates the dates of all the tasks that depend on it in order to take advantage of the time gained. Conversely, if a task is delayed, all the tasks that depend on it are automatically rescheduled, which may or may not impact the overall end date of the project.

In project management, the Gantt chart is the most common and popular way of visualizing a project plan. It shows the tasks as horizontal bars, arranged against a background calendar display. OpenMind's Gantt view displays the branches of a Mind Map in this way, each branch or sub-branch representing a project task.



The date formats you see in OpenMind will depend on your computer's settings. In this documentation we use the most common international format, putting the day first, for example 1-Sept-2007, or 01/09/07.



By using the Gantt view you can build and manage complete project plans in this standard, well-defined format. You can easily add or remove tasks, set or adjust the duration of tasks (length of bars), link tasks (for example to make one task follow immediately after another), and add constraints (for example to specify that a task must end no later than a given date).

To help you get started, OpenMind includes various ready-made project plans for common business activities (organizing a tradeshow, producing a publication, launching a product and so on). You can use these for training purposes, or as a basis for your own project plans.

- To access one of these templates, choose **File | New**, click the **Templates** tab and select the Business category.

To find out how to set up and build a project plan, see "Setting up a project plan".

## Accessing the Gantt view

You can open the Gantt view in two ways:

- By choosing **File | New** and clicking the **Gantt** thumbnail to create a new project plan.
- By choosing **View | View Map as Gantt** in the main menu to display an existing document in the Gantt view.

You can also right-click the workspace and choose that same command in the local menu.



This command is not available when you are working on a timeline. For this command to be available, you must choose the document type 'Task management' in the Task/Timeline Info panel. For more information on this panel, see "Inserting task information".



Going to the Gantt view automatically enables project management features if this is not the case already. The main consequences of this are:

- All parent branches become summary tasks: their start dates, end dates and durations are calculated automatically from their sub-tasks and cannot be edited manually any longer. Any existing time information associated with parent branches is lost.
- Tasks are only scheduled during working time, as defined by the project calendar.

Project plans have other important rules regarding links and constraints that are all described in the following topics.

When you are working on a project plan, these project management rules apply even if you switch temporarily to another view than the Gantt view, for instance to brainstorm your plan in one of the Mind Mapping views, or to view it as a timeline in the Timeline view. This means that any change you make to the project plan tasks while in one of these other views will obey project management rules.

## Elements of the Gantt view

As all the other views, the Gantt view is made up of several components:

- **The Gantt Outline**

This area, shown on the left of the Gantt view, presents all your project tasks as a hierarchical list which you can expand and collapse as required.

The tasks are listed in creation order, which means that if you created them in a different view such as the Mind Map view, they will be listed in the Gantt Outline in the same order as in the Mind Map view (going clockwise from the top right), rather than in chronological order.

- **The Gantt Chart**

The Gantt chart, shown on the right of the view, represents each project task graphically as a bar stretching from its start date to its end date. Week-ends and other non-working days are denoted by a hash pattern. Task relationships are represented by links joining the related tasks.

- **The Task/Timeline Info Panel**

This panel is displayed on the right of the workspace. It gives you an alternative way of specifying task information such as duration, priority, completion level or resources.

The Task/Timeline Info panel is described in detail in the topic "Inserting task information".

If it is not visible, click the **Task/Timeline Info** tab on the right of the workspace.

- **The Gantt Toolbar**



This toolbar appears as soon as you switch to the Gantt view. Its icons allow you to perform various actions on your project tasks, as described in the next few topics.




## Undocking the panels

The Task/Timeline Info panel is anchored to the right of the workspace by default.


You can however move it freely on the workspace or dock it to a different position by enabling Advanced docking. See "Advanced docking" in the topic "Setting up your workspace" for more information.

## Using the Gantt Outline

The Gantt Outline is made up of several columns. Some of these only appear if one or more of the project tasks contains the corresponding element:

- The first column is the **Entry** column. It shows the unique entry number automatically allocated to each task. The entry numbers do not necessarily represent the order in which the tasks will be performed.
- A **picture** icon  in the second column denotes the presence of a branch picture. Just move the pointer over the icon to see a preview of the picture. Double-click the icon to display the picture in the image viewer associated with its file extension on your computer.
- A **yellow comment** icon  in the next column indicates that the corresponding task contains a pop-up comment. Just move the pointer over the icon to open the comment window.
- A **paperclip** icon  in the fourth column indicates that the corresponding task contains attached objects (text notes, text files, video files and so on) or that it is linked to another task via a branch connection. To view an attached object, move the pointer over the icon to display the pop-up list of attached objects and click the required object to open it in the associated viewer.
- If you have inserted one or more **icons** from the Icon palette on the corresponding branch, these are shown in the next column.

The Gantt Outline also contains columns that are specific to project management:

- **Indicators:** If you have applied a constraint to a task, for example to specify that it must end no later than a given date, a constraint icon  is displayed in the column immediately before the Task Name column. Constraints are described in detail in "Using Constraints".
- **Task Name:** The name of each task. Tasks that contain one or more sub-tasks are shown in bold. These tasks (which correspond to parent branches in the Mind Map view) are called "summary tasks". Ordinary tasks (corresponding to branches without sub-branches in the Mind Map view) are shown in normal typeface and indented according to their level. See the paragraph "Grouping Tasks" in "Entering and editing tasks".
- **Duration:** The amount of working time the task will take. Time units are indicated by letters: mins (minutes), hrs (hours), days, wks (weeks), mths (months). The letter **e** before the time unit indicates elapsed time, in which case the task will last exactly the time specified, regardless of what the project calendar defines as working and non-working time. A question mark means that the figure is still an estimate. By default, OpenMind assigns a duration of one day to new tasks or tasks without specified duration. For more information about calendars, see "Defining calendar settings".

The task bar of a summary task is automatically set to extend from the beginning of the earliest of its sub-tasks to the end of the last of its sub-tasks. You cannot change the duration of a summary task.



When expressed in days, weeks or months, the number shown in the Duration column (for instance "2 days") is linked to the default number of working hours per day, week or month set in the Project Calendar Settings dialog (choose **Tools | Task Management | Project Calendar**).

For more information about durations, see "Entering a task duration" in the topic "Entering and editing tasks".

- **Start:** The current start date of the task. By default, OpenMind schedules new tasks to start on the project start date, as defined in the Project Information dialog (choose **Tools | Task Management | Project Information**).

Although you can set start dates explicitly, it is best to let OpenMind set them automatically according to the dependencies between the various tasks. See "Specifying start and end dates" in the topic "Entering and editing tasks" for more information.

The start date of a summary task is automatically set to be the start date of the earliest of its sub-tasks.

- **End:** The current end date of the task. OpenMind calculates the end date for a task from its start date and its duration, paying attention to the working and non-working time specified by the project calendar. Unless the duration is specified as "elapsed", OpenMind only schedules tasks during working time. For more information about calendars, see "Defining calendar settings".

Although you can set end dates explicitly, it is best to let OpenMind set them automatically according to the dependencies between the various tasks.


The end date of a summary task is automatically set to be the end date of the last of its sub-tasks.



- **Predecessors:** If a task is linked to one or more earlier (predecessor) tasks, this column shows the entry numbers of those earlier tasks. Task entry numbers are shown in the first column. See "Using links" for more information on task dependencies.
- **Resources:** If you have assigned resources to a task, they are listed in this column. See "Assigning resources".



*You can hide any of these columns by right-clicking the Task Name header at the top of the Gantt Outline and deselecting the unwanted columns in the local menu.*

The Gantt Outline works exactly as the main Outline view. When working in the Gantt Outline, you can for instance:





- Add, delete, move, cut, copy and paste tasks in exactly the same way as in the main Outline view.
- Add branch pictures, icons, text notes and pop-up comments to any of your branches.
- Attach objects such as text files, video files, sound files, buttons and so on.
- Use the **Detail level** icons  of the Filter toolbar to determine how many levels of tasks should be visible.

- Use the **Filter** icon  of the Filter toolbar  to restrict the display to a particular task.

For details on how to perform these operations, see "Using the Outline view".

## Viewing the Gantt Chart

You can manipulate the timescale shown at the top of the Gantt chart to view your tasks with more or less detail as follows:

- Click the **Zoom In** icon  of the Display toolbar  to view your schedule in more detail, going for instance from a Months/Weeks combination to a Days/Hours combination.
- Click the **Zoom Out** icon  to show larger increments of time, going for instance from a Months/Weeks combination to a Years/Quarters combination.
- Click **Fit to Screen**  to let OpenMind choose the level of detail that allows the entire project plan to fit on the chart.

You can also choose from a wider variety of combinations of calendar headings as follows:

- Double-click the headings (tiers) at the top of the calendar display to open the **Gantt Timescale** dialog.



- Choose a unit and a label for the **top tier** (the top heading).
- Choose a unit and a label for the **bottom tier** (the bottom heading).

Note that the choices offered for the bottom tier depend on your choice of top tier.

If the task you want to view falls outside the time range shown on the Gantt chart, you can reveal that part of the project plan to view the relevant task bar as follows:

- Select the task in the Gantt Outline and click the **Go to Selected Task** icon  on the Gantt toolbar.

For other ways of customizing the representation of your project plan on the Gantt chart, see "Enhancing a project plan".

## Setting up a project plan

These are the typical steps you should follow when setting up, building, managing and revising a project plan.

- (optional) Start by brainstorming all the tasks that make up your project plan in one of the standard Mind Mapping views (Mind Map, Top Down or Left/Right), using the Task/Timeline Info panel to enter preliminary task data.
- Define the project settings, such as its start date, end date and scheduling mode. For more information, see "Defining the global project settings".
- (optional) Define the project calendar. You may be able to bypass this step if you have already set up appropriate calendar defaults. See "Defining calendar settings" for more information.
- (optional) Create the global resources list. Although OpenMind lets you define the resources as you need them, it is usually quicker to start by setting up a global resources list from which you can then select resources to assign to the various project tasks. See "Assigning resources" for details.
- Enter or edit task names and durations. See "Entering and editing tasks".
- Assign resources to tasks. See "Assigning resources".
- Create links to specify the dependencies between the project tasks. See "Using links".
- Set constraints on the tasks as necessary. See "Using constraints".
- Make final adjustments to the project plan. See "Enhancing a project plan".
- Once the project has actually started, inspect it at regular intervals to detect potential problems or scheduling conflicts and make any corrections required. See "Reviewing a project plan".
- (optional) If you need to expand your project plan further, you can easily export it to Microsoft Project to take advantage of the advanced project management capabilities of this application.

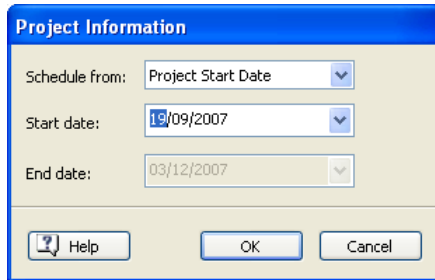
For more information, see "Exporting to Microsoft Project".

- You can also create various HTML reports from your project plan, export it to Microsoft Outlook as a series of tasks or export it in XML format. For more information, see "Creating reports" and "Exporting a project plan".

# Defining the global project settings

Before doing detailed scheduling work on the tasks of your project plan, it is worth considering its global settings, such as its start date and scheduling mode.

➤ To view these settings, choose **Tools | Task Management | Project Information**.



This dialog contains general project information which is important in determining how the project tasks are scheduled.

**Schedule from:** Defines the scheduling mode for your project. The most common way of setting up a project is to schedule it from its start date. In this mode the default is for tasks to start as soon as possible, which means that the whole project finishes at the earliest possible date. When you plan backwards from the project end date, tasks are scheduled to start as late as possible so that the whole project finishes on the specified end date. Planning from the end date is not recommended as it does not allow any slack time between tasks. Even when you have a specific deadline for your project, planning from the start date is the most flexible approach as it ensures that each task is completed at the earliest possible date, leaving as much slack time as possible to deal with unplanned problems or delays.

**Start date:** Specifies the first day of the first task. By default, this field is set to today's date. If your project is due to start sometime in the future or if you are planning a project that has in fact already started, indicate the start date of the project in this field.

By default, all the tasks you create will be scheduled to start on the project start date, unless you assign specific timings to them or link them to other tasks.

If you are scheduling from the start date, OpenMind calculates the project end date automatically, based on the duration of the project tasks, their relationships, and the project calendar.

**End date:** Specifies the last day of the last task. If you are scheduling from the end date, OpenMind calculates the start date automatically, also by taking into consideration the duration of the project tasks, their relationships, and the project calendar.

# Defining calendar settings

Calendars and calendar settings provide the basic information about working and non-working time that OpenMind uses to schedule the tasks of a project plan. OpenMind does not allow work to happen on non-working days or at non-working times.

There are two types of calendar:

- **The default calendar**

The default calendar provides the initial settings for any new OpenMind file you create. By editing these defaults to values reflecting your company's normal working days and times, you can minimize the changes needed when you create a new project plan.

- **The project calendar**

Each project plan has its own project calendar. The settings it contains affect the way OpenMind schedules the project tasks. To start with, when you create a new file, the project calendar is identical to the default calendar.

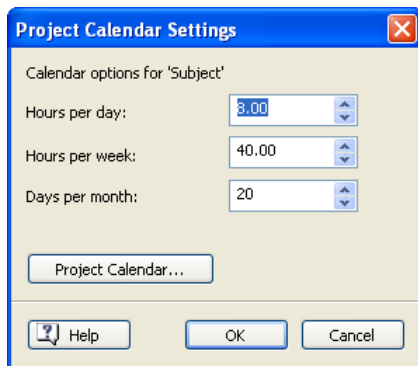
The project calendar is saved with the rest of the project properties whenever you save the file.

You can edit either calendar together with the relevant settings:

- To edit the **default calendar**, choose **Tools | Options** and open the **Project Management** tab. Changes you make here only affect the initial settings for new files; they do not affect existing files.
- To edit the **project calendar**, choose **Tools | Task Management | Project Calendar**. Changes you make here only affect the current file.

The two dialogs are almost identical: all the options are described below, but only the project calendar dialogs are illustrated.

## Defining the settings



**Hours per day:** Defines the number of working hours in a standard working day, for example 8. You can enter the value as a decimal number (e.g. enter 7.5 to specify 7 hours and 30 minutes). OpenMind uses this value to calculate task durations that are specified in days.

**Advanced notes:** This setting and the next two settings determine the amount of working time that OpenMind allocates to a task when you specify a duration in days, weeks or months.

When you enter durations, OpenMind always converts them to minutes and that is the number it stores behind the scenes. OpenMind uses standard values to convert hours to minutes: one hour equals 60 minutes. However when you specify a duration in days, weeks or months (provided you have not specified "e" for elapsed) OpenMind uses the number of working hours per day, week or month defined here to calculate the corresponding number of minutes to store.

From the working days and working times allowed by the project calendar it then works out the number of days required for the task and calculate its end date. For this reason, it is a good idea to make sure that the values you choose here match the working time allowed by the calendar as closely as possible, as it will make the entries in the Duration column of the Gantt Outline match the lengths of the task bars more closely.

Redefining these settings after having entered tasks does not alter their real durations (since they are stored in minutes) or the lengths of the task bars (since the amount of work has not changed), but the numbers for days, weeks and months in the Duration column will change.

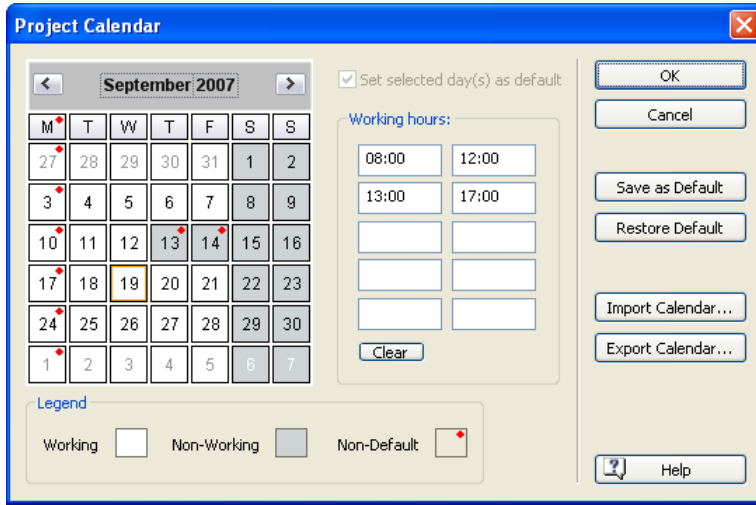
For more information about durations, start dates and end dates, see "Entering and editing tasks".

**Hours per week:** Defines the number of working hours in a standard working week, for example 40. You can enter the value as a decimal number. OpenMind uses this value to calculate task durations that are specified in weeks.

**Days per month:** Defines the number of working days in a standard working month, for example 20. Enter a whole number value. OpenMind uses this value to calculate task durations that are specified in months.

## Modifying the calendars

- Click **Project Calendar** to access the calendar itself (or **Default Calendar** if viewing the default calendar settings).



Working days are shown in white and non-working days are shown in grey.

- In the project calendar, a red dot on a particular day indicate that the working hours for that day are different from those set in the default calendar.
- In the default calendar, a red dot indicates that you have made a change to the working hours of that day since opening the dialog. These red dots disappear as soon as you save the default calendar.

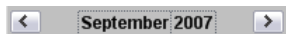
Note that the distribution of red dots in your project calendars may change if you edit the default calendar. This does not mean that your project plans have changed, only that the differences between the default and project calendars have changed.

➤ To see the working hours for a particular day, select the day by clicking it.

The working hours appear in the boxes on the right of the calendar grid.

### Displaying a particular day

If the day you want to examine is not currently visible on the calendar grid, you can browse to it in several ways by using the calendar header:



- Click the arrows placed on each side of the header until the correct month and year appear.
- Click the year on the header and use the up and down arrows to reach the correct year.
- Click the month name on the header and choose the correct month in the drop-down list.

## Selecting one or more days

To change the working times defined by the calendar, start by selecting the day or days to be modified:

- To select one day only, just click it.
- To select several contiguous days, select the first day and drag the mouse until the last day in the range. You can also select the first day, press the Shift key and click the last day in the range.
- To select several non-contiguous days, select the first day and press the Ctrl key while selecting all the other days.
- To select all Fridays (for example), click F in the column header. This selection applies to the whole duration of the project, not just the displayed month. You can select several columns by Shift- or Ctrl-clicking them.

## Editing one or more days

➤ Select one or more days as described above.

If you select several days with different working hours, the boxes on the right show the working hours of the earliest day in the range.

You can now make changes:

- To change the working hours, enter new values in the boxes on the right.
- To make the day(s) non-working, click Clear to delete the time entries from the boxes.
- To reset the working times to the default calendar values, select "Set selected days as default".

## Saving and restoring defaults

- To save the current project calendar as the new default calendar, open the Project Calendar dialog and click **Save as Default**. Your existing default calendar will be overwritten.
- To return all project calendar settings to those of the default calendar, open the Project Calendar dialog and click **Restore Default**.

You can return the default calendar to the original OpenMind settings as follows:

- Open the **Default Calendar** dialog (Tools | Options | Project Management).
- Click **Import Calendar**.
- Browse to:

C:\Program Files\MatchWare\OpenMind 2.0 BE\Resources\Gantt

- Select the file **defaultcal.xml**.

Your current default calendar is overwritten with the original OpenMind default calendar.

- Click **Save** from the Default Calendar dialog to save the restored default calendar.

## Importing and exporting calendars

You can also import calendars from other projects or export your calendars for use by colleagues.

- To import a previously saved OpenMind calendar, click **Import Calendar**. Existing settings will be overwritten.



*You can also import the calendar of an existing Microsoft Project document by exporting that document to XML from Microsoft Project, then choosing the exported XML document in this dialog.*




- To export your current calendar for use on a different project for instance, click **Export Calendar**.



When exported, the OpenMind calendar is saved the OpenMind XML format.

## Entering and editing tasks

When working in the Gantt view, you can use the Gantt Outline to work on tasks exactly as in the main Outline view. You can for instance:

- Add, delete, move, cut, copy and paste tasks as in the main Outline view.
- Add branch pictures, icons, text notes and pop-up comments to any of your tasks.
- Attach objects such as text files, video files, sound files, buttons and so on.
- Use the **Detail level** icons  of the Filter toolbar to determine how many levels of tasks should be visible.
- Use the **Filter** icon  of the Filter toolbar  to restrict the display to a particular task.

For details on how to perform these operations, see "Using the Outline view".



You can also create the tasks of your project plan in other ways:

- By importing a task list from Microsoft Outlook and converting it to a project plan.

For more information on the import procedure, see "Importing from Microsoft Outlook".


- By importing a project from Microsoft Project, either directly or via the Microsoft Project XML format.

For more information, see "Importing from Microsoft Project" and "Importing from XML".


- By copying a list of tasks from an external application such as Microsoft Excel, Microsoft Word or Microsoft Project and pasting it into the Gantt Outline.

## Entering a task duration

By default, tasks have a duration of one day and are marked with a question mark, to indicate that the duration is only an estimate. As soon as you edit the duration, the question mark disappears. You can modify the duration of a task in various ways:

- On the Gantt chart, position the cursor at the end of the task bar until it changes to , and drag the end of the bar to the right or left.
- In the Gantt Outline, type a number of days in the appropriate cell in the **Duration** column. You can follow the number with letter(s) to indicate time units other than days: m (minutes), h (hours), d (days, the default), w (weeks), mo (months). You can enter the letter "e" before the time unit (for instance "3ed") to indicate elapsed time, in which case the task will last exactly the time specified, regardless of what the project calendar defines as working and non-working time.

You can indicate that a duration is still an estimate by adding a question mark.

- Select the task and click the **Task Information** icon  on the Gantt toolbar to open its Task Information dialog. Enter a value in the Duration field as described above.



*You can also open the Task Information dialog by pressing **Shift + F2** or by double-clicking the task bar on the Gantt chart.*

- Select the task and, in the **Task/Timeline Info** panel, enter a value in the Duration field as described above.

The duration of the task is now indicated on the Gantt chart by a bar extending from its start date to its end date.

**Advanced notes:** When you enter durations, for example "4 hours", OpenMind converts them to minutes and that is the number it stores behind the scenes. OpenMind uses standard values to convert hours to minutes: one hour equals 60 minutes. However if you specify a duration in days, weeks or months (provided you have not specified "e" for elapsed) OpenMind uses the number of working hours per day, week or month set in the Project Calendar Settings dialog (Tools | Task Management | Project Calendar), to calculate the corresponding number of minutes to store. See "Defining calendar settings" for more information about these settings.

While durations determine the amount of working time that you allocate to a task, the length of the task bar indicates how long the task will actually take. These are not necessarily the same. For example, because OpenMind does not schedule work on non-working days, any task bar spanning a week-end is automatically lengthened to take account of this. Similarly, if your working day is specified as having 8 hours, but the relevant section of the calendar restricts work to only 4 hours a day, a task with a duration of one day (8 hours) will actually take two days (4 hours each day) to complete.


The labels shown in the Duration column, for example "2 days", are calculated from the stored number of minutes for each task. For durations initially specified in days, weeks or months OpenMind uses once more the number of working hours per day, week or month set in the Project Calendar Settings dialog to convert the stored number of minutes back to days, weeks or months. Consequently if you redefine the number of working hours in a day, week or month set in that dialog, the numbers in the Duration column will change, but the underlying number of minutes, and consequently the length of the bars, will remain the same.

## Specifying start and end dates



Although you might be tempted to enter specific start and end dates for your tasks, it is not recommended unless you understand the implications of doing so. A better practice is to link tasks so that they follow on logically from one another, and let OpenMind calculate the dates automatically. In OpenMind and similar project management applications, entering an explicit start date is equivalent to setting a 'Start No Earlier Than' constraint. Similarly, entering a specific end date is equivalent to setting a 'Finish No Earlier Than' constraint. Although applying constraints in this way is perfectly legitimate if your tasks must indeed obey these constraints, it is best to avoid them wherever possible as they limit the flexibility of your project plan. For more information on the different types of constraints and their effects, see "Using Constraints".

If you must enter a specific start date, you can do so in different ways:


- Move the cursor to the center of the task bar and drag the bar to the new position.
- Click the **Start** entry of the task in the Gantt Outline and type or select a date.
- Select the task. On the **Task/Timeline Info** panel, select a date in the Start date field.
- Select the task and click the **Task Information** icon  on the Gantt toolbar to open its Task Information dialog. Select a date in the Start field.




*You can also open the Task Information dialog by pressing **Shift + F2** or by double-clicking the task bar on the Gantt chart.*

You can enter an end date in the following ways:

- Click the **End** entry of the task in the Gantt Outline and type or select a date.

- Select the task. On the **Task/Timeline Info** panel, select a date in the End date field.
- Select the task and click the **Task Information** icon  to open its Task Information dialog. Select a date in the End field.



When you enter a specific start or end date, a constraint icon  appears next to the task name in the Gantt Outline. Hovering this icon with the mouse displays a tooltip with details about the constraint.

To remove the constraint set by entering an explicit start or end date:

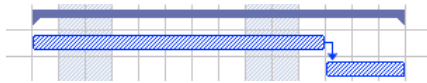
- Open the Task Information dialog and remove the tick from the Constraint date field.

Constraint type:	Start No Earlier Than	Constraint date:	<input checked="" type="checkbox"/> 19/09/2007
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## Grouping tasks

You can group tasks together by creating sub-tasks under a parent task, called a **summary task**. This allows you to divide your project into logical units, each with its own collection of tasks. The start dates, end dates and durations of summary tasks are calculated automatically from their sub-tasks.

A summary task is indicated on the Gantt chart by a solid bar extending from the beginning of the first sub-task to the end of the last one.



If you add sub-tasks to a task that already has a duration assigned to it, this assigned duration is automatically replaced by the new duration obtained from the sub-tasks. Once a task becomes a summary task, it is no longer possible to specify its start date, end date or duration manually. If you change the timing of a sub-task, the summary task duration is automatically adjusted to reflect the change.



The duration of a summary task is the number of available working days between its start and its end, regardless of whether work is actually happening on any given day. The figure is calculated from the available working hours between the two dates, as specified on the project calendar, and the 'Hours per day' figure set in the Project Calendar Settings dialog. For more information about calendar settings, see "Defining calendar settings".

Sub-tasks are sub-branches, and you create them in the Gantt view in the same way as in any other view. The parent task is converted automatically to a summary task when you add its first sub-task.

You can convert an existing task to a sub-task or move it to a different level in the task hierarchy just as in the Outline view:

- Select the task you want to move to a different location by clicking it with the left mouse button.
- While keeping the left mouse button pressed, drag the task to the required location.

The mouse pointer changes to a different shape to show you where the task will be inserted when you let go of the mouse button.

- A small right arrow ➞ indicates that the task will become a sub-task of the task containing the arrow.
  - A small up arrow ↑ indicates that the task will be inserted above the task containing the arrow, at the same level.
  - A small down arrow ↓ indicates that the task will be inserted below the task containing the arrow, at the same level.
- Release the mouse button to insert the task at the required location.
- You can also click the **Indent** icon  to move the selected task or tasks to the next level down in the hierarchy, so that they become sub-tasks of the preceding task in the Gantt Outline.
  - Conversely, clicking the **Outdent** icon  moves the selected task or tasks to the next level up in the hierarchy.

The root of the Mind Map, the first task in the Gantt Outline, is a summary task extending across the whole of the project plan. The end of this summary task bar indicates the current end date of the project.

You can expand and collapse summary tasks just as in the main Outline view. See "Using the Outline view" for details. Collapsing summary tasks is a useful way of making large project plans easier to view.

## Assigning resources

OpenMind allows you to assign resources to your task lists and project plans. Resources can be people, materials, equipment, budget amounts, or anything else. Typically, you might enter the names of people who will work on the tasks as resources.

You can add as many resources as you want to each task. Note that in OpenMind, assigning resources to a task has no effect on the task duration, regardless of whether you are working on a simple task list or a project plan.

Although OpenMind lets you define the resources as you need them, it is usually quicker to start by setting up a global resources list from which you can then select resources to assign to the various tasks.

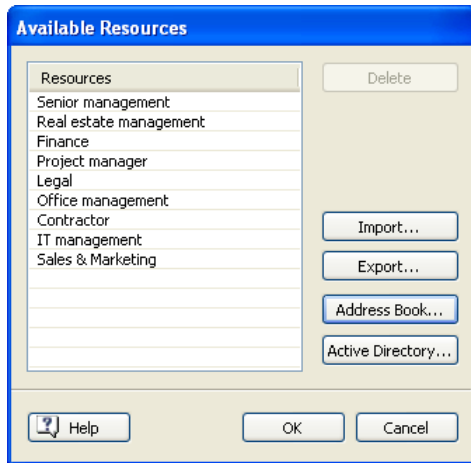
The global resources list associated with a task list or project plan is saved whenever you save the file. Each task list or project plan can have its own global resources list.

## Setting up a global resources list

The global resources list is the list of all currently available resources.

- Choose **Tools | Task Management | Resources**.

The Available Resources dialog lists all the resources that are currently assigned to tasks, as well as any that you import or type in directly.



This dialog lets you perform different operations:

- To type in a new resource, click the first empty field and enter the resource name.
- To delete one or more resources, select them and click **Delete**.



*Use the Shift key to select contiguous resources and the Ctrl key to select non-contiguous resources.*

- To import one or more resources from your Microsoft Outlook Address Book, click **Address Book**, select the contact names you want to add as resources in the Outlook dialog, click the Add button and click OK.
- To import one or more resources from the Windows Active Directory database, click **Active Directory**. In the dialog box that opens, click the Advanced button, then the Find Now button. Select the user(s) you want to add as resources in the bottom part of the dialog, and click OK. The Active Directory is a centralized database maintained by Windows to store information relating to an organization's network (such as resources, services and users).
- To export the global resources list for use in other documents or for sharing with colleagues, click **Export**, and choose a folder and file name for your exported list.



*When exported, the global resources list is saved in the OpenMind XML format.*

- To import a previously exported global resources list, click **Import** and select the required list.



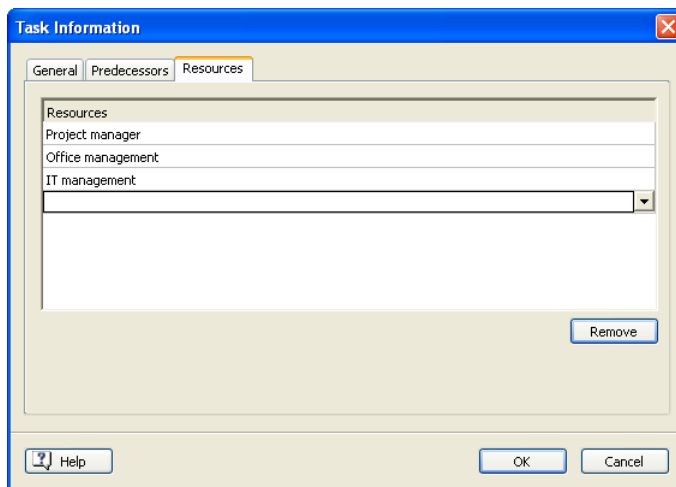
*You can also import the resources list of an existing Microsoft Project document by exporting that document to XML from Microsoft Project, then choosing the exported XML document in this dialog.*

## Assigning resources to tasks

You can assign resources to tasks when you create the task or at any time afterwards. Even if you have not created a global resources list, you can still assign resources to tasks. Any resource you assign to a task by typing its name is automatically added to the global resources list so that you don't have to type it next time.

You can assign resources to a task from its Task Information dialog as follows:

- Select the task and choose **Tools | Task Management | Task Information**.



- Click an empty row in the **Resources** dialog and enter the resource by typing it or by selecting it from the list.
- To de-assign a resource, select it and click Remove. Note that this only de-assign the resource from the task, it does not remove the resource name from the global resources list.




*Where possible, it is better to select rather than type resource names. That way you don't run the risk of adding wrongly spelled entries to the global resources list.*

You can also enter resources in other ways:


- In the **Task/Timeline Info** panel, type the resource name(s) in the **Resources** field, separating them with semi-colons. To remove resources, simply delete them from the field.

Or, if you are working on a project plan in the Gantt view:

- Select the task. Click the **Task Information** icon  on the Gantt toolbar to open its Task Information dialog and click the **Resources** tab.



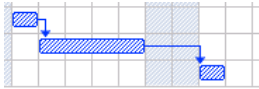
*You can also open the Task Information dialog by pressing **Shift + F2** or by double-clicking the task bar on the Gantt chart.*

- Select the task and click the **Resources** icon  on the Gantt toolbar.
- Click the **Resources** cell of the task at the far right of the Gantt Outline. Type the resource name(s), separating them with semi-colons.

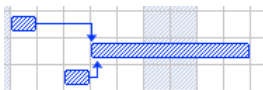
## Using links

Project plans normally require tasks to be performed in a specific order. For instance, a publication must be written and proofread before it can be printed. To achieve this, OpenMind lets you link tasks so that they depend on each other. By default, tasks are linked in a 'Finish to Start' relationship (dependency), which means that the first task you select (the **predecessor** task) must end before the next task you select (the **successor** task) can start, and so on.

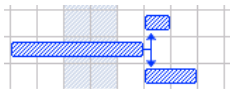
This is represented on the Gantt chart by lines with arrowheads joining each task to its successor. The arrowhead indicates the direction of the link: it goes from the predecessor to the successor.



A task can have more than one predecessor. In this case its start date is determined by the predecessor link that gives it the latest start date. As dates and times change during the course of the project, the predecessor link that determines the start date of the task may also change.



Similarly a task can have several successors. In this case the task determines the start date of all its successor tasks.




When you are scheduling a project plan from its start date (see "Defining the global project settings"), OpenMind calculates the end date of the project automatically, on the basis of the task durations, the task dependencies and the project calendar.

The possibility of linking tasks in this way is what makes project management software particularly powerful: you can change the duration of one or more tasks, add a task or remove a task from a chain of linked tasks, and all the dates are recalculated automatically so as to maintain the task dependencies you have defined.

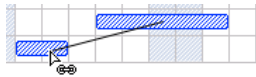
## Linking tasks


You can link tasks in the following ways:

- Select the tasks to be linked, in the order you want them to be linked, by Shift-clicking them (for contiguous tasks) or Ctrl-clicking them (for non-contiguous tasks), then click the **Link** icon  on the Gantt toolbar.

You could also choose **Edit | Link Tasks** in the main menu or press **Ctrl + F2**.

- Place the pointer on the bar of the predecessor task. When it changes to an icon with four arrows, drag the pointer downwards (or upwards) until a line emerges from the task bar and a link icon appears under the pointer. Continue dragging until the line reaches the bar of the successor task and release the mouse button.



- Select the task to be linked to. Click its **Predecessors** cell in the Gantt Outline and type the entry number(s) of the predecessor task(s). Separate multiple numbers by semi-colons.
- Select the task to be linked to and click the **Task Information** icon  to open its Task Information dialog. Click the Predecessors tab and select the predecessor task(s).

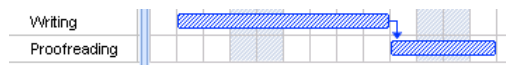


*You can also open the Task Information dialog by pressing **Shift + F2** or by double-clicking the task bar on the Gantt chart.*

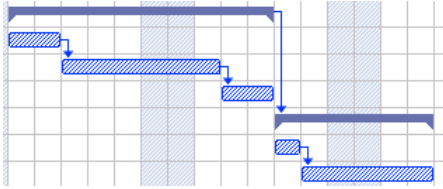


All these methods create the default task relationship, namely 'Finish to Start'. See below to find out how to create other types of relationships.

In the example below, the proofreading task (successor) has been linked to the writing task (predecessor). The proofreading task cannot start before the writing ends. If the writing task is delayed or takes longer than planned, the start date of the proofreading task is recalculated automatically so that the task relationship is always maintained.



You can link summary tasks in the same way as other tasks, but not to one of their own sub-tasks. Linking a summary task to another summary task has the same effect as linking its last sub-task to all of the sub-tasks in the other summary task. To make your project plan easy to read, it is usually best to link summary tasks only to summary tasks and sub-tasks to sub-tasks (within the same summary task), like this:





Alternatively you may prefer to restrict linking to regular tasks. Links from summary tasks to regular tasks tend to confuse the display.



A summary task can only be linked to its predecessors with a 'Finish to Start' or 'Start to Start' relationship.

## Unlinking tasks


You can unlink tasks in the following ways:

- Select the tasks by Shift- or Ctrl-clicking them, then click the **Unlink** icon  on the Gantt toolbar.  
You could also chose **Edit | Unlink Tasks** in the main menu or press **Ctrl + Shift + F2**.
- On the Gantt chart, right-click the link you want to remove and choose **Edit Link** in its local menu. This opens the Task Information dialog. Select the predecessor task you want to remove and click Delete.
- Select the task whose predecessors you want to remove. Click its **Predecessors** cell in the Gantt Outline and delete the number(s) of the predecessor(s) you want to remove.
- Select the task whose predecessors you want to remove and click the **Task Information** icon  to open its Task Information dialog. Click the Predecessors tab, select each predecessor task you want to remove and click Delete.

## Defining lead or lag time

By adding a **lead** or **lag** time you can extend a link backwards or forwards so that the successor task starts earlier or later than it otherwise would. For a default 'Finish to Start' link, this either introduces an overlap (lead time), so that the successor task starts before its predecessor ends, or it introduces a delay (lag time) that makes the successor task start some time after its predecessor ends.

When planning the production of a marketing brochure for instance, you could use lead time to make the creation of artwork start a few days before the writing phase is over. The two tasks are however still linked, which means that a delay of the writing phase will also delay the creation of the artwork.

- Select the successor task and click the **Task Information** icon  to open its Task Information dialog.
- Click the **Predecessors** tab.
- In the **Lag** column for the task, enter the appropriate lead or lag time. A positive value indicates a lag time (a delay); a negative value indicates a lead time (an overlap). You can follow the number with letter(s), for example w for weeks, as described in the paragraph "Entering a task duration" in "Entering and editing tasks".

You can also enter percentage values, for example if you enter "-25%" the task will start 75% of the way through the predecessor task. Note that percentages relate to the duration of the predecessor task.

In the following example, we start with three linked tasks (to save space, the Start and End columns are not shown):

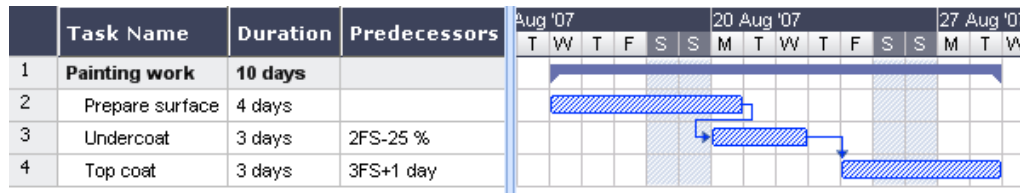
	Task Name	Duration	Predecessors	Aug '07							20 Aug '07							27 Aug '07						
				T	W	T	F	S	S		M	T	W	T	F	S	S	M	T	W				
1	<b>Painting work</b>	<b>10 days</b>																						
2	Prepare surface	4 days																						
3	Undercoat	3 days	2																					
4	Top coat	3 days	3																					

Notice that the Predecessors column shows the number of each task's predecessor. Experience shows that we can actually start applying undercoat when surface preparation is three quarters complete, in other words when only 25% remains to be done. To give the desired overlap (lead time) we enter a lag of -25%, as described above:

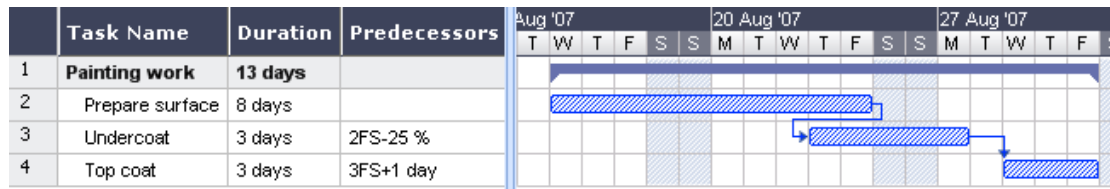
	Task Name	Duration	Predecessors	Aug '07							20 Aug '07							27 Aug '07						
				T	W	T	F	S	S		M	T	W	T	F	S	S	M	T	W				
1	<b>Painting work</b>	<b>9 days</b>																						
2	Prepare surface	4 days																						
3	Undercoat	3 days	2FS-25 %																					
4	Top coat	3 days	3																					

Because surface preparation has currently been allocated 4 working days, the undercoat task starts after the third working day. As usual, no work is scheduled during non-working days. Notice that the **Predecessors** column now includes the type of link (FS, or 'Finish to Start'), and the amount of lead time (-25%).

Now we want to allow a 1-day gap after the undercoat task to ensure that the undercoat is fully dry before the top coat is applied. To give the desired delay we enter a lag of 1 day, as described above:



If we now have to change the duration of the surface preparation task to 8 days, everything moves out. However, the 25% overlap (which now represents 2 working days) and the 1-day delay are preserved:




Although the example above shows tasks linked by the default 'Finish to Start' relationship, you can apply lead or lag time to any type of task relationship.



Moving linked bars by dragging does not set lead or lag times, but instead sets constraints which override the linking. See "Using constraints" for more information.

## Using other task relationships

OpenMind supports four different relationships (dependencies) between tasks:

- **Finish to Start (FS) - the default:** The task cannot start before its predecessor ends, although it may start later. This is the most common type of relationship and the only link you can create by clicking the Link icon , as described above. Typically the successor starts as soon as the predecessor is complete. You can introduce an overlap or delay by using lead and lag times, but still, if the end date of the predecessor task moves, so will the start date of the successor.
- **Start to Start (SS):** The task cannot start until the predecessor starts, although it may start later. This can be useful if you have a task whose start date depends on the start date of another task.
- **Finish to Finish (FF):** The task cannot end before the predecessor ends, although it may end later.
- **Start to Finish (SF):** The task cannot end before the predecessor starts, although it may end later. This task relationship is rarely used.

To change the relationship between two tasks:

- Select the successor task and click the **Task Information** icon  to open its Task Information dialog.



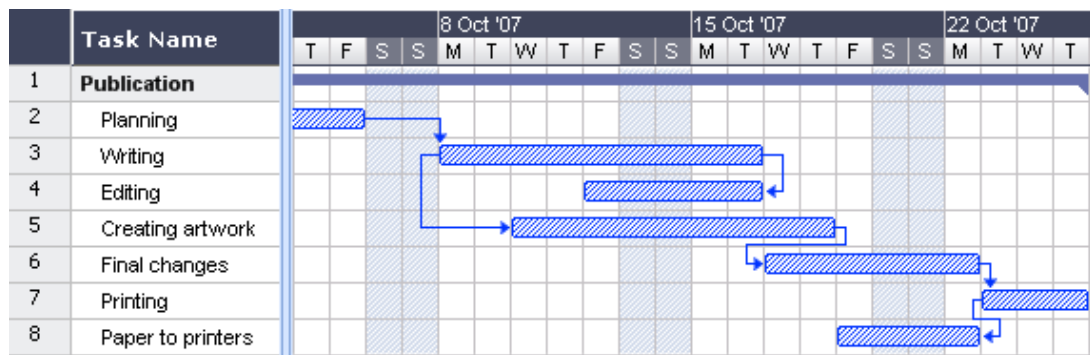
*You can also just double-click the link between the predecessor and the successor task on the Gantt chart.*

- Select the predecessor on the **Predecessors** tab.
- In the **Type** column, select the new relationship type.

Type
Finish to Start (FS) ▼
Finish to Finish (FF)
Finish to Start (FS)
Start to Finish (SF)
Start to Start (SS)

## Example

The following project plan for the preparation of a publication illustrates all these kinds of relationships.



In this example:

- The writing task follows on directly from the planning task. If the end date of planning changes, so will the start of writing. This is the normal **Finish to Start** relationship.
- The editing task starts some way through the writing task. The writers and the editors work together as a team until the text is complete. Their tasks effectively end at the same time. If the end date of writing changes, so will the end date of editing. This is a **Finish to Finish** relationship.
- The creation of artwork depends on the start of writing. In this case a lag has been introduced so that it doesn't start exactly when writing starts. Even so, if the start of writing changes, so will the start of artwork creation. This is a **Start to Start** relationship.

- The final changes task depends on the end of artwork creation, but an overlap is included so that it actually begins two working days before the end date of artwork creation. If artwork creation is delayed, so will be the start of final changes. This is the normal **Finish to Start** relationship.
- Printing starts after final changes are complete. This is also a **Finish to Start** relationship.
- The transferring of paper from the warehouse to the printers must be complete in order for printing to start, but is not related to any of the preceding tasks. The printers have limited storage capacity and do not want the paper to arrive until it is needed, so the start of printing drives the delivery of paper. If the start of printing changes for some reason, so will the end date for getting paper to the printers. This is a **Start to Finish** relationship.

Here each task has a single predecessor, the simplest arrangement. However, a task *can* have several predecessors. In such situations you will need to think carefully about possible undesirable consequences. For example, if you added another predecessor to the "Paper to printers" task above, it would be possible for that predecessor to push out "Paper to printers" so that its end date was later than the start of printing.

## Using constraints

Constraints define the degree of flexibility available to OpenMind when scheduling or rescheduling a task by imposing restrictions on its start or end date.












OpenMind supports 8 types of task constraints, offering different degrees of flexibility.

### Constraint types

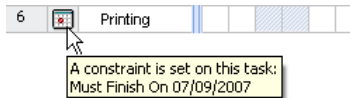
Two "constraints" are actually so flexible that they are not generally regarded as constraints at all:


- **As Soon As Possible (ASAP):** This is the default constraint when you schedule your project from its start date, as is normally the case (see "Defining the global project settings"). You should try to keep this default whenever possible as it gives OpenMind the most scheduling flexibility. If you apply this constraint to an unlinked task, the task will be scheduled to start at the project start date. If you apply it to a linked task, it will start as soon as the dependencies with its predecessor tasks will allow.
- **As Late As Possible (ALAP):** This is the default constraint when you schedule your project from its end date. If you apply this constraint to an unlinked task, the task will be scheduled so that its end date coincides with the end date of the overall project. If you apply it to a task linked to a successor task, the task will be scheduled to end when the successor needs to start. On the whole, you should avoid this constraint as it does not leave any slack time to deal with possible problems. Any delay on the task is likely to impact the overall end date.

The following constraints all restrict OpenMind's flexibility when scheduling tasks. Although you might be tempted to use them if you are new to project management, you need to make sure you understand the implications. Keeping their use to a minimum (especially the last two) will allow you to take full advantage of OpenMind's automatic scheduling possibilities.


- Start No Earlier Than (SNET)**  : This means that the task, whether linked or not, may not start before the given date. However, OpenMind still has the flexibility to start the task later than the given date.  
 If you change a task's start date, for instance by typing a new date in the Gantt Outline or by moving its task bar on the Gantt chart, this constraint is automatically applied.  
 If you drag a linked task backwards, a SNET constraint is set for the start date corresponding to the new position of the task bar, but the bar immediately moves back to its original position. This is because the start date determined by the link comes later than the SNET date. The SNET date is therefore applied, but does not change the original scheduling of the task.
- Start No Later Than (SNLT)**  : This means that the task, whether linked or not, may not start later than the given date. However, OpenMind still has the flexibility to start the task earlier than the given date.  
 When you are scheduling your project from its end date, changing a task's start date automatically applies this constraint.
- Finish No Earlier Than (FNET)**  : This means that the task, whether linked or not, may not end before the given date. However, OpenMind still has the flexibility to end the task later than the given date.  
 If you change a task's end date, this constraint is automatically applied.
- Finish No Later Than (FNLT)**  : This means that the task, whether linked or not, may not end later than the given date. However, OpenMind still has the flexibility to end the task earlier than the given date.  
 When you are scheduling your project from its end date, changing a task's end date or moving its task bar on the Gantt chart automatically applies this constraint.
- Must Start On (MSO)**  : This rigid constraint means that the task, whether linked or not, must start on the given date. Even if the preceding task is completed earlier, OpenMind cannot pull in the constrained task to take advantage of the time gained.
- Must Finish On (MFO)**  : This rigid constraint means that the task, whether linked or not, must end on the given date. As above, even if the preceding task is completed earlier, OpenMind cannot pull in the constrained task to take advantage of the time gained.

When you apply one of these constraints to a task, a constraint icon appears next to its name in the Gantt Outline. Hovering this icon with the mouse displays a tooltip with details about the constraint.



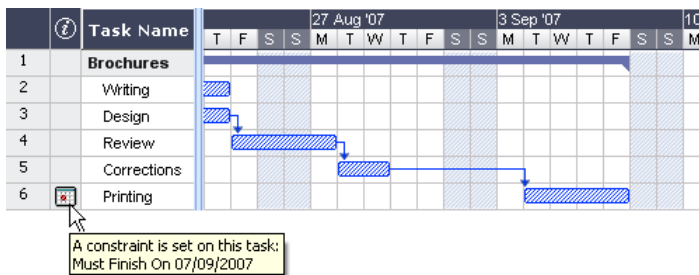
 If you decide to apply one of these constraints to a task, it is good practice to attach a note or a comment to the task to explain why you did so. If the constraint causes scheduling conflicts later on as your project evolves, you will be able to refer to the note to decide whether to keep the constraint, change it or remove it altogether. Such notes also allow you to distinguish easily between the tasks you have constrained yourself deliberately and the tasks you may have constrained inadvertently by moving their task bar or editing their start or end date manually.

You can sometimes avoid using constraints by setting deadlines instead (see "Setting deadlines" in the topic "Enhancing a project plan"). If you have an important date to meet, it is usually better to set a deadline on the task rather than a constraint such as 'Must Finish On'. Not only this type of constraint restricts OpenMind's scheduling flexibility, but it may in fact increase the likelihood of missing the deadline, as the example below shows.

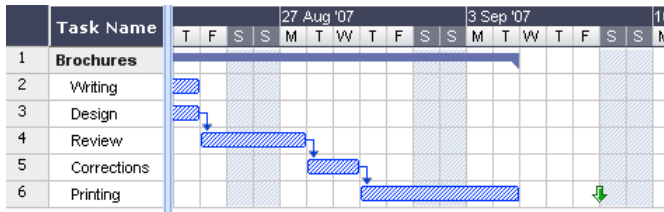
 The effect of a constraint is not always obvious when you schedule your project plan from its end date, so take care to check that it does give the result you want.

## Example

The following example shows some tasks in the preparation of a brochure for a mail shot. The mail shot is scheduled for September 10th. The tasks are linked, but we have set a 'Must Finish On' constraint on the printing task for September 7th, the latest date that will allow the mailing to go ahead on the following Monday, September 10th. The constraint, as usual, overrides the link. By setting a 'Must Finish On' constraint for September 7th, we have effectively moved the task out so that it ends exactly on September 7th, regardless of whether it could have been completed earlier or not.



The problem with this is that if the printing task takes longer than expected, the mailing date will be missed. It would be much better to take advantage of the unused time after the end of the corrections task to get started with printing. However, we still need to keep an eye on the September 7th deadline. To do this, we remove the constraint from the printing task, so that the link will determine its start date, and add a deadline marker instead.

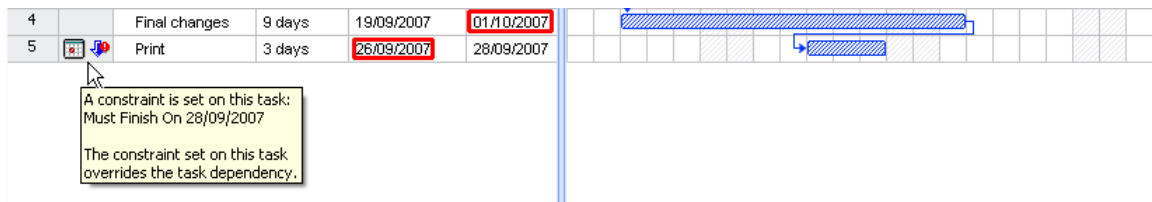


Now there is a useful three day gap between the end of printing and the deadline, and the deadline is clearly indicated. The printing task is now much less likely to appear on the critical path, and the deadline indicator will warn us if the task moves past its deadline.

## Interaction between task dependency links and constraints

Constraints combine with task dependency links to affect the timing of tasks. In some cases, applying a constraint to a task in addition to a task relationship may create a scheduling conflict. When such a conflict arises, the constraint always takes precedence over the task dependency.

Let us consider the example below. Here the "Print" task is linked to the "Final changes" task with the default 'Finish to Start' relationship. The "Final changes" task ends on Oct 1st. In normal circumstances, this would mean that the "Print" task cannot start before Oct 2nd. However, because you imperatively need the printed materials on Sept 28th for a training session, you have set a 'Must Finish On' constraint on the "Print" task for Sept 28th, as evidenced by the constraint indicator. Since the constraint set on a task always overrides any relationship it may have with other tasks, the start date of the "Print" task has been rescheduled automatically to end on Sept 28th.



In this case the constraint has led to an illogical relationship with the predecessor task: printing is now scheduled to start before final changes are complete. Note that OpenMind conveniently flags this as a possible problem using the icon, which shows that a link has been overridden by a constraint.


If you later decide to remove the constraint, for instance because the training session has been postponed, the task dependency link is enforced again, as shown here:

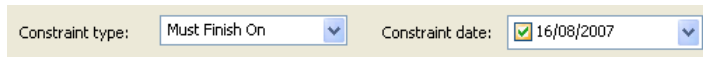


For more information about how to detect and solve potential scheduling conflicts, see "Reviewing a project plan".

## Setting a constraint

You can apply a constraint to a task as follows:

- Select the task and click the **Task Information** icon  to open its Task Information dialog.
- Select the constraint type. For constraints other than 'As Soon as Possible' or 'As Late As Possible', you also need to set the constraint date required.



The screenshot shows a dialog box with two fields. The first field is labeled 'Constraint type:' and has a dropdown menu with 'Must Finish On' selected. The second field is labeled 'Constraint date:' and has a date '16/08/2007' selected, preceded by a small green checkmark icon.

As mentioned above, changing a task's start date by editing it in the Gantt Outline or moving its task bar on the Gantt chart applies a 'Start No Earlier Than' constraint automatically (assuming you are scheduling from the project start date). Changing a task's end date applies a 'Finish No Earlier Than' constraint.

When scheduling from the end, changing a task's start date applies a 'Start No Later Than' constraint. Changing a task's end date applies a 'Finish No Later Than' constraint.

- To remove a rigid constraint, select 'As Soon as Possible' in the Task Information dialog (or 'As Late As Possible' if you are scheduling from the end).

## Enhancing a project plan

There are various things you can do to make your project plan easier to use. For example:

- You can add explanatory notes to tasks. This is especially useful for tasks that have constraints. Constraints override links and can lead to illogicalities or schedule conflicts in the plan, so you will need to keep an eye on them.
- You can highlight the critical path in order to see at a glance the tasks that are currently directly affecting your project end date.
- You can set milestones or deadlines to mark key dates.
- You can give tasks priorities.
- You can show a percentage completion for any task, visible on the task bar.
- You can customize the display of the project plan on the Gantt chart.

## Adding notes

You can add notes and comments to any task, just as in all the other OpenMind views. See "Inserting text notes" and "Inserting comments".

## Viewing the critical path

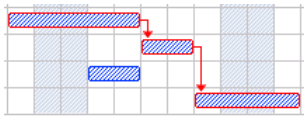
In a project plan, the critical path corresponds to the tasks or chain of linked tasks that cannot be delayed without delaying the entire project. A task lies on the critical path if a change to its start date or duration affects the end date of the project (or the start date if you are scheduling from the end of the project).

Keeping a close eye on the status of your critical tasks at any time is therefore key to good project management. If the overall project duration is too long, the only way to make it shorter and bring in its end date is to shorten the critical path.

- To toggle the critical path on or off, click the **Critical Path** icon  on the Gantt toolbar. Tasks on the critical path are highlighted in red.



*To change the color used to highlight the critical tasks, right-click an empty part of the Gantt chart and choose **Customize Gantt Chart** in the local menu. See below for a description of the other customization options.*



## Setting milestones

A milestone is a task with zero duration. It appears on the Gantt chart as a solid diamond. Milestones are generally used to indicate important dates on the project plan, often key events or goals. For example, you might use milestones to mark desired completion dates, or project review meetings.




As with any task, a milestone can be linked to other tasks. However, milestones are generally used as fixed markers and are therefore not normally linked.

To enter a milestone:

- Create a task and give it a duration of 0.

To convert a task to a milestone:

- Select the task and give it a duration of zero, or
- Select the task and click the **Task Information** icon  on the Gantt toolbar to open its Task Information dialog. Check the option 'Set task as milestone'.

To convert a milestone to a task:

- Select the milestone and give it a non-zero duration.

## Setting deadlines


You can add a deadline marker to any task. This does not affect any of OpenMind's Gantt calculations, but places a visible marker on the Gantt chart as a reminder.



If the task end date moves past the deadline, a missed deadline icon appears in the Indicators column of the Gantt Outline.




To add a deadline to a task:

- Select the task and click the **Task Information** icon  to open its Task Information dialog. In the Deadline field, select the deadline date.

To remove a deadline from a task, you open the Task Information dialog again and remove the check mark from the Deadline field.

## Assigning priorities

You can assign a priority to a task in the following ways:

- Select the task and click the **Task Information** icon  to open its Task Information dialog. Enter a priority number in the **Priority** field.
- Select the task. On the **Task/Timeline Info** panel, enter a priority number in the Priority field.


Although priorities can range from 0 to 1000, you can use any convenient scale, for example 1 (highest priority) to 10 (lowest priority).


## Setting completion values

You can indicate the progress that has been made towards completing a task by entering a % completion value. A blue line on the task bar indicates progress.



You can enter or modify a % completion value for a task in the following ways:

- Move the cursor to the left of the task bar (or to the right end of the completion line if the task already has a completion value) until it changes to  % and drag rightwards or leftwards until the appropriate completion position is reached.

- Select the task and click the **Task Information** icon  to open its Task Information dialog. Select a value in the **Completion (%)** field.
- Select the task. On the **Task/Timeline Info** panel, select a value in the Completion (%) field.

## Customizing the Gantt chart display

You can modify the display of individual task bars on the Gantt chart as follows:

- To display the task name and/or the resources names after the task bar, select the task, click the **General** tab on the right of the workspace and check **Show task name** and/or **Show resources** in the Properties dialog.
- To change the border color of a given task bar, modify the **Task border color** property.
- You can also modify the fill color of the task bar by modifying the **Task fill color** property.

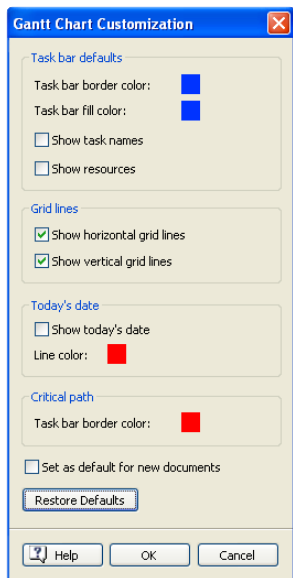


*To modify these properties for several tasks at once, start by selecting the tasks in the Gantt Outline by clicking them while pressing the Shift key (for contiguous tasks) or Ctrl key (for non-contiguous tasks).*

You can also customize the Gantt chart display itself as follows:

- Right-click an empty part of the Gantt chart and choose **Customize Gantt Chart** in the local menu.

The Gantt Chart Customization dialog opens.



- The upper part of the dialog lets you select task bar properties for any new task you create in the document. Existing tasks will retain their current properties and will not be affected by these settings.
- The 'Grid lines' area lets you switch the horizontal and vertical grid lines of the Gantt chart on and off.
- The 'Today's date' area allows you to display a vertical line identifying the current date on the Gantt chart.
- The 'Critical path' option lets you change the color used to highlight the tasks lying on the project's critical path.

Once you have defined your preferences in this dialog, you can check **Set as default** to re-use them every time you create a new project plan in the Gantt view.

The **Restore Defaults** button lets you restore OpenMind's original settings.

## Reviewing a project plan

It's a good idea to review your project plan regularly in order to locate conflicts or other problems. You can then make appropriate changes to remove them.

### Checking deadlines

Have any tasks overshot their deadline? If so, you will see red warning markers in the Indicators column:



To overcome the problem you may need to reschedule tasks. Alternatively, if the overshoot is acceptable, you can change the deadline by opening the Task Information dialog (double-click the task bar) and assigning a new date. To remove the deadline altogether, remove the check mark from the Deadline field.

### Checking the project end date

Is the project on course? Check that the end date of your project looks reasonable.

When you are scheduling a project plan from its start date (see "Defining the global project settings"), OpenMind calculates the end date of the project automatically, on the basis of the task durations, the task dependencies and the project calendar.


You can check the project end date in several ways:

- View the end date of the first task in the project plan, either in the Gantt Outline or in the Gantt chart. This is the root summary task that covers the whole project.

	Task Name	Duration	Start	End
1	Painting work	14 days	17/08/2007	05/09/2007

- View the end date of the last task in the project plan, either in the Gantt Outline or in the Gantt chart.



*If the task bar of the last task is not visible in the Gantt chart, select the task in the Gantt Outline and click the **Go to Selected Task** icon  on the Gantt toolbar.*

- Choose **Tools | Task Management | Project Information** to view the start and end date of the overall project.

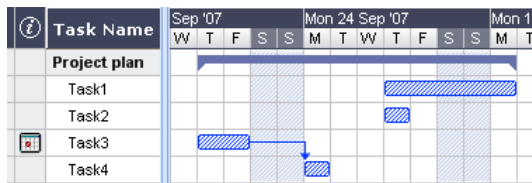
If the end date is too late, and the suggestions described in the following paragraphs cannot help, you may need to apply more resources to one or more tasks. For example, if you assign two people rather than one to a task, you should be able to halve its duration.

## Checking the project start date

If unconstrained tasks start later than you expect them to, check the project start date (**Tools | Task Management | Project Information**).

In the following example, Task1 and Task2 actually start on the project start date, as they should. However, Task3 has a 'Must Start On' constraint that is *earlier* than the project start date. This effectively extends the project backwards before its official start date. This also happens when a task is given a lead time that pushes its start date *before* the project start date.

The project start date is nevertheless maintained, and any new task you add is scheduled to start on the official start date.





## Checking the dependencies

Are all the links between tasks necessary? By unlinking tasks that don't actually depend on each other, you will make use of all the slack time available, thereby shortening your schedule and maximizing its flexibility.


Alternatively, consider whether some tasks could overlap each other to reduce the overall duration of the project. If so, assign appropriate lead times (see "Defining lead or lag time" in the topic "Using links"). Another possibility is to redefine some of your 'Finish to Start' relationships to either 'Finish to Finish' or 'Start to Start' if the logic of your schedule allows it.

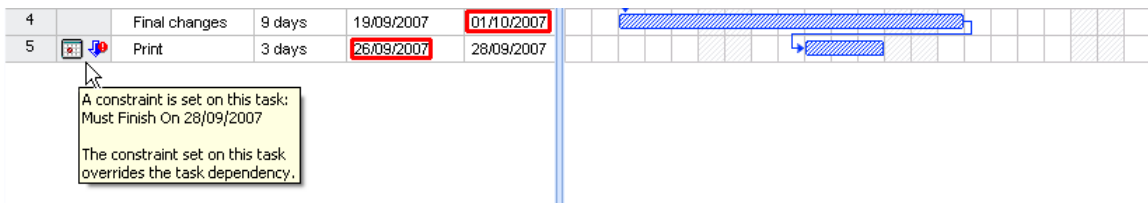
## Checking the constraints

Are the constraints working as you expect? Look in the Indicators column of the Gantt Outline for tasks that have constraint markers  . If you have been adding an explanatory note to every constraint you set, read the notes to check that your intentions are still being met. And look for tasks that have a constraint but no note: these may have been created inadvertently and be causing trouble.

Do the tasks that have constraints fall where you expect them to? Do they fit logically with the other tasks around them? Check that their start and end dates are neither too early nor too late.

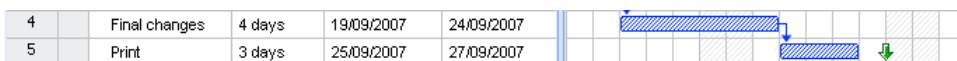
Look for unexpected overlaps or gaps (see below) between linked tasks: often this is caused by a rigid constraint on one or other of the tasks, in which case you should see a constraint marker in the Indicators column. However, remember that overlaps and gaps can also be caused by intentional lead or lag times. Displaying the Predecessors column in the Gantt Outline will allow you to check for the presence of lead or lag time.

Because constraints override links, they can introduce schedule conflicts, identified by the icon  in the Indicators column. For example, in the following case, final changes are taking longer than expected, but the 'Must Finish On' constraint set on the printing task prevents it from moving out. The result is that printing is now scheduled to begin well before the final changes are complete.



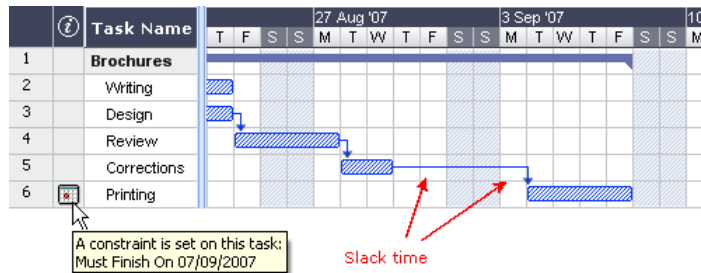
To resolve this problem, assuming that you want to maintain the end date of Sept 28th for printing:

- Double-click the task bar for the printing task to open its Task Information dialog.
- Remove the rigid constraint by unchecking the Constraint date checkbox and revert to the default 'As Soon As Possible' constraint. The link from "Final changes" will now determine the start of printing.
- In the Deadline field, select 28/09/07 to put a deadline marker on the printing task so that you are reminded of the required completion date. The deadline marker is simply a marker: it does not apply a constraint of any sort. Click OK to close the dialog.
- Shorten the time allowed for final changes (or one of its predecessor tasks), for example by assigning more people to the task, so that printing finishes on or before the deadline.



## Looking for gaps

Are there any gaps where work could be allocated but has not been? Gaps can occur when a rigid constraint has been applied to a task. The task's predecessor finishes early, leaving a gap (slack time). Because of the constraint, the task cannot move backwards to take advantage of the slack.

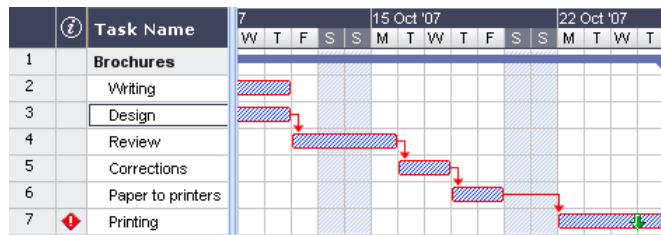


To overcome problems like this, and make use of the slack time, consider removing the rigid constraint and replacing it by the default 'As Soon As Possible'.

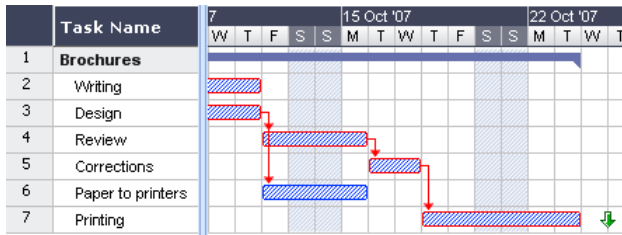
## Checking the critical path

Are there tasks on the critical path that should not be there? A task is on the critical path if it directly contributes to the duration of the project. Removing a task from the critical path will shorten the overall project.

- Click the critical path icon  to highlight in red the tasks that are on the critical path.



In this example, the "Paper to printers" task is on the critical path, but actually it could be done in parallel with the other tasks. The printing task is overshooting its deadline (green arrow), hence the red exclamation mark indicator. Taking the "Paper to printers" task off the critical path reduces the overall duration of the project and meets the deadline for completion of printing:



Redefining a 'Finish to Start' relationship to either a 'Finish to Finish' or a 'Start to Start' relationship is also a useful way of taking a task off the critical path.

## Creating reports

When working in the Gantt view, you can create a number of HTML reports from your project plan, such as Project Summary, Top Level Tasks, Critical Tasks, Tasks in Progress and so on.

- Choose **File | Export to | HTML Project Reports**.
- Choose a folder for the reports. OpenMind creates a sub-folder named 'GanttHtmlExport' in the folder you specify.
- Click the link of the report you want to view.

## Exporting a project plan

All the export methods are available when working on a project plan. The export methods that are particularly relevant to project plans are the following:

**Export to HTML:** Choosing this export method from the Gantt view lets you create a number of different HTML reports, such as Top Level Tasks, Critical Tasks, Tasks in Progress and so on. See "Creating reports" for more information. Choosing this export method from any other view lets you export your project plan as a standard web site. See "Exporting to HTML" for more information.


**Export to Microsoft Outlook:** This allows you to export your project plan as a series of tasks in the Outlook folder of your choice. For more information, see "Exporting to Microsoft Outlook".

**Export to Microsoft Project:** This allows you to take advantage of Microsoft Project's advanced project management capabilities to develop your project plan further. See "Exporting to Microsoft Project" for more information.

**Export to XML:** This method lets you export your project plan in two different XML formats, namely OpenMind XML and Microsoft Project XML. For more information, see "Exporting to XML".

# Printing a project plan

You can print a project plan in one of the following ways:

- Click the **Print** icon , or
- Choose **File | Print**, or
- Press **Ctrl + P**.

OpenMind enables you to spread your printout on several pages, which is very useful in the case of project plans. Increasing both horizontal and vertical page spread values, for instance, will allow you to create a legible printout of your entire plan, spread over several pages.

For a full description of the printing options, see "Printing a Mind Map".

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# Spellchecking

## Using the Spellchecker

OpenMind allows you to find and correct spelling errors in your entire document as well as in the currently selected element. The OpenMind Spellchecker is able to detect misspelled words and automatically correct common misspellings in the following elements:

- Branch names
- Floating comments
- Pop-up comments
- Text notes
- Object names

In addition to looking up words in its own dictionaries, the Spellchecker also references **custom dictionaries** to determine whether a particular word is correctly spelt or not. You can customize these dictionaries by adding, replacing or deleting words.

The Spellchecker also uses an **auto-correct list** to correct common mistakes automatically. Again, you can customize this list by adding, replacing or deleting word pairs.

Finally the Spellchecker allows you to spell check your documents in **several languages**, including American and British English, French, German, Italian, Spanish, Dutch and Danish.

## Spellchecking as you type

By default, OpenMind checks for spelling errors as you type, underlining in red any mistakes found.

You have the option of correcting the mistake straight away by right-clicking the misspelled word.

This opens the local menu, in which you can choose any of the following commands:

- **Corrections**

This lets you choose one of the suggestions listed, which then replaces the misspelled word.

- **Ignore All**

Choose this command to accept without change the currently highlighted occurrence of the word and all other such occurrences in the document and any other document opened during this OpenMind session.

- **Add to Dictionary**

Choose this command to add the underlined word to your default custom dictionary, thereby making it a valid word which the Spellchecker will no longer report as a mistake. See the topic "Spellchecking options" for more information on custom dictionaries.

- **AutoCorrect**

This lets you choose one of the suggestions listed. In addition, the misspelled word and its corrected equivalent will be added to the AutoCorrect list. This means that whenever you type this misspelled word in the future, it will be automatically replaced by its corrected equivalent. See the topic "Spellchecking options" for more information on the AutoCorrect list.

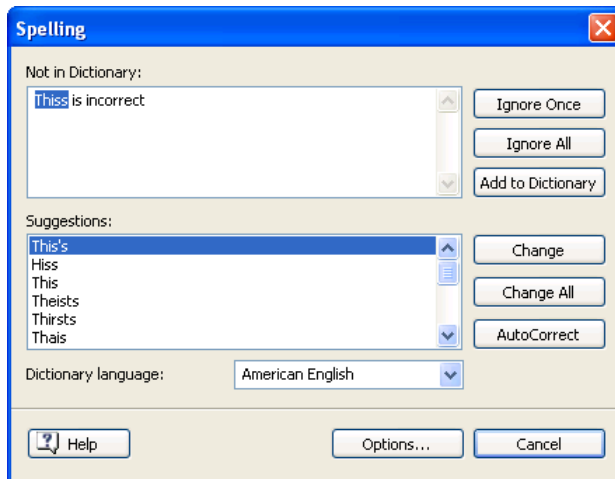
- **Spelling**

This opens the Spelling dialog, which allows you to spell check the entire selected element.

## Spellchecking the document

➤ Choose **Tools | Spellcheck Document** or press **F7**.

OpenMind goes through your document, examining branch names, floating comments, pop-up comments, text notes and object names for spelling mistakes. As soon as it detects a spelling mistake in one of these elements, OpenMind selects the element containing the mistake and opens the Spelling dialog.



The top field shows the phrase containing the misspelling, with the first misspelled word highlighted. The bottom field shows a list of suggestions from which you can choose an alternative spelling for the highlighted word.

You can choose one of the following options:

- **Ignore Once**

This will accept without change the currently highlighted occurrence of the word.

- **Ignore All**

This will accept without change the currently highlighted occurrence of the word as well as any other such occurrences during the entire OpenMind session.

- **Add to Dictionary**

This will add the misspelled word to your default custom dictionary.

- **Change**

If you have edited the misspelled word in the top field, this replaces it with the edited word. Otherwise the misspelled word is replaced by the alternative spelling chosen in the Suggestions field. Only this occurrence of the misspelled word is corrected. If you also want all following occurrences of the word replaced, click Change All.

- **Change All**

If you have edited the misspelled word in the top field, this replaces it with the edited word. Otherwise the misspelled word is replaced by the alternative spelling chosen in the Suggestions field. This replaces all the occurrences of the misspelled word in the entire document.

- **AutoCorrect**

This replaces the misspelled word by the alternative spelling chosen in the Suggestions field. In addition, the misspelled word and its corrected equivalent are added to the AutoCorrect list.

- **Dictionary language**

This lets you choose a different language for the Spellchecker to use to check your document.

- **Options**

This opens the Spell Checking Options dialog, which lets you set various options to control the way the spell checking is done. See the topic "Spellchecking options" for a full description of this dialog.

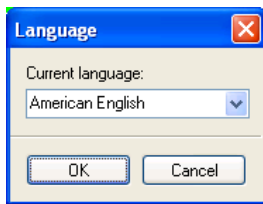
## Spellchecking the currently selected element

- Choose **Tools | Spellcheck Selection** or press **Ctrl + F7**.

OpenMind goes through the currently selected element, looking for spelling mistakes. As soon as it detects a spelling mistake, OpenMind selects the phrase containing the spelling error, highlights the error and opens the Spelling dialog described above.

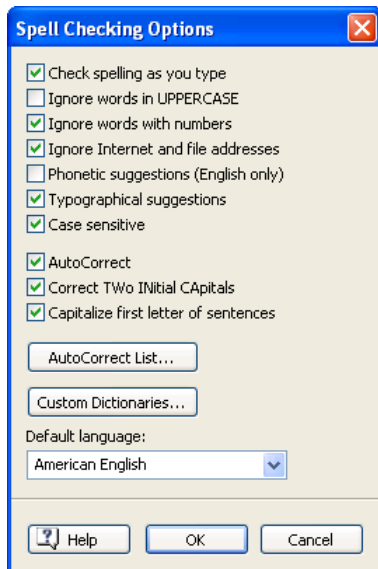
## Choosing a different dictionary

- Choose **Tools | Language** and select the language dictionary you would like to use to spell check your document.



## Spellchecking options

This dialog contains various options which you can set to determine the type of errors reported by the Spellchecker.



**Check spelling as you type:** If you disable this option, the misspelled words will not be automatically underlined in red as you type them. You will need to use the Spell Check commands to spell check your Mind Map at a later stage.

**Ignore words in uppercase:** When enabled, this option causes any word written entirely in upper case to be ignored by the Spellchecker and skipped. It is useful to keep this option enabled if your document contains many acronyms.

**Ignore words with numbers:** When enabled, this option causes any word containing numbers to be ignored by the Spellchecker and skipped. It is useful to keep this option enabled if your document contains many words or symbols including numbers, such as Q4.

**Ignore Internet and file addresses:** When enabled, this option causes any words that appear to make up an Internet domain name, a URL or an email address to be ignored and skipped.

**Phonetic suggestions (English only):** When enabled, this option causes suggestions to be made on the basis of their phonetic similarity to the misspelled word. This option tends to improve suggestions for badly misspelled words.

**Typographical suggestions:** This is the default option. It causes suggestions to be made on the basis of the similarity of their spelling to that of the misspelled word. Note that the Spellchecker does not offer suggestions if you disable both this option and the 'Phonetic suggestions' option.

**Case sensitive:** When enabled, this option causes the Spellchecker to distinguish between capitalized and non-capitalized letters. The word "europe" for instance would be considered as a mistake. If you disable this option, "europe" and "Europe" would be considered identical and both regarded as correct.

**AutoCorrect:** If you disable this option, even if a misspelled word is included together with its correct equivalent in the AutoCorrect list, the misspelled word will not be automatically replaced by its equivalent.

**Correct two initial capitals:** If you type the first two letters of a word in upper case, this option causes the 2nd letter to be automatically converted from upper case to lower case. The word "EUrope" for instance would be automatically replaced by "Europe".

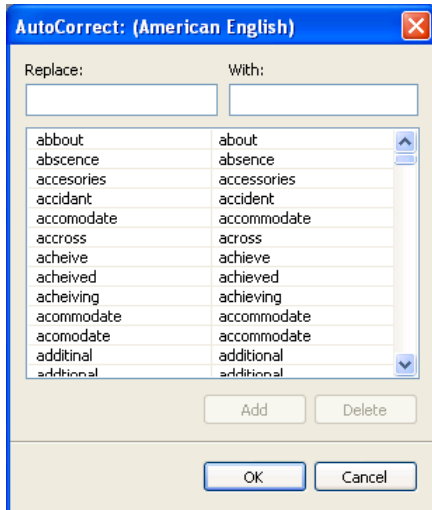
**Capitalize first letter of sentences:** Automatically converts the 1st letter of a sentence to upper case.

You can also click **AutoCorrect List** or **Custom Dictionaries** to open the corresponding dialogs. Both dialogs are described below.

**Default language:** This lets you choose the default language which you want the Spellchecker to use to check your documents.

## AutoCorrect list

As well as pre-defined standard auto-corrections, this list contains all the misspelled words which you have corrected by using the AutoCorrect feature described above. Each line is made up of the originally misspelled word in the 'Replace' column on the left, together with the suggestion you chose to replace it with in the 'With' column on the right.



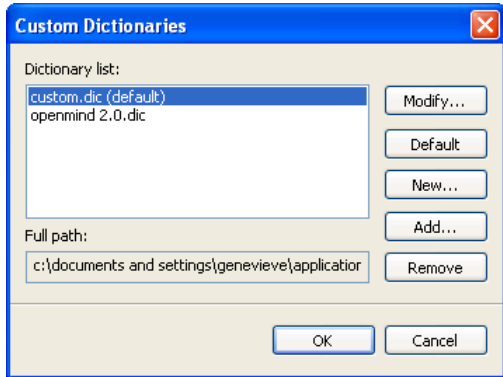
If you work with different languages, the Spellchecker maintains one such AutoCorrect list per language.

You can customize the AutoCorrect list in various ways:

- You can add new AutoCorrect pairs by typing a commonly misspelled word in the 'Replace' field followed by its correct equivalent in the 'With' field and clicking **Add**.
- You can replace the correct equivalent of a misspelled word by selecting this misspelled word in the 'Replace' list, typing the new equivalent in the 'With' field and clicking **Replace**.
- You can delete an AutoCorrect pair by selecting the corresponding row in the list and clicking **Delete**.

## Custom dictionaries

This dialog contains a list of all your custom dictionaries as well as several buttons allowing you to customize them.



Custom dictionaries contain all the words reported as misspelled by the Spellchecker that you decided to accept as valid by clicking Add to Dictionary during spell checking. This means that a word included in any of the custom dictionaries is no longer reported as a misspelling by the Spellchecker.

The Custom Dictionaries dialog allows you to:

- Modify one of the custom dictionaries by clicking it, then selecting **Modify**. You can then add new words to the dictionary or remove existing words.
- Set one of the custom dictionaries as default by selecting it and clicking **Default**. Any new word you now accept as valid by clicking Add to Dictionary while spell checking will be automatically added to this dictionary.
- Create a new custom dictionary by clicking **New**.
- Add an existing custom dictionary by clicking **Add**.
- Remove an existing custom dictionary by selecting it and clicking **Remove**.

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# Exporting

## Introduction

OpenMind lets you export your document to many different applications, including Microsoft® Word, Microsoft® PowerPoint, Mediator, Microsoft® Outlook and Microsoft® Project. You can also export it to HTML or XML.

These export possibilities mean that you can use OpenMind to brainstorm your ideas, organize them visually and collect all the associated material, and then convert the map into the format you require. In this way, you immediately obtain a professional-looking document, which you can process further if necessary using tools such as FrontPage® (for HTML export), Microsoft® Word, Microsoft® PowerPoint, Microsoft® Project, MatchWare Mediator and so on.

Once you have exported your document and worked on it in one of these applications (for instance Word, PowerPoint, Mediator, Outlook or Project), you can re-import it back into OpenMind if necessary, while preserving much of the work done in the external application. The branch structure, layout and contents of the original Mind Map is also preserved as far as possible. For more information about importing a document into OpenMind, see the "Importing" section of this documentation.

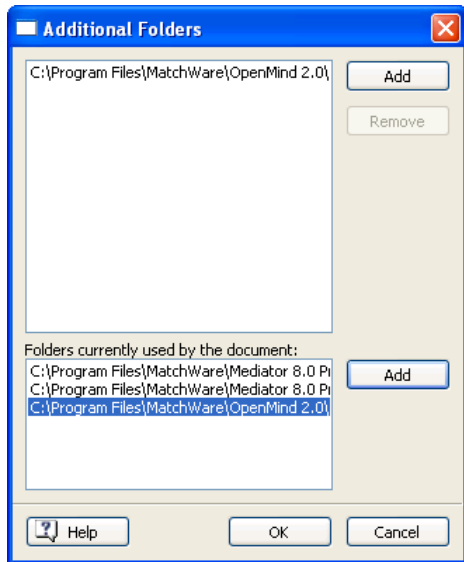
The export options offered by OpenMind are all described in detail in the next topics.

## Additional folders

When you export your document to one of the export formats available, OpenMind automatically includes and references all the files you have used in the document.

If however you have created a particular folder structure for the external files used by your document, you can ensure that OpenMind preserves this structure when exporting to HTML or using the Pack & Go feature by specifying the list of folders that need to be included in the export folder as follows:

- Choose **Tools | Additional Folders** to open the following dialog:



- Click the **Add** button and select the first folder you wish to include in the export.
- Repeat for all the folders you would like to include.

Note that you can enlarge the dialog by dragging one of its corners if the folder paths are not fully visible.

In the exported version of your document, all references to external files are automatically modified to point to the correct output folder.

# Exporting to Microsoft Word

This export method lets you export your Mind Map as a Microsoft® Word document. If for instance you have created a Mind Map to brainstorm the structure of a report, this export mode provides you with a ready-made outline of your map as a Word document, which you can then turn into a fully blown report by working directly in Word.

If after working for some time on your Word document, you realize you need to review the structure of your map in OpenMind before doing any further work in Word, you can re-import it back into OpenMind without losing any new text or formatting you might have added in Word. See "Importing from Microsoft Word" for more information.



You must have Microsoft Word installed on your computer in order to use this export mode. OpenMind supports all Microsoft Word versions from 2000 onwards.

Each branch is exported as a paragraph heading at the relevant level, in other words Heading 1 for main branches, Heading 2 for sub-branches, Heading 3 for sub-sub-branches and so on, using hierarchical numbering (unless you disable it in Advanced Export). Attached objects and inserted elements are listed below the heading.



As Microsoft Word only supports 9 heading levels, any OpenMind branch deeper than 9 levels is exported as Heading 9.

By default, OpenMind automatically includes an overall picture of your map on the first page of the document, followed by a Table of Contents.



*If you add new headings to the document when working directly in Microsoft Word, you can easily update this Table of Contents by right-clicking it and choosing Update Field in the Word local menu. If you don't need the Table of Contents, you can delete it by selecting it and pressing Delete.*

The branches of the map are exported to Word in the order in which they are displayed in the Mind Map view, starting from the top right in a clockwise direction.

You can however exclude entire branches and sub-branches from the export by disabling their 'Include branch and subs in export' property in the Properties dialog.

Include branch and subs in export ☐

## Export modes

There are two export modes available:

- **Quick Export**

The Quick Export mode allows you to export your map quickly using the OpenMind defaults or the last Advanced Export settings you chose if you have already used that mode.

- **Advanced Export**

The Advanced Export mode allows you to choose a template for your Word document. You can also specify the elements of your map to be exported and how they should be treated.

The export settings you choose in Advanced Export are saved with the OpenMind document and re-used next time you export your map using Quick Export or Advanced Export. This means you do not have to redefine them every time you make a small alteration to your map and want to export it again to Word.



When exporting a Mind Map to Word, OpenMind inserts bookmarks in the Word document to keep track of how the various elements should be re-imported back into OpenMind if you choose to do so. You should take care not to delete these bookmarks, which are hidden by default. To make them visible while you work, check 'Show bookmarks' in the View tab of the Tools | Options dialog in Word.

## Relationship between OpenMind and Word elements and objects

The following table indicates how OpenMind treats the various inserted elements and attached objects contained in your map when exporting it to Microsoft Word.

OpenMind element	Exported to Word as
Branch name	Heading at relevant level with hierarchical numbering (3 levels by default)  Hierarchical numbering can be disabled in Advanced Export.
Text note	Text inserted under the branch heading
Branch picture	Picture inserted under the branch heading
Floating picture	<ul style="list-style-type: none"><li>• If connected to a branch, inserted under the branch heading</li><li>• If not connected to a branch, not exported</li></ul>
Floating comment	As for Floating picture
Pop-up comment	Word comment on the branch heading
Branch connection	Cross-reference prefixed by "See" under the start branch heading, pointing to the end branch heading

OpenMind object	Exported to Word as
Text file	Hyperlink
Picture file	Picture inserted in the Word document  In Advanced Export, you can choose instead to insert the file as a hyperlink.
Video file	Hyperlink  In Advanced Export, you can choose instead to insert the file directly in the Word document.
Sound file	Hyperlink  In Advanced Export, you can choose instead to insert the file directly in the Word document.
Button	Hyperlink
Hyperlink	Hyperlink
Flash file	Hyperlink

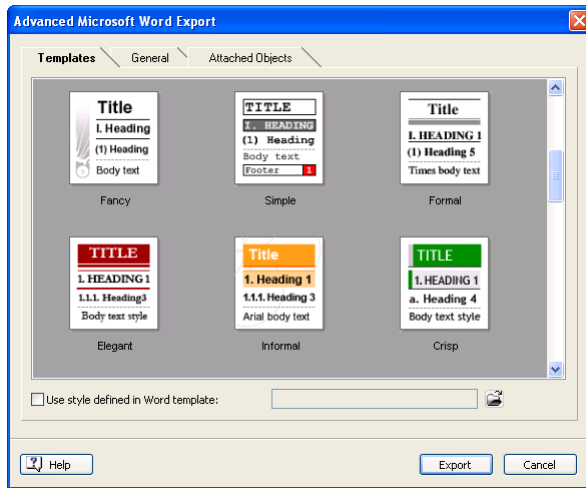
## Using Quick Export

- Choose **File | Export to Microsoft Word | Quick Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.
- Specify a folder and a file name for the new Word document in the Save As dialog.

OpenMind starts exporting your Mind Map to Microsoft Word. Once export is complete, you can start working directly in Word on your new document.

## Using Advanced Export

- Choose **File | Export to Microsoft Word | Advanced Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.
- Choose your preferred template in the **Templates** tab of the Advanced Microsoft Word Export dialog or browse for one of the templates supplied with Microsoft Word or one of your own templates.

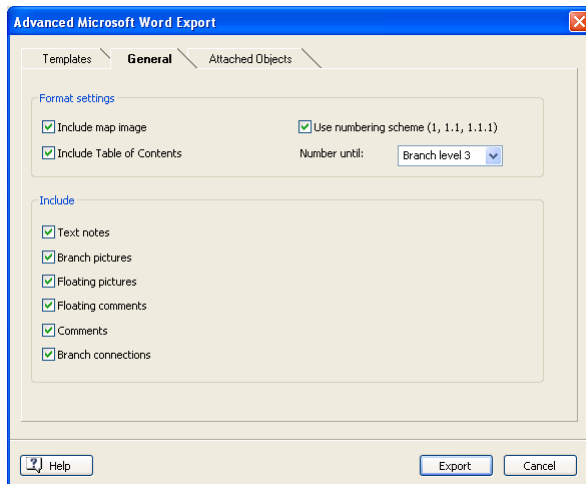


The APA and MLA templates supplied with OpenMind are designed to help you format your documents according to the APA (American Psychological Association) and MLA (Modern Language Association) standards, commonly used in the United States. The MLA template contains further styles which you can use when finalizing your document, such as "block quotes" and "works cited".



You can easily define your own Word template to be used when exporting from OpenMind. All you need to do is to define the Title style as well as styles for Headings 1 to 9 and save the document as a Word template (.dot). You must also make sure the template does not contain any text.

- In the **General** tab, choose the required general export settings and specify which elements of your map you want to export.

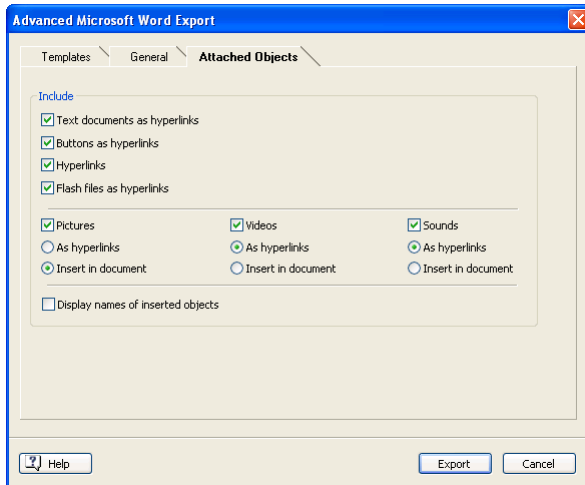




If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

Include in export ☒

- Choose the required export settings for any attached object in the **Attached Objects** tab.



Note that if you choose 'Insert in document' for Videos and Sounds, these objects will only be embedded directly in the Word document if Word supports their extension type.

- Click **Export**.
- Specify a folder and a file name for the new Word document in the Save As dialog.

As for Quick Export, OpenMind starts exporting your Mind Map to Microsoft Word as a new document and displays a message once the export is complete.

# Exporting to Microsoft PowerPoint

This export method lets you export your Mind Map as a Microsoft® PowerPoint presentation. If for instance you have created a Mind Map to brainstorm the structure of a business presentation, this export mode allows you to transfer it to PowerPoint in order to refine it further before delivering it to your audience.

If after working for some time on your PowerPoint presentation, you realize you need to review the structure of your map in OpenMind before doing any further work in PowerPoint, you can re-import it back into OpenMind without losing the layout work done in PowerPoint. See "Importing from Microsoft PowerPoint" for more information.



You must have Microsoft PowerPoint installed on your computer in order to use this export mode. OpenMind supports all Microsoft PowerPoint versions from 2000 onwards.

The root makes up the first slide, with the root label as the slide heading, followed by a list of the main branches.

Each branch is then exported as a slide, with any sub-branches listed below the slide heading. Inserted elements and hyperlinks are placed on the right side or at the bottom of the slide.

The branches of the map are exported to PowerPoint in the order in which they are displayed in the Mind Map view, starting from the top right in a clockwise direction.

You can however exclude entire branches and sub-branches from the export by disabling their 'Include branch and subs in export' property in the Properties dialog.

Include branch and subs in export ☐

## Export modes

There are two export modes available:

- **Quick Export**

The Quick Export mode allows you to export your map quickly using the OpenMind defaults or the last Advanced Export settings you chose if you have already used that mode.

- **Advanced Export**

The Advanced Export mode lets you choose a PowerPoint template for your presentation. It also allows you to specify the elements of your map to be exported and how they should be treated.

The export settings you choose in Advanced Export are saved with the OpenMind document and re-used next time you export your map using Quick Export or Advanced Export. This means that you do not have to redefine them every time you make a small amendment to your map and want to export it again to PowerPoint.

## Relationship between OpenMind and PowerPoint elements and objects

The following table indicates how OpenMind treats the various inserted elements and attached objects contained in your map when exporting it to PowerPoint.

OpenMind element	Exported to PowerPoint as
Branch name	Slide heading
Text note	Text object  Due to PowerPoint limitations, if the text note contains tables or bulleted lists, these elements will be exported as regular text. Similarly, if the text note contains a hyperlink, the formatting of the hyperlink will be preserved, but not the link itself.
Branch picture	Picture on the right of the slide  In Advanced Export, you can choose instead to insert the branch picture as a hyperlink.
Floating picture	<ul style="list-style-type: none"> <li>• If connected to a branch, inserted as a picture on the right or at the bottom of the slide</li> <li>• If not connected to a branch, not exported</li> </ul>
Floating comment	<ul style="list-style-type: none"> <li>• If connected to a branch, inserted on the slide as a PowerPoint comment</li> <li>• If not connected to a branch, not exported</li> </ul>
Pop-up comment	PowerPoint note in the bottom Notes pane
Branch connection	Hyperlink in a text object
OpenMind object	Exported to PowerPoint as
Text file	Hyperlink in a text object
Picture file	Picture on the right or at the bottom of the slide  In Advanced Export, you can choose instead to insert the file as a hyperlink in a text object

Video file	Hyperlink in a text object  In Advanced Export, you can choose instead to embed the video directly on the slide
Sound file	Hyperlink in a text object
Button	Hyperlink in a text object
Hyperlink	Hyperlink in a text object
Flash file	Hyperlink in a text object

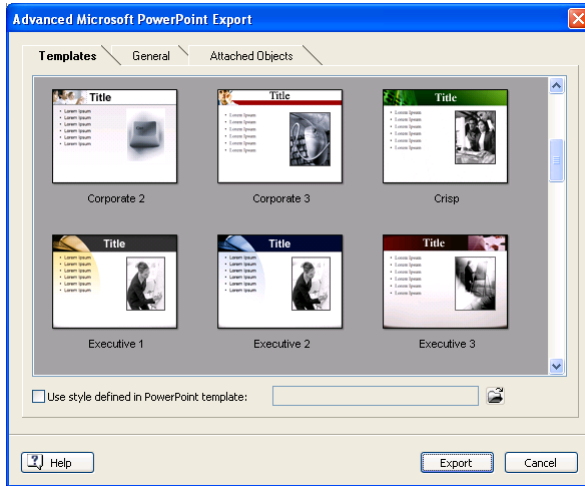
## Using Quick Export

- Choose **File | Export to Microsoft PowerPoint | Quick Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.

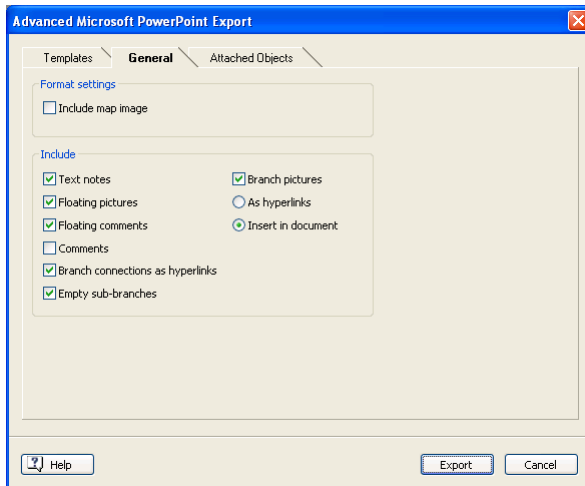
OpenMind starts exporting your Mind Map to Microsoft PowerPoint as a new presentation, and displays a message once the export is complete. You can then start working directly in PowerPoint on your new presentation and save it with the name of your choice.


## Using Advanced Export

- Choose **File | Export to Microsoft PowerPoint | Advanced Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.
- Choose your preferred template in the **Templates** tab of the Advanced Microsoft PowerPoint Export dialog or browse for one of the templates supplied with Microsoft PowerPoint.



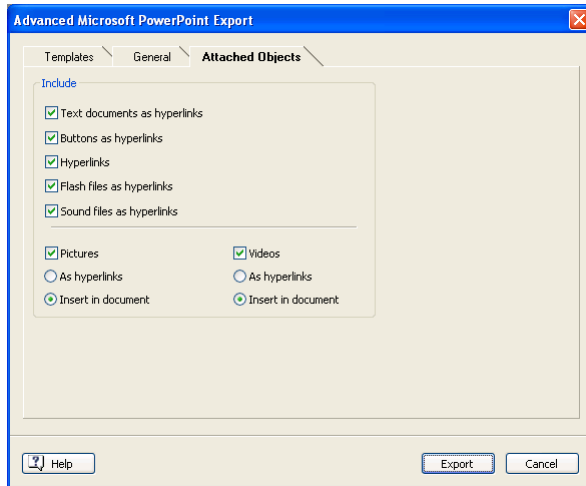
- In the **General** tab, choose the required general export settings and specify which elements of your map you want to export.



 If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

Include in export ☒

- Choose the required export settings for any attached object in the **Attached Objects** tab.



- Click **Export**.

As for Quick Export, OpenMind starts exporting your Mind Map to PowerPoint as a new presentation, and displays a message once the export is complete.

# Exporting to Microsoft Outlook

OpenMind lets you export your document to Microsoft® Outlook as tasks in an Outlook task folder. If, for instance, you have brainstormed a task list in the Mind Map view or the Outline view, you can then export it to Microsoft Outlook if you prefer to track tasks from there.

You can export your document to Microsoft Outlook even if the branches do not contain dates or other task information. This lets you brainstorm the task names in OpenMind and only add the rest of the task information once the document is transferred to Outlook.

OpenMind also lets you import task lists from Microsoft Outlook. For more information, see "Importing from Microsoft Outlook".



You must have Microsoft Outlook 2000 or above installed on your computer in order to use this export mode.

## Procedure

- Choose **File | Export to Microsoft Outlook | Export as new tasks**.



If you have already exported the OpenMind document to Outlook previously, or if you have created the OpenMind document by importing an Outlook task list, you will be given the option of synchronizing the OpenMind document with the Outlook folder you specified at that time rather than creating new tasks. See below for more information on this procedure.

- In the Outlook dialog that opens, select the Outlook task folder or sub-folder where you want to export the tasks.
- In the next dialog, specify whether you want to export all the tasks (i.e. branches) of your OpenMind document, or only those that contain dates.

OpenMind exports your document to Microsoft Outlook as a series of tasks in the task folder you specified, and displays a message once the export is complete.



You can exclude any branch from the export by disabling its 'Include branch and subs in export' property in the Properties dialog.

Include branch and subs in export ☐

## Limitations

When an OpenMind branch contains sub-branches, only the sub-branches are exported. Parent branches are not exported.

Only the elements of the OpenMind document that are supported in Microsoft Outlook are exported:

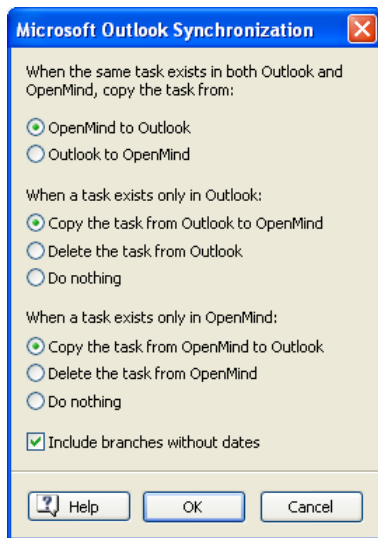
- Task names (i.e. branch names), dates, durations, priority and completion values are exported in the Outlook task list.
- Pop-up comments are exported as Outlook task notes.
- Text notes are not exported.
- Other elements of the OpenMind document that are not supported by Microsoft Outlook (such as branch pictures, icons, attached objects and so on) are not exported.

## Synchronizing between OpenMind and Microsoft Outlook

Once you have exported an OpenMind task list to Microsoft Outlook, or conversely once you have imported an Outlook task list into OpenMind, you can continue making changes to the tasks in OpenMind or in Outlook. You can even continue working on the task list in both applications independently. If at some point you want to re-align the two versions to make sure they contain identical data, you can use OpenMind's synchronization feature.

➤ Choose **File | Export to Microsoft Outlook | Synchronize**.

The Microsoft Outlook Synchronization dialog opens.



In the top part of the dialog, you specify what should happen when the same task exists in both the Outlook task folder and your OpenMind document in two different forms. You have two choices:

- Copy the task from the OpenMind document to the Outlook folder (thereby overwriting any other task information associated with the task in the Outlook folder with the OpenMind version)
- Copy the task from the Outlook folder to the OpenMind document (thereby overwriting any other task information associated with the task in the OpenMind document with the Outlook version)

The middle part of the dialog lets you specify what should happen if a task existing in the Outlook folder cannot be found in the OpenMind document. You have three choices:

- Copy the task from the Outlook folder to the OpenMind document
- Delete the task from the Outlook folder, so that it does not exist any longer in either version
- Leave things as they are

Finally the bottom part of the dialog lets you deal with the opposite situation, i.e. when a task exists only in the OpenMind document.

You can exclude the branches of your OpenMind document that do not contain dates from the synchronization by checking the relevant option at the bottom of the dialog.

# Exporting to Microsoft Project

OpenMind lets you export your document as a Microsoft® Project plan. This may be useful when, for instance, having built and fine-tuned a project plan in the OpenMind Gantt view, you now want to take advantage of Microsoft Project's advanced project management capabilities.

All the task and scheduling information contained in the OpenMind project plan is exported to Microsoft Project.



This export method is only available when you are working on a project plan. See "Inserting task information" and "Using the Gantt view" for more information about project plans.

OpenMind also lets you import documents from Microsoft Project. For more information, see "Importing from Microsoft Project".



OpenMind does not support versions of Microsoft Project prior to 2003. You need to have Microsoft Project installed on your computer in order to use this export method.



*You can also export an OpenMind project plan to the Microsoft Project XML format. The advantage of this method is that you do not need to have Microsoft Project installed on your machine. See "Exporting to XML" for more information.*

## Procedure

- Choose **File | Export to Microsoft Project**.
- Choose a file name and a destination for the exported file and click OK.

OpenMind starts exporting your document to Microsoft Project as a new project plan, and displays a message once the export is complete.

## Limitations

Only the elements of the OpenMind project plan that are supported by Microsoft Project are exported:

- Branch pictures, icons, attached objects and so on are not exported.
- Pop-up comments are exported as Microsoft Project task notes.
- OpenMind text notes are not exported.



The property 'Include branch and subs in export' of the Properties dialog is ignored when exporting to Microsoft Project.

# Exporting to HTML: Overview

This export method lets you export your Mind Map as a set of web pages in HTML format. It allows you to obtain a professional-looking web site very quickly, without having to worry about web design techniques.



Although you do not need to have a web browser installed on your machine in order to use this export method, you obviously need one to view the web site created. Among the web browsers supported by the OpenMind HTML export are Internet Explorer version 5.0 or above, Firefox 1.0.4 and above and Opera 8.02 and above.

The exported HTML pages are placed in a sub-folder named 'OMHtmlExport' in the folder of your choice.

All the pictures you have included in your document are placed in a sub-folder of 'OMHtmlExport' named 'img', whereas the picture files used by the OpenMind export template are placed in a sub-folder named 'omfiles'. All other external files used in your document are placed directly in 'OMHtmlExport'. As it creates the HTML pages, OpenMind automatically modifies all the references to external files contained in your document so that they point to the correct output folder.

Each branch, including the root, is exported as a HTML page of the same name as the branch, and each page contains a menu of all its sub-branches and optionally, a menu of the main branches.

By default, a Home button taking you back to the root page is included on each HTML page. A Site Map button containing a link to an interactive picture of your entire map and a 'You are here' locator showing you the complete path from the root are also included on each HTML page.

Unless you define a different arrangement in the Export Wizard, all the objects attached to a branch are exported below each other and left aligned on the page.

The branches of the map are exported to HTML in the order in which they are displayed in the Mind Map view, starting from the top right in a clockwise direction.

You can however exclude entire branches and sub-branches from the export by disabling their 'Include branch and subs in export' property in the Properties dialog.

Include branch and subs in export ☐

Note that if you want a specific description to appear when the user hovers a picture from your map in the browser, you can enter this description in the Name property of the relevant picture (root picture, branch picture, floating picture or attached picture file). This description is then converted by OpenMind to an HTML Alt tag during the export.

## Export modes

There are two export modes available:

- **Quick Export**

The Quick Export mode allows you to export your map quickly using the OpenMind defaults or the last export settings you chose.

- **Export Wizard**

The HTML Export Wizard lets you choose from a number of professional ready-made templates with various navigation layouts which you can customize to your liking. You can also specify the elements of your map to be exported and how they should be treated. Moreover, if you have created a particular folder structure for the external files used by your document, you can ensure that OpenMind preserves this structure when exporting to HTML by specifying the list of folders that need to be included in the export folder.

The export settings you choose are saved with the OpenMind document and re-used next time you export your map to HTML. This means that you do not have to redefine them every time you make a small alteration to your map.

## Relationship between OpenMind and HTML elements and objects

The following table indicates how the various OpenMind elements and objects are exported on the HTML page.

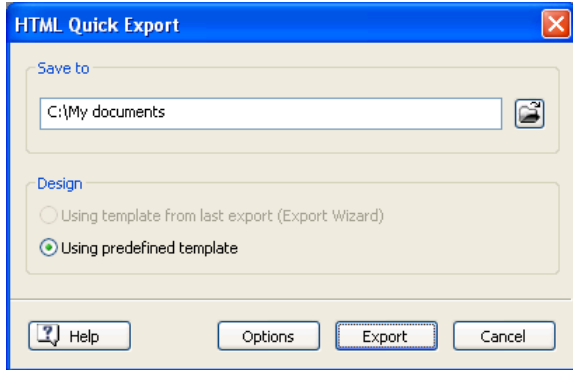
OpenMind element	Exported to HTML as
Branch name	Page title
Text note	Inserted as text
Branch picture	Inserted as picture
Floating picture	<ul style="list-style-type: none"><li>• If connected to a branch, inserted as a picture</li><li>• If not connected to a branch, not exported</li></ul>
Floating comment	<ul style="list-style-type: none"><li>• If connected to a branch, inserted as text</li><li>• If not connected to a branch, not exported</li></ul>
Pop-up comment	Inserted as text
Branch connection	Depending on your choice, inserted as a button link or hypertext link

<b>OpenMind object</b>	<b>Exported to HTML as</b>
Text file	Depending on your choice, inserted as a button link or hypertext link
Picture file	Inserted as a picture
Video file	Inserted as a Media Player object
Sound file	Depending on your choice, inserted as a button link or hypertext link
Button	Inserted as a button link
Hyperlink	Inserted as a hypertext link
Flash file	Inserted as a Flash file (embedded)

## Exporting to HTML: Quick Export

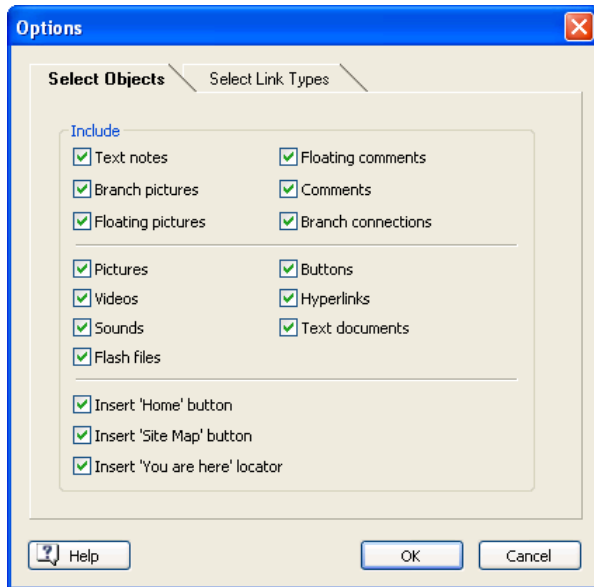
- Choose **File | Export to HTML | Quick Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.


The HTML Quick Export dialog appears.



- Choose a path for your new web site.  
OpenMind will create a sub-folder named 'OMHtmlExport' in the folder you specify, and place all the files making up your web site in this sub-folder.
- Choose whether to use:
  - The template you last used in the Export Wizard if you have already used that export mode for your map.
  - The MatchWare predefined export template (with top and side navigation menu)
- (optional) Click **Options** to define further export options:

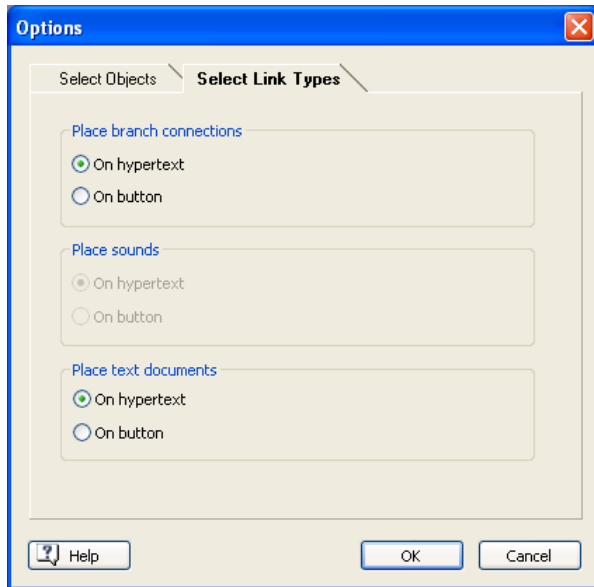
The **Select Objects** tab allows you to specify the elements of the map to include in the export.



 If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

Include in export ☒

The **Select Link Types** tab only appears if your map contains branch connections and/or attached sound files or text files. It lets you choose whether these elements should be placed on HTML hyperlinks or buttons.



➤ Click **Export**.

Once the export is completed, OpenMind displays a dialog giving you the choice of immediately viewing your web site in your default browser or uploading it to Internet using the MatchWare FTP Upload Manager. For more information on this tool, see "FTP Upload Manager".



To open your exported web site from within Windows Explorer at a later date, double-click the file index.htm in the sub-folder 'OMHtmlExport'.

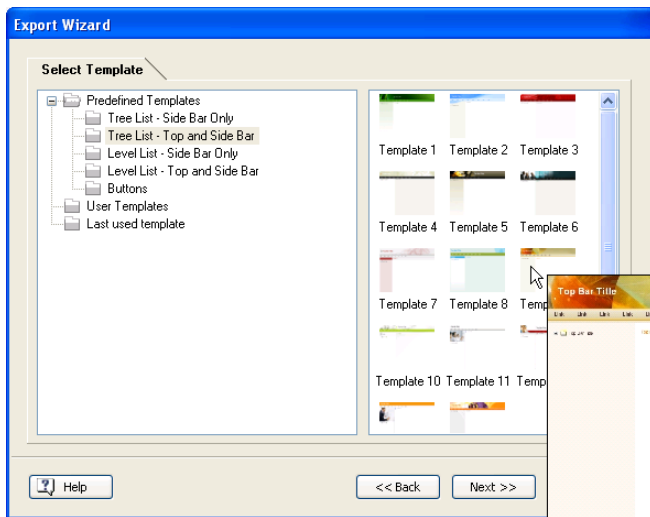
# Exporting to HTML: Export Wizard

- Choose **File | Export to HTML | Export Wizard**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click Next.

The Export Wizard now displays a series of dialogs, the first of which is the **Select Template** dialog.

## Selecting a template

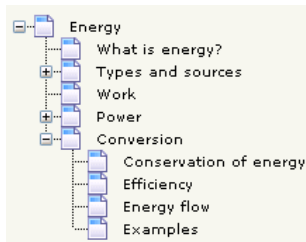
This dialog allows you to select a navigation layout for the pages of your web site.



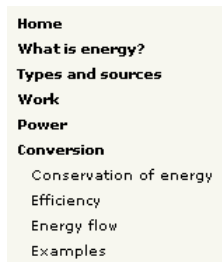
- **Predefined Templates:** This lets you choose one of the professional OpenMind export templates with ready-made top and side navigation.

These templates are available in the following navigation styles :

**Tree List:** With this design, the list of side links is shown as a tree whose levels you can expand and collapse as in Windows Explorer. All the pages of the web site are available from the Tree List.



**Level List:** With this type of navigation, you only see a maximum of three levels of links on the side: the current page, any pages at the level just above it, and any pages at the level just below it.



**Buttons:** In this design, the side bar contains a list of links, where each link represents a sub-branch of the branch corresponding to the current page.

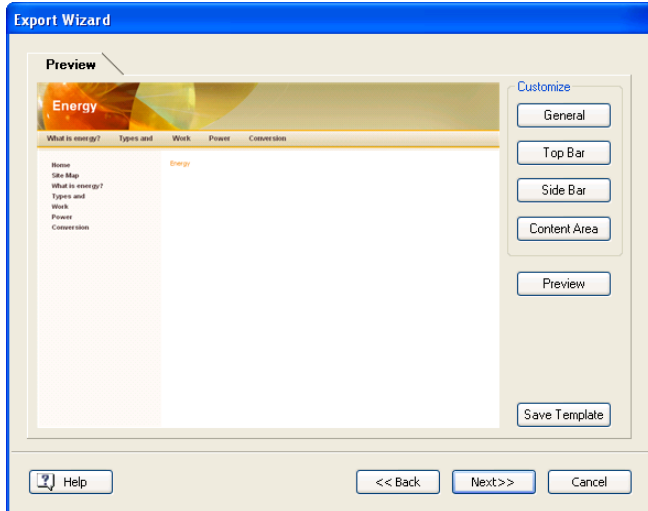
What is energy?	Types
Home	
Site Map	
Potential	
Kinetic	
Chemical	
Thermal	
Nuclear	
...other	

To see a larger preview of the templates shown on the right of the window, just place the mouse pointer over the relevant thumbnail. Note that you will be able to go back to this step of the wizard at any time to choose a different template if you are not satisfied with your original choice.

- **User Templates:** This lets you choose one of your own previously saved export templates. See further down for information on how to save your own export template.
- Select a template on the right and click Next.

## Preview

The Export Wizard opens the **Preview** dialog, which lets you customize the various areas of the navigation layout chosen in the first step.



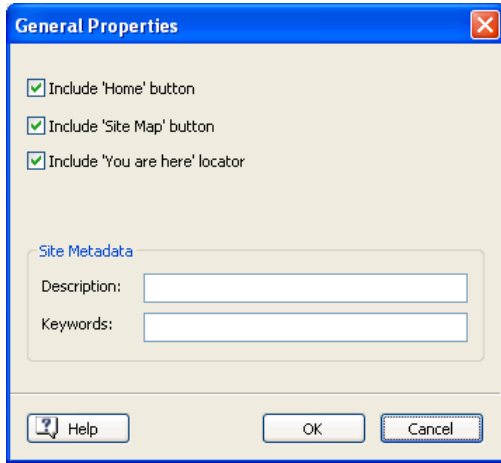
You can customize each area in turn by clicking the **Customize** buttons, namely:

- General
- Top Bar
- Side Bar
- Content Area

Feel free to experiment with the various customization options. At any time, you can obtain a full size preview of your design reflecting any changes made by clicking the Preview button. Note however that this Preview does not allow you to navigate the site.

### Customizing the General properties (optional)

- Click **General** in the Preview dialog.



This dialog gives you the following options:

**Include 'Home' button:** This inserts a Home hyperlink or button on each of your web pages, allowing you to return to the page corresponding to the root of your map in just one click.

This option is not available if you have chosen a Tree List design, as this design always allows you to return to the root of your map in one click. A 'Home' button is therefore superfluous in this case.

**Include 'Site Map' button:** This inserts a Site Map hyperlink or button on each of your web pages. Clicking it will display an interactive picture of the entire web site.

**Include 'Timeline' button:** This option is only available if you are exporting a document from the Timeline view. It inserts a Timeline button on each of your web pages. Clicking it will display an interactive representation of the timeline as shown in the Timeline view. For more information about working with timelines, see "Using the Timeline view".

**Include 'You are here' locator:** This inserts a dynamic link on each page of the web site to show the complete path from the root web page to that particular page.

You can also enter meta-tags for your web site as follows:

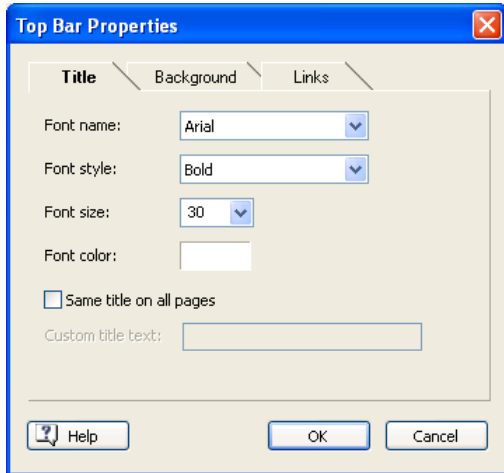
**Description:** Any text entered here will be inserted in the <description> tag of each of the HTML pages created.

**Keywords:** Similarly, any keywords entered here (separated by commas) will be inserted in the <keywords> tag of each of the HTML pages created.

### Customizing the Top Bar (optional)

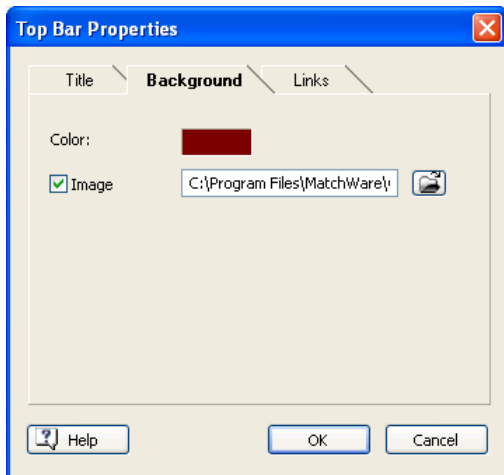
- Click the **Top Bar** button or double-click the top bar area in the Preview dialog.

The Top Bar Properties dialog opens on its **Title** tab.



By default, the title displayed on each web page is the branch name. Here you can change the font, attributes and color for this title or even enter your own title, which will be displayed on all the pages of the web site.

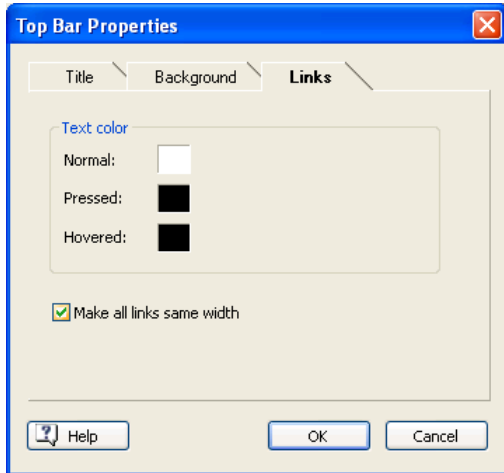
- Click the **Background** tab.




This tab lets you select a plain color or a different background picture for the top bar.

If you want to change the background picture, the best approach is to make a copy of the existing picture and edit its design to suit your requirements, making sure that the picture size stays unchanged so that it still fits the template.

- Click the **Links** tab.



 The Links tab is only available if the top bar of the template chosen contains buttons or hyperlinks.

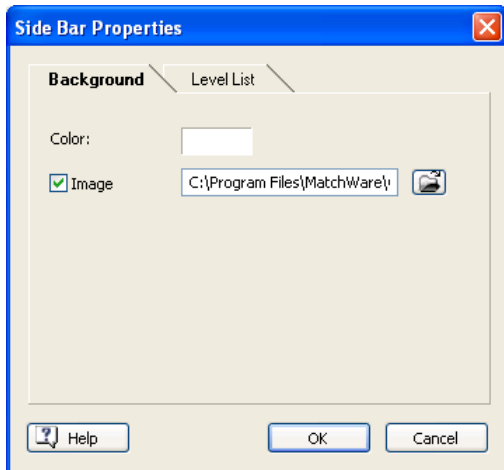
This tab lets you select different colors for the top bar links depending on their state, i.e. "Normal", "Pressed" (the link is clicked) or "Hovered" (the mouse pointer is placed on the link).

You can also choose to make all the links the same width, or have their width vary according to the length of their label.

### Customizing the Side Bar (optional)

- Click the **Side Bar** button or double-click the side bar area in the Preview dialog.

The Side Bar Properties dialog opens on its **Background** tab.



This tab lets you select a plain color or a different background picture for the side bar.

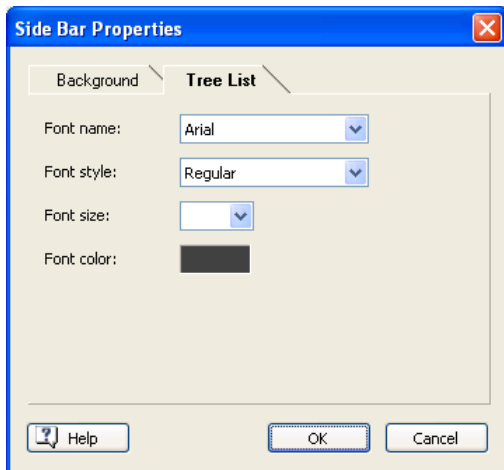
As for the top bar, the best approach if you want to change the background picture is to make a copy of the existing picture and edit its design to suit your requirements.

The second tab of the Side Bar Properties dialog varies depending on the type of navigation template you chose in the first screen of the Export Wizard. The three possibilities are:

- Tree list
- Level list
- Links

We will now look at each of these possibilities in turn.

### Tree List

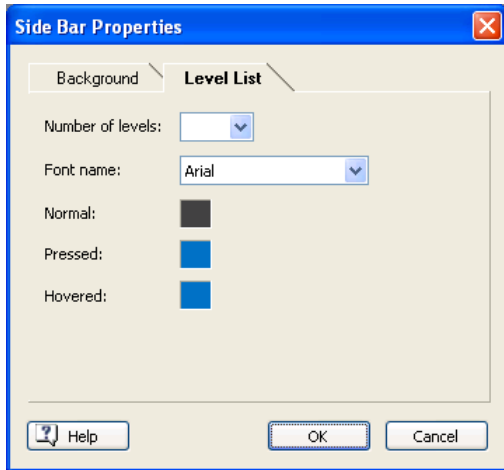


This is the tab displayed if you have chosen a Tree List design in the first step of the Export Wizard.

With this design, the list of side page links is shown as a tree whose levels you can expand and collapse as in Windows Explorer. All the pages of the web site are available from the Tree List.

This tab lets you modify the default font, attributes, size and color of the links.

## Level List

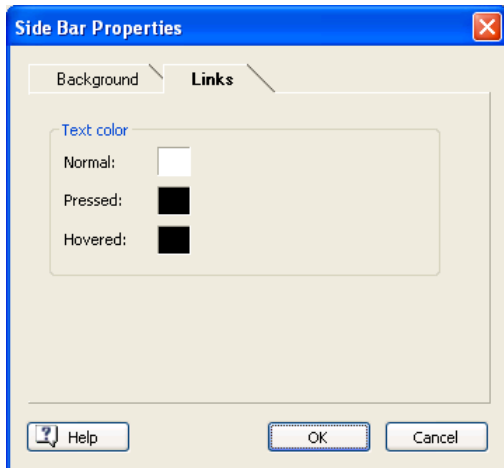


This tab is displayed if you have chosen a Level List design.

With this type of navigation, you only see a maximum of three levels of links on the side: the current page, any pages at the level just above it, and any pages at the level just below it.

The Level list tab lets you choose how many levels the list should show. You can also define the font and color of the links.

## Links



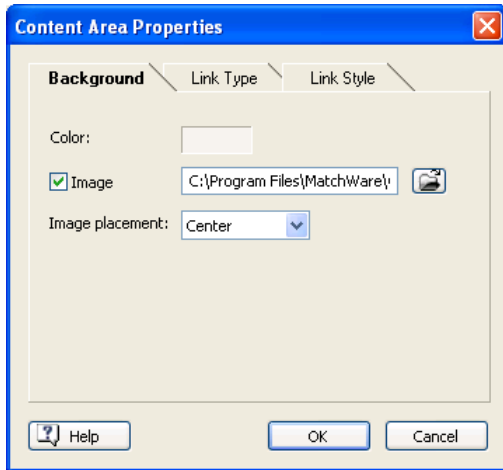
This tab is displayed if you have chosen a Buttons design in the first screen of the Export Wizard.

With this design, the side bar contains a list of links, where each link represents a sub-branch of the branch corresponding to the current page. The Links tab lets you select different colors for the side bar links depending on their state, i.e. "Normal", "Pressed" (the link is clicked) or "Hovered" (the mouse pointer is placed on the link).

### Customizing the Content Area (optional)

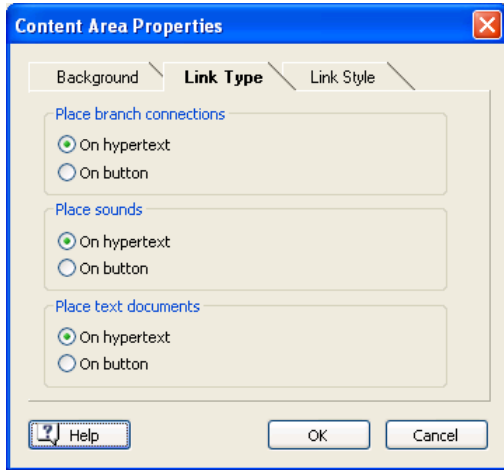
- Click the **Content Area** button or double-click the middle area in the Preview dialog.

The Content Area properties dialog opens on its **Background** tab.



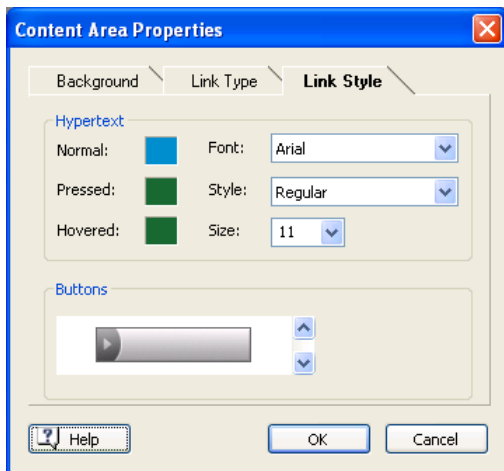
This tab lets you select a plain color or a different background picture for the body of the page. Feel free to experiment with the image placement options by checking the effect in the Full Size Preview.

- Click the **Link Type** tab.



If your map contains branch connections, sound files or attached text documents, this tab lets you decide whether you want to place these objects on hypertext links or on buttons.

- Click the **Link Style** tab.



This tab lets you choose styles for any buttons or hyperlinks contained in your map.

- Define the hypertext style required by selecting a font, attribute and size. You can also define different colors depending on the state of the hyperlink, i.e. "Normal", "Pressed" (the link is clicked) or "Hovered" (the mouse pointer is placed on the link).
- Scroll through the various buttons available to choose the type you like best.

## Previewing the customized template (optional)

- Click the **Preview** button in the Preview dialog to obtain a 800x600 real-time preview of your design reflecting any changes made so far.
- Check how your web site will look in different browser resolutions by resizing the window.

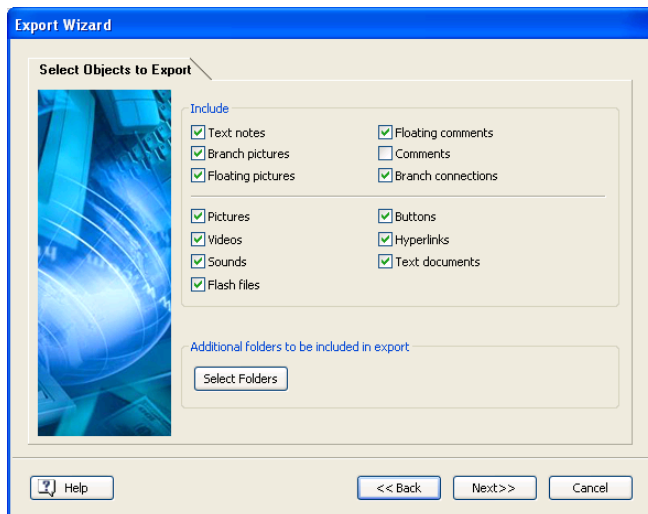
Reducing the window size might for instance cause the top buttons or hyperlinks to spread onto two rows. Conversely enlarging the window might cause them to arrange themselves on one row only.

## Saving the customized template (optional)

- You can save your customized export template for later use by clicking the **Save Template** button of the Preview dialog. The Save User Template dialog that opens contains a list of the export templates you have already saved. Enter the name of your new export template and click Save.
- Once you are satisfied with the design of all the page components, click Next.

## Selecting the objects to export

The Export Wizard now opens the **Select Objects to Export** dialog.



- Select the OpenMind objects which you want to export to HTML.



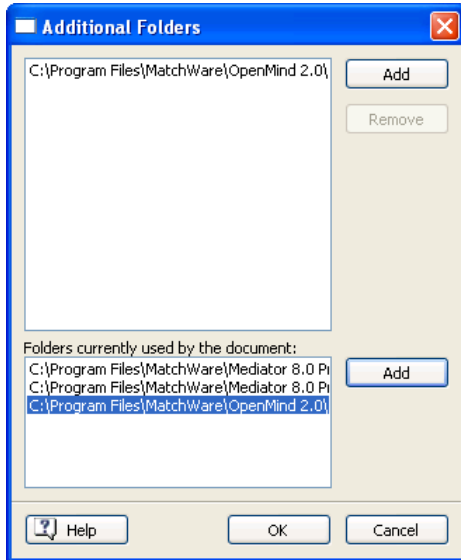
If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your

floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

☐ Include in export ☒

If you have created a particular folder structure for the external files used by your document, you can ensure that OpenMind preserves this structure when exporting to HTML by specifying the list of folders that need to be included in the export folder as follows:

- Click the **Select Folders** button to open the following dialog:



- Click the **Add** button and select the first folder you wish to include in the export.
- Repeat for all the folders you would like to include.

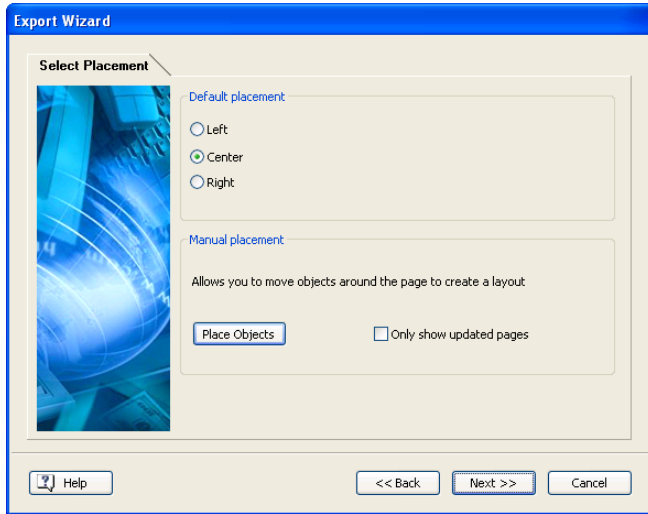
Note that you can enlarge the dialog by dragging one of its corners if the folder paths are not fully visible.

As it creates the HTML pages, OpenMind automatically modifies all the references to external files contained in your document so that they point to the correct output folder.

- Click Next.

## Placing the objects on the page

The Export Wizard now opens the **Select Placement** dialog, which allows you to define where the various objects attached to each branch should be placed on the corresponding HTML page.



You can either:

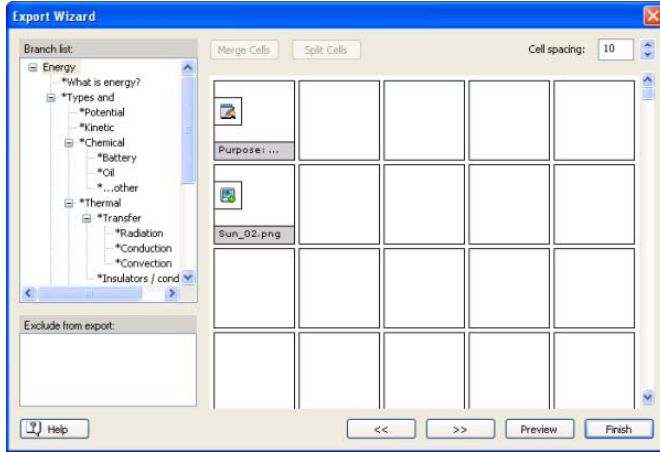
- Choose a default placement of Left, Center or Right and click Next. In that case, the objects will be placed one after the other on each page according to their order in the Object list, either on the left, the center or the right of the page.
- Choose a default placement, and then click the **Place Objects** button to arrange the objects manually on the page as you wish.



If you have already exported your map to HTML, you can check 'Only show updated pages'. In that case, the Export Wizard only shows you the pages which you have edited since the last export. If your map contains a large number of branches, this saves time as you do not have to review the object positioning on all the unchanged pages.

### Positioning the objects manually (optional)

If you have chosen to place the objects manually by clicking 'Place Objects' in the previous dialog, the Export Wizard now shows the Object Positioning window.



This is based on a default grid containing 5 columns, each representing 20% of the width of the HTML page, and divided in a number of cells.

All the objects associated with the first branch of your map are identified on the grid by a small icon bearing their name, in the default position chosen in the previous dialog. You can now reposition these objects or resize them by manipulating the grid cells as follows:

- To move an object on the page, drag it from one cell to the other.
- To resize a column on the grid, drag its edge until it reaches the required size.
- To merge two or more cells so that the object is stretched across them, select the cells by dragging the mouse pointer across them and click the Merge Cells button (or right-click and choose Merge Cells in its local menu).
- To split a cell made up of merged cells, select it and click Split Cells (or right-click it and choose Split Cells in the local menu).
- To align objects horizontally or vertically within a cell, select the relevant cells by dragging the mouse pointer across them, right-click and choose Alignment in the local menu. Then select an Alignment option by clicking a square in the menu (these represent top left alignment, top center alignment, top right alignment and so on). Note that you can also perform this operation on empty cells before moving objects into them.
- To add an empty row, right-click the row above which you want to insert a row and choose Add Row in its local menu.
- To delete a row, right-click it and choose Delete Row in its local menu.
- To increase or decrease the space between each cell, click the up or down arrows of the 'Cell spacing' option.

All the objects that are excluded from the export, either because you have disabled their 'Include in export' property or because you have chosen to exclude them in the 'Select Objects to Export' dialog described above, are listed in the 'Exclude from export' area in the bottom left of the grid. You are free to drag any of these objects back onto the HTML page.

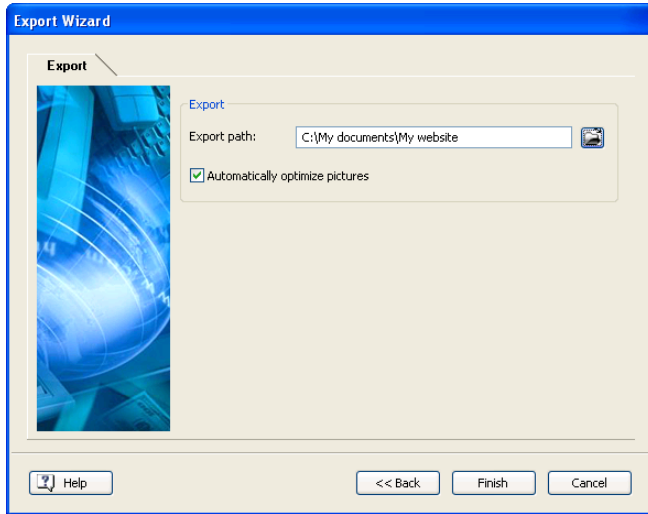
You can also exclude particular objects from the export by dragging them to the 'Exclude from export' area, and drag them back to the HTML page later if you change your mind.

- Click Preview to visualize the effect of your changes on the actual page.
- When you are satisfied with the positioning of the objects on the page, click the right double arrow button to go to the next page, or choose another page in the Branch list shown on the left of the dialog.
- Repeat the operation until you have reviewed all the pages that needed revisiting.
- Once you have reviewed all the pages, click Finish.

## Exporting

You are now ready to export your map to HTML.

- Choose a destination folder for your new web site.
- (optional) You can optimize your pictures for web export by checking the option 'Automatically optimize pictures'. This has two effects:
  - All .bmp pictures used on your map are converted to .jpg to reduce their file size.
  - Any .bmp or .jpg picture used on your map that is larger than the dimensions allocated to it on the HTML page is scaled down to these dimensions.
- Click **Finish**.



Once the export is completed, OpenMind displays a dialog giving you the choice of immediately viewing your web site in your default browser or uploading it to Internet using the MatchWare FTP Upload Manager. For more information on this tool, see "FTP Upload Manager".



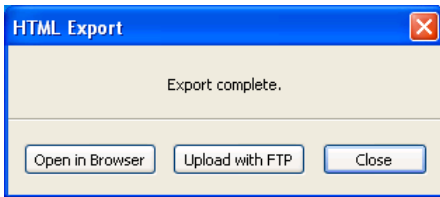
To open your exported web site from within Windows Explorer at a later date, double-click the file index.htm in the sub-folder 'OMHtmlExport'.

# FTP Upload Manager

To help you get your HTML site on the web as quickly and effortlessly as possible, OpenMind comes with a built-in FTP program, the MatchWare FTP Upload Manager.

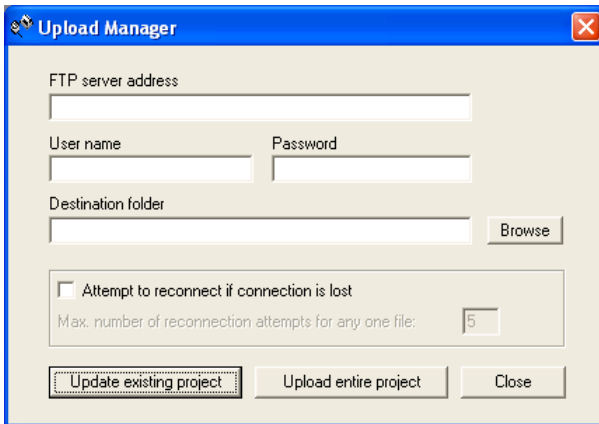
## Starting the FTP Upload Manager


Before you can use the FTP Upload Manager you must export your OpenMind document to HTML (see "Exporting to HTML: Quick Export" or "Exporting to HTML: Export Wizard"). At the end of the export the following dialog appears:



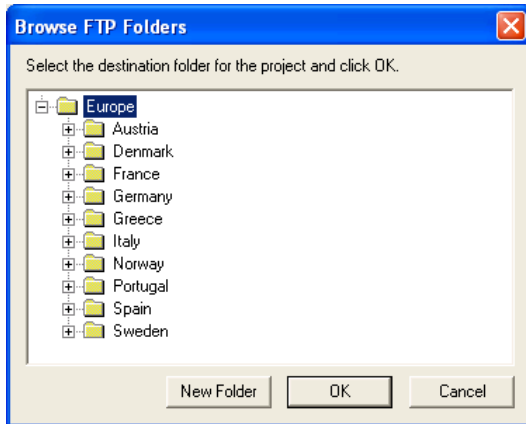
- To open the FTP Upload Manager click 'Upload with FTP'.

The FTP Upload Manager dialog appears:



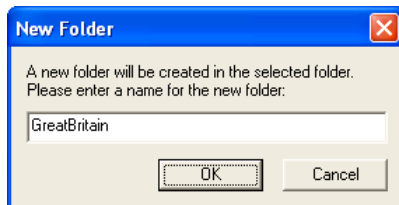
- In the **FTP server address** field, enter the FTP upload address that you have received from your Internet Service Provider (ISP).
- Enter your **User name** and **Password** in their respective fields.
-  If you do not have an FTP address, user name or password or have lost them, contact your ISP.

- Clicking the Browse button next to **Destination folder** will connect you to the Internet. Once online, search for the remote folder you wish to upload your web site to.



- Select the folder required and click OK to return to the Upload Manager dialog.

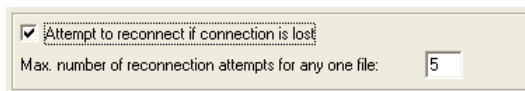
If you would like to upload the web site to a new folder, click New Folder to create a new remote folder on the server. Click OK to return to the Upload Manager dialog.



*To quickly create a new remote folder enter a forward slash and the name of the new folder in the Destination folder field.*



If your Internet connection goes down often, you are advised to check the option 'Attempt to reconnect' in the Upload Manager dialog to guarantee a successful upload.

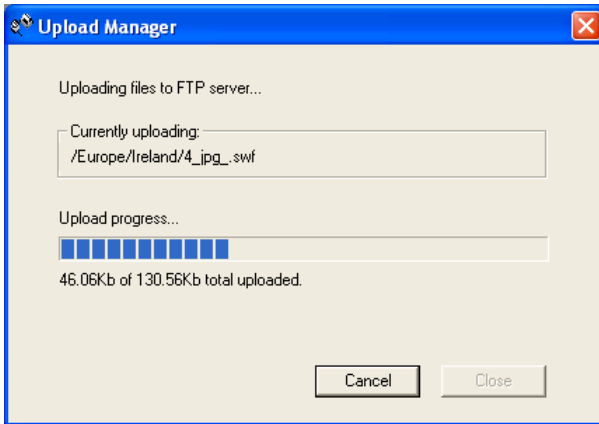


You can also set the number of reconnection attempts you want the Upload Manager to perform for a given file. If upload is still unsuccessful after this number of attempts, it is cancelled.

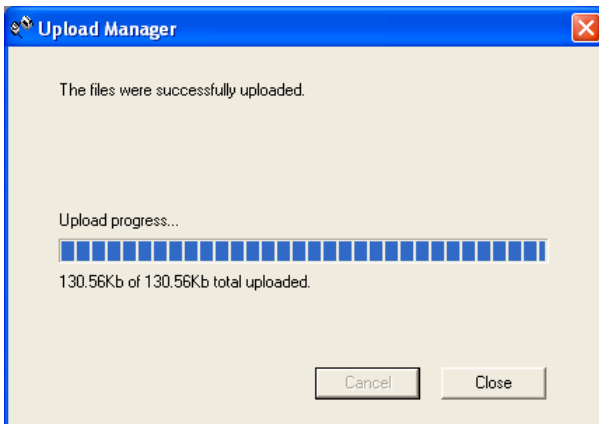
## Uploading your web site

- If you are uploading your web site for the first time, click **Upload entire project** to connect to the FTP server and upload all the files.

You can follow the progress of the upload in the Upload dialog.



If upload is completed successfully, the following dialog appears:



- Click Close to return to OpenMind.

The FTP Upload Manager remembers your FTP address, Username, Password and Destination. If you make changes to your web site and would like to upload it again, click **Update existing project** to upload only the files that have changed since your last upload.

# Exporting to Mediator: Overview

This export method lets you export your Mind Map as a Mediator document.

Combining OpenMind and Mediator is a powerful way to create web sites and multimedia presentations. Once you have finished brainstorming and organizing your ideas in OpenMind, you can export your map to Mediator and turn it into an interactive CD presentation or a set of dynamic Flash or HTML pages by adding Mediator events and actions to it.

If after working for some time on your Mediator presentation, you realize you need to review the structure of your map in OpenMind before doing any further work in Mediator, you can re-import it back into OpenMind without losing the work already done in Mediator. See "Importing from Mediator" for more information.



You do not need to have Mediator installed on your computer to use this export mode. However, Mediator version 8 with Service Pack 3 or above is needed to view the exported Mediator document. This free update is available on the MatchWare web site at:

<http://www.matchware.com/en/support/servicepacks/mediator8.htm>

The exported Mediator document is placed in the folder of your choice, and all relevant external files are placed in a sub-folder named MD8 within that folder.

Each branch, including the root, is exported as a Mediator page of the same name as the branch. The sub-branches belonging to a particular branch are exported as sub-pages of the corresponding Mediator page.

By default, a Home button, taking you back to the root page, and a Back button, taking you back to the previous page, are included in all the pages of your Mediator document.

All the objects attached to a particular branch are listed in the Mediator Object list of the corresponding Mediator page and tiled on the page on top of each other.

The branches of the map are exported to Mediator in the order in which they are displayed in the Mind Map view, starting from the top right in a clockwise direction.

You can however exclude entire branches and sub-branches from the export by disabling their 'Include branch and subs in export' property in the Properties dialog.

Include branch and subs in export ☐



If your OpenMind document was created by importing a Mediator presentation, a dialog might appear at the end of the export procedure, listing all the branches corresponding to pages created directly in Mediator. Because you might not want to change the appearance of these pages in the new Mediator presentation, you can deselect them in this dialog to indicate that the export template should not be applied to them.



When exporting the Mind Map to Mediator, OpenMind places special tags formatted with # signs in the Notes tab of the Properties dialog of particular elements of the new Mediator presentation, including the pages themselves. These tags contain information required by OpenMind to re-import the Mediator presentation, should you decide to do so at a later stage. You should take care not to delete these tags if you want to preserve the structure and layout of the original Mind Map.

## Export modes

There are two export modes available:

- **Quick Export**

The Quick Export mode allows you to export your map quickly using the OpenMind defaults or the last export settings you chose.

- **Export Wizard**

The Mediator Export Wizard lets you choose from a number of professional ready-made templates with various navigation layouts which you can customize as you wish. You can also specify the elements of your map to be exported and how they should be treated.

The export settings you choose are saved with the OpenMind document and re-used next time you export your map to Mediator. This means that you do not have to redefine them every time you make a small alteration to your map.

## Relationship between OpenMind and Mediator elements and objects

The following table indicates how the various OpenMind elements and objects are exported on the Mediator page.

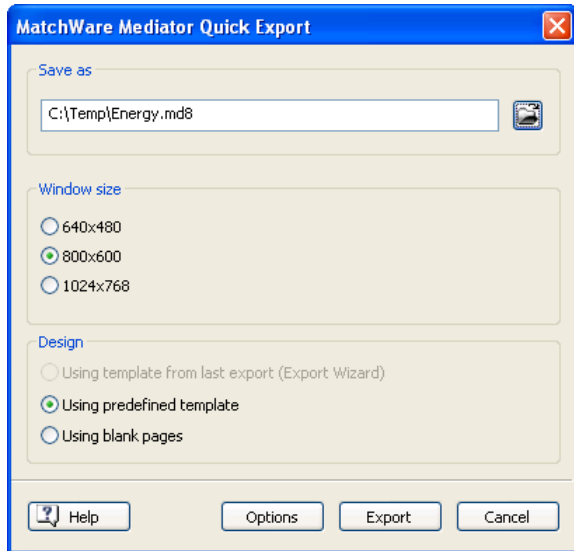
OpenMind element	Exported to Mediator as
Branch name	Page description. If the branch name is unique, the branch name is also the page name. Otherwise, page names are numbered sequentially, i.e. Idea, Idea01, Idea02 and so on.
Text note	Mediator text object  Note that if the OpenMind text note contains one or more hyperlinks, these hyperlinks retain their color and underline attributes in the Mediator text object, but are not converted to Mediator hypertext objects. This means that they do not retain their link information.
Branch picture	Mediator picture object

Floating picture	<ul style="list-style-type: none"> <li>• If connected to a branch, inserted as a Mediator picture object on the page</li> <li>• If not connected to a branch, not exported</li> </ul>
Floating comment	<ul style="list-style-type: none"> <li>• If connected to a branch, inserted as a Mediator text object on the page</li> <li>• If not connected to a branch, not exported</li> </ul>
Pop-up comment	Text note in the Notes tab of the Properties dialog for the page
Branch connection	Mediator button, looking either like a standard button or like a hypertext link, depending on your choice
<b>OpenMind object</b>	<b>Exported to Mediator as</b>
Text file	Mediator button, looking either like a standard button or like a hypertext link, depending on your choice
Picture file	Mediator picture object
Video file	Mediator Media Player object
Sound file	Mediator button, looking either like a standard button or like a hypertext link, depending on your choice
Button	Mediator button
Hyperlink	Mediator button
Flash file	Mediator Flash object

## Exporting to Mediator: Quick Export

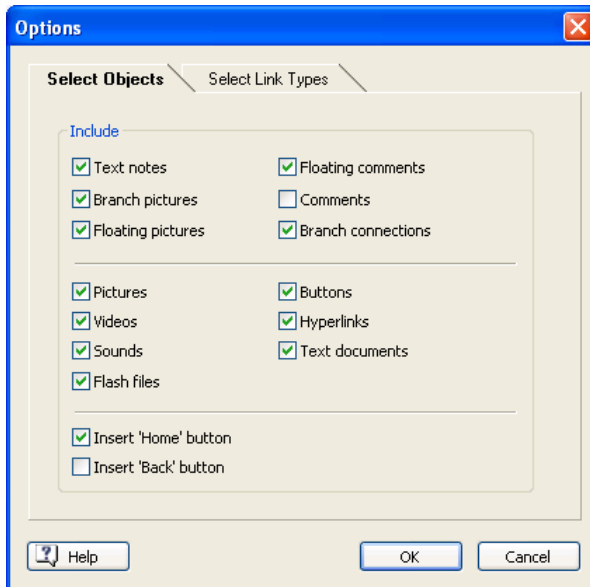
- Choose **File | Export to MatchWare Mediator | Quick Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.


The MatchWare Mediator Quick Export dialog appears.



- Choose a path and file name for your new Mediator document.
- Choose the window size that corresponds to your screen resolution or the screen resolution of the intended users of your Mediator document.
- Choose whether to use:
  - The template you last used in the Export Wizard if you have already used that export mode for your map. If you choose this option, the window size options become inactive as the window size is already defined.
  - The MatchWare predefined export template (with top and side menu)
  - Blank pages (without any menu structure or graphic design elements)
- (optional) Click **Options** to define further export options:

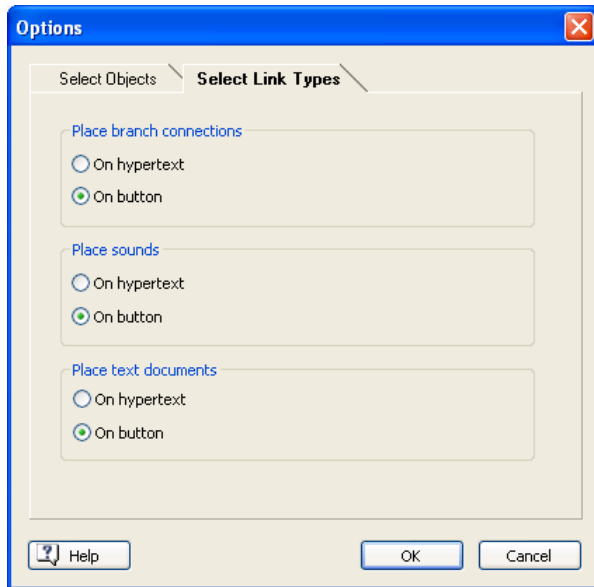
The **Select Objects** tab allows you to specify the elements of the map to include in the export. You can also disable 'Insert Home button' and/or 'Insert Back button' if you do not want these buttons on the pages of your Mediator document.



 If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

Include in export ☒

The **Select Link Types** tab only appears if your map contains branch connections and/or attached sound files or text files. It lets you choose whether these elements should be placed on Mediator hypertext or button objects.



➤ Click **Export**.



If your OpenMind document was created by importing a Mediator presentation, a dialog might appear at this point, listing all the branches corresponding to pages created directly in Mediator. Because you might not want to change the appearance of these pages in the new Mediator presentation, you can deselect them in this dialog to indicate that the export template should not be applied to them.

Once the export is completed, OpenMind lets you either view your presentation straight away in Mediator or continue working in OpenMind.



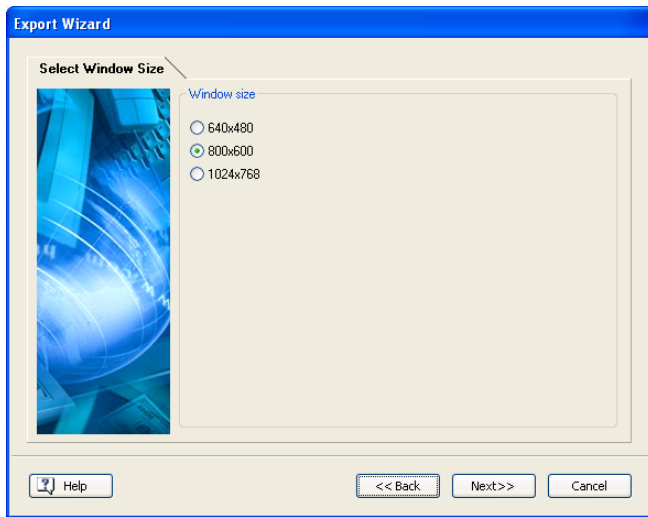
When exporting the Mind Map to Mediator, OpenMind places special tags formatted with # signs in the Notes tab of the Properties dialog of particular elements of the new Mediator presentation, including the pages themselves. These tags contain information required by OpenMind to re-import the Mediator presentation, should you decide to do so at a later stage. You should take care not to delete these tags if you want to preserve the structure and layout of the original Mind Map.

## Exporting to Mediator: Export Wizard

- Choose **File | Export to MatchWare Mediator | Export Wizard**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click Next.

The Export Wizard now displays a series of dialogs, the first of which is the **Select Window Size** dialog.

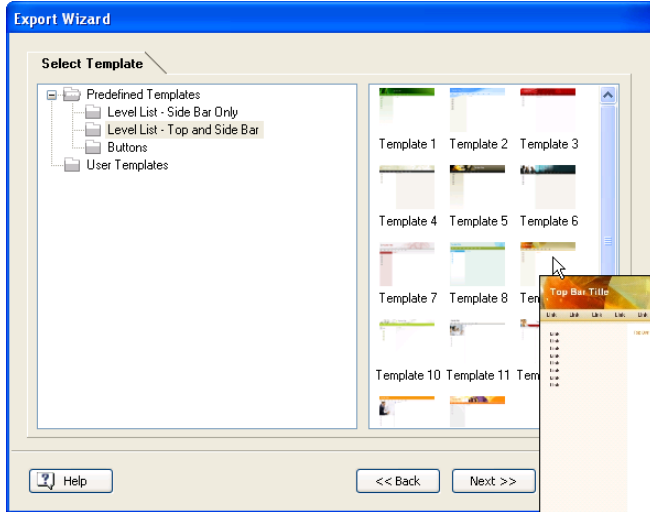
### Selecting the window size



- Choose the window size corresponding to your screen resolution or the screen resolution of the intended users of your Mediator document and click Next.

### Selecting a template

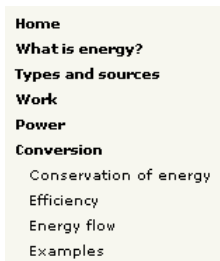
This dialog allows you to select a navigation layout for the pages of your Mediator document.



- **Predefined Templates:** This lets you choose one of the professional OpenMind export templates with ready-made top and side navigation.

These templates are available in the following navigation styles:

**Level List:** With this type of navigation, you only see a maximum of three levels of links on the side: the current page, any pages at the level just above it, and any pages at the level just below it.



**Buttons:** In this design, the side bar contains a list of links, where each link represents a sub-branch of the branch corresponding to the current page.

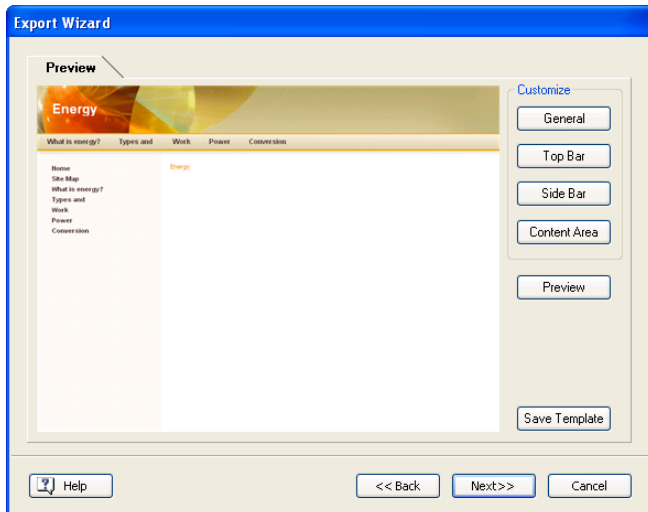
What is energy?	Types
Home	
Site Map	
Potential	
Kinetic	
Chemical	
Thermal	
Nuclear	
...other	

To see a larger preview of the templates shown on the right of the window, just place the mouse pointer over the relevant thumbnail. Note that you will be able to go back to this step of the wizard at any time to choose a different template if you are not satisfied with your original choice.

- **User Templates:** This lets you choose one of your own previously saved export templates. See further down for information on how to save your own export template.
- Select a template on the right and click Next.

## Preview

The Export Wizard opens the **Preview** dialog, which lets you customize the various areas of the navigation layout chosen in the first step.



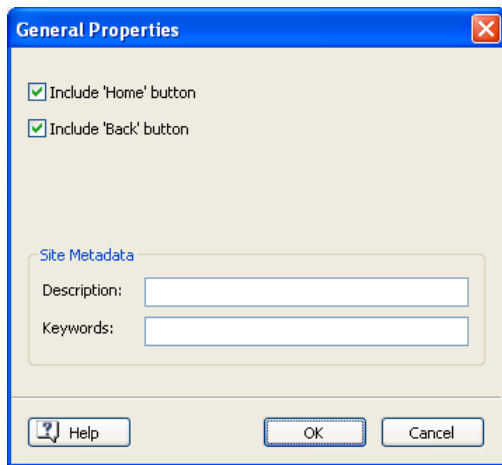
You can customize each area in turn by clicking the **Customize** buttons, namely:

- General
- Top Bar
- Side Bar
- Content Area

Feel free to experiment with the various customization options. At any time, you can obtain a full size preview of your design reflecting any changes made by clicking the Preview button. Note however that this Preview does not allow you to navigate the document.

### Customizing the General properties (optional)

➤ Click **General** in the Preview dialog.



This dialog gives you the following options:

**Include 'Home' button:** This inserts a Home hyperlink or button on each of your Mediator pages, allowing you to return to the page corresponding to the root of your map in just one click.

**Include 'Back' button:** This inserts a Back hyperlink or button on each of your Mediator pages, enabling you to go back to the last page visited.

You can also enter meta-tags for your Mediator document as follows:

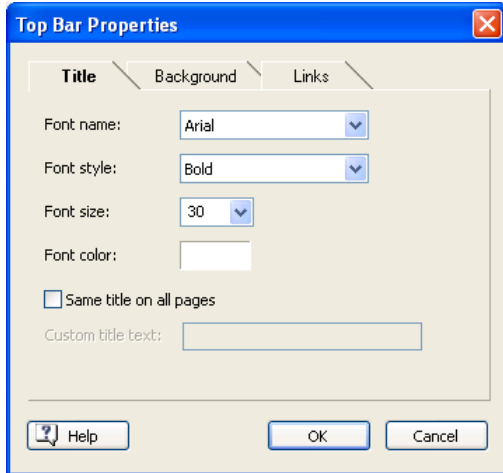
**Description:** Any text entered here will be inserted in the Description tag of the Mediator document (visible by clicking the HTML tab of the Document Properties dialog in Mediator).

**Keywords:** Similarly, any keywords entered here (separated by commas) will be inserted in the Keywords tag of the Mediator document (also visible by clicking the HTML tab of the Document Properties dialog in Mediator).

## Customizing the Top Bar (optional)

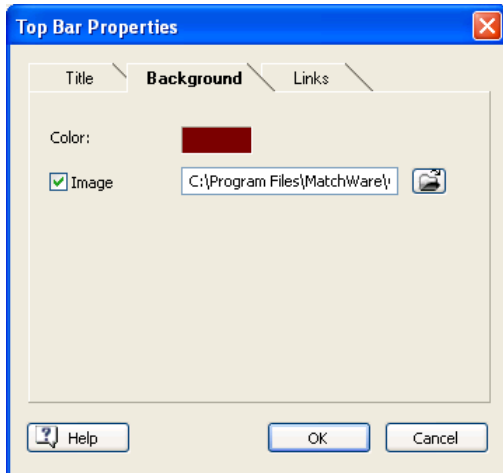
- Click the **Top Bar** button or double-click the top bar area in the Preview dialog.

The Top Bar Properties dialog opens on its **Title** tab.



By default, the title displayed on each Mediator page is the branch name. Here you can change the font, attributes and color for this title or even enter your own title, which will be displayed on all the pages of the document.

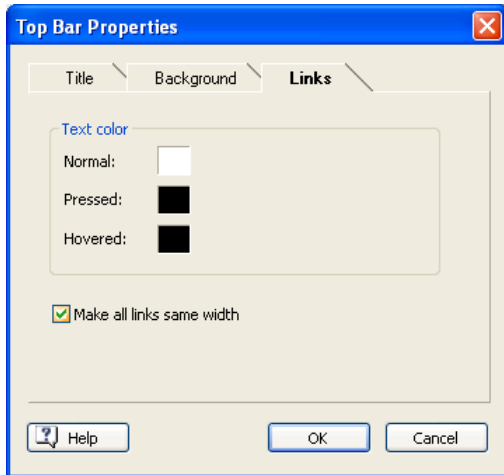
- Click the **Background** tab.



This tab lets you select a plain color or a different background picture for the top bar.

If you want to change the background picture, the best approach is to make a copy of the existing picture and edit its design to suit your requirements, making sure that the picture size stays unchanged so that it still fits the template.

- Click the **Links** tab.



The Links tab is only available if the top bar of the template chosen contains buttons or hyperlinks.

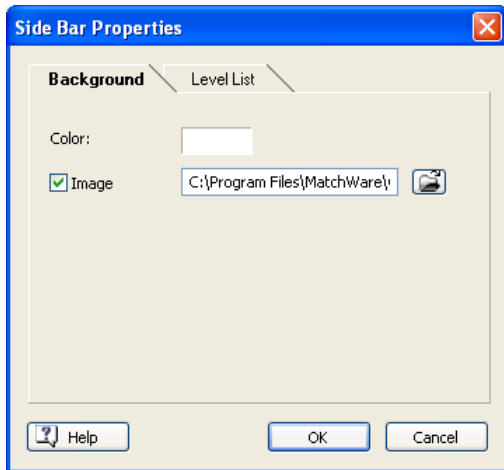
This tab lets you select different colors for the top bar links depending on their state, i.e. "Normal", "Pressed" (the link is clicked) or "Hovered" (the mouse pointer is placed on the link).

You can also choose to make all the links the same width, or have their width vary according to the length of their label.

### Customizing the Side Bar (optional)

- Click the **Side Bar** button or double-click the side bar area in the Preview dialog.

The Side Bar Properties dialog opens on its **Background** tab.



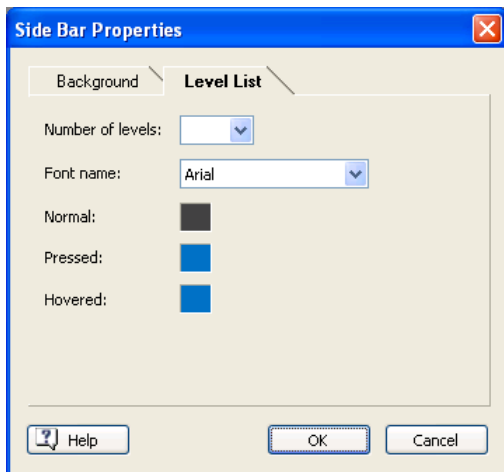
This tab lets you select a plain color or a different background picture for the side bar.

As for the top bar, the best approach if you want to change the background picture is to make a copy of the existing picture and edit its design to suit your requirements.

The second tab of the Side Bar Properties dialog varies depending on the type of navigation template you chose in the first screen of the Export Wizard. The possibilities are:

- Level list
- Links

### Level List

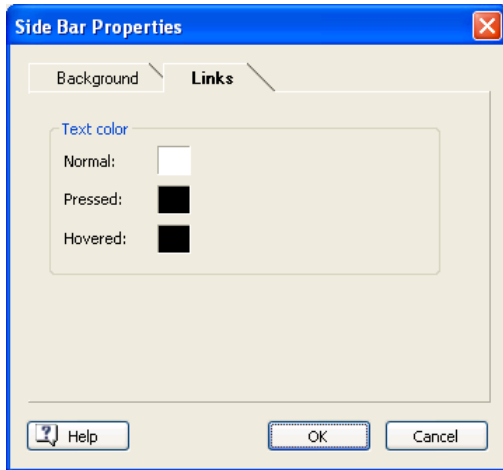


This tab is displayed if you have chosen a Level List design.

With this type of navigation, you only see a maximum of three levels of links on the side: the current page, any pages at the level just above it, and any pages at the level just below it.

The Level list tab lets you choose how many levels the list should show. You can also define the font and color of the links.

## Links



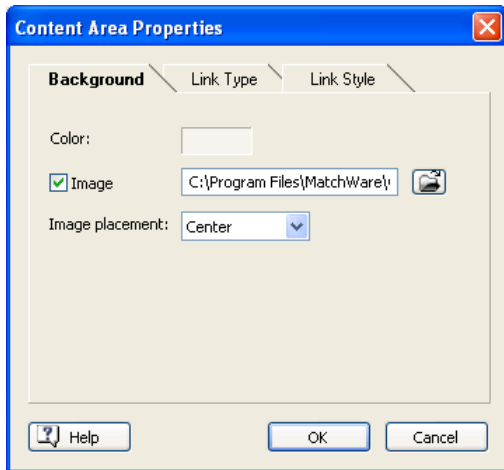
This tab is displayed if you have chosen a Buttons design in the first screen of the Export Wizard.

With this design, the side bar contains a list of links, where each link represents a sub-branch of the branch corresponding to the current page. The Links tab lets you select different colors for the side bar links depending on their state, i.e. "Normal", "Pressed" (the link is clicked) or "Hovered" (the mouse pointer is placed on the link).

## Customizing the Content Area (optional)

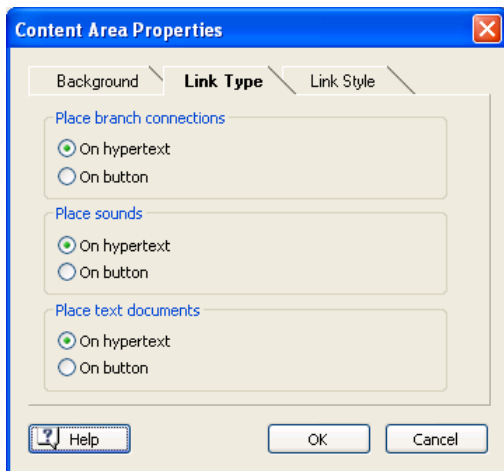
- Click the **Content Area** button or double-click the middle area in the Preview dialog.

The Content Area properties dialog opens on its **Background** tab.



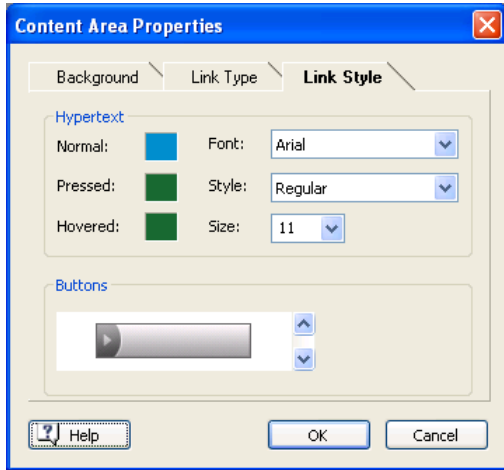
This tab lets you select a plain color or a different background picture for the body of the page. Feel free to experiment with the image placement options by checking the effect in the Full Size Preview.

- Click the **Link Type** tab.



If your map contains branch connections, sound files or attached text documents, this tab lets you decide whether you want to place these objects on Mediator hypertext or button objects.

- Click the **Link Style** tab.



This tab lets you choose styles for any buttons or hyperlinks contained in your map.

- Define the hypertext style required by selecting a font, attribute and size. You can also define different colors depending on the state of the hyperlink, i.e. "Normal", "Pressed" (the link is clicked) or "Hovered" (the mouse pointer is placed on the link).
- Scroll through the various buttons available to choose the type you like best.

### Previewing the customized template (optional)

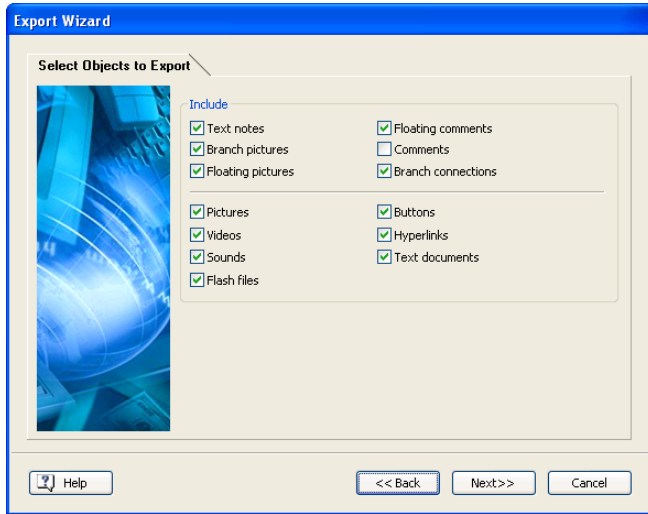
- Click the **Preview** button in the Preview dialog to obtain a real-time preview of your design reflecting any changes made so far.

### Saving the customized template (optional)

- You can save your customized export template for later use by clicking the **Save Template** button of the Preview dialog. The Save User Template dialog that opens contains a list of the export templates you have already saved. Enter the name of your new export template and click Save.
- Once you are satisfied with the design of all the page components, click Next.

## Selecting the objects to export

The Export Wizard now opens the **Select Objects to Export** dialog.



- Select the OpenMind objects which you want to export to Mediator.



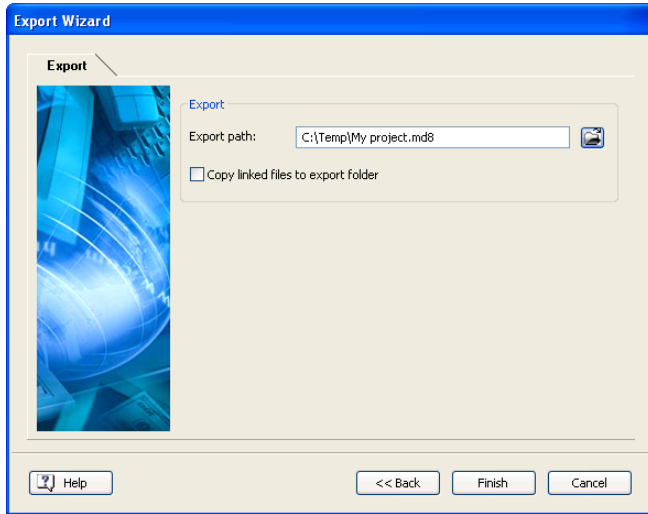
If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

Include in export ☒

- Click Next.

## Exporting

You are now ready to export your map to Mediator.



- Choose a path and file name for your new Mediator presentation.
- If you want OpenMind to place a copy of all the external files used in your map (such as text files, sound files, video files and so on) in the export folder, check the option 'Copy linked files to export folder'. Such files will then be placed in the sub-folder named MD8 of your export folder. This will allow you to distribute or transfer your Mediator presentation easily by copying the actual Mediator file as well as the entire MD8 sub-folder.
- Click **Finish**.



If your OpenMind document was created by importing a Mediator presentation, a dialog might appear at this point, listing all the branches corresponding to pages created directly in Mediator. Because you might not want to change the appearance of these pages in the new Mediator presentation, you can deselect them in this dialog to indicate that the export template should not be applied to them.

Once the export is completed, OpenMind lets you either view your presentation straight away in Mediator or continue working in OpenMind.



When exporting the Mind Map to Mediator, OpenMind places special tags formatted with # signs in the Notes tab of the Properties dialog of particular elements of the new Mediator presentation, including the pages themselves. These tags contain information required by OpenMind to re-import the Mediator presentation, should you decide to do so at a later stage. You should take care not to delete these tags if you want to preserve the structure and layout of the original Mind Map.

## Exporting to RTF

This export method lets you export your Mind Map in RTF format. This may be useful if you want to process your document further in a word processor, but do not have Microsoft Word installed on your computer.

Each branch is exported as a paragraph heading at the relevant level, in other words Heading 1 for main branches, Heading 2 for sub-branches, Heading 3 for sub-sub-branches and so on, using hierarchical numbering (unless you disable it in Advanced Export). Attached objects and inserted elements are listed below the heading.

By default, OpenMind automatically includes an overall picture of your map on the first page of the document.

The branches of the map are exported to RTF in the order in which they are displayed in the Mind Map view, starting from the top right in a clockwise direction.

You can however exclude entire branches and sub-branches from the export by disabling their 'Include branch and subs in export' property in the Properties dialog.

Include branch and subs in export ☐

## Export modes

There are two export modes available:

- **Quick Export**

The Quick Export mode allows you to export your map quickly using the OpenMind defaults or the last Advanced Export settings you chose if you have already used that mode.

- **Advanced Export**

The Advanced Export mode allows you to specify the elements of your map to be exported and how they should be treated.

The export settings you choose in Advanced Export are saved with the OpenMind document and re-used next time you export your map using Quick Export or Advanced Export. This means that you do not have to redefine them every time you make a small amendment to your map and want to export it again to RTF.

## Relationship between OpenMind and RTF elements and objects

The following table indicates how OpenMind treats the various inserted elements and attached objects contained in your map when exporting it to RTF.

<b>OpenMind element</b>	<b>Exported to RTF as</b>
Branch name	Heading at relevant level with hierarchical numbering (3 levels by default)  Hierarchical numbering can be disabled in Advanced Export.
Text note	Text inserted under the branch heading
Branch picture	Picture inserted under the branch heading
Floating picture	<ul style="list-style-type: none"> <li>• If connected to a branch, inserted under the branch heading</li> <li>• If not connected to a branch, not exported</li> </ul>
Floating comment	As for Floating picture
Pop-up comment	Text under the branch heading
Branch connection	Cross-reference prefixed by "See section" under the start branch heading, pointing to the end branch heading
<b>OpenMind object</b>	<b>Exported to RTF as</b>
Text file	Object name followed by hyperlink to file
Picture file	Picture embedded in the RTF document  In Advanced Export, you can choose instead to insert the file as an object name followed by a hyperlink to the file.
Video file	Object name followed by hyperlink to file
Sound file	Object name followed by hyperlink to file
Button	Object name followed by hyperlink to file
Hyperlink	Object name followed by hyperlink to file
Flash file	Object name followed by hyperlink to file

## Using Quick Export

- Choose **File | Export to RTF | Quick Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.

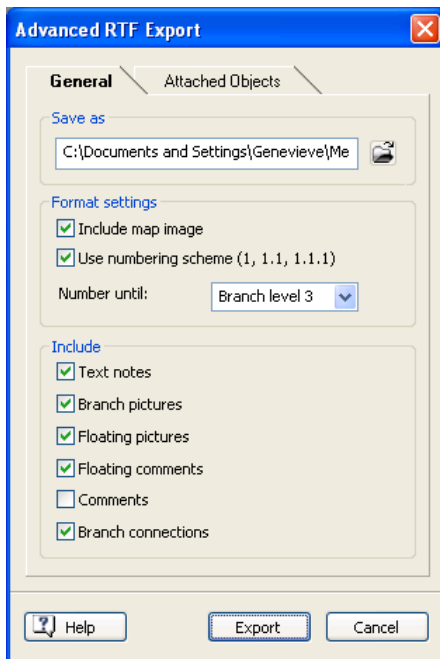
The Save As dialog opens.


- Choose a folder, type a file name for the RTF document and click Save.

Once the export is complete, OpenMind lets you view the document in the viewer associated with the .RTF extension on your computer.

## Using Advanced Export

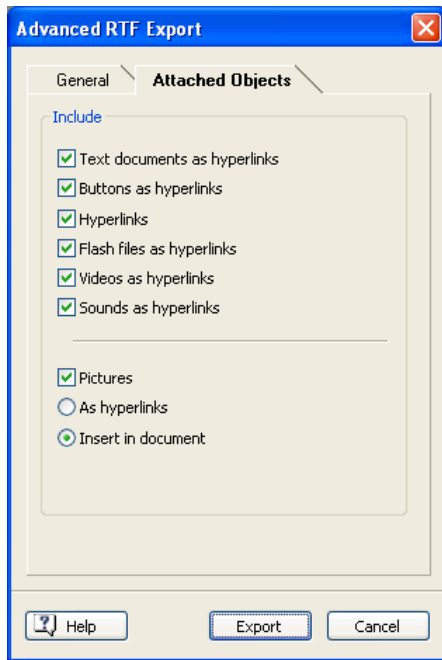
- Choose **File | Export to RTF | Advanced Export**.
- If your OpenMind view contains several maps (i.e. several roots), choose the map you want to export in the 'Select Map to Export' dialog and click OK.
- In the **General** tab, choose the required general export settings and specify the elements of the map to export.



 If you exclude some elements from the export by deselecting them here, none of the elements of this type will be exported, regardless of the value of their individual 'Include in export' property in the Properties dialog. Let's suppose for instance your map contains a floating picture whose 'Include in export' property is enabled. If you choose to exclude floating pictures from the export here, your floating picture will not be exported. Conversely, if you specify here that floating pictures should be exported, only the floating pictures whose 'Include in export' property is enabled will be exported.

Include in export ☒

- Choose the required export settings for any attached object in the **Attached Objects** tab.



- Click **Export**.

As for Quick Export, OpenMind starts exporting your Mind Map to RTF as a new document. Once the export is complete, OpenMind lets you view the document in the viewer associated with the .RTF extension on your computer.

# Exporting to XML

This export method lets you export your document in XML format.

OpenMind supports two XML export file types:

- **OpenMind XML:** This file type allows OpenMind documents to be converted to other application formats after implementation of a transformation file.
- **Microsoft Project XML:** This file type allows you to create a version of your OpenMind document that can be opened in Microsoft® Project with the standard File | Open command of that application. You can use the Microsoft Project XML export method even if you do not have Microsoft Project on your computer. It is therefore a useful alternative to exporting directly from OpenMind to Microsoft Project in the .mpp format, for which you do need to have Microsoft Project installed on your computer.

Only the elements of the OpenMind project plan that are supported by Microsoft Project are exported. This means that branch pictures, icons, attached objects and so on are not exported. Pop-up comments are exported as Microsoft Project task notes. OpenMind text notes are not exported.

## Procedure

- Choose **File | Export to XML**.
- Choose a file name and a destination for the exported file.
- Choose the required export file type in the Type field.
- Click OK.



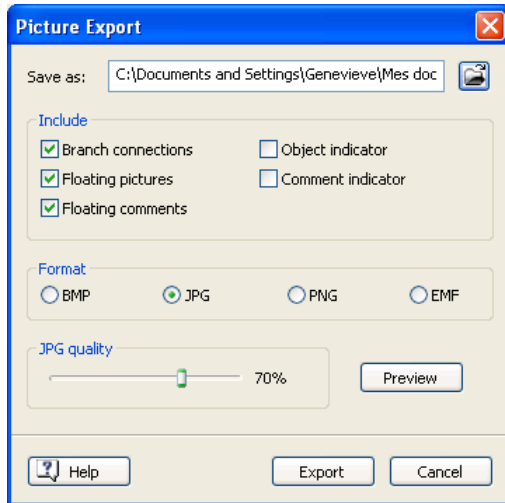
The property 'Include branch and subs in export' of the Properties dialog is ignored when exporting to XML.

## Exporting as picture

This export method lets you save your Mind Map as a picture file. The picture file formats supported are .bmp, .jpg, .png and .emf.

- Choose **File | Export to Picture**.



The following dialog appears to let you choose the required export settings.



- Enter the path and file name for the picture in the Save as field or click the Browse button to choose an existing path.
- If you do not want to display branch connections, floating pictures and floating comments in the picture, clear the corresponding check mark.



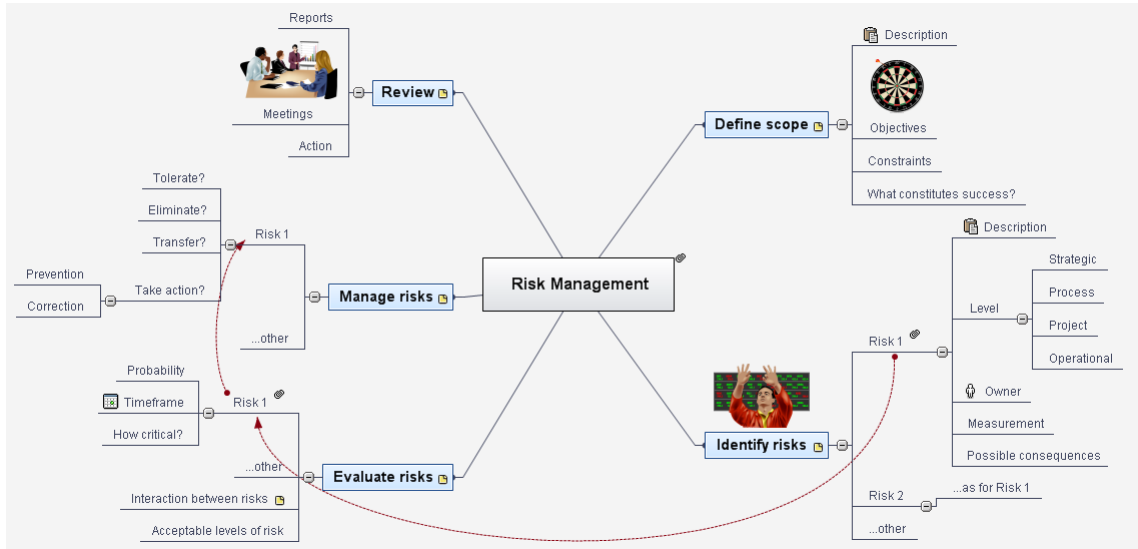
Since this export method creates a picture of your entire map, all elements chosen above are displayed on the picture, regardless of the value of their individual 'Include in export' property in the Properties dialog. Similarly, all branches will be visible, regardless of the value of their individual 'Include branch and subs in export' property.

- If you want to display the object indicator  and/or the comment indicator  next to each branch containing attached objects and/or comments, click the relevant check box.
- Choose the required picture format.

If you choose the .jpg format, you can use the 'JPG quality' slider to define the level of quality needed. Note that decreasing the level of quality increases the level of compression, and therefore reduces the file size.

- (optional) Preview the effect of your settings on the picture by clicking Preview.
- Click **Export**.

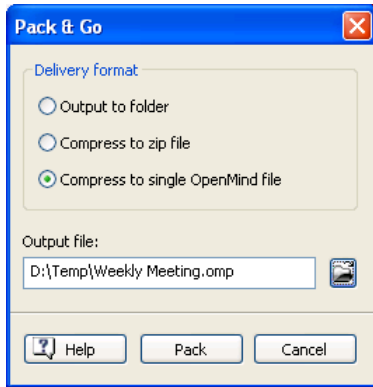
Note that icons and branch pictures are always displayed and that it is not possible to display text notes.



The export settings you choose are saved with the OpenMind document. This means that you will not have to specify these settings again if you make changes to the map and want to re-export it as a picture.

## Pack & Go

This feature allows you to distribute your Mind Map to other users very easily. It is for instance ideal for students who need to send their assignments to their teacher, so that he or she can consolidate them in a master map.



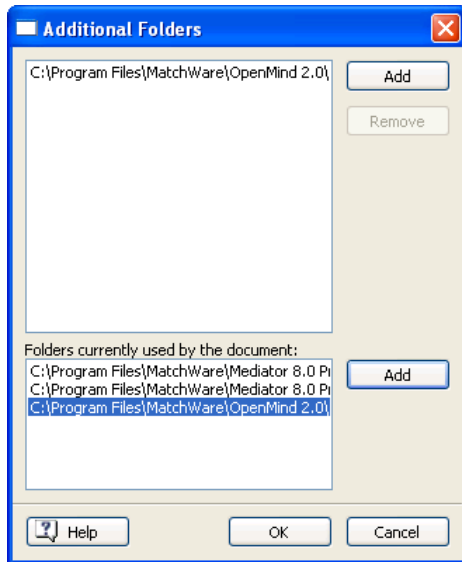
With just one mouse click, you can create a complete packed version of your Mind Map, ready to be sent via email, shared over the network or distributed via CD-ROM.

Note that if the OpenMind view contains several maps (i.e. several roots), they are all packed when using Pack & Go.

## Additional folders

If you have created a particular folder structure for the external files used by your document, you can ensure that OpenMind copies this structure when creating the packed version by specifying the list of folders that need to be included as follows:

- Choose **Tools | Additional Folders** to open the following dialog:



- Click the **Add** button and select the first folder you wish to include in the packed version.
- Repeat for all the folders you would like to include.

Note that you can enlarge the dialog by dragging one of its corners if the folder paths are not fully visible.

## Packing a Mind Map

There are three packing possibilities:

- **Output to folder** copies the entire OpenMind document to the output folder you specify, including all external files referenced by attached objects and any additional folders listed in the Additional Folders dialog. All references to external files are automatically modified to point to the correct output folder.
- **Compress to zip file** performs the same operations as 'Output to folder', but the entire folder is then zipped. This allows you to distribute it very easily by email, CD-ROM and so on. The recipients can then unzip it in the folder of their choice.
- **Compress to single OpenMind file** creates a new Mind Map document integrating all the external files referenced in the original Mind Map document within the .omp file and places the new document in the output folder specified.

When you open an OpenMind document compressed in this way, OpenMind starts by prompting you for a folder name where to extract the integrated files and automatically modifies all the references to point to the extraction folder chosen.

This is the easiest way to distribute a Mind Map to other users. If however the external files used by your map are rather large, the single OpenMind file obtained with this packing method may be too big to be distributed easily. It might also take quite a while for OpenMind to open it for the first time, as the entire file needs to be read in memory. In this case, it is preferable to use the second packing method, "Compress to zip file".

Note that this packing method is not available if you have specified any additional folders in the Additional Folders dialog.

Once the operation has completed, OpenMind lets you open straight away the folder into which the files have been copied.

## **Merging packed Mind Maps in a master map**

You can easily merge into a master map several Mind Maps that have been packed using Pack & Go:

- Open your master map in OpenMind.
- Open each packed map in turn. Each document opens in a separate tab in OpenMind.
- Merge each packed map into your master map by copying its root (Edit | Copy or Ctrl + C) and pasting it onto the relevant branch of your master map. See "Moving a branch" for more information about copying and pasting branches.

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# Importing

## Introduction

OpenMind lets you import documents from many different applications, including Microsoft® Word, Microsoft® PowerPoint, MatchWare Mediator, Microsoft® Outlook and Microsoft® Project. You can also create OpenMind documents by importing XML files.

The import options offered by OpenMind are all described in detail in the next topics.

# Importing from Microsoft Word

OpenMind lets you import Microsoft® Word documents. This is particularly useful when:

- You have a Word document which you would like to restructure using the brainstorming capabilities and features of OpenMind before exporting it again to Word.
- You have exported an OpenMind Mind Map to Word, developed some of the topics in Word, but then realized you need to review the structure of your map in OpenMind before doing any further work in Word.

In both cases, OpenMind allows you to import the Word document into a new Mind Map, preserving the text added in Word together with its formatting. Pictures, comments and hyperlinks added in Word are also preserved wherever possible.

If the Word document was created by exporting an OpenMind Mind Map to Word, the new Mind Map will have the same branch structure and layout as the original Mind Map.

If you then re-export the new Mind Map to Word after having made the required changes in OpenMind, any elements added in OpenMind are exported to the new document.

For more information about the elements that OpenMind is not able to preserve, see "Limitations" below.



You must have Microsoft Word installed on your computer in order to import a Word document into OpenMind. OpenMind supports all Microsoft Word versions from 2000 onwards.

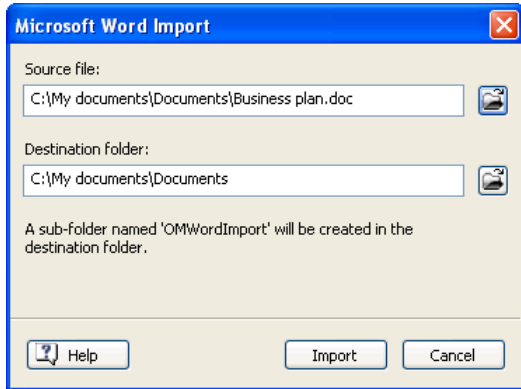
Although OpenMind can import any Word document, a useful branch structure can only be created if the document is organized in paragraphs containing headings defined with the Microsoft Word heading styles "Heading 1" through to "Heading 9".

OpenMind imports each paragraph of the Word document as a branch at the relevant level. In other words paragraphs with a Heading 1 title become main branches, paragraphs with a Heading 2 title become sub-branches, paragraphs with a Heading 3 title become sub-sub-branches and so on.

If the Word document starts with a main heading with the style "Title", then this heading is used as the root name. Otherwise the name of the Word document is used as the root name.

## Procedure

- Choose **File | Import from Microsoft Word**.
- Select the Word document you want to import.
- Select the destination folder, i.e. the folder for the OpenMind document created from the Word document.



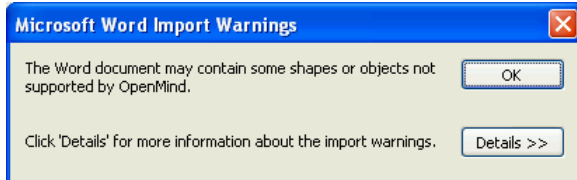
➤ Click **Import**.



During the import procedure, the display may flicker a few times. This is normal.

OpenMind creates a sub-folder named 'OMWordImport' within the destination folder and places in it the new OpenMind document as well as any picture that might have been embedded in the Word document.

There may be elements of the Word document that OpenMind is not able to import. If this is the case, OpenMind displays a Warning dialog listing these elements. See "Limitations" below for more information.



When exporting a Mind Map to Word, OpenMind inserts bookmarks in the Word document to keep track of how the various elements should be re-imported back into OpenMind if you choose to do so. You should take care not to delete these bookmarks, which are hidden by default. To make them visible while you work, check 'Show bookmarks' in the View tab of the Tools | Options dialog in Word.

## Relationship between Word and OpenMind elements and objects

The following table indicates how OpenMind converts the various elements of your Word document to OpenMind elements and objects.

Word element	Imported in OpenMind as
Title (with Title style)	Root of the Mind Map <ul style="list-style-type: none"><li>• If the Word document does not contain a Title heading at its very top, the name of the Word document is used as root name.</li><li>• If the Word document contains more than one "Title" heading, each such heading is imported as a text note of the corresponding higher level branch.</li></ul>
Heading 1 (with Heading 1 style)	Main branch
Heading 2 (with Heading 2 style)	Sub-branch of the corresponding higher level branch
and so on until...	
Heading 9 (with Heading 9 style)	Sub-branch of the corresponding higher level branch
Regular text	<ul style="list-style-type: none"><li>• If the document was created in Word, imported as a text note of the corresponding branch</li><li>• If the document was created by exporting an original OpenMind Mind Map, imported as text note or floating comment of the corresponding branch as in the original document</li></ul>
Picture embedded in paragraph heading	Floating picture of the corresponding branch
Picture embedded in body text	<ul style="list-style-type: none"><li>• If the document was created in Word, imported as a picture embedded in a text note of the corresponding branch</li><li>• If the document was created by exporting an original OpenMind Mind Map, imported as branch picture, floating picture or attached picture file of the corresponding branch as in the original document</li></ul>
Comment	Pop-up comment for the corresponding branch

Intra-document cross reference to heading with style Title or Heading 1 to 9	Branch connection between the relevant branches
Hyperlink	Hyperlink in text note of the corresponding branch

## Limitations

The following limitations apply when importing a Word document into OpenMind:

- Indexes, tables of contents, tables of authorities, tables of figures, headers and footers are not imported.

Note that you can choose to have the Table of Contents regenerated automatically when re-exporting the Mind Map to Word.

- Sounds and videos that are embedded in the Word document are not imported in OpenMind. To import such elements in the OpenMind Mind Map, make sure they are inserted in the Word document as hyperlinks.
- Editable Word shapes such as AutoShapes, Text Effects (WordArt) and diagrams are imported in the OpenMind document as pictures. This means that when re-exported to Word, they become standard pictures and do not keep their original editable properties.
- If the Word document contains mathematical symbols and the Word equation editor is not installed, you may be prompted to install it. You will need to restart the import procedure after having installed the equation editor.

In addition, if you are importing a document created from an original OpenMind Mind Map, the following limitations apply:

- Pop-up comments will not retain their original size and position.
- Pictures embedded in the Word document as a result of the export from OpenMind do not retain their file name information. When re-importing the document, OpenMind creates new files for these pictures in the 'OMWordImport' folder.
- Re-import of sounds and videos is only possible if you originally chose to export them from OpenMind to Word as "hyperlinks" rather than "inserted in document" (in the Attached Objects tab of the Advanced Microsoft Word Export dialog). Sounds and videos that are embedded in the Word document cannot be re-imported back into OpenMind.
- If you chose to include a picture of the whole Mind Map in the Word document when exporting from OpenMind, this picture is not re-imported back into OpenMind.

# Importing from Microsoft PowerPoint

OpenMind lets you import Microsoft® PowerPoint presentations. This is particularly useful when:

- You have a PowerPoint presentation which you would like to expand using the brainstorming capabilities and features of OpenMind before exporting it again to PowerPoint.
- You have exported an OpenMind Mind Map to PowerPoint, worked on the layout in PowerPoint, but then realized you need to review the structure of your map in OpenMind before doing any further work in PowerPoint.

In both cases, OpenMind allows you to import the PowerPoint presentation into a new Mind Map, preserving as much of the layout and contents of the PowerPoint presentation as possible.

If the PowerPoint presentation was created by exporting an OpenMind Mind Map to PowerPoint, the new Mind Map will have the same branch structure and layout as the original Mind Map.

If you then re-export the new Mind Map to PowerPoint after having made the required changes in OpenMind, any elements added in OpenMind are exported to the new presentation.

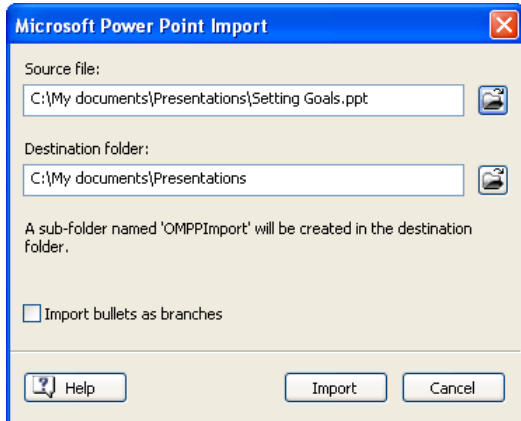
For more information about the elements that OpenMind is not able to preserve, see "Limitations" below.



You must have Microsoft PowerPoint installed on your computer in order to import a PowerPoint presentation into OpenMind. OpenMind supports all Microsoft PowerPoint versions from 2000 onwards.

## Procedure

- Choose **File | Import from Microsoft PowerPoint**.
- Select the PowerPoint presentation you want to import.
- Select the destination folder, i.e. the folder for the OpenMind document created from the PowerPoint presentation.
- (optional) If you want to import the bullet lists that may be included on the PowerPoint slides as sub-branches of the corresponding branches, check **Import bullets as branches**. If you leave this box unchecked, the bullet lists that may be included on the PowerPoint slides are inserted as text notes on the corresponding OpenMind branches.



➤ Click **Import**.

OpenMind creates a sub-folder named 'OMPPImport' within the destination folder and places in it the new OpenMind document as well as any pictures or other objects such as sounds or videos embedded in the PowerPoint presentation.

There may be elements of the PowerPoint presentation that OpenMind is not able to import. If this is the case, OpenMind displays a 'PowerPoint Import Warnings' dialog listing these elements. See "Limitations" below for more information.



## Import modes

The Import operation has two modes depending on how the PowerPoint presentation was created:

- **The PowerPoint presentation was originally created in PowerPoint**

In this mode, the title of the first slide becomes the root name of the new OpenMind document. If you have checked the 'Import bullets as branches' option, each bullet list item of that first slide becomes a new main branch. If not, the entire bullet list is imported as a text note for the root.

All the other slides are imported as further main branches. If you have checked the 'Import bullets as branches' option and some of those slides contain bullet lists, each bullet list item becomes a sub-branch of the corresponding OpenMind branch. If not, the entire bullet list is imported as a text note for the branch.

- **The PowerPoint presentation was created by exporting an OpenMind document**

In this mode, the original branch structure of the OpenMind document is preserved, provided that you have not removed any slide. If you have added new slides, they are imported as main branches.

## Relationship between PowerPoint and OpenMind elements and objects

The following table indicates how OpenMind converts the various elements of your PowerPoint presentation to OpenMind elements and objects.

PowerPoint element	Imported in OpenMind as
Slide	Branch
Slide title	Branch title
Slide sub-title	Text note
Slide body text	Text note
Slide bullet list	<ul style="list-style-type: none"> <li>• If the presentation was created in PowerPoint and you checked 'Import bullets as branches' in the Import dialog, each bullet is imported as a sub-branch. If you didn't check 'Import bullets as branches', the entire bullet list is imported as a text note for the branch.</li> <li>• If the presentation was created by exporting an original OpenMind document, the branch structure of the Mind Map is recreated from the slide titles, not from the bullet list. The text of the bullet list is therefore ignored.</li> </ul>
Slide comment	Floating comment
Slide notes	Pop-up comment
Embedded picture	<ul style="list-style-type: none"> <li>• If the presentation was created in PowerPoint, imported as an attached picture object stored in the 'OMPPIImport' folder</li> <li>• If the presentation was created by exporting an original OpenMind document, imported as a branch picture or floating picture as in the original document</li> </ul>
Autoshape	Attached picture object stored in the 'OMPPIImport' folder
Linked picture	Attached picture object pointing to the original path
Embedded video	Attached video object pointing to the original path

Embedded sound	Attached sound object stored in the 'OMPPIImport' folder
Link to slide	Branch connection

## Limitations

The following limitations apply when importing a PowerPoint presentation into OpenMind:

- The formatting of the slide title and of any slide notes included is not preserved.
- If the layout of the PowerPoint slide contains more than one bullet list, only the first bullet list is taken into account by the import.
- When importing bullets as branches, indented bullets within the main bullet list are imported as branches of the same level as the main bullets, not as sub-branches.
- PowerPoint master slides are not taken into account by OpenMind. Their contents are therefore not imported into the OpenMind document.
- Although hyperlinks contained in PowerPoint text objects are imported into the corresponding OpenMind text note, only their formatting is preserved. The links themselves are not preserved.
- The following PowerPoint objects are imported as pictures in the OpenMind document and listed in the 'PowerPoint Import Warnings' dialog:
  - AutoShapes
  - OLE controls, embedded OLE objects and linked OLE objects
  - Diagrams
  - Tables
  - Text Effects (WordArt)

All other unknown shapes also cause the display of the 'PowerPoint Import Warnings' dialog, but are otherwise ignored.
- If you are using PowerPoint 2003 and above, the picture files that are created in the 'OMPPIImport' folder have the .PNG extension. This means they can be stretched with antialiasing, resulting in higher quality. With PowerPoint 2000, the picture file format used is .GIF. This file format cannot be stretched with antialiasing.

In addition, if you are importing a presentation created by exporting an OpenMind document, the following limitations apply:

- If you delete one or more slides while working in PowerPoint, OpenMind is not able to recreate the branch structure exactly as in the original Mind Map:
  - If you delete the slide corresponding to the root branch, all the slides are imported as main branches, as if you had created the presentation from scratch in PowerPoint.
  - If you delete slides corresponding to branches with sub-branches, OpenMind cannot recreate the structure of these sub-branches.
- Similarly, if you rearrange the slides in a different order in PowerPoint, OpenMind does not take the new order into account.
- Since OpenMind uses the PowerPoint slide titles to recreate the branch structure, any changes you make to the bullet list text in PowerPoint will not be preserved in OpenMind.
- Pop-up comments will not retain their original size and position.
- Pictures embedded in the PowerPoint presentation as a result of the export from OpenMind do not retain their original file name or path information. When re-importing the presentation, OpenMind creates new files for these pictures in the 'OMPPIImport' folder.
- If you chose to include a picture of the whole Mind Map in the PowerPoint presentation when exporting from OpenMind, the slide containing this picture is not re-imported back into OpenMind.

# Importing from Microsoft Outlook

OpenMind lets you import Microsoft® Outlook task lists. This is particularly useful when for instance:

- You have started a task list in Microsoft Outlook which you would like to expand using the brainstorming capabilities and features of OpenMind.
- You have exported an OpenMind task list to Microsoft Outlook, starting adding tasks or editing existing ones, but then realized you need to review the structure of your task list in OpenMind before doing any further work in Microsoft Outlook.

In both cases, OpenMind allows you to import the Microsoft Outlook task list as a new document in the Mind Map view.

Once you have made the required changes in OpenMind, you can either re-export the task list to Outlook as a new series of tasks, or synchronize the edited OpenMind version with the original Outlook version. For more information on exporting and synchronizing, see "Exporting to Microsoft Outlook".



You must have Microsoft Outlook 2000 or above installed on your computer in order to use this import method.

## Procedure

- Choose **File | Import from Microsoft Outlook**.
- Select the Outlook task folder whose tasks you want to import.



If the Outlook folder contains tasks that you have already imported to an OpenMind document or exported from an OpenMind document previously, you might prefer to find the OpenMind document in question and synchronize the task folder with it rather than creating a new OpenMind document.

The imported task list opens in the Mind Map view.

## Limitations

Only the elements of the Microsoft Outlook task list that have an equivalent in OpenMind are imported and shown in the Task/Timeline Info panel:

- Task names, dates, durations, priorities and completion levels are all imported.
- Outlook task notes are imported as pop-up comments.
- Other information corresponding to features that are not supported in OpenMind, such as status, reminders, categories and so on, as well as any user-defined field, is not imported.

# Importing from Microsoft Project

OpenMind lets you import Microsoft® Project plans. This is particularly useful when for instance:

- You have started a project plan in Microsoft Project which you would like to expand using the brainstorming capabilities and features of OpenMind.
- You have exported an OpenMind project plan to Microsoft Project, starting adding tasks or editing existing ones, but then realized you need to review the structure of your plan in OpenMind before doing any further work in Microsoft Project.

In both cases, OpenMind allows you to import the Microsoft Project plan as a new project plan in the Gantt view.



OpenMind does not support versions of Microsoft Project prior to 2003. You need to have Microsoft Project installed on your computer in order to use this export method.



*You can also import Microsoft Project plans via XML. The advantage of this method is that you do not need to have Microsoft Project installed on your machine. See "Importing from XML" for more information.*

## Procedure

- Choose **File | Import from Microsoft Project**.
- Select the Microsoft Project plan you want to import.

The imported project plan opens in the Gantt view.

## Limitations

The OpenMind Gantt view does not support all the project management features offered by Microsoft Project. This means that only the elements of the Microsoft Project that have an equivalent in OpenMind will be imported:

- Task names, dates, durations, lead and lag times, resources, priorities, completion levels, links, constraints and so on are all imported.
- Milestone tasks are imported, but their duration is set to zero.
- The project calendar is imported.
- Task notes are imported as pop-up comments.

- Other Microsoft Project information corresponding to features that are not supported in OpenMind, such as task types, baselines, resource calendars, task calendars, detailed resource allocation information (work units, contours, cost etc.) is not imported. Information derived from tracking and leveling operations in Microsoft Project is not imported.

In most cases, the tasks dates and scheduling information will be identical in OpenMind and in Microsoft Project. They may differ if advanced operations not supported by OpenMind (such as leveling or tracking) have been performed on the project in Microsoft Project.

# Importing from Mediator

OpenMind lets you import Mediator presentations. This is particularly useful when:

- You have a Mediator presentation which you would like to expand using the brainstorming capabilities and features of OpenMind before exporting it again to Mediator.
- You have exported an OpenMind Mind Map to Mediator, added interactivity to it in Mediator using events and actions, but then realized you need to review the structure of your map in OpenMind before doing any further work in Mediator.

In both cases, OpenMind allows you to import the Mediator presentation into a new Mind Map, preserving as much of the structure and contents of the Mediator presentation as possible.

If the Mediator presentation was created by exporting an OpenMind Mind Map to Mediator, the new Mind Map will have the same branch structure and layout as the original Mind Map.

If you re-export the new Mind Map to Mediator after having made the required changes in OpenMind, any elements added in OpenMind are exported to the new presentation. Note that although OpenMind creates a new Mediator presentation when re-exporting, the original Mediator document must remain accessible. If it is no longer accessible, OpenMind cannot preserve the elements of the original presentation that are specific to Mediator (such as events and actions or Mediator objects that have no equivalent in OpenMind).

For more information about the elements that OpenMind is not able to preserve, see "Limitations" below.



You must have Mediator 8 with Service Pack 3 or above installed on your computer in order to import a Mediator presentation into OpenMind.

This free update is available on the MatchWare web site at:

<http://www.matchware.com/en/support/servicepacks/mediator8.htm>

OpenMind imports the first Mediator page as the root of the new OpenMind document, and all the other Mediator pages of the same level as further main branches. Mediator sub-pages become sub-branches of the corresponding OpenMind branch and so on.

## Procedure

- Make sure the Mediator presentation to be imported is not already open in Mediator.
- Choose **File | Import from MatchWare Mediator**.
- Select the Mediator presentation and click Open.

OpenMind creates a new document and import the Mediator presentation into it.

## Relationship between Mediator and OpenMind elements and objects

The following table indicates how OpenMind converts the various elements of your Mediator presentation to OpenMind elements and objects.

Mediator element	Imported in OpenMind as
Page	Branch  Note that the Mediator page description is used as the branch name. If the Description field is empty, then the page name is used.
Page note (Notes tab of the Properties dialog)	Pop-up comment
Picture object	<ul style="list-style-type: none"><li>• If the presentation was created in Mediator, imported as an attached picture object</li><li>• If the presentation was created by exporting an original OpenMind document, imported as a branch picture, floating picture or attached picture object as in the original document</li></ul>
Text object	<ul style="list-style-type: none"><li>• If the presentation was created in Mediator, imported as a text note for the branch</li><li>• If the presentation was created by exporting an original OpenMind document, imported as a text note or as a floating comment as in the original document</li></ul>
Hypertext object	Text note
Button object	<ul style="list-style-type: none"><li>• If the presentation was created in Mediator, imported as a button</li><li>• If the presentation was created by exporting an original OpenMind document, imported as a button, a branch connection, an attached text object or an attached sound object as in the original document</li></ul>
Flash object	Attached Flash object
Media Player object	Attached video object
All other Mediator objects and elements	These are not imported. They are however preserved if you re-export the OpenMind document to Mediator, provided that the original Mediator document is still accessible.

## Limitations

The following limitations apply when importing a Mediator presentation into OpenMind:

- If the first page in the Mediator presentation contains sub-pages, these sub-pages are not imported.
- When importing a Mediator hypertext object into OpenMind, the hypertext object is converted to a text note. This means that any events and actions that may be associated with it in the original Mediator presentation are not preserved when re-exporting the OpenMind document to Mediator.
- Once the presentation is imported into OpenMind, if you change the name of a branch and re-export the presentation, the Description field of the corresponding Mediator page will be changed to the new name, but the Page name will remain unchanged.

In addition, if you are importing a Mediator presentation created by exporting an original OpenMind Mind Map to Mediator, the following limitations apply:

- When exporting a Mind Map to Mediator, OpenMind places special tags formatted with # signs in the Notes tab of the Properties dialog of particular elements of the new Mediator presentation, including the pages themselves. These tags contain information required by OpenMind to re-import the Mediator presentation. If you delete one or more of these tags by accident, OpenMind will not be able to recreate the corresponding element(s) exactly as in the original Mind Map.
- When exporting a Mind Map to Mediator, OpenMind buttons, hyperlinks, branch connections, attached text files and attached sound files are converted to Mediator buttons containing the relevant events and actions. An attached sound object in the OpenMind document for instance becomes a button with a Mouse Click event and a Sound action in the Mediator presentation. If you delete or move these events and actions while working in Mediator, although OpenMind will be able to recreate the original object, the link path will be lost.

# Importing from XML

This import method lets you create OpenMind documents by importing files in various XML formats into OpenMind. OpenMind supports the following XML import file types:

- **OpenMind XML:** This file type allows you to open OpenMind documents previously exported in the OpenMind XML format.
- **Microsoft Project XML:** This file type allows you to create an OpenMind project plan by importing a Microsoft® Project plan exported from Microsoft Project in the XML format. You can use the Microsoft Project XML import method even if you do not have Microsoft Project on your computer. It is therefore a useful alternative to importing a Microsoft Project plan in the .mpp format, for which you do need to have Microsoft Project installed on your computer.

The same limitations apply when importing a Microsoft Project XML file as when importing a Microsoft Project .mpp file. For more information, see "Importing from Microsoft Project".



OpenMind does not support versions of Microsoft Project XML prior to 2003.

- **MindManager XML:** This file type allows you to create an OpenMind document by importing a MindManager® document exported from MindManager in the XML format. You can use the MindManager XML import method even if you do not have MindManager on your computer.

Note that elements of the MindManager file that do not have an equivalent in OpenMind are not imported. OpenMind supports MindManager XML files from versions X5 and 6.

- **MindManager MMAP:** This file type allows you to create an OpenMind document by importing a MindManager® document in the .mmap format. You can use the MindManager MMAP import method even if you do not have MindManager on your computer.

Note that elements of the MindManager file that do not have an equivalent in OpenMind are not imported. OpenMind supports MindManager .mmap files from versions X5 and 6.

## Procedure

- Choose **File | Import from XML**.
- Choose the required import file type in the Type field.



*The Autodetect XML file type presented by default lets OpenMind detect automatically the type of the XML file you specify, provided that it is one of the supported XML file types.*

- Click OK.

The imported file opens in the Mind Map view.

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# Support

## Getting help

The OpenMind documentation is provided as online help in the program.

### The FAQ knowledge base

If you require support from MatchWare, please refer to our FAQ Knowledge Base:

<http://faq.matchware.com/en/>

As well as answering the most commonly asked technical questions concerning OpenMind, this database allows you to post comments and send questions to MatchWare.

### The Discussion forum

You will find different help options and forums for all MatchWare products on our web site. More forums and help options are added as necessary. For an overview of the current options, please visit:

<http://www.matchware.com>

You can select any of the forums and read its entries, even search for a topic or keyword. To ask questions or add a comment to a topic, you need to register as a MatchWare product user.

Discussion forums are intended for users to exchange ideas and experience with our products. Please note that they are not intended for reporting issues found in the program.

## Reporting a problem

To report a problem, bug or any other error in OpenMind, please send a message to MatchWare via our FAQ Knowledge Base:

<http://faq.matchware.com/en/>

### MatchWare BugBuster™

This is a small program that runs in the unfortunate event of an OpenMind crash. If this happens, BugBuster™ displays a form pre-filled with specific information about the problem. Enter a description of the circumstances of the crash and give as many details as possible. A step-by-step description will help us to quickly locate and fix the bug.

BugBuster will help us make OpenMind more stable, which in turn will benefit you.



If the crash is particularly severe, BugBuster may not work.



# Reference

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# Reference

The reference section contains a description of the following OpenMind features:

- Properties

These topics give a full description of the properties applicable to each of the OpenMind elements, such as the document itself, the root, the branches and the various objects.

- Shortcuts

This topic lists all the keyboard shortcuts provided by OpenMind.

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# Properties

## Overview

Many OpenMind components, such as the document itself, the root, the branches and any attached objects have specific properties, displayed in the Properties dialog. You can use the Properties dialog to make any necessary changes to these components, as described in "Using the Properties dialog."

The topics of this section describe in detail the properties applicable to each OpenMind component.

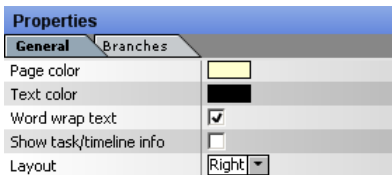
### Notes:

- If the Properties dialog is not already visible, click the **General** tab on the right of the workspace to open the corresponding panel.
- The properties described are not always applicable to all views. The Properties dialog only lists the properties applicable to the current view.

## Document

### Document properties: General tab

A click on the workspace (in other words away from the root or any branch) displays this Properties dialog.



**Page color:** Click the small rectangle to choose a new color for the page (i.e. the workspace).

**Text color:** Click the small rectangle to choose a new color for the text displayed on the page (in other words the root label and branch labels).

**Show duration bars:** This property only appears when you are viewing the map in the Timeline view. By default, if you have entered both a start time and an end time for a particular event, the duration of the event is shown as a bar below the time axis. Uncheck this property if you do not want to see these duration bars below the time axis.

**Show title:** This property only appears when you are viewing the map in the Timeline view. By default, the timeline displays the root name as title, or, if you have applied a filter to a branch, the name of that branch. Uncheck this property if you don't want to see a title, or if you prefer to create your own title by inserting a floating comment in the timeline.

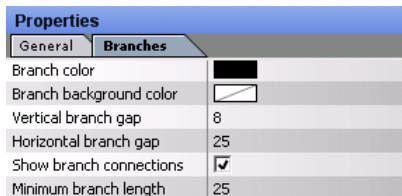
**Word wrap text:** Check this option if you want the text to wrap automatically to the next line when you enter long branch names. This setting applies to all the branches of your document.

**Show task/timeline info:** Check this box to display directly on the Mind Map any task or time information you might have associated with its branches. Checking this box has the same effect as checking the 'Show info on branches' option in the Task/Timeline Info panel.

**Layout:** This property only appears when you are viewing the map in the Left/Right view. Click the arrow and choose Right to display all the branches on the right of the root, or Left to display them on the left of the root. See "Using the Left/Right view" for more information.

## Document properties: Branches tab

The Branches tab of the Document properties dialog allows you to define default properties for the branches of your map.



**Branch color:** Click the small rectangle to choose a new color for all the branches and sub-branches of your map.

**Branch background color:** Click the small rectangle to choose a new color for the label background of all the branches and sub-branches of your map.

**Vertical branch gap:** The value you enter in this field represents the vertical spacing between each set of branches. The default value depends on the view used.

**Horizontal branch gap:** The value you enter in this field represents the horizontal spacing between each set of branches. The default value depends on the view used.

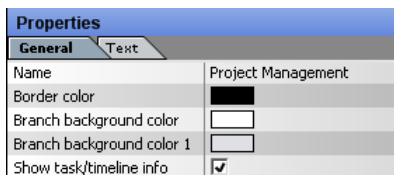
**Show branch connections:** This box is checked by default. Uncheck it if you do not want branch connections to be visually represented on your map. See "Creating branch connections" for more information.




**Minimum branch length:** This field indicates the minimum length of the horizontal part of the branch underlying the branch label. However if the branch label is longer than the minimum width defined here, OpenMind chooses a branch width sufficient to underline the entire label.

## Root

### Root properties: General tab

When you select the main root or any other root contained on your map, the following Properties dialog is shown.



Properties	
General Text	
Name	Project Management
Border color	
Branch background color	
Branch background color 1	
Show task/timeline info	<input checked="" type="checkbox"/>

**Name:** This property shows the label of the currently selected root. You can edit it or enter a new label by typing in the input field. Note that if your label contains several lines (which you enter by pressing Ctrl + Enter at the end of each line), only the first line is displayed in this field.

**Border color:** Click the small rectangle to choose a new color for the border surrounding the root shape.

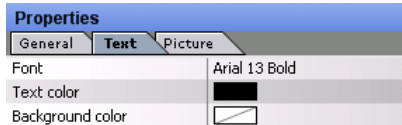
**Branch background color:** Click the small rectangle to choose a new color for the background of the currently selected root.

**Branch background color 1:** This option is only available in Mind Map view, when the map style chosen for the Mind Map allows background gradients. Click the small rectangle to choose an end color for the gradient.

**Show task/timeline info:** This option is only displayed when the 'Show task/timeline info' option of the document as a whole is checked (see "Document properties: General tab"). It is checked by default. You can uncheck it to hide the task or time information for the root.

### Root properties: Text tab

The Text tab of the Root properties dialog allows you to define all the properties related to the root label.



**Font:** Click this field to choose a new font, attribute (e.g. bold, italics etc.) or point size for the label.

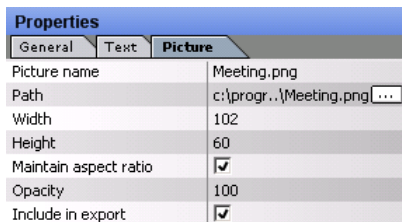
**Alignment:** This field only appears if the currently selected root has a multi-line label (which you can create by pressing Ctrl + Enter at the end of each line). You can choose to right-align, left-align or center all the lines making up the label.

**Text color:** Click the small rectangle to choose a new color for the label of the currently selected root.

**Background color:** Click the small rectangle to choose a new color for the label background.

## Root properties: Picture tab

The Properties dialog of the root only contains a Picture tab if you have inserted a branch picture on the root. The Picture tab allows you to define the properties related to the branch picture.



**Picture name:** By default, this field shows the name of the picture file. You can however replace it with a name of your choice.

- If you export your document to HTML, this picture name will also be inserted in the Alt meta-tag for the picture in the .html file. When viewing the HTML page in the browser and moving the mouse pointer over the picture, you will therefore see the name of the picture appear in a small frame under the picture.
- Similarly, if you export your document to Mediator, the picture name will be inserted in the Notes tab of the Properties dialog of the picture in Mediator.

**Path:** This shows the path of the picture. Enter a new folder and/or file name or click the Browse button (...) to choose a different picture.

**Width:** This field shows the current width of the picture. You can resize the picture by entering a different value.

**Height:** This field shows the current height of the picture. You can resize the picture by entering a different value.

**Maintain aspect ratio:** This option is checked by default. Disable it if you do not want to preserve the proportions of the branch picture (in other words, the ratio between its width and its height) when resizing it.

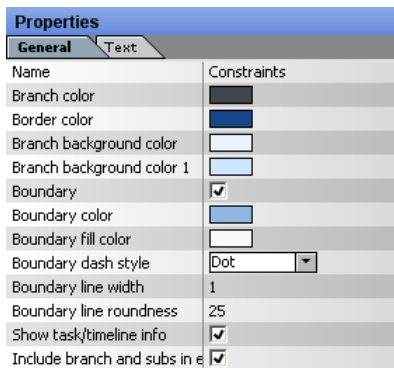
**Opacity:** By default, this field has the value 100, which means that the picture is 100% visible. You can give it a transparency effect by entering a lower value in this field, thereby decreasing its opacity. The value 1 means that the picture is completely transparent.








**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the branch picture to be exported.

## Branch

### Branch properties: General tab

When you select a branch or sub-branch on your map, the following Properties dialog is shown.



Properties	
General	Text
Name	Constraints
Branch color	
Border color	
Branch background color	
Branch background color 1	
Boundary	<input checked="" type="checkbox"/>
Boundary color	
Boundary fill color	
Boundary dash style	Dot 
Boundary line width	1
Boundary line roundness	25
Show task/timeline info	<input checked="" type="checkbox"/>
Include branch and subs in export	<input checked="" type="checkbox"/>

**Name:** This property shows the label of the currently selected branch. You can edit it or enter a new label by typing in the input field. Note that if your label contains several lines (which you enter by pressing Ctrl + Enter at the end of each line), only the first line is displayed in this field.

**Line width:** (only for sub-branches) This field, which is only displayed if the currently selected branch is a sub-branch, indicates the width of the line connecting the sub-branch to its parent branch. The value must be included between 1 and 5.

**Branch color:** Click the small rectangle to choose a new color for the branch.

**Border color:** (not available in all map styles) Click the small rectangle to choose a new color for the border surrounding the branch.

**Branch background color:** Click the small rectangle to choose a new color for the background of the currently selected branch.

**Branch background color 1:** This option is only available in Mind Map view, when the map style chosen for the Mind Map allows background gradients. Click the small rectangle to choose an end color for the gradient.

**Boundary:** Check this box to show a boundary around the branch and all its sub-branches.

The next five fields only appear if you have checked the Boundary property.

**Boundary color:** Click the small rectangle to choose a new color for the boundary.

**Boundary fill color:** Click the small rectangle to choose a new color for the space within the boundary.

**Boundary dash style:** Click the down arrow to choose a style for the boundary.

**Boundary line width:** Enter a value between 1 and 5 to determine the width of the boundary.

**Boundary line roundness:** Enter a value between 1 and 50 to determine how rounded the corners of the boundary should be.

**Show task/timeline info:** This option is only displayed when the 'Show task/timeline info' option of the document as a whole is checked (see "Document properties: General tab"). It is checked by default. You can uncheck it to hide the task or time information for the selected branch.

The next four properties only appear when you are working in the Gantt view.

**Show task name:** Check this box to display the task name after the task bar in the Gantt chart.

**Show resources:** Check this box to display the resources names after the task bar in the Gantt chart.

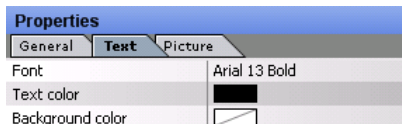
**Task border color:** Click the small rectangle to choose a new color for the border of the task bar in the Gantt Chart.

**Task fill color:** Click the small rectangle to choose a new color for the task bar in the Gantt Chart.

**Include branch and subs in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the branch and all its sub-branches to be exported.

## Branch properties: Text tab

The Text tab of the Branch properties dialog allows you to define all the properties related to the branch label.



This tab is identical to the Text tab of the root. See "Root properties: Text tab" for more information.

## Branch properties: Picture tab

The Properties dialog of a particular branch only contains a Picture tab if a branch picture has been inserted on the branch. The Picture tab allows you to define the properties related to the branch picture.

Properties		
General	Text	Picture
Picture name	Meeting.png	
Path	c:\progr...\Meeting.png ...	
Width	102	
Height	60	
Maintain aspect ratio	<input checked="" type="checkbox"/>	
Opacity	100	
Include in export	<input checked="" type="checkbox"/>	

This tab is identical to the Picture tab of the root. See "Root properties: Picture tab" for more information.

## Text object

### Text object properties: General tab

When you select a text object in the Object list of a branch, the following Properties dialog is shown.

Properties	
General	Text
Name	Addresses.doc
Path	C:\Te...\Addresses.doc ...
Include in export	<input checked="" type="checkbox"/>

**Name:** By default, this field shows the name of the attached text file. You can however replace it with a name of your choice.

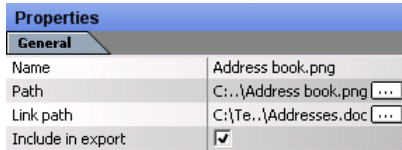
**Path:** This shows the path of the attached text file. Enter a new folder and/or file name or click the Browse button  to choose a different text file.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the text object to be exported.

## Picture object

### Picture object properties: General tab

When you select a picture object in the Object list of a branch, the following Properties dialog is shown.



**Name:** By default, this field shows the name of the attached picture file. You can however replace it with a name of your choice.

- If you export your document to HTML, this picture name will also be inserted in the Alt meta-tag for the picture in the .html file. When viewing the HTML page in the browser and moving the mouse pointer over the picture, you will therefore see the name of the picture appear in a small frame under the picture.
- Similarly, if you export your document to Mediator, the picture name will be inserted in the Notes tab of the Properties dialog of the picture in Mediator.

**Path:** This shows the path of the attached picture file. Enter a new folder and/or file name or click the Browse button [...] to choose a different picture file.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the picture object to be exported.

If you have placed a link on the picture, the Properties dialog lists additional properties which vary according to the link type as follows:

### URL link

**URL:** You can edit the URL of the link or enter a different URL by typing in this field.

**Open link in new window (HTML):** Check this box if you intend to export your map to HTML and want the link to open in a new browser window.

### File or Folder link

**Link path:** You can edit the path of the file link or enter a different path by typing in this field.

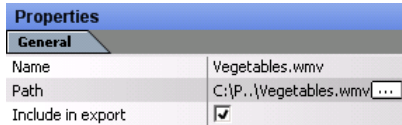
### Email link

**Email address:** You can edit the email address of the email link or enter a different address by typing in this field.

## Video object

### Video object properties: General tab

When you select a video object in the Object list of a branch, the following Properties dialog is shown.



**Name:** By default, this field shows the name of the attached video file. You can however replace it with a name of your choice.

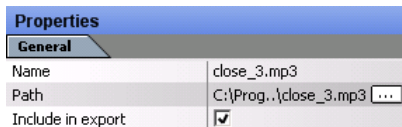
**Path:** This shows the path of the attached video file. Enter a new folder and/or file name or click the Browse button (...) to choose a different video file.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the video object to be exported.

## Sound object

### Sound object properties: General tab

When you select a sound object in the Object list of a branch, the following Properties dialog is shown.



**Name:** By default, this field shows the name of the attached sound file. You can however replace it with a name of your choice.

**Path:** This shows the path of the attached sound file. Enter a new folder and/or file name or click the Browse button (...) to choose a different sound file.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the sound object to be exported.

## Button

### Button properties: General tab

When you select an attached button in the Object list of a branch, the following Properties dialog is shown.

Properties	
General	
Name	MatchWare
URL	http://www.matchware.com
Open link in new window (HTML)	<input type="checkbox"/>
Include in export	<input checked="" type="checkbox"/>

**Name:** You can edit the button name or enter a different name by typing in this field.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the button to be exported.

The remaining properties vary according to the type of the link that has been placed on the button as follows:

### URL link

**URL:** You can edit the URL of the link or enter a different URL by typing in this field.

**Open link in new window (HTML):** Check this box if you intend to export your map to HTML and want the link to open in a new browser window.

### File or Folder link

**Link path:** You can edit the path of the file link or enter a different path by typing in this field.

### Email link

**Email address:** You can edit the email address of the email link or enter a different address by typing in this field.

## Hyperlink

### Hyperlink properties: General tab

When you select an attached hyperlink in the Object list of a branch, the following Properties dialog is shown.

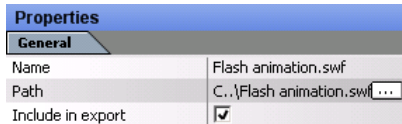
Properties	
General	
Name	Address
Email address	sales@matchware.com
Include in export	<input checked="" type="checkbox"/>

This tab is identical to the General tab for buttons. See "Button properties: General tab" for more information.

# Flash object

## Flash object properties: General tab


When you select a Flash object in the Object list of a branch, the following Properties dialog is shown.



The screenshot shows a 'Properties' dialog box with a 'General' tab. It contains three fields: 'Name' with the value 'Flash animation.swf', 'Path' with the value 'C:\Flash animation.swf...' and a browse button '...', and 'Include in export' which is checked with a checkbox.

Properties	
General	
Name	Flash animation.swf
Path	C:\Flash animation.swf...
Include in export	<input checked="" type="checkbox"/>

**Name:** By default, this field shows the name of the attached Flash file. You can however replace it with a name of your choice.

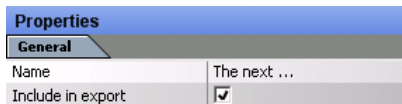
**Path:** This shows the path of the attached Flash file. Enter a new folder and/or file name or click the Browse button  to choose a different Flash file.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the Flash object to be exported.

# Text note

## Text note properties: General tab

When you select a text note in the Object list of a branch, the following Properties dialog is shown.



The screenshot shows a 'Properties' dialog box with a 'General' tab. It contains two fields: 'Name' with the value 'The next ...' and 'Include in export' which is checked with a checkbox.

Properties	
General	
Name	The next ...
Include in export	<input checked="" type="checkbox"/>



**Name:** This shows the default name of the text note. You can edit it or enter a different name by typing in this field.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the text note to be exported.

# Floating comment

## Floating comment properties: General tab

When you select a floating comment on the workspace, the following Properties dialog is shown.

Properties	
General	Text
Name	Planned for summer
Frame color	
Frame width	2
Line color	
Line width	1
Include in export	<input checked="" type="checkbox"/>

**Name:** This shows the contents of the comment. You can edit it by typing in this field.

**Frame color:** Click the small rectangle to choose a new color for the frame surrounding the comment.

**Frame width:** Edit this field to increase or decrease the width of the frame surrounding the comment.

The next two properties only appear if the floating comment is connected to a branch.



**Line color:** Click the small rectangle to choose a new color for the line connecting the comment to the branch.

**Line width:** Edit this field to increase or decrease the width of the line connecting the comment to the branch.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the floating comment to be exported.

## Floating comment properties: Text tab

The Text tab of the Floating comment properties dialog allows you to define all the properties related to the comment text.

Properties	
General	Text
Font	Arial 10 Bold
Text color	
Background color	

**Font:** Click this field to choose a new font, attribute (e.g. bold, italics etc.) or point size for the comment text.

**Alignment:** This field only appears if the selected comment contains several lines (which you can create by pressing Ctrl + Enter at the end of each line). You can choose to right-align, left-align or center all the lines making up the comment.

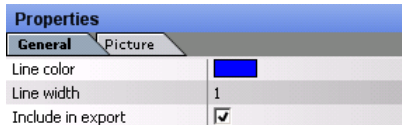
**Text color:** Click the small rectangle to choose a new color for the comment text.

**Background color:** Click the small rectangle to choose a new color for the comment background.

# Floating picture

## Floating picture properties: General tab

When you select a floating picture on the workspace, the following Properties dialog is shown.



The following two properties only appear if the floating picture is connected to a branch.

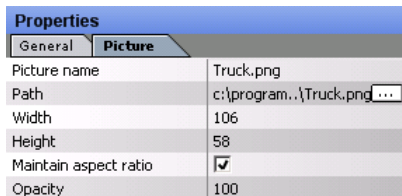
**Line color:** Click the small rectangle to choose a new color for the line connecting the floating picture to the branch.

**Line width:** Edit this field to increase or decrease the width of the line connecting the floating picture to the branch.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the floating picture to be exported.


## Floating picture properties: Picture tab

Clicking the Picture tab of the Floating picture properties dialog shows the following dialog.



**Picture name:** By default, this field shows the name of the picture file. You can however replace it with a name of your choice.

- If you export your document to HTML, this picture name will also be inserted in the Alt meta-tag for the picture in the .html file. When viewing the HTML page in the browser and moving the mouse pointer over the picture, you will therefore see the name of the picture appear in a small frame under the picture.
- Similarly, if you export your document to Mediator, the picture name will be inserted in the Notes tab of the Properties dialog of the picture in Mediator.

**Path:** This shows the path of the picture. Enter a new folder and/or file name or click the Browse button  to choose a different picture.

**Width:** This field shows the current width of the picture. You can resize the picture by entering a different value.

**Height:** This field shows the current height of the picture. You can resize the picture by entering a different value.



**Maintain aspect ratio:** This option is checked by default. Disable it if you do not want to preserve the proportions of the branch picture (in other words, the ratio between its width and its height) when resizing it.

**Opacity:** By default, this field has the value 100, which means that the picture is 100% visible. You can give it a transparency effect by entering a lower value in this field, thereby decreasing its opacity. The value 1 means that the picture is completely transparent.

## Branch connection

### Branch connection properties: General tab

When you select a branch connection in the Object list of a branch, the following Properties dialog is shown.

Properties	
General	
Name	Next year
Line color	
Line width	1
Hover color	
Include in export	<input checked="" type="checkbox"/>

**Name:** This shows the name given to the branch connection, which by default is the name of the end branch.

**Line color:** Click the small rectangle to choose a new color for the branch connection.

**Line width:** Edit this field to increase or decrease the width of the branch connection.

**Hover color:** This refers to the color taken by the branch connection when you select it or when you just move the mouse pointer over it. Click the small rectangle to choose a new hover color for the branch connection.

**Include in export:** This option is checked by default. Disable it if you intend to export your map to another format (HTML, Mediator, Word and so on) but do not want the branch connection to be exported.

---

# Keyboard shortcuts

The table below lists all the keyboard shortcuts provided by OpenMind.

Keyboard shortcut	Description
<b>Enter</b>	Add a new branch at the same level as the selected branch
<b>Insert</b>	Add a new sub-branch to the selected branch
<b>Shift + Enter</b>	Add a new branch just before the selected branch
<b>Delete</b>	Delete the selected branch or element
<b>Up</b>	Select the branch placed above the currently selected branch
<b>Down</b>	Select the branch placed below the currently selected branch
<b>Left</b>	Select the branch to the left of the currently selected branch in the map
<b>Right</b>	Select the branch to the right of the currently selected branch in the map
<b>F1</b>	Help
<b>F2</b>	Edit the name of the selected branch or the selected floating comment
<b>F3</b>	Toggle Brainstorm mode
<b>F4</b>	Resize the map so that it fits entirely in the workspace
<b>F7</b>	Spell check the document
<b>F8</b>	Toggle between selected branch and Text Note editor
<b>F9</b>	Toggle Full Screen mode
<b>F11</b>	Insert or edit a pop-up comment on the selected branch
<b>F12</b>	Specify a start time for the selected branch
<b>Ctrl + A</b>	Select all branches
<b>Ctrl + F</b>	Find and replace text in document
<b>Ctrl + N</b>	Create a new document

<b>Ctrl + O</b>	Open and browse for an existing document
<b>Ctrl + P</b>	Print the active document
<b>Ctrl + S</b>	Save the active document
<b>Ctrl + Z</b>	Undo the last action
<b>Ctrl + Shift + Z</b> <b>Ctrl + Y</b>	Reverse the last Undo
<b>Ctrl + C</b> <b>Ctrl + Insert</b>	Copy the selected data to the clipboard
<b>Ctrl + X</b> <b>Shift + Delete</b>	Cut the selected data to the clipboard
<b>Ctrl + V</b> <b>Shift + Insert</b>	Paste the data contained in the clipboard to the selected destination
<b>Ctrl + "+"</b>	Zoom in
<b>Ctrl + "-"</b>	Zoom out
<b>Ctrl + F6</b>	Go from one open document to the next
<b>Ctrl + F7</b>	Spell check the selected element
<b>Ctrl + F8</b>	Open the Text Note editor to create a new text note
<b>Ctrl + F12</b>	Specify an end time for the selected branch
<b>Ctrl + Tab</b>	Switch between open documents
<b>Ctrl + Up</b>	Move the selected branch up (Mind Map, Left/Right and Outline views only)
<b>Ctrl + Down</b>	Move the selected branch down (Mind Map, Left/Right and Outline views only)
<b>Ctrl + Left</b>	Move the selected branch left (Top Down view only) Collapses the selected branch (Outline view only)
<b>Ctrl + Right</b>	Move the selected branch right (Top Down view only) Expands the selected branch (Outline view only)
<b>Ctrl + Home</b>	Go to the first cell of the Outline (Outline view, Timeline view, Gantt view)

<b>Ctrl + End</b>	Go to the last cell of the Outline (Outline view, Timeline view, Gantt view)
<b>Shift + drag</b>	Navigate the Mind Map by panning the view within the workspace
<b>Ctrl + 1</b>	Show only the main branches
<b>Ctrl + 2, 3, 4</b>	Show only two, three or four levels of branches
<b>Ctrl + 5</b>	Show all levels of branches
<b>Ctrl + Shift + "+"</b>	Expands the selected branch
<b>Ctrl + Shift + "-"</b>	Collapses the selected branch
<b>Ctrl + Shift + 1</b>	Display the document in Mind Map view
<b>Ctrl + Shift + 2</b>	Display the document in Top Down view
<b>Ctrl + Shift + 3</b>	Display the document in Left/Right view
<b>Ctrl + Shift + 4</b>	Display the document in Timeline view
<b>Ctrl + Shift + 5</b>	Display the document in Outline view
<b>Ctrl + Shift + 6</b>	Display the document in Gantt view
<b>Ctrl + F2</b>	Link tasks (Gantt view only)
<b>Ctrl + Shift + F2</b>	Unlink tasks (Gantt view only)
<b>Shift + F2</b>	Open the Task Information dialog (Gantt view only)
<b>Alt + Shift + Right</b>	Indent the selected branch (Outline view) or task (Gantt view)
<b>Alt + Shift + Left</b>	Outdent the selected branch (Outline view) or task (Gantt view)

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