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Welcome to MindManager

What's new in MindManager for Windows?

What do you want to do?

Get the right things done faster, better, and more collaboratively with MindManager 21 by bringing clarity and structure to plans, projects, and processes.

MindManager 21 helps you transform scattered ideas and information into dynamic visual mind maps, flowcharts, concept maps, matrices, and other diagrams. With tools and features that let you take control of your work, synthesize vast amounts of data and communicate more effectively, MindManager 21 boosts your productivity to gain a competitive edge.

Want to know about compatibility with earlier versions?

New in MindManager 21

Enhanced topic information

View topic info faster and easier with new topic info cards. You also get greater flexibility over the way your information is displayed, resulting in the perfect display for your use case. With a fresh new design, the new topic info style is more clear, concise, and customizable.

Enhanced MindManager Snap

MindManager Snap offers new personal and collaborative ways to capture, receive, and share content any time, from anywhere, through your desktop, Chrome browser or mobile device..

New accelerator keys

Use new accelerator keys to quickly add and create resources and tags on the fly.

New Places import & export project management

Import and export any supported file type — including Microsoft Word, Excel, and Project files and more — to and from Places (cloud storage services), such as OneDrive, Google Drive, and SharePoint.

New flowchart extensions

Increase your impact with improved relationship connection capabilities by adding a new dimension of readability to complex flowcharts with line jumps, including rounded, bridge, and gap jumps.

Enhanced Microsoft Word import & export

Take advantage of our fully redesigned Word import and export tools. Rebuilt from the ground up to offer greater customization and usability, without the dependence on a native Word installation.

Reimagined slides & presentations

Take unprecedented control over your slides. Use diagramming capabilities on individual slides, add information from multiple maps, and save your slides as a deck file, which can be presented in MindManager 21.

New MindManager for Microsoft Teams app

The MindManager App for Microsoft Teams deeply integrates with Microsoft Teams to unleash the power of MindManager directly into your teams and channels. It gives you the flexibility to open and edit MindManager files using an embedded editor directly in Microsoft Teams or in the MindManager desktop program. What's more, you can co-edit maps, manage team dashboards, and keep tasks and projects on track all within Microsoft Teams.

Compatibility with earlier versions

MindManager can read maps from MindManager X5 through MindManager 21 without any changes to the maps.

No special procedure is needed to open maps from these earlier versions, but if you used any custom add-ins from third-party vendors on your maps, you will need to get updated versions of these to use.

Getting started with MindManager

MindManager lets you capture ideas and information visually, organize them and then create an action plan. You can analyze a problem, brainstorm a solution or plan a complex project.

Note: You must be signed in to your MindManager account to use MindManager 21. For more information, see Signin.

Before getting to work, try a series of built-in interactive tutorials that will help you quickly get up-tospeed with a variety of MindManager features and workflows.

For more information about working with MindManager licences in multi-user environments, see Work with server-based MindManager licenses.

Entering Your MindManager license key

When you purchase MindManager 21 or have it installed by your Administrator, you receive a License Key. You can enter this key at any time:

- during installation
- · during or after the trial period

To enter your license key when MindManager is starting up:

On the **Welcome** dialog, click **Enter**License Key...

Click **Continue**, and follow the instructions below.

To enter your license key when MindManager is open, or to add it to your existing online account:

On the **Help** tab, click **License Key**.

On the **File** tab, click Help, then click the **License Key** button.

Note: When you sign in to your account, MindManager remains logged into your account until you sign out; there is no need to sign in each time you want to use MindManager.

Alternatively, Administrators can also grant a License using the Customer Admin Portal, in which case users don't require a License Key. They would simply sign in with their MindManager account or organizational credentials.

Interactive Tour of MindManager

To learn more about using MindManager, take the interactive tour by doing **one** of the following.

On the **Help** tab, click **Tutorial**. On the **File** tab, click **Help**, then select **Tutorial**.

Having problems?

For troubleshooting information, visit the Support section of the MindManager website.

What do you want to do?

Work with server-based MindManager licenses

MindManager simplifies the deployment, management and administration of its products in environments with multiple users.



The Customer Admin Portal acts as a hub for anyone tasked with overseeing MindManager licenses. It gives a snapshot of an organization-wide deployment, displaying a breakdown of total and available licenses by product. It also displays itemized account details for each end user, which allows for easy editing of the account.

End users can see information about the MindManager products that they're using on the Account Details panel. It launches from within the application, displays status of all MindManager products associated with an account, and allows for the addition of more products.

MindManager software products always use the license in your account that allows you to leverage the most functionality. For example, if you own both a Perpetual license and a Subscription license, you can access the additional benefits and features associated with the Subscription license. Also, if you purchase a Perpetual license before your Trial subscription expires, you can continue to take advantage of Trial subscription benefits and features until your trial period ends.

Customer Administrators

The Customer Admin Portal simplifies deploying and managing MindManager licenses. You can also see who has admin privileges and add or remove account administrators.

Set up a Customer Admin account

- 1. Click the administrator registration link in your License Certificate or Order Confirmation email.
- Sign in using an existing account or create one.

View status of all MindManager licenses

In the Customer Admin Portal, you can see the status, expiry date (Subscription licenses only), License Key, and a breakdown of total available and used licenses for each product associated with the account.

READ NOTE

If you want to use Single Sign-on (SSO) authentication, click Setup SSO.

Manage administrators

Add an administrator

- 1. Click Add Admin.
- 2. Enter an email address for the new administrator.
- 3. Click Submit.

Remove an administrator

• In the **Administrator** list, click the **Remove** button for the administrator.

Manage products

Click Administrate for the product that you want to modify.

The administration page for the product displays expiry date, License Key, a breakdown of total available and used licenses for the product, and a list of users and their status.

■ READ NOTE

Add users to a product

- 1. On the administration page for the product, click **Add Users**.
- 2. Do one of the following:
 - Enter an email address for the new user, and click Submit.
 - Click Import CSV to add multiple users listed in a CSV file.

Manage user status

On the administration page for the product, click the dropdown arrow in **User Status** column for a user, and choose one of the following:

- Activate gives a user access to the product
- **Deactivate** denies user access to the product and prevents them from using the License Key for the product
- Remove denies user access to the product but does not prevent them from reusing License Key for the product

Search for users

In the Customer Admin Portal, type a name or email address in the User Search box.

The search covers all products associated with the Customer Admin account.

Click **Details** for any user found in the search to view account and license information.

End users

Signin

The first time an end user launches the deployed software, they must create or sign into their MindManager account. If an organization uses Single Sign-on (SSO) authentication, end users can use their company credentials to sign in.



After a user has signed in to their MindManager account on launching the application, they don't need to sign in again to use Cloud-based features like MindManager Snap, Co-Editing, Publishing, or Zapier.

Sign in to MindManager

- 1. Click the desktop shortcut.
- 2. Do one of the following:
 - Click Sign In, and enter the email address associated with your MindManager account and password.
 - Click Sign In with SSO, then using company's authentication service, such as Microsoft Azure or Google G Suite, enter your credentials.

This sign-in method must be configured by your company IT and MindManager IT.

• Click Create Account to create a MindManager account.

Sign out of MindManager

Click the Account Info button in the top-right of the application window, and choose Sign Out.

Account details

Users can manage and access information about their account from within the application.

View account details

Click the **Account Info** button in the top-right of the application window, and choose **Account Details**.

The Account Details panel lists all products associated with the MindManager account. You can also see a license's status, expiry date, owner, and auto-renewal setting.

Add or upgrade a product

- 1. On the Account Details panel, click Add Product.
- 2. Enter the License Key for the product.
- 3. Click Submit.

View status of Trial versions

If you're using a Trial version, the amount of time remaining in the trial is displayed in the Welcome dialog when you launch MindManager or in the bottom-left corner of the application window.

You can also see the expiry date by clicking the **Account Info** button in the top-right of the application window, and choosing **Account Details**.

Read Hint

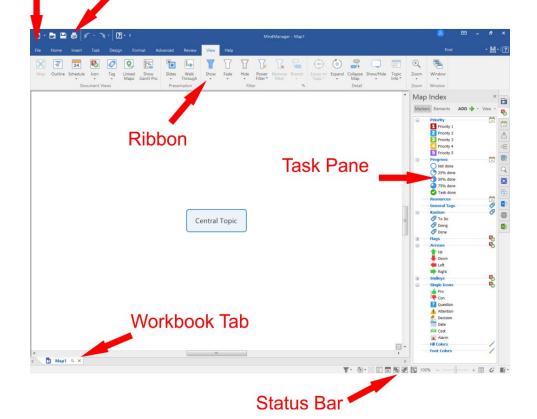
Click **View Pricing** in the bottom-left corner of the application window to get more information about upgrading.

The Interface

MindManager interface and ribbons

The MindManager mapping window is where you create and edit maps. This window opens when you start MindManager. MindManager also offers several other views for working with your maps.

File Tab Quick Access toolbar



What do you want to do?

Customize the ribbon

Customize the
Quick Access
Tool Bar

Learn more
about viewing
options

The Ribbons

The Home Tab

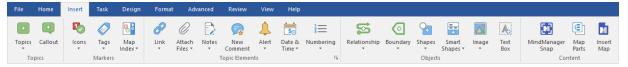


The easy-to-use Home tab provides everything you need to get started mapping with MindManager.

If you've started by using Flowchart template, the Home tab will change to reflect the new Flowchart options:



The Insert Tab

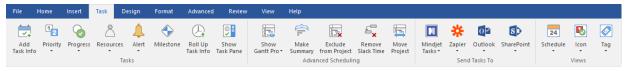


The Insert tab has all the items you'll frequently want to add to your map.

If you're creating a flowchart, the Insert tab will change to reflect Flowchart options:



The Task Tab



The Task tab collects all possible task actions, all in one place.

The Design Tab



Need to change the way the map looks? It's on the Design tab.

The Format Tab



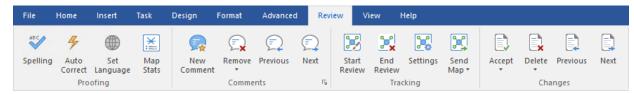
All topic-formatting tools are on the Format tab.

The Advanced Tab



Ready to kick it up a notch? You'll find expanded options on the Advanced tab.

The Review Tab



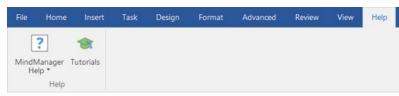
All the review tools you'll need are there on the Review tab.

The View Tab



MindManager offers a variety of ways of viewing maps and map data through the View tab.

The Help Tab



Need help? Want to take the one-minute tutorial? It's all on the Help tab.

The Help system

The MindManager help system is available both online or as a local file.

- When you first install MindManager, it is configured to use the online Help.
 - The online Help file provides the most current Help information available, and includes additional content that is only available online. It also gives you the ability to provide feedback on this Help system directly to MindManager.
- You can choose which version of Help you want to use in MindManager Options. (In environments without Internet access, your administrator may disable this option, and you will use local help by default.)
- If you are usually not connected to the Internet or if you have a very slow connection you should use local Help—this will speed the Help system's response.

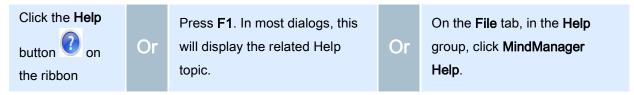
The advantages of using online Help

The **online** Help file provides the most current Help information available, and includes additional content that is only available online. It also gives you the ability to provide feedback on this Help system directly to MindManager.

- If online Help is enabled but is not available (if you are not connected to the Internet) MindManager will attempt to connect, then use the local Help installed on your system.
- If you are usually not connected to the Internet, you can set an option to use local Help.

Visit the MindManager
online Support Page
Find other Resources

How to get Help



Or, use the MindManager Support Center button (above the ribbon) to connect to our support team.

Support Center Send your question to the Support Center, and the Support Center pane will let you know when you can expect a reply from a Support team member.

How to Use Help

- Use the Help system's Contents and Search tabs to locate topics of interest.
- When viewing a topic, click the **See also** links to see other topics that may be helpful to you.
- Keyboard shortcuts are marked with
- Helpful drop-down hints are marked
- Important drop-down notes are marked

How to use tutorials

There are built-in interactive tutorials that help users quickly get up-to-speed with a variety of MindManager features and workflows.

1. Do one of the following:

On the **File** tab, click **Learning**. On the **Help** tab, click **Tutorials**.

- 2. Click a tutorial, then click **Get Started** in the window that appears.
 - At each stage of the tutorial, hints and how-to information about the feature or workflow are displayed.
- Click the Next Step overlay to proceed to the next chapter of the tutorial.
 At any point in the tutorial, you can click the drop-down arrow in the top-right corner of the step overlay and restart the tutorial, restart the current chapter, or exit the tutorial.

When you exit a tutorial, MindManager bookmarks where you stopped, so you can restart right where you left off.

Other resources

Consult the **File** tab's **Help** pane. Under MindManager Help you'll find other resources like an interactive tour of the product, Quick Tips tutorials that show how to use MindManager for specific tasks, and keyboard shortcuts.

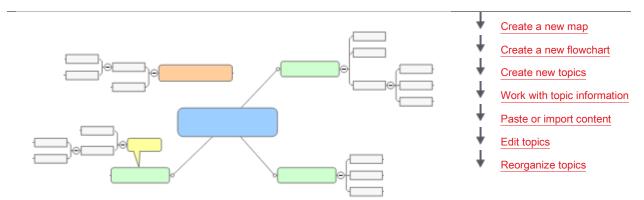
If you prefer to use a printed reference, download the *MindManager for Windows User Guide* here. The MindManager online Support page is your gateway to a variety of other resources:

- FAQ's
- Training, tutorials and tips
- Product resources
- Knowledge base
- MindManager profile sign-up
- Maintenance and support plans
- Contact support

Add Content to Maps

What is a map—and how do you use all those topics?

What do you want to do?



Maps offer a way to aggregate and visualize information and relationships. The basic building-blocks of a map are map topics.



See <u>Create topics</u> for a summary of commands for adding topics and a selection of shortcuts for adding map content.

A <u>flowchart</u> is a specific type of map that describes a process or workflow.

Central topic	The main theme or title of your map. When you create a map, this will be the first Topic created and you will build the map from this one.
Main topics	The major ideas that make up the theme. Create them by selecting the central topic, then clicking New Subtopic.
Subtopics	Details about a topic. Create them by selecting a main topic and clicking New Subtopic.
Callouts	Additional information for a specific topic or relationship. Create them by selecting a topic (but not the central topic) and clicking Callout.
Floating topics	Auxiliary information or text.
Selected topics	Selected topics display the blue topic frame and the Quick Add tabs. Grab the frame to move or resize the topic. Click the Quick Add tab to add a new topic.

Creating, Opening, and Closing Maps

Create a new map

What do you want to do?

The first step in creating a map is to begin a new map.

You can either create an empty map to add content from scratch, or you can use a template or an existing map (whole map, or just a portion) as the basis for your new map. You can import a file from another application to create a new map instantly from that content.

You can also create a new flowchart.

Create a blank map

Create a map based on a

Map Template

Create a new map from an existing map

Create a new map from a branch on an existing map

Create a new map by importing a file from another application

See also:

Create topics

Paste or import content

Brainstorm

Create and modify Map
Templates

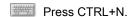
Create a blank map

For a new, blank map, do one of the following in the main MindManager window:

• Double-click on an empty area of the bottom workbook tabs bar.



- On the Quick Access Toolbar, click New ...
- Click the **File** tab, click **New**, and choose a blank map template.



MindManager opens a new map based on the New Blank Map template.

Each new blank map begins with a central topic, or title. To begin, click on the central topic and enter the theme of your map. Then, go on to create other topics. READ HINT

You can set an option to open a new map each time MindManager starts using the **General** options.

Create a new map based on a Map Template

You can create a new map using a Map Template shown in the New Map dialog, or if you are connected to the Internet, you can choose a template from the Online Gallery or from the Maps for That! collection.

1. Do **one** of the following:



The set of built-in map templates is displayed, organized into sections with titles such as Project Management, Strategic Planning, and Personal Productivity.

- Browse the built-in map templates under Templates Home :
 - The Blank templates offer basic MindManager templates in several map layouts: orgchart, radial, right-facing, tree, and flowchart.
 - My Templates lists templates you have added using the Add Template button or through the Template Organizer in the Design tab.
 - Click any of the MindManager Professional Templates categories (Management, Meetings and Events, Personal Productivity, Problem Solving, Project Management, Strategic Planning, and Flowcharts) to see pre-designed template options.
 - In **Online Templates**, click either *Online Gallery* or *Maps for That!*, select a category, and then browse the displayed templates.
- 3. Do **one** of the following:
 - Click a template to open up a preview window. Then click Create Map or close by clicking the X at top right.
 - Double-click the desired template to use as a basis for the new map.
 ✓ READ HINT

To navigate back to the top level of Templates, use the Back button

Back Templates Home or the template folder breadcrumbs at the top of the page.

Add a Map Template to the set of built-in templates

1. If you don't see the Template you want to use in the dialog, click the Add Template button

Add Template... at top right.

- 2. Navigate to the location of the Template file you wish to add, and then click **Open**.
- 3. The Template will appear with the set of built-in templates in the New Map dialog. READ HINT See Modify a Map Template for more information on editing Map Templates.

Create a new map from an existing map

To add to or modify an existing map without changing the original, use the Save As command in the <u>File</u> tab or the Quick Access Toolbar to save the map under a new name.

Create a new map from a branch on an existing map

You can create a new map from topics on an existing map by using the **Send Topic(s) To** command. You may want to use this feature if:

- You want to duplicate a topic or topics in a new map.
- Your map gets large and you want to "break off" topics to create a separate map. You can link these maps together, and then use the <u>Linked Maps View</u> to see previews of all the linked maps and execute a variety of commands on them.
- 1. Do one of the following:

Right-click the topic.

Select several topics and then right-click on one of them.

- 2. Click **Send Topic(s) To**, and then click **New Linked Map**.
 - If you selected a single topic you can choose whether it will become the central topic or a main topic (branching off a new central topic) on the new map.
 - If you want to remove the topics from the current map, choose the Delete original topics
 and create links to exported topics. The topics will move to the new map and links will be
 added to the original map that point to the new map.
 - If you want the exported topics to link back to the original map, check Create links from exported topics to original topics.

Otherwise, the topics are simply copied to create a new map but the original is left unchanged. (This produces the same result as copying the topics, opening a new map and pasting them.)

Create a new map by importing a file from another application

You can import a file from another application to use its content as the basis for a map. MindManager can open:

- Microsoft Word documents
- Microsoft Excel spreadsheet
- Microsoft Project files
- Microsoft Project Exchange (MPX) files
- OPML documents
- XMind or XMind:ZEN file
- FreeMind
- 1. On the File tab, click Import.
- 2. Click the type of file you want to import, select the file, and then click **Open**.

See <u>Work with Microsoft Word</u>, <u>Work with Microsoft Project</u>, <u>Import a Microsoft Excel file</u>, <u>Import an MPX file</u>, <u>Import an XMind or XMind:ZEN file</u>, <u>Import a FreeMind file</u> and <u>Import an OPML document</u> for more information on using these files.

Open and close a map

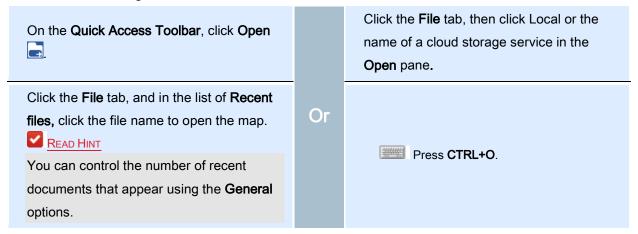
What do you want to do?

You can open a map for editing to change the original map. To avoid changing the original you can open a copy or open the map as read-only. If you open a map that is password-protected you may be asked to enter a password to open or edit the map.

Open an existing map
Open a map as a copy or
open as read-only
Open a password-protected
map
Close maps

Open an existing map

1. Do **one** of the following:



2. The standard Windows Open File dialog appears so you can navigate to the map file, and then click **Open**. (You can open a map from an earlier version. See Compatibility with earlier versions.)

READ HINT

You can double-click on a map (.mmap) file in Windows Explorer to open it.

Open several maps at once

You can have multiple maps open in MindManager. (To open several at once, press CTRL as you select their names in the Open File dialog, then click **Open**.) If you are using Workbook Tabs you'll see a tab for each open map at the top of the map window. (Note that you can choose to see workbook tabs with either the map title or the map file name using the **View** options.)

If a map is already open, you cannot open a second copy of it, but the <u>Split map</u> view allows you to work on one section of the map while viewing a different section.

READ HINTS

You can direct MindManager to automatically open an existing map on startup using the General options.

You can set up shortcuts to frequently-used maps and folders in the My Maps task pane and open them with a single click.

You can open other file types (Word, Project) to help you create a map quickly. See <u>Import content</u> for details.

If you are working on a map with links to other maps, you can open the linked maps from the <u>Linked Maps View</u>.

If you want to find a map containing specific content, you can use the Search Files option to find it.

Open a map as a copy or open as read-only

When you open a copy of a map, MindManager creates a duplicate map with a new name (prefixed by default with Copy (1) of...). Any changes you make are saved to the copy, not the original. When you open a map as read-only, you can view and edit the map but you cannot save it with the same name.

1. Do **one** of the following:



- 2. The standard Windows Open File dialog appears so you can navigate to the map file.
- 3. Click the Open arrow, and then click Open as Copy, or click Open as Read-Only.

Open a password-protected map

If you open a map that is password protected, you'll be prompted to enter the password. Maps can be assigned two types of passwords:

- A password which allows you to open the map. If you don't know the password you cannot open the map
- A password to modify the map. If you don't know this password you can open the map as Read
 Only: you can view and modify the map, but you cannot save it with the same name.

The first time you open it a password protected map you are given the option to remember the password. You will not be asked for the password again unless you open the map on a different computer. The **Security** option lets you clear all remembered passwords.

Close maps

There are several ways to close maps. You will be asked to save changes to any unsaved maps.

After you close a map, MindManager returns to the last map that you were working in.

To close the current map, do one of the following:



Close maps from workbook tabs

Right-click the map's workbook tab and click:

- Close to close the current map
- Close Special, and then Close All But This to keep the current map open.
- Close Special, then Close and Delete to close and delete the current map.



You can set an option to warn you if you have maps open when you close MindManager. Before closing, you will be asked to save any new or changed maps. If you do not save them, your changes will be lost.



If you are working on a linked map, you can also close maps from the Linked Maps View.

Recover unsaved maps

MindManager provides protection from abnormal shutdown (e.g. if the power goes out or your system crashes) by saving AutoRecover information at regular intervals. The AutoRecover feature saves the open maps and the current application state, including the MindManager options and custom Quick Access Toolbar settings.

You can adjust the AutoRecover interval in the Save options.

Open recovered maps

When you re-start MindManager after an abnormal shut-down, MindManager will attempt to recover any unsaved maps open at the time of the shut-down. If MindManager saved AutoRecover information for

them you'll see a Map Recovery dialog with a list of these maps. This list will only contain maps that you edited but did not have a chance to save (including new, unsaved maps).

Select the maps you want to recover, and then click Recover.

MindManager will apply the AutoRecover info that it has saved to the last saved version of the map, and display the recovered version. Recovered maps are given a temporary name (Recovered 1, Recovered 2, etc). You can then save them to save these changes.

Click Don't Recover if you do not want to open any of the recovered maps.



If you set your AutoRecover interval too high, you could lose a substantial amount of work. For example if you set the interval to 60 minutes and your system crashes after using MindManager for 59 minutes without saving your maps, no AutoRecover information would be saved and you would lose all your work. The default setting is 10 minutes.

Import a Microsoft Excel file

The Excel Data Mapper lets you import a Microsoft Excel (XLSX, XLS, or CSV) spreadsheet into a topic in an existing map or create a new map based on the file. This feature simplifies breaking down data in a Microsoft Excel file, including task info such as start and due dates, into categories that are mapped to topics. When you import an Excel file, a topic structure is created where sibling topics are created from rows that share a common ancestor.

Import an Excel file

• Do **one** of the following:

On the **File** tab, click **Import**, and then click **Import using Excel Data Mapper**.



On the **Advanced** tab, in the **Dashboards** group, click **Excel Data Mapper**.

- On the Excel Data Mapper pane, choose one of the following, and click Next:
 - Selected Topic to insert the spreadsheet data into the currently selected topic
 - New Map to create a new map based on the Excel file
- Navigate to the Excel file, and click Open.
- To use the default import settings, click Next twice and then Apply.
 To customize the data import, you can modify the options in the Excel Data Mapper pane.



You can click Next and Back buttons to scroll between the settings pages.

Save a preset configuration for importing Excel files

- 1. On the Level page of the Excel Data Mapper pane, click the Save Preset File button,
- 2. Type a name for the preset file.
- 3. Click Save.

The preset file extension is .mmxp.

Import an MPX file

You can import a selected MPX 4.0 file into either the current map (under the selected topic) or to create a new map, if no map is open.

This feature is disabled by default. To see these options click the **File** tab, click **Options**, and then click **Add-Ins**.

Prepare to import an MPX file

• If you are importing task dependencies as Relationships, and you expect to have many of these on the map, you may want to set the default format of Relationships to a light color and thin lines. You can also do this after import.

MPX Import

- 1. Click the File tab, click Import, and then click Import MPX File.
 - READ NOTE

If you do not see this option, check to see that you have the corresponding <u>add-in</u> installed and enabled.

- 2. In the Choose Location dialog, do one of the following:
 - To import a file on your system, choose Local.
 - To import a file stored in a cloud storage service, choose the service.
- 3. In the dialog, select the MPX file to import.
- 4. Make your selections in the MPX Import Settings dialog.
 - READ NOTE

Note that if it is a large file, it may take a while to import.

Import an OPML file

You can import an OPML document to create a new map.



Any OPML formatting or features not supported by MindManager will not be recreated in the resulting map.

OPML Import

- 1. Click the File tab, click Import, and then click Import OPML Document.
- 2. In the Choose Location dialog, do one of the following:
 - To import a file on your system, choose Local.
 - To import a file stored in a cloud storage service, choose the service.
- 3. In the dialog, select the OPML document to import.
 - I READ NOTE

Note that if it is a large file, it may take a while to import.

Import an XMind or XMind:ZEN file

You can create a new map based on an XMind or XMind: ZEN file. MindManager supports XMind 8 update 7 files and XMind: ZEN files

Import an XMind file

- 1. Click the File tab, click Import, and then click Import XMind File.
- 2. In the Choose Location dialog, do one of the following:
 - To import a file on your system, choose Local.
 - To import a file stored in a cloud storage service, choose the service.
- 3. Click Open.

Open an XMind file

- 1. Click the File tab, click **Open**.
- 2. Navigate to the folder that contains the XMind or XMind: ZEN file.
- 3. In the list box next to the File name box, choose XMind Map File (*.xmind).
- 4. Select the XMind or XMind: ZEN map file.
- 5. Click Open.

Import a FreeMind file

You can create a new map based on a FreeMind file. MindManager supports file created with the latest official stable release of FreeMind.

Import a FreeMind file

- 1. Click the File tab, click **Import**, and then click **Import FreeMind File**.
- 2. In the Choose Location dialog, do one of the following:
 - To import a file on your system, choose Local.
 - To import a file stored in a cloud storage service, choose the service.
- 3. In the dialog, select the FreeMind file to import.
- 4. Click Open.

Open a FreeMind file

- 1. Click the File tab, click Open.
- 2. Navigate to the folder that contains the FreeMind file.
- 3. In the list box next to the File name box, choose FreeMind Map File (*.mm).
- 4. Select the FreeMind map file.
- 5. Click Open.

Finding maps and content

Search for maps or documents

The Search feature is particularly helpful for finding a map that contains some specific text.

- Specify the text you want to find, the location(s) to search, and the topic fields to check.
- You can also use this feature to search through a set of linked maps.

When the search is completed, click on a topic in the **Search Results** window to open the map and jump to the matching topic. You can also display the search results as topics in a map.



MindManager makes local map content available to the Windows Search feature and to other desktop search engines. This means you can also search for maps based on their content using these methods.

Open a Recent Map

To open a file you recently worked on:

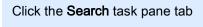
• Click the File tab, then click the file in the Recent Files pane.

MindManager displays the list of the last few maps that you opened. Click the file name to open the map. You can control the number of recent documents that appear using the **General** options.

Open the Search pane

You enter your Search information from the Search task pane.

To open the Search task pane, do **one** of the following:





Click the **Task Panes** button on the bottom status bar and click **Search** to open the Search task pane.



You can also conduct a search from the top menu bar: Enter the search text in the **Find** box and choose your search type from the icon's pull-down menu, or click **Search** to open the Search task pane.

Search through maps in folders

What do you want to do?

Open a recent map
Open the Search pane
Search through maps in folders

Search through a set of linked maps

Display Search Results in a map

See also:

Use Linked Maps View

1. In the **Search** task pane, under **Define Search**, enter a word or phrase in the **Look for** box.



You can enter a sub-string of the text you want to match. The Search function will show any word that contains this string as a match.

- 2. Select a location to search, or enter the name of the folder you want to search in the **Look in** box. Select the **Include subfolders** checkbox to search subfolders as well.
- 3. To specify which topic fields to search, click **More search options** and select the checkboxes for the fields you want to inspect. (By default, only the topic text is searched).
- 4. Click **Search** to start the search. To stop the search, press ESC.
- 5. The **Search Results** window displays a tree with the map names and topics that are positive matches.
- 6. To see any matching topic click the topic name in the **Search Results** window.



If your map is very large, or if you are searching through many maps, the search may take some time. You can click **Stop** at any time to stop the search.

Search through a set of linked maps

- 1. Open the main map that links to the other maps
- 2. Switch to Linked Maps View. You'll see thumbnails of the open map and all the maps it links to.
- 3. On the Linked Maps View tab in the Linked Maps group click Search.
- 4. In the Search task pane, under Define Search, enter a word or phrase in the Look for box.



You can enter a sub-string of the text you want to match. The Search function will show any word that contains this string as a match.

- By default, only the topic text in maps is searched. To specify which topic fields to search, click
 More search options and select the checkboxes for the fields you want to inspect.
- 6. Click **Search** to start the search. To stop the search, press ESC.
- 7. The **Search Results** window displays a tree with the map names and topics that are positive matches.
- 8. To see any matching topic click the topic name in the Search Results window.

Display Search Results in a map

- 1. Once you have completed the search, in the Search task pane, click **Send to**.
- 2. Choose to create a new map, or to add the search results to the selected topic.
- 3. A new map or topic is created, with the search results as subtopics. Each result topic contains a link to the map and to the topic that contains the search text.

What do you want to do?

The **My Maps** task pane can help you keep your maps organized and gives you quick access to maps and folders. Here, you can set up shortcuts to individual maps and organize them into collections. You may also set up shortcuts to folders. The My Maps pane comes preloaded with some default map shortcuts.

You can also pin frequently used maps to the Recent Files list in the Files tab.



Open the My Maps task pane

- Click the Task Panes button on the bottom status bar then click My Maps.
- Click the My Maps task pane tab.



You can set an option to automatically open the My Maps task pane on startup.

Create and manage map shortcuts

First, you create a collection to hold the shortcuts, and then you create the shortcuts for that collection.

Create a new collection of map shortcuts

- 1. In the My Maps task pane, under Map Shortcuts, click Add new collection.
- 2. Enter the collection name.

Add map shortcuts to a collection

- 1. In the My Maps task pane, under Map Shortcuts, click the collection name.
- 2. Do one of the following:

Click **Add shortcut to existing map,** select the map in the dialog, then click **Open.**



Open a map and click **Add shortcut to current map.**

Move or copy shortcuts

 To move map shortcuts to a different collection click and drag the shortcut (hold down CTRL as you drag to copy the shortcut).



You can save a shortcut to the same map in several different collections.

Rename a map shortcut

- 1. In the My Maps task pane, under Map Shortcuts, right-click the shortcut and click Rename.
- 2. Enter the new name for the shortcut. (Note that this does not change the name of the map itself.)

Create folder shortcuts

Create a shortcut to a folder

 In the My Maps task pane, under Folder Shortcuts, click Add folder shortcut and navigate to the folder.



If you save a new map in a shortcut folder, the My Maps pane is not automatically updated. Right-click the folder shortcut and click **Refresh** to see a current listing.

Rename a folder shortcut

- 1. In the My Maps task pane, under Folder Shortcuts, right-click on the shortcut and click Rename.
- 2. Enter the new name for the shortcut. (Note that this does not change the name of the folder itself.)

Use shortcuts

Open a map using a shortcut

- 1. Open the My Maps task pane.
- 2. Under **Map Shortcuts** open the collection that contains the shortcut, or under **Folder Shortcuts** open the folder that contains the shortcut.
- 3. Click the shortcut for the map you want to open.

See properties (size, type and location) of a map or folder shortcut

Right-click on the shortcut and then click Properties.

Repair broken shortcuts

You can set an option to update the shortcuts dynamically. If you move, rename or delete a map all shortcuts to it will be "broken" as indicated by a special icon. If you do not set this option, you will not be informed of the broken shortcut until you click on it. You will have the opportunity to repair it at that time.

READ NOTE

This option may slow performance if your shortcuts point to maps on a network drive.

- 1. Under Map Shortcuts, click the broken shortcut.
- 2. You can choose to browse for the map to repair the shortcut or you can remove the shortcut from the collection.

Use default collections and shortcuts

- The Map Shortcut collection *My Projects* is added by default. You can rename or delete this folder.
- The folder shortcut "My Maps" is added. This special folder is created and used by MindManager as the default document folder for opening and saving maps.

Pin frequently-used maps to the Recent Files list

Another way to make frequently-used maps easy to find is to pin them to the Recent Files list.

- 1. In the **Files** tab, click **Open**.
- 2. Click the name of the map you want to pin, the click the pin icon to the right of the name.

The file will appear in a separate section at the top of the recent files list with the pinned icon $^{+}$ to the right. To *unpin* the map, click the pinned icon.

Adding Map Topics

Create topics

What do you want to do?

A map can contain several different types of topics. The central topic appears on a new map automatically. You can then use keystrokes and menu commands to quickly add other topics in Map View or Outline View.

The default placement of topics on your map is controlled by the <u>layout</u> settings you choose.

Create topics using keystrokes

Create topics using the topic frame and Quick Add tabs

Create topics using menu commands

Enter topic text

Create topics using keystrokes

To create:	Keystroke	Mouse
Central topic	{ added automatically }	
Main topic	ENTER	Double-click the map background
Topic (sibling)	Select a topic and press ENTER	
Topic before (above) a topic	Select a topic and press SHIFT + ENTER	
Topic as a parent of a topic Does not apply to Central Topic	Select a topic and press CTRL+ SHIFT + INSERT	
Subtopic	Select a topic and press INSERT or CTRL+ENTER	
Callout topic	Select a topic and press CTRL+SHIFT+ENTER	

Floating topic	Click the map background and type the topic text at the cue arrow Or Double-click the map background and type directly into the floating topic. You can set options to enable these features.
Convert a topic to a floating topic	Select a topic, press SHIFT, and drag it to a new location to detach it.

Create topics using the topic frame's Quick Add tabs

Click the topic, callout, or boundary where you would like to add a topic or callout. The selected item displays the blue topic frame and the Quick Add tabs.

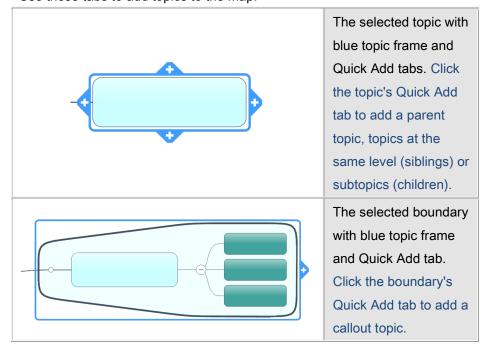


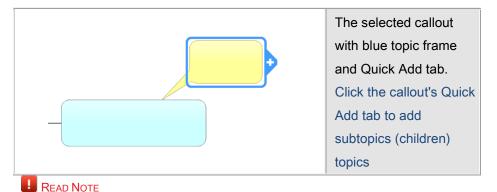
The map's Central topic has two Add Topic tabs (right and left). Use these tabs to create new main topics.

Callouts and Floating topics only have one Add Topic Tab, which adds a subtopic.

You can hide the Quick Add tabs in Options.

Use these tabs to add topics to the map:





If you are zoomed out to 50% or less, the blue topic frame and the Quick Add tabs will not be displayed.

Or

Create topics using menu commands

On the **Home** or **Insert** tab, in the **Add Topics** group, do **one** of the following to create a topic:

To add a topic at the same level as the currently selected topic (sibling topic), click **New Topic** on the **Home** tab **OR** click **Topic** on the **Insert** tab.

To add a topic at the level below the currently selected topic, Click **New Subtopic** on the **Home** tab **OR** click the **Topics** arrow on the **Insert** tab and choose **Add Subtopic**.

To add a parent topic, click the **Topics** arrow on the **Insert** tab and choose **Add Parent Topic**.

To add a topic above the current topic, click the **New Topic** arrow on the **Home** tab and choose **Add Topic Before OR** click the **Topics** arrow on the **Insert** tab and choose **Add Topic Before**.

To add a floating topic, click **Floating** on the **Home** tab **OR** click the **Topics** arrow on the **Insert** tab and choose **Add Floating Topic.**Then, click on the map background where you want to add the topic.

To add a callout to the current topic, click **Callout** on the **Home** or **Insert** tab.

Or on the **Insert** tab, in the **Add Topics** group:

• Click **Parent** to add a topic as the current topic's parent.

Enter topic text

When you create a topic, a placeholder topic appears, and is automatically selected.

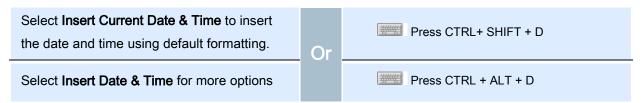
- Type the text for the new topic and ENTER.
- To create a line break within the topic text hold SHIFT and press ENTER.
- These <u>additions ▼</u> to your Central Topic can help set the theme for your map.
 You can <u>add an image</u> to set the tone for the map.

You can also display the revision number and modification date using the Show / Hide command. You can reset the revision number on the Map Properties - Statistics tab.

Add the date and / or time to a topic

You can add the date and / or time to any topic on the map. This information is most typically added to the central topic to indicate when the map was current. You may also insert the dates and times in topics to indicate when they were added or the date of an event.

- 1. Select the topic (info is added in place of the default topic text, or at the beginning of existing text), or select a location within the topic text.
- 2. On the Insert tab, in the Topic Elements group, click the Date & Time pull-down.
- 3. Then, either:



Sortable formats let you use the Sort command to reorganize topics.

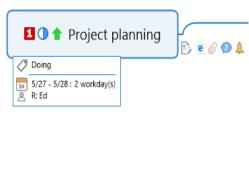
The <u>Task Information</u> feature gives you more options for working with task dates for projects: Start and Due dates.

If you are entering or editing a <u>Note</u>, the date / time will be added at the current cursor position within the note.

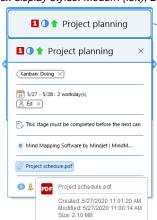
Work with topic information

The Topic Info Box appears on every topic that contains task info, visual information, topic data or topic elements. From a topic's Info Box, you can launch a Topic Info Card, which appears below a topic and displays a summary of information contained in that topic. It always shows all information related to the topic including task info, dates, costs, resources and more; topic elements, such as links, attachments, alerts, comments or notes; visual information like markers, images or slide; and topic data, such as properties or formulas. The Topic Info Box is customizable. You can choose whether to display them, how they look, and what information to include. And if you prefer the display style of topic information in MindManager 2020.1 and earlier versions, you can choose to use the legacy topic-info mode. When you open maps created with MindManager 2020.1 or lower, the legacy topic-info display style is used.





Topic Info Box display styles: Modern (left), Legacy (right)



Topic Info Card

What do you want to do?

Display Topic Info
Cards

Customize theTopic Info Box

Show or hide specific types of topic information

Display Topic Info Cards

Do **one** of the following:

- Right-click a Topic Info Box, and choose Show Info Card.
- Right-click a topic, click the Topic Info drop-down on the mini-toolbar, and choose Show
 Info Card.
- Select a topic, click the View tab, and click the Topic Info drop-down, and choose Show Info
 Card.

Hovering your mouse pointer over a piece of topic info displays more data about that item.

To close the Topic Info Card, click the close button in the card's title bar.

Customize the Topic Info Box

- 1. Do **one** of the following:
- Right-click a Topic Info Box, and choose Topic Info Display Settings.
- Right-click a topic, click the Topic Info drop-down on the mini-toolbar, and choose Topic
 Info Display Settings.
- Select a topic, click the View tab, and click the Topic Info drop-down, and choose Topic Info
 Display Settings.
- 2. Perform a task from the following table.

То	Do the following
Choose a Topic Info Box display style	Enable the Legacy option to display topic info as it appeared in MindManager 2020.1 and earlier or the Modern option to use the default style.
Show icons in the Topic Info Box	Enable the Show Icons in topic info check box
Display Control Strip icons to right of topic	Enable the Show Control Strip on the right check box.
Group information types	Enable the Show separators between information types check box.
Change the background color	Open the Background color picker, and choose a color.
Change the font color	Open the Font color picker, and choose a color.
Change the color of tags	Open the Default tag color picker, and choose a color.

Show or hide specific types of topic information

- 1. Do **one** of the following:
- Right-click a Topic Info Box, and choose Topic Info Display Settings.

- Right-click a topic, click the Topic Info drop-down on the mini-toolbar, and choose Topic
 Info Display Settings.
- Select a topic, click the View tab, and click the Topic Info drop-down, and choose Topic Info
 Display Settings.
- In the Show/Hide specific information area, enable check boxes corresponding to the type of topic info to show.

If a map contains hidden topic info, the Show/Hide indicator Show/Hide is in Use-Click to Reset displays in the lower left of the map. You can show hidden topic info by clicking it and choosing **Reset Show/Hide to Default**.

READ NOTES

You can hide a specific type of topic info by right-clicking an instance of the topic info and choosing **Hide** [topic info type].

If a topic contains hidden topic information, an icon — appears in the bottom right of the Topic Info Box. You can choose not to display the hidden topic information icon by unchecking the **Show icon on topics** with hidden information check box. Hovering your mouse pointer over the icon displays the Topic Info Card and topic information, both shown and hidden.

Copy Topic Info

 In a Topic Info Box, click an icon for cost, resources, properties, or dates, and drag it to the destinati topic.

To cut the icon, hold CTRL while you drag it to the destination topic.

Collapse Topic Info

Do one of the following:

- Right-click a Topic Info Box, and choose Collapse Topic Info.
- Right-click a topic, click the Topic Info drop-down on the mini-toolbar, and choose
 Collapse Topic Info.
- Select a topic, click the View tab, and click the Topic Info drop-down, and choose Collapse Topic Info.

I READ NOTE

If a topic contains collapsed topic information, an icon — appears in the bottom right of the Topic Info Box. Hovering your mouse pointer over the icon displays the Topic Info Card showing topic information, both shown and collapsed. You can expand collapsed topic information by right-clicking the icon and choosing Expand Info on Topic.

Paste or import content

You can import content by pasting text from many applications to create topics on your current map. You can also import another map as a branch within the current map.

In addition, you can import content from Word, Excel, Project, XMind, FreeMind and MPX files.

Create a topic by pasting text or an image

You can cut or copy text or an image, then paste it into your map in Map View to create a new topic. The text or image can come from MindManager or from another application. In Outline View you can create a new topic by pasting text.

If the pasted text contains paragraph breaks, a separate topic will be created from each paragraph.

- 1. Copy or cut the text or image from within MindManager or from another application (usually, select it and press CTRL+C to copy or CTRL+X to cut).
- 2. In Map View or Outline View, click where you want to add the new topic:
 - To create a main topic, select the central topic
 - To create a subtopic, select a topic.
 - To create a floating topic, click on an empty space. (In Map View only.)
- 3. To paste using the default formatting:



To paste in a different format:

- On the Home tab, in the Clipboard group, click the Paste arrow, or right-click the topic, and point to Paste in the shortcut menu.
- Click the format you want to use:

Paste Inside appends the text or image to the existing topic.

Paste Unformatted Text pastes text without formatting - the default formatting is used.

Paste Formatted Text (RTF) retains the text formatting.

Paste Bitmap creates a new topic with an image.

Paste Link pastes the text as a link on the selected topic. The text should be a valid URL, email address, or document link.

Paste Notes pastes the text as a note on the current topic, retaining the formatting of the original.

Paste as Callout creates a callout on the selected topic.

Paste as Next topic creates a new sibling topic below the selected topic. If the topic already has a note, the copied text is appended to the existing note.

To see more formats, click **Paste Special**. The formats available will depend on what you have cut or copied. For information about pasting topic properties, see Copy and paste topic properties.



The text formatting is retained when you use the Paste command, unless you paste **Unformatted text**. The pasted topic will then use the default topic formatting. To automatically use MindManager's default formatting for all text pasted from other applications, clear the option to use formatting from the original.

Import a map as topics

You can import an existing map as a set of topics for the current map. The imported map's central topic will become a subtopic of the currently selected topic.



Insert Map is disabled for flowcharts

1. Do **one** of the following:

Select a topic, then on the **Insert** tab, in the **Content** group, click **Insert Map**.



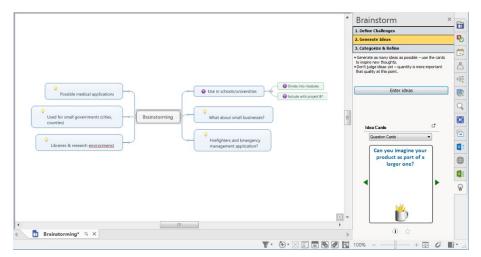
Right-click a topic on the current map, click **Insert**, and then click **Map**.

2. Choose the map you want to import.



If you only want to import part of a map, you can open it and <u>copy the topics</u>, then paste them into the current map, or simply import the whole map and delete the unwanted topics.

Brainstorm



The **Brainstorm** function speeds the entry of new topics when you are creating a new map or adding content to an existing map. When you've finished the brainstorming session you can drag the results in the map to structure your ideas. You can use an Analysis View as a complement to brainstorming to rate and categorize your topics.



If you want to limit your session to a certain amount of time use the <u>Timer</u> tool to set a countdown clock before you begin that will alert you when the time is up.

The Brainstorm tool does not work if you have read-only permission for a map. Check with the map's owner or your system administrator to change a map's permissions.

You can also use the components of the brainstorming tool independently at any time.

This feature is disabled by default. To see these options click the **File** tab, click **Options**, and then click **Add-Ins**.

Step 1: Define Challenges

Define a set of challenges that are added to the map as main topics.

- At the top of the pane, click Define Challenges.
- Click Custom challenges to generate your own challenges, or click Predefined challenges to
 choose challenges from a list of possibilities. Each challenge you choose is added to the map.
 Use the tabs in the dialog that appears to switch between Custom and Predefined challenge
 entry.
- Record all your potential challenges don't worry about ordering or prioritizing them yet.
- Step through the Challenge Cards at the bottom of the pane to help generate ideas.

Hints for using card decks ▼

Using Brainstorm Challenge and Idea card decks

- The back of each card contains additional information. Click the card to flip it.
- To see the cards in a separate window, click . When you close this window, the cards move back to the pane.
- The same card decks are used for all open maps. Each time you start MindManager it uses default decks.
- Marking cards as favorites allows you to use a subset of the cards in the deck. Click below the card to mark it as a favorite. Once you have marked your favorites in the deck, click or to move through the favorite cards.
- Right-click on the cards display to customize the deck by adding, editing and deleting cards.
- If you want to save the current decks (including your marked favorites), you can save them in a MindManager Cards (.mmbd) file.
- To load a customized cards file, right-click on the cards display section of the Brainstorm task pane.

Step 2: Generate ideas

- Select the challenge you want to address on your map.
- Click Generate Ideas at the top of the pane, and then click Enter ideas.
- Use the Idea Cards at the bottom of the pane to help you generate ideas.

Step 3: Categorize and refine

Add topics to help you group the ideas that address your challenges:

- Select a challenge topic whose ideas you want to group, then click **Categorize & Refine**.
- Select one or more categorization branch names from the pull-down, and then click Add branches to map.
- Drag and drop each idea onto its group.

Add topics to further refine each idea:

- Select an idea topic on the map.
- Select one or more refinement branch names from the pull-down, and then click Add branches to topic.

Use Brainstorm functions independently

You can use the Brainstorm functions independently to help you generate the types of topics you want.

On the Advanced tab, click the Brainstorm pull-down, and then select the function you want to
use from the menu.

Use Map Parts

MindManager comes with two basic types of Map Parts, both displayed in the Map Parts task pane:

Static Map Parts are topic structures with standard content. Their purpose is to save time re-entering frequently used or common information sets such as days of the week, actions, standard meeting agendas etc. You can create your own Map Parts from frequently used topics.

Static Map Parts are displayed in the top-level Map Parts folder.

Smart Map Parts are a special type of Map Parts that contain active links to applications and web services which are external to MindManager. They have the ability to integrate data retrieved from desktop programs, application databases, search engines and online news organizations into a map by using XML, XSL and Web Services technologies.

Smart Map Parts and Web Services Map Parts are displayed in subfolders under the top-level Map Parts folder.



If you do not see the **File Explorer** or **Microsoft Excel Linker**ECommerce, etc.) in the **Map Parts** pane, you need to enable these add-ins in MindManager.

What do you want to do?

Add a Map Part to your map
Create or modify a Static
Map Part

Use Smart Map Parts

Refresh Map Parts

Convert a Smart Map Part to a static topic

See also:

Manage Map Parts

Work with Microsoft Excel

Add a Map Part to your map

1. Do **one** of the following:

On the **Insert** tab, in the **Content** group, click **Map Parts**.



Click the Task Pane's **Map Parts** tab.

2. In the **Map Parts** task pane, navigate to the Map Parts folder you want to use. (The top folder for generic, static Map Parts, or the subfolders for Smart Map Parts or Web Services Map Parts.)



To see the Map Parts as a set of thumbnails, right-click the list background and select Thumbnails View.

3. In the lower pane, click the Map Part that you want to add and drag it onto the map. Use the visual cue to drop the part as a main topic, subtopic or floating topic.



You can only add map parts to a <u>flowchart</u> as a floating topic. After adding the map part, connect it to the flowchart using a relationship line.

Map parts in the top-level folder are static, and they become normal map topics and subtopics once they are added to the map. You can use these just as you would use topics that you added from scratch. Adding a Smart Map Part or Web Services Map Part activates its link (if you have an active Internet connection), and the Map Part will automatically be populated with information from the data source. Some Map Parts require you to enter information. For example, if you add the Amazon Search Map Part, a dialog displays so you can enter the search details. If you cancel the action, the dialog closes and the Map Part is removed from the map.

You can modify the topics added as a Map Part. If you modify the subtopics of a Smart Map Part or a Web Services Map Part your changes will be lost if it is refreshed.

Create or modify a Static Map Part

You can save part of a map you create as a static Map Part for easy re-use. You can also modify existing Map Parts.

Create a Static Map Part

1. Select the topic(s) that you want to save as Map Parts.



You can select multiple topics to save. Each topic along with its attached subtopics and callouts will be saved as a separate Map Part.

2. To open the Map Parts task pane do **one** of the following:

On the Insert tab, in the Content group, click Map Parts.

On the Status Bar click the Task

Panes button , then click Map

Parts.

In the top section of the Map Parts task pane, navigate to the Map Parts folder where you want to add the new part.



To create a new subfolder, right-click a folder and then click **New Folder**.

4. Do **one** of the following:

Drag the topics from the map to the lower preview pane in the Map Parts task pane.



At the top of the preview pane, click **Add Selected Topic(s)**.

The new Map Part(s) will appear in the preview pane.

Modify a Static Map Part

In the **Map Parts** task pane, click on the arrow to the right of the part to show a menu of <u>commands</u> to modify, copy, duplicate, delete and rename the part.

- 1. To change the content of the part, click Modify.
- 2. The Map Part opens so you can edit its content.
- 3. When you are done editing, click **Save** on the Quick Access Toolbar or click **File** > **Save**. The Map Part is automatically saved in the proper location on your system.
- 4. Close the Map Part.

Use Smart Map Parts

MindManager comes with several categories of Smart Map Parts. You can modify Smart Map Parts using <u>commands</u> to modify, copy, duplicate, delete and rename the part. To see the latest content for the part, you can <u>refresh</u> it.

Once you have added a Map Part to your map you can see options for viewing and updating its information in its context menu. Right-click on the part to see these options. The particular options available will depend on the Map Part's function.

File Explorer

These Map Parts create links to files and subfolders within a particular folder on your system.

Add a File Explorer Map Part to a map ▼

- 1. Select an existing topic or create a new topic to act as a root topic for the Map Part.
- 2. Do one of the following:



3. In the **Map Parts** task pane, navigate to the **File Explorer** Map Parts folder. The Map Parts are displayed in the bottom pane:

All Files and Folders creates links to all files and subfolders under the target folder.

All Files creates links to all files within the target folder.

All Folders creates links to all subfolders under the target folder.

- 4. Drag the Map Part onto the map (or just click on the part to add it as a subtopic of the currently-selected topic).
- 5. Select the folder that you want the map part to link to, then click **OK**.

After a short pause, the Map Part will be populated with links to the files or folders on your system. The links will be updated (reflecting any files or folders added or removed) only when the Map Part is refreshed.

The Map Index task pane Elements list Business Topics group displays all the topics on your map that contain File Explorer map part queries and their results.

Microsoft Excel Linker

The Microsoft Excel Linker Map Parts feature two-way communication between MindManager and Microsoft Excel. This allows you to add data to your map and edit it using either application. See Work with Microsoft Excel for more information.

News Feeds

You can create your own news feed Map Parts to give you the latest headlines from a specific source. The content is updated each time the Map Part is refreshed.

Create your own News Feed Map Parts ▼

You can create your own news feed Map Parts using any source that provides its feeds in RSS (or RDF) format. RSS is an XML-based format for distributing and aggregating Web content (such as news headlines and blogger entries). Many popular news sites such as CNet and Yahoo provide RSS feeds free of charge for use by individuals and non-profit organizations for personal, non-commercial uses. Additionally, independent news aggregator sites like Syndic8 list targets for thousands of RSS feeds from a wide variety of sources.

1. Do **one** of the following:

On the Insert tab, in the Content group, click Map Parts.

On the Status Bar click the Task Panes button the Task Panes button, then click Map Parts.

- 2. In the **Map Parts** task pane right-click on the Map Parts folder.
- 3. Click Add new News Feed to Library.
- 4. Enter the URL of the feed source. You can obtain the URL by copying it from the site you want to link to. In some cases you'll see a button for the feed XML.
 - Click the button and click Copy Shortcut, then switch back to MindManager. Right-click in the URL box and click Paste.
 - Click the button, copy the URL from the browser Address field, and then switch back to MindManager. Right-click in the URL box and click Paste.

- 5. Click OK.
- 6. In the Map Parts task pane, drag the new Map Part to the folder where you want to add this part. (Right-click and then click **New Folder** if you want to create a new folder.)

The new News Feed Map Part will appear in the Map Parts pane, and you can use it as you would any other Map Part. READ HINTS

Some news feeds may not have an associated image, so they show up without a label in the Library. You can add your own text label to the part by doing the following:

Click the arrow next to the Map Part, and then click **Modify**. The Map Part appears in its own window. Add text as you would to any topic. Then, click Save and Close in the upper-right of the window.

Refresh Smart Map Parts

Smart Map Parts keep an active link to the original data source, so when the source changes, the Map Part can be updated to reflect the latest state of the external data. You can refresh all Map Parts, or just a single Map Part to see the most recent information. You may also convert a Smart Map Part to a static Map Part.

Refresh all Smart Map Parts

Right-click the map background, and then click Refresh All Topics.

During the refresh operation, the whole Smart Map Part is deleted and replaced with a new part containing the latest data from the data source. All modifications to the part (e.g. adding of subtopics, changing the text or visual attributes) are lost. The progress bar shows the name of each topic in the map.

Refresh a single Smart Map Part

- 1. Right-click the Smart Map Part icon on the root topic (for example,).

2. Click Refresh.

Convert a Smart Map part to a static topic

- 1. Right-click the root topic's Smart Map Part icon.
- Click Convert to Regular or Disconnect ...

The Map Part is no longer linked to its source and the current data will no longer be refreshed. Disconnected Microsoft Excel data becomes a Spreadsheet.

Editing

Select topics and objects

Before you can modify, move, or delete topics and objects you must select them. There are several ways to do this.

You can select topics and objects on your map in Map View or Outline View directly using the mouse and keyboard or by using the **Select** command options.

You can also select topics and objects indirectly: By type using the **Select Special** command, by properties (map markers, task info, review info and other properties) using the **Power Select** command, or by text content using the **Find** command.

What do you want to do?

Select topics and objects directly

Select topics and objects by type

Select topics by properties
(Power Select)

Select topics using the Find command

See also:

Find and replace topic text

Filter topics

Select topics and objects directly

Select a single topic or object

• Click the topic or object. A blue highlight appears to show that it is selected.



Select multiple topics and objects

- Hold down the CTRL key and click to select or de-select them.
- Hold down the SHIFT key and use the arrow keys to select additional topics.

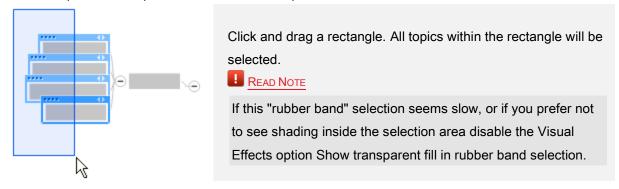
Keyboard shortcuts for selecting multiple topics▼

Action	Shortcut keys	Menu *
Select all topics and objects	Ctrl+A	Select All
Select additional topics	Shift+arrow keys	N/A
Select all siblings (below only) (above only)	Ctrl+Shift+A Shift+End Shift+Home	Select Siblings
Select all siblings and parent Select all siblings and subtopics	Crtl+Shift+left arrow Crtl+Shift+right arrow	N/A

Select topic and all descendants (all levels) Shift + F3 Select Descendants

* Home tab, Editing group, Select command

Select all topics within a particular area on the map



Use the Select command

On the **Advanced** tab, in the **Edit Topics** group, the **Select** command offers the following options for selecting multiple topics and objects:

Select All selects all topics (including callouts and floating topics) and objects (including relationship lines and boundaries).

Select Siblings selects all topics at the same level (or levels) as the current topic(s).

Select Descendants selects all topics branching off the current topic(s).

Select Special selects topics and objects by type

Invert Selection de-selects the currently selected topics and objects and selects all other topics and objects.

<u>Power Select</u> selects topics based on their properties. Within Power Select, you can also choose to select by a previously saved guery.

De-select topics

- To de-select individual topics press CTRL and click them.
- To de-select all topics, click the map background in Map View or on the empty space below the outline in Outline View.

Select topics and objects by type

The Select Special command allows you to select objects in Map View based on their type.

1. Do **one** of the following:

Click on the map background to select from all topics (no topics selected).

Or

Select a topic to select only from this topic and its descendants.

- 2. On the **Advanced** tab, in the **Edit Topics** group, click the **Select** arrow, and then click **Select Special**.
- 3. Select the check boxes for the types of elements you want to select.
- 4. Click OK.

Select topics by properties

The **Power Select** command lets you select a set of topics based on their properties, including the topic text. You can choose to select all topics that match (or do not match) the criteria you choose. You can also use a previously **Saved Query** to select topics.



If you want to show or hide topics based on their properties use the Power Filter command.

Use Power Select

- On the Advanced tab, in the Edit Topics group, click the Select arrow, and then click Power Select.
- 2. Do one of the following:

In the **Power Select** dialog, on the left side, choose the property type.

Then, on the right side, select the match criteria. Note that you can select a combination of properties of different types.

Or

Click **Saved Queries** to save the current query (or to select match criteria previously stored as a saved query).

- 3. Check **Expand branches to show all matches** on the **Options** tab if you want branches that contain matches to expand automatically.
- 4. In the Select drop-down, and click Select Matching Topics or click Select Non-matching Topics.

Select by Saved Query

- 1. On the Advanced tab, in the Edit Topics group, click the Select arrow, and choose Power Select.
- 2. In the Saved Queries drop-down, click the name of the query you want to use as selection criteria. Topics that match the criteria will be selected.



If you want to select all non-matching topics, click the **Select** arrow, and then click **Invert Selection**.

Select topics by topic text using the Find command

The Find command allows you to specify some text and select all the topics on your map that contain matching text.



The <u>Power Select</u> feature is more flexible in that it allows you to find topics with specific text alone, or in combination with other topic properties (such as specific map markers, task information, topic styles, and review information).

The Find command finds only matching text.

Use the Find command to select topics

- 1. Enter your text in the **Find** box at the right end of the ribbon.
- 2. Click the Find & Search button, and then click Find All.
- 3. All the topics with matching text will be selected.

The <u>Find</u> command provides additional features for tailoring your search and offers an option to replace the matching text.

Edit topics

What do you want to do?

Edit the topic text

You can replace or modify the text of any topic in Map view or Outline view by editing it directly, or by using the Cut, Copy and Paste commands to paste text into a topic.

Cut, copy, or paste topic text

You can also change the width of a topic to control how the text wraps, or split a single topic into multiple topics.

Change the topic width

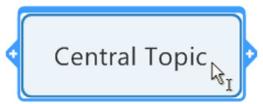
Split a topic into multiple topics

See also:

Keyboard shortcuts

Edit the topic text

1. Select the topic.



Move the mouse near the text.

A small cursor bar displays next to the mouse arrow.

- 2. Next, do one of the following:
 - To overwrite the existing text, press F2 to highlight the text, and then start typing. The new text will overwrite the current text. (Map View only).
 - To edit the current text, click again or press F2, then position the cursor and type the new text.
 - To begin editing at the beginning of the text, press SPACEBAR.
 - To begin editing at the end of the text, press SHIFT+SPACEBAR.



Press SHIFT+ENTER to create a line break

3. Press ENTER when you've finished, or press ESC to cancel editing.

See Keyboard Shortcuts for more info on keystrokes used in text editing mode.

Cut, copy, and paste topic text

You can also use the **Cut**, **Copy**, **Paste** and **Paste Inside** commands to modify the topic text. You can paste text from MindManager or another application into your topics.

Cut or copy text from a topic

1. Select the topic.

- 2. Click again on the topic text, and highlight what you want to cut or copy.
- 3. On the Home tab, in the Clipboard group, click Cut or Copy.



Append cut or copied text to an existing topic.

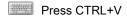
- 1. Select the topic.
- 2. On the **Home** tab, in the **Clipboard** group, click the **Paste** arrow, and then click **Paste Inside**.



For map topics, right-click on the topic and click **Paste Inside**. (This feature does not work for flowchart topics).

Paste cut or copied text at a specific location inside a topic

- 1. Select the topic.
- 2. Click again to begin edit mode.
- 3. Click at the location you want to paste the text.
- 4. On the Home tab, in the Clipboard group, click Paste.



Create a new topic from cut or copied text

- 1. Select the parent topic.
- 2. Do one of the following:
 - On the **Home** tab, in the **Clipboard** group, click **Paste**.
 - Right-click, then click Paste.



To paste the new topic without formatting (so its formatting is determined by the Map Theme). Click the **Paste** arrow, and then click **Paste Special** and choose **Unformatted Text**.

Change the topic width

The topic width determines whether the text will wrap.



Change the width of a single topic by dragging the outside edge.

To the reformat topic text to a single line, rest the pointer on the outer edge of the blue topic frame so that the resize cursor shows and double-click.



Control the preferred width for all topics using the size formatting options.

Split a topic into multiple topics

You can split a topic into multiple topics or multiple subtopics using spaces as a delimiter.



You cannot undo this command.

Split Topic is not available in flowcharts.

- 1. Select the topic.
- 2. On the ribbon's **Advanced** tab, in the **Edit Topics** group, click **Split Topic**.
- Select As Multiple Topics to create a group of new topics, all at the same level, or select As
 Multiple Subtopics to create a topic from the first word, with the other words as subtopics.
- To split into multiple topics press CTRL+ALT+ENTER.
- To split into a topic with multiple subtopics press CTRL+ALT+INSERT.

Or, you can split the topic at a particular location, using the text to the right of the cursor for the new topic(s).

- 1. Select the topic, and click inside the topic at the location where you want to split it.
- On the ribbon's Advanced tab, in the Edit Topics group, click Split Topic.
- 3. Click the topic type you want to create with the text to the right of the cursor. If you choose one of the "Multiple" options, the text is split at the cursor location, and then into additional new topics using spaces as the delimiter.
- To split and create a sibling topic press ALT+SHIFT+Down.
- To split and create a subtopic press ALT+SHIFT+Right.

Find and replace topic text

The **Find** command lets you find text in the current map. You can find the topics one by one, then edit and move on to the next. Or you can find and select all the matching topics, so you can edit them as a group (for example, apply icons or colors to add visual cues and allow filtering), copy them, or delete them from the map.

The **Replace** command finds the text and replaces it with text you enter. You can step through matching topics one at a time, or replace all the matching text in the map.

What do you want to do?

Find text

Replace text

Change the search starting point

See also:

Search for maps or documents

Markers

The Find and Replace **Options** let you:

Select topics and objects

- specify which map elements to include in the search (choose topic text, notes, links, or task info)
- restrict your search to a specific part of the map (for example, only subtopics of the current topic),
- match case or whole words only



To find text in other maps, use the Search command.

You can also find topics based on their icons or tags.

To find and select all topics with matching text in combination with other properties, use Power Select.

Find text

- 1. On the top menu bar, enter the search text in the **Find** box arrow to choose from the history of the last 10 searches (in the order of last used).
- 2. Click , click Find, and then click the options if you wish to further specify which map elements to search, which parts of the map to search, and criteria for positive matches. By default, only the topic text is searched.
- 3. Do one of the following:

2.

Click **Find All** to search the whole map and select all matching topics. Then you can edit the topics as a group (add icons or colors as visual cues and to allow filtering) copy or delete them from the map.

Click **Find Next** to find the next occurrence of the search text. Then you can do any (or none) of the following:

- · Edit the text in the map
- Click Find Next or Enter (or press SHIFT+F4
 if you've been working on the map) to
 resume the search starting with the current
 topic.
- Click , then click **Replace** if you want to replace the text.

Or

Press ESC or click Close to cancel the search

You'll see a message if no matching text is found.



The ENTER key is set to the **Find Next** button. So by just pressing ENTER, you can search the entire map.

Replace text

- 1. On the top menu bar click , then click Replace.
- 2. Enter the search text in the **Find what** box. The drop-down list shows the history of the last 10 searches (in the order of last used).
- 3. Enter the replacement text in the **Replace with** field. The drop-down list shows the history of the last 10 replacement phrases (in the order of last used).
- 4. Click **Options** if you wish to further specify which map elements to search, which parts of the map to search, and criteria for positive matches. By default, only the topic text is searched.
- 5. Do **one** of the following:

Click Find Next to find the first
occurrence of the text, then either:

• click Replace to replace the
text and find the next match or
• click Find Next to skip this text
and find the next match
• press ESC or click Close to



Map changes made by the Replace All command can be undone with one (compound) Undo.

You'll see a message if no matching text is found.

cancel the search

At the end of the search, a message box shows that the search is complete and the number of replacements made.



The ENTER key is set to the **Replace** button. So by just pressing ENTER, you can change the text continuously for the whole map.

Change the search starting point

Each new search starts with the currently selected topic. If multiple topics are selected, the search starts with the primary selection. If nothing is selected, it starts at the central topic. Topics are searched in a clockwise direction.

• To begin the search with a different topic, select it.

When you switch between maps, MindManager "remembers" the current search topic, so that you can resume the search where you left off.

Reorganize topics

You can reorganize the topics on your map by dragging one or more topics to a new location, or by using the Cut, Copy, and Paste commands. Automatic topic positioning features can help keep your map organized and balanced. When you delete a topic, you can choose to keep its subtopics and callouts.

What do you want to do?

Drag and drop topics on a map

Use automatic topic positioning

Drag and drop topics in
Outline View

Cut, copy, and paste topics

Sort topics

Group floating topics or flowchart topics

Delete or remove topics

Drag and drop topics on a map

You can drag and drop topics in Map view, when viewing a slide, or in Walk Through view.



Select the topic(s) and drag them to a new position on the map. A visual cue appears showing where the topic(s) will be added.

- To copy, press CTRL as you drag and drop.
- To create or move a floating topic, press SHIFT as you drag and drop.
- Callouts remain attached to their parent when they are moved. Use Cut and Paste to move a
 callout to a different parent.



If you want objects to Misnap to a grid during drag and drop, enable the **Snap to grid during drag** and drop option (**File > Options > Edit > Drag and drop**) or click the **Snap to Grid** button on the status bar. The default grid size is 10 mm. You can nudge an object 2 mm with an arrow key or micro-nudge it .2 mm by pressing CTRL + SHIFT as you use an arrow key.

You can use drag and drop to move and copy topics between maps that you are viewing simultaneously.

When you drag a topic and hover over another topic, an options menu appears containing commands for repositioning topics:

- To drop the dragged topic as a subtopic of the destination topic, choose Drop as Subtopic.
- To drop the dragged topic as a sibling topic of the destination topic, choose Drop as Sibling Topic
 Before or Drop as Sibling Topic After.
- You can also drag topics to drop as notes, or to insert links or relationships.

Reposition main topics

Normally, when you move a main topic MindManager automatically determines the best new location for it. The result is that the topic may not be located just where you want it - especially on maps with only a few main topics.

- To move a main topic to a specific position do one of the following:
 - Drag the topic by its handle.
 - Press ALT while you drag the topic to its new position.
 - o Drag the topic using the right mouse button.



If you don't see any topic handles use the <u>Show / Hide</u> command to display Main Topic Handles.

Once you drop the topic at its new position its handle becomes black to show that it has been freely positioned. The topic will maintain this approximate position as you add to or edit your map but may shift slightly to avoid overlapping with other topics.

Use automatic topic positioning

Return topics to their default positions

- For a single topic, right-click, and then click **Reset Position**.
- For all topics, right-click the map background, and then click **Reset All Topic Positions**.



Balance topics

You can ensure that new main topics are distributed evenly on the map as you add them by enabling the **Balance new main topics** option.

To distribute topics evenly on the map at any time, do **one** of the following:

On the **Design** tab, click **Balance Map**.

Right-click on the map background, and then click **Balance Map**.



There are several format settings to control the topic spacing and the layout of map topics.

Allow floating topic overlap

To allow map subtopics to overlap a floating topic, right-click the floating topic and clear the **Snapped** option. When checked, this option causes floating topics to move out of the way of new subtopics. Note that this option is re-enabled automatically if you move the floating topic.

Drag and drop topics in Outline View

- Select the topic(s) and drag them to a new position in the outline. A visual cue appears showing where the topic(s) will be added.
 - Drag topics up and down to reorder them.
 - Point to the left half of the target topic to create a sibling (topic at the same level).
 - Point to the right half of the target topic to create a subtopic of the target.



To copy, press CTRL as you drag and drop.

Cut, copy, and paste topics

Besides using the direct drag and drop method, you can also move and copy topics using the **Cut**, **Copy** and **Paste** commands. You can use this method to copy topics to another map, or to move or paste a topic as a callout.

- 1. Select the topic you want to copy or move.
- 2. On the **Home** tab, in the **Clipboard** group, click **Copy** \square or **Cut** \blacktriangleleft .
- Press CTRL+C to copy or CTRL+X to cut.
- 3. Optional Switch to the map you want to paste to.
- 4. Do **one** of the following:



5. On the **Home** tab, in the **Clipboard** group, click **Paste** to create a subtopic of the current topic.



To paste the text inside the topic or to create other topics, select an option in the **Paste** button menu.

- Press CTRL+V to create a subtopic of the current topic
- Press CTRL+ALT+V to create a sibling of the current topic.

Paste a topic as a callout

- 1. Select the topic you want to copy or move.
- 2. On the **Home** tab, in the **Clipboard** group, click **Copy** or **Cut** ...
- Press CTRL+C to copy or CTRL+X to cut.

- 3. Optional Switch to the map you want to paste to.
- 4. Right-click the target topic, click Paste, then click Paste as callout.

Sort topics

This command lets you quickly sort a set of selected topics and their sub-topics. If you select the central topic, you sort the whole map.

- 1. Select the topic(s), or select the central topic to sort the whole map.
- 2. On the **Advanced** tab, in the **Edit Topics** group, click the **Sort** arrow, then click **Sort Options** and choose the options to use.
 - I READ NOTE

If you do not see the **Sort** command, you need to enable the Sort Topics add-in.

3. Click **OK** to sort the map with the current settings.



To instantly sort a branch or the whole map: click **Sort** in the Advanced tab's **Edit Topics** group to sort the map using the default options: Alphanumeric sort, subtopics only sort depth, forward sort direction.

The map topics are sorted and reorganized. On the map, main topics begin at the upper-right and continue clockwise, and subtopics are sorted top to bottom.

Group floating topics or flowchart topics

You can group floating topics or flowchart topics by using a Smart Shape or shape as a container. Smart Shapes are topic containers by default, but shapes are not. When you move a Smart Shape or a shape that has been made a topic container containing floating or flowchart topics, all topics move with the container object.

Use a Smart Shape as a topic container

- On the Insert tab, in the Objects group, click the Smart Shapes arrow, and choose a Smart Shape type.
- 2. Click in the map where you want the container object, hold down the mouse button, and drag over the floating or flowchart topics.
 - Now when you move the Smart Shape, the topics contained within move with it.
- 3. Click in the map where you want the container object, hold down the mouse button, and drag over the floating or flowchart topics.

Now when you move the shape or Smart Shape, the topics contained within move with it.



You can also use an existing Smart Shape as a topic container by dragging floating or flowchart topics onto the object.

Smart Shapes are set to be topic containers by default. To disable the topic container setting for a Smart Shape, right-click it and uncheck **Topic Container**.

Use a shape as a topic container

On the Insert tab, in the Objects group, click the Shapes arrow, and choose a shape type.

Click in the map where you want the container object, hold down the mouse button, and drag over the floating or flowchart topics.

Right-click the shape, and check Topic Container.

Now when you move the shape, the topics contained within move with it.



You cannot use divider or bracket shapes as topic containers.

Delete or remove topics

You can *delete* a topic including all its subtopics and callouts, or you can *remove* a topic but leave its subtopics and callouts intact.



If you only wish to suppress the display of certain map elements or topics you can use the Show / Hide command and the Filter commands to hide them without removing them from the map.

Delete a topic and all of its subtopics

Select the topic(s) and do one of the following:

Press DELETE. The topic(s) (including icons, images and shapes), attached subtopics and callouts will be deleted.



On the **Home** tab, click the **Delete** button, and then select **Topic**.

Remove a topic, but keep all its subtopics and callouts

1. Right-click the topic, then click **Delete Topic Only**.



2. The topic (including icons, images and shapes) will be removed, and its subtopics will be promoted up one level. Its attached callouts will be converted to floating topics. (The new floating topics will not display in Outline View, but will appear on the map.)



If you removed or deleted the topic(s) in error, click **Undo** on the **Quick Access Toolbar** to restore them.

Adding Topic Elements

Links

Links serve as references to external documents, including other maps, Web addresses, or email addresses. Using Links lets you avoid cluttering the map by including or duplicating information, and ensures that you see an updated document or page each time you click the link.

READ HINT

If you want to include a document within the map file, use the Attachments feature

You can ...

- create links on your map in Map View or Outline View, and in topic Notes in the Notes window.
- give a link a descriptive title, helping you clarify the link's destination.
- create multiple links on a topic. When you rest your pointer on the icon you'll see the link destination.



You can use the Power Select and Power Filter commands to select and filter topics that have links attached.

The Map Index task pane Elements list displays all the topics on your map that contain links.

add links that point to:

an existing file (including another map), a folder, or a Web page

- another topic within the current map or in another map
- an email address

When you create a link on a map, an icon will appear on the topic. The icon indicates the type of link ▼.

multiple links (click to see the list)

link to local map

(or other document type icon) link to file

🥭 (or other browser icon or favicon) link to Web page

What do you want to do?

Link to a file, folder, or Web page

Link to a topic in this map

Link to an email address

Other ways to create links

Manage links

Display link targets in the

Show locations of target files



link to a topic in this map

ink to a topic in another local map

Link to a file, folder, or Web page

You can link to an existing file (including another map), Web page, or folder. If you link to another map, you can select a specific topic to link to.

- 1. Select the topic or click the location in a topic note where you want the link.
- 2. Do **one** of the following:



3. In the **Add Link** dialog, do **one** of the following:

Link to a file, folder, or web page ▼

Click the **Link Type** drop-down, and click **URL / File Path**. In the **Link Target** box enter the file name and path, the folder path or the URL, or click the drop-down arrow , click Select File and Select Folder to find the destination. (For a Web page copy and paste the URL from your browser into the **Link Target** box. You do not need to include "www.")

For Folders or Files, you can choose whether the link path is stored as absolute or relative to the location of the parent map. If you create a map with URL links, favicons are displayed for these links by default, and MindManager will attempt to connect to the Internet whenever you open the map. Use MindManager's **Visual Effects** options to disable this behavior.

Link to another map ▼

Click the **Link Type** drop-down, and click **URL / File Path**. In the **Link Target** box enter the file name and path, the folder path or the URL, or click the drop-down arrow , click Select File and Select Folder to find the destination. Browse to or enter the name of a MindManager map file in the **Link Target** box.

Optional Select a specific topic to link to

Link to another map ▼

Click the Link Type drop-down, and click URL / File Path. Next to the Link Target box, click the drop-down arrow, then click Select File From [cloud storage service].

You can add a cloud storage service by clicking Add Place.

Optional Select a specific topic to link to

Next to the Topic box, click Select then click a topic.

4. You can assign a title to a link in the **Link Title** box. When you point to the link, the link title is displayed along with the URL, path, or file name.



You can display link titles in the Topic Info Box by right-clicking the topic, choosing **Topic Information Display Settings**, and enabling the **Link Titles** check box.

- 5. Click **Advanced** to set special options used when you export your map to another document format or to a web page, or when you want to pass arguments with the link.
- 6. A link icon appears on the topic, reflecting the type of link you've added for example if you link to a map, a map link icon appears ; if you link to a Word document, the Word icon appears and so on. Some web addresses may use favicons (custom icons) when you link to them. A topic with multiple links displays this icon:

To see the link's title or target location(s), point to it.



See Other ways to create links for more ways to create links.

Check for broken file and folder links ▼

If you move, rename or delete a document that is a link destination all links to it will be "broken." You can check the map for broken links to files and folders.

READ NOTE

This command does not check links to web sites or other web locations.

- On the Home tab or the Insert tab, in the Topic Elements group, click the Link arrow, and then click Check File & Folder Links.
- 2. If a broken link is found, you can choose to browse for the file to repair the link or remove the link from the map.



If you click a broken link you'll get a message that offers you the opportunity to repair it immediately.

You can set an option to check file links dynamically. A broken link icon will be displayed for file

links that cannot be validated. For topics with multiple links, the broken link icon is only displayed in the list of links - it does not change the multi-link icon.

Link to a topic in this map

You can link from one topic to another.

- 1. Select the topic, or click the location in a note where you want the link.
- 2. Do one of the following:



- 3. In the **Add Link** dialog, click the **Link Type** drop-down, and then click **Topic in this Map**. A list of all map topics will appear.
- 4. Click the map topic you want to link to.
- 5. You can assign a title to a link in the **Link Title** box. When you point to the link, the link title is displayed along with the topic text.
- 6. Click **Advanced** to set special options used when you export your map to another document format or to a web page, or when you want to pass arguments with the link.
- 7. The topic link icon appears on the topic, or (on a topic with multiple links) in the link icon pull-down.



See Other ways to create links for more ways to create links.

Link to a topic in this map by dragging

- 1. Drag the topic that you want to link to over the topic where you want to insert the link.
- 2. When the menu button appears, release the mouse button, and choose Insert Link.

 To insert links between the two topics, choose Reciprocal Link.

Link to an email address

Use an email address link to automatically create an email message each time you click on it.

- 1. Select the topic or click the location in a note where you want the link.
- 2. Do **one** of the following:

Right-click the topic		On the Home tab or Insert tab,		Press
and click Add Link.	Or	in the Topic Elements group,	Or	CTRL+ Shift
		click Link.		+ K.

- 3. In the Add Link dialog, click the Link Type drop-down, and then click Email Address.
- 4. Enter the address, or click it in the list of **Recently used email addresses**.

- 5. Enter a **Subject** to use for messages created by this link.
- 6. You can assign a title to a link in the Link Title box. When you point to the link, the link title is displayed along with email address.
- 7. Click Advanced to set special options used when you export your map to another document format or to a web page, or when you want to pass arguments with the link.

The email link icon papears on the topic, or (on a topic with multiple links) in the link icon pull-down. Click on it to begin a new email message.

Other ways to create links

Here are some shortcuts for creating links:

Link to a map using copy and paste:

In Map View right-click on the map's document tab at the bottom of the window, and then click Copy as Link. (Or, click the Copy drop-down in the Clipboard Group on the Home Ribbon, then select Copy as Link.) You can then paste the link into a MindManager map or another document. In MindManager, right-click on a topic, click Paste, and then click Paste Link.

In other applications, select a location in the document and use the **Paste** command.

Link to a topic using copy and paste:

In Map View or Outline View right-click the target topic and select Copy as Link, then right-click on a topic (in the same map or in another map) and select Paste (pastes source text and link) or Paste Link (pastes only the link).

You can also paste the link into another document or into an email or chat message.

Link to a file or web page using copy and paste:

Copy the location text, for example C:\My Documents\myfile.doc or http://www.mindmanager.com/.

In MindManager, right-click on a topic, click Paste, and then click Paste Link.

Link to a Web page by sending a link from the browser:

If you are viewing a Web page or file within the MindManager browser, on the Browser task pane toolbar, click the **Add to Map** so button.

To create a link to a Web page from your external browser, click the **Send to MindManager** button in the browser toolbar to create a new topic with a link to the page you are viewing



Link to a file, folder, or web page using drag and drop:

- To create a link to a file, drag it from Windows Explorer or other external source (like the desktop, or a dialog with a file list) and drop it into the map, then choose to add it as a link (or press CTRL while you drag and drop to automatically add it as a link. Alternatively, you can add it as an Attachment.
- To create a link to a folder, drag it from Windows Explorer or other external source (like the desktop) and drop it into the map.

 To create a link to a web page, drag the link icon from the browser address bar and drop it into the map.

A <u>visual cue ▼</u> shows you how the link will be added.

Drop location	Result
Empty space on map (no cue)	New floating topic with link; link address is new topic text
Empty space on map (red cue)	New main topic with link; link address is new topic text
Topic center (green cue)	Link is added to the topic; topic text is not changed.
Topic edge (red cue)	New subtopic with link; topic text is link address

Once the link is added you can edit the topic text. This does not affect the link itself.



To create a floating topic regardless of drop location press SHIFT while dropping the link.

Manage links

Topics with single links

Edit a link

1. Do **one** of the following:

Right-click the topic link icon (for example or in Map View or Outline View, or right-click the linked text or image in a topic note, and then click Edit Link.	Or	Click the map topic, or click the note text or image with the link. Then, on the Home tab or the Insert tab, in the Topic Elements group, click the Link pull-down, and then click Edit Link	Or	Press CTRL+ Shift + K.
---	----	---	----	---------------------------

2. Make the changes, and then click **OK**.

Cut or copy a link from one topic and paste to another

1. Right-click the topic link icon, and then click **Cut link** or **Copy link**.

2. Right-click the topic or location where you want to add the link, click **Paste**, and then click **Paste** Link.



If you paste the link on the map background, a new topic is created that includes the link and the link address as the text.

Copy or move links by dragging in Map view

- To copy, drag the link to the new topic or into another application.
- To move, press CTRL while dragging.
- You can drag single and multiple links.
- For targets that already contain links, the dragged link is added to the topic's list of links.

Remove a link

- Right-click the topic link icon, or on the linked text or image, and then click Remove link.
- To remove several (or all) links, select the topics (press CTRL+A to select all topics). On the Home tab, click the Delete button, and then select Links.



You can suppress the display of link icons on topics in Map view (for example if you want to print the map without them) using the Show / Hide command.

Topics with multiple links

When a topic has multiple links, it displays this icon: A. You can manage the links by doing the following:

- To remove all the links, click the multi-link icon, and then click Remove All Links.
- To add, edit, remove or re-order the links, click the multi-link icon, and then click Manage Links.



The first link in the list is the "primary link". Only this link is included in exports to Microsoft Project. Other exports include all the links.

Display link targets in the built-in Browser

You can display supported link targets in the MindManager **Browser** pane. Supported targets include any files (such as HTML files) that can be opened by the browser.

To use the built-in browser to view links:

• On the Home tab or Insert tab, click the Link arrow, and then click Use Built-in Browser for Links.



If you navigate to a different page, and you want to add the link to your map, on the **Browser** task pane toolbar, click the **Add to Map** button. The link is added to the map on the currently selected topic, or on the Central topic if nothing is selected.

The Browser uses your system's Microsoft Internet Explorer security settings.

If you do not see this option, check to see that you have the corresponding <u>add-in</u> installed and enabled.

To open a page that is displayed in the built-in Browser externally in your system browser:

• Click the Open Outside MindManager button on the Browser toolbar.

To open a link outside of MindManager when the Use Built-in Browser for Links option is enabled:

When the topic contains a single link: When a topic contains multiple links

Right-click the link icon, then click **Open Link Outside MindManager**, or press CTRL while you click the link icon.

Click the link icon, point to the link you want to open, and then click **Open Link**Outside MindManager

Show locations of target files

Show target files or folders in Explorer

When a link points to a file or folder on your local system, you can show the link's target in Windows Explorer.

When the topic contains a	When a topic contains	For a topic with multiple
single link:	multiple links	links
Right-click the link icon,	Click the link icon, point to	In the Manage Links
and then click Show in	the link whose target you	dialog, select the link and
Explorer.	want to see, and then click	then click Show .
	Show in Explorer.	

Attach Files

What do you want to do?

Attach a file to a topic

Manage attached files

Open attached files

Edit attached files

When you attach a document to your map:

- The document content is stored as part of the map file.
- The documents go along when you move the map to a new location or distribute it to coworkers.
- You can attach several documents to a single topic.



A map with many attached files can be quite large. To reduce map size, use links to point to the documents instead of attaching them. Links do not increase the size of your map significantly, and the files can be modified outside of MindManager.

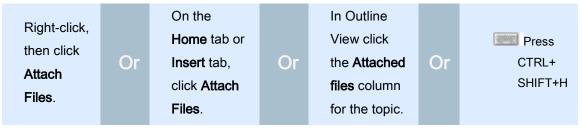
- You can attach an existing file or a new, empty document that you create on the fly.
- The Map Index task pane Elements list displays all the topics on your map that contain attachments and links.



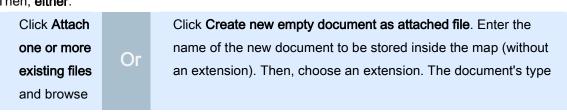
If your system administrator has disabled the Attach Files feature, you will not see the Attach Files command on the ribbon. When you open a map that contains attached files, you will see the "disabled attachment" icons.

Attach a file to a topic

- 1. Click the topic where you want to attach the document(s).
- 2. Do one of the following:



3. Then, either:



See also:

Links

Select topics and objects

Filter topics

Export maps

to select the will be determined by the filename extension you use, for example file(s). a .doc extension indicates that this is a new Microsoft Word file.

4. Click Edit attached file now if you want to open the document(s) immediately to view or edit them.



The attached document must be associated with an application on your system that can view and edit it.

The attached document must be associated with an application on your system that can view and edit it.

Click OK. If you chose to edit the document now, edit the document in the application, then save it. You'll return to MindManager

An icon appears on the map to show that the topic has an attached file. Topics with multiple attached files show this icon: You can hide or show these using the Show / Hide command. You can display attachment filenames in the Topic Info Box by right-clicking the topic, choosing Topic Information Display Settings, and enabling the Filenames check box.



Use the **Power Select** and **Power Filter** commands to select and filter topics that have attached files. Type your drop-down text here.

Attach an existing file

If you attach an existing file:

- The document is copied and stored as part of the map file, and the original document it is no longer used.
- You can delete the original once its been attached without affecting the attached file in your map.
- You need to modify the attached document using MindManager. Modifying the original document will not affect the attached file.
- If you keep and modify the original, the changes will show in MindManager only if you remove the attached file and then re-attach it.



From Windows Explorer or other external source (like the desktop, or a dialog with a file list), drag the filename, and then drop it into the map. Choose to add the item as an attached file.

Create a new attached file

- If you attach a new document, you can enter its content immediately, or wait until later
- The document exists only as an attached file inside the map file—to make it accessible outside of MindManager, you need to save it as a separate file on disk

Export Maps with Attached files

- Attached files are ignored when you export your map or tasks to Project.
- Attached files are included when you Save as Web Pages. The attached files are saved in individual files in the export folder, and a link to the attached file is inserted on the Web pages at the appropriate location.
- Attached files are included, unchanged (they remain as part of the map) when you send a
 packaged map to a mail recipient or use the Pack and Go command to package the map in an
 archive.
- Attached files are not included when you share your map, or send or export your map as an HTML5 map or OPML file.

Open attached files

You can view an attached document in either the standalone application or within the built-in MindManager Browser pane.

Open an attach file in the associated application

• Click on the topic's attached file icon and click **Open**: *filename* where *filename* is the document you want to open. (If there is only one attached file it opens automatically.)



You cannot open an attachment unless it is associated with an application installed on your system that can edit and view this file type.

Open an attached file using the built-in Browser

You can open attached files of supported file types (Microsoft Office documents, text files, and any other files, such as HTML files) in the MindManager **Browser** pane. Attachments that cannot be viewed by the Browser will open outside of MindManager in their native applications.

To use the built-in browser for attached files:

 On the Home tab or Insert tab, click the Attach Files arrow, and then click Use Built-in Browser for Attached Files.



If you do not see this option, check to see that you have the corresponding add-in installed and enabled.

The Browser uses your system's Microsoft Internet Explorer security settings.

Override the Use Built-in Browser setting for Attached Files option

To open an attached file outside of MindManager when the **Use Built-in Browser for Attached Files** option is enabled:

- For a topic with a single attach file: right-click the attach file icon.
 For a topic with multiple attached files, click the attached file icon.
- Click Open Outside MindManager: filename (where filename is the document you want to open),
 or, press CTRL while you click the attachment icon.

Open a page displayed in the MindManager Browser in its default application

If want to open an attached file that is displayed in the Browser externally in its native application, click the
Open Outside MindManager button on the Browser toolbar.

Edit an attached file

You cannot edit an attachment in the built-in Browser. Instead, open and edit it in the associated application, then refresh the Browser to reflect the edits.

Edit an attached file that is displayed in the Browser:

- Click the Open Outside MindManager button on the Browser toolbar.
- Edit and save the document in the native application.
- Click the Refresh button to update the attached file displayed in the MindManager Browser.

Manage attached files

The Manage Files shows a list of all the documents attached to a topic and gives you commands to manage the attachments.

1. Do **one** of the following:

In Map View right click the topic's
attached files icon , and then click

Manage Attached Files.

In Outline View click the Attached files
column for the topic.

2. In the Manage Attached files dialog select one or more documents from the list. You can now do any of the following:

Open Opens the selected attached file for viewing or editing.

Save as Saves the attached document in a separate file on disk so that it is accessible outside of MindManager. This external file has no connection to the attached file—it can be edited independently and will not change the content of the attachment.

Add Inserts a new attached file on the topic

Rename Renames the selected attached file

Remove Removes the document from the list of attached files

Copy or move attached files by dragging in Map view

To copy, drag the attached file to the new topic or into another application.

- To move, press CTRL while dragging.
- You can drag single and multiple attached files.
- For targets that already contain attached files, the dragged attachment is added to the topic's list of attached files.

Topic Notes

Map topics are most readable when they are kept short. For topics that need more detail, you can add topic notes to include larger amounts of information as formatted text and graphics. This additional documentation is especially useful for maps that you will export to a Word document.

More about Notes:

- You can enter the text or copy it from another document.
- The Notes icon papears automatically on a topic when a note is attached —next to the topic in Map View, and in the Notes column in Outline View.
- You can choose to show or hide these icons in Map View by
 using the <u>Show / Hide</u> command. To hide them in Outline View,
 right-click on the column header and clear the **Notes** option.
- For information on printing Notes, see Print.
- You can choose to display Note icons and previews. For more information, see Show or hide specific types of information.



You can use the <u>Power Select</u> and <u>Power Filter</u> commands to select and filter topics that have notes attached.

If you want to add complex documents to your map, you can create a link to the document from the topic, or you can include the document in the map file by using an attachment.

The Map Index task pane Elements list displays all the topics on your map that contain Notes.

Enter notes text

Enter notes by typing the content in, or paste text from another note or document. Select an automatic font for the all the notes on your map by modifying the map theme before you begin.

- 1. Select the topic.
- 2. Do **one** of the following:

Right-click, then click Notes.

What do you want to do?

Enter notes text

Add images in notes

Add links in notes

Add tables to notes

Move, remove, or copy notes

In Outline View, click in the Notes column.

On the **Home** tab or **Insert** tab, in the **Topic Elements** group, click **Notes.**





The Topic Notes window opens. (You can control its size and orientation ▼).

Note that it has its own toolbar.

Choose to display this window vertically or horizontally by default using one of the following methods:

- Right-click on the window then click Window Placement.
- On the Home tab in the Topics Elements group, click the Notes arrow and select the orientation.
- Set the **Notes window placement** in the MindManager **Notes** options.

To expand the vertical window, click the **bigger** button on the top toolbar. You can also drag the left-hand or top border to see more of the note and less of the map.

4. Enter your text. Text will automatically be formatted using the default font ▼.



If you want to insert line breaks in your text, press SHIFT+ENTER where you want the line break.

A quick way to add notes is to paste them from another application:

Copy the text, place your cursor inside the Notes window, and then use the <u>Paste</u> command, or press CTRL+V.

To control the default font that is used for notes on this map:

• On the **Design** tab, click **Notes Theme**.

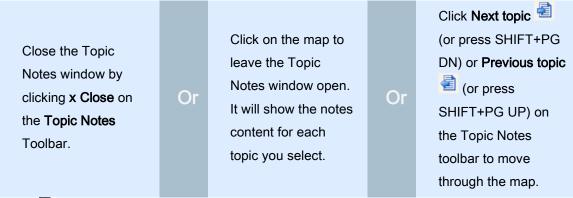
This setting is saved as part of the map theme.

5. Use the commands in the **Topic Notes** toolbar to format the text and add other elements: Notes can contain tables, links, images and date / time data.



The Format Painter on this toolbar works in the same way as the <u>Format Painter</u> on the ribbon. You must use this toolbar to format the notes text. The formatting options on the ribbon are for formatting the map only.

6. When you are finished entering the note you can:



A Notes icon will appear on the topic to show that it contains a note. You can show or hide these icons using the Show / Hide command.

Add images in notes

You can add pictures to your text notes from the MindManager image Library or from a file.

- Images from files can be embedded and saved with the map document or referenced via a link to keep the map file small.
- Initially, the image is added at its original size but you can re-size it and edit it as needed.
- Images added to a note can be saved on disk.

Add an image from the Library to the note

- 1. Click inside the topic note at the location for the image.
- 2. On the **Status Bar**, click the **Task Panes** button , then click **Library**.
- 3. At the bottom of the Library task pane, click Images, then locate the image you want to add.
- 4. Drag the image into the note. (*Note:* If you just click the image it will be added to the current topic, not to the note.)

Add an image from a file to the note

- 1. Click inside the topic note at the location for the image.
- 2. Click Image and on the Topic Notes toolbar.
- 3. Locate the image you want to add.
- 4. Do **one** of the following:

To *embed* the image in the notes (include the image in the map file) click **Insert.**



To *link to* the image (include only a reference to the image file in the map file), click the arrow next to **Insert** and click **Insert and Link**.

Not sure which to do? See Linking vs. embedding images ▼.

Linking vs embedding images

You may prefer to link to images from files rather than embedding them because:

- You want to keep the map file size small
- The image will change and you want to see only the current version of it

If you choose the **Insert and Link** option when inserting an image, you will link to the source image. Each time you view the notes, the image is updated.

Update the image manually

- 1. Right-click the image.
- 2. Click Refresh Image.

Choose to link or embed an image after its been added

- 1. Right-click the image.
- 2. Click Format Image.
- 3. Enable or disable the **Link to image** option as desired.
- 4. If you enable the link, enter (browse to) the file's location.
- If the source file is moved or deleted, you will see a broken image link displayed rather than the image. Use steps above to correct the file location for an image that's been moved.

You have the option to embed linked images when exporting the map to Word using the MindManager **Notes** options settings for **Export conversions (RTF)** That way, the image is included with the exported files, rather than just including a reference.

Paths for Linked Images

Relative or absolute paths for linked images are stored according to the **Properties - Summary** options for links, but you can change this setting for individual images.

Set the path for an individual image to relative or absolute

- 1. Right-click the image.
- 2. Click **Format Image**. You'll see the default path setting (relative or absolute.)
- 3. Set the Store this image path as: option as desired.
- Click **Defaults** to change the default path setting for all subsequently added images.

See Images for more information on the types of images you can import.



You can add a link to an image, for example, a button image that you can click on to jump to a web page or to begin an email.

You can paste an image that you've cut or copied from another application into a note. Click inside the note where you want to place the image and press CTRL+V or, on the **Home** tab, in the **Clipboard** group, click **Paste**.

Edit an image in a topic note

Resize an image

- 1. Click the image in the note.
- 2. Drag the handles to change the image size.



Hold CTRL while you drag the corner handles to maintain the image's aspect ratio.

If you know that you want the image to be a specific size (in pixels), right-click the image, then click **Format Image** and specify the dimensions.

3. You can return the image to its original size - right click, and then click Reset Image Size.

Edit linked images in place

You can edit linked images in place. Images you dragged to the note from files inserted into the Library cannot be edited in place: Instead you must edit the Library image or edit the original file externally, and then re-add the modified image.

- 1. Right-click the image, and then click **Open Source**.
- 2. The image is opened in its associated application so you can edit it.
 - READ NOTE

The associated application must be capable of editing in order for you to change the image.

- 3. After editing, save the modified image in the editing application.
- 4. In MindManager, right-click the image, and then click **Refresh Image** to see the updated picture. The image is also re-read (and updated) automatically each time the topic is selected.

Save an image from a topic note

You can save any image included in a note, regardless of its origin, to a file.

- 1. Right-click the image.
- 2. Click **Save image**, and enter the file's location and name. You will have a choice of several formats in the **Save as type** list that depend on the image's original format.
- 3. Click Save.

Add links in notes

Adding a link in a note is similar to adding a link to a map topic.

- 1. In the **Topic Notes** window, click where you want to add the link (if you select some text or an image, the selected objects will be "hot" and will open the link when clicked.)
- 2. Do one of the following:



3. Define the link. See Links for additional information on the various types of links you can add.

Add the content of a topic as a note

- 1. Drag the topic containing the text that you want to add as a note over the topic to which you're adding the note.
- 2. When the menu button = appears, release the mouse button, and choose **Drop as Notes**.



You can only add topics that contain only text to another topic as a note.

Add tables to notes

- 1. In the **Topic Notes** window, click the location for the table.
- 2. Click Insert Table iii on the Topic Notes Toolbar.
- 3. Click Insert, then click Table.
- 4. Enter the number of rows and columns to use. Click **Remember dimensions for new tables** to set the default size for the next table you add.
- 5. Click OK.
- 6. An empty table appears in the note. Enter the contents of the table cell by cell.

Edit a table

Show the Table toolbar

The table toolbar contains special commands for configuring and formatting the table.

On the Topic Notes Toolbar, click the Table arrow

 , and then click Show Table Toolbar.

Select table cells

Use these commands to select table elements for editing or formatting. You must click inside the table to make these commands available.

To select	Table menu	or click
Table	Select - Table	Table's upper left corner

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Column	Select - Column	Top of column
Row	Select - Row	Left end of row
Cell	Select - Cell	Click and drag to highlight cell

Insert, delete, or merge table elements

Option	Table menu	Table Toolbar
Insert columns	Insert - column to left Insert - column to right	¥.
Insert rows	Insert - Row above Insert - Row below	⇒ €
Delete	Delete - Table Delete - Columns Delete - Rows Delete - Cells	- ♥ => =>
Merge cells	Merge cells	n/a
Split cell	Split cell	n/a
Align top Center vertically Align bottom	n/a	
Fill color	n/a	ॐ

Table formatting and layout

You can edit and format the text within a table in the same way as ordinary notes text. There are additional ways to select different table areas. Options for table formatting and layout are available in the **Table** menu and by using the **Table Toolbar**.

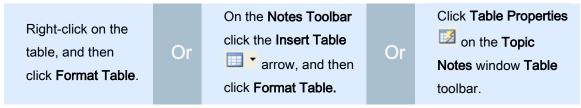
Format table text

- 1. Select the area that you want to format a cell, row, column or the whole table.
- 2. Click a formatting command on the Topic Notes toolbar.

Format table borders and shading; table and column widths

You can format the borders and shading for the whole table or for individual cells. You can also set the table and column widths for Web export.

- 1. Click inside the table.
- 2. Do one of the following:



3. Use the **Borders and Shading** tab options to change the table's appearance. Use the **Table and Column Width** tab options to set properties for exported tables.

Move, remove, or copy notes

You can copy topic notes between topics that already have notes.

Cut, copy, and paste note

- 1. Click a topic's notes icon to open the **Topic Notes** window.
- 2. Right-click the source topic's notes icon.
- 3. Click **Cut Notes** (to move) or **Copy Notes** (to copy).
- 4. Right-click the destination topic.
- 5. Point to **Paste**, then click **Paste Notes**. If the topic already has a note, you will be offered the option to either replace it or append the new note.



You can also paste the note into another application using the applications Paste command.

Copy or move notes by dragging in Map view

- To copy, drag the notes to a new topic, or into another application.
- To move, press CTRL while dragging.
- If you drop notes onto a topic that already has notes, the existing notes are overwritten.

Remove a single note

Right-click on the topic's notes icon, and then click Remove Notes.

Remove the notes from several topics

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Select the topics, and then do **one** of the following:

Right-click the notes icon on one of	Or	On the Home tab, click the Delete button,
them, then click Remove Notes .	Oi	and then select Notes .



You can temporarily hide the notes icons in Map View using the **Show / Hide** command.

Other options

Open the Notes window, then use the **Cut**, **Copy**, and **Paste** commands on the **Home** tab, in the **Clipboard** group to:

- Move or copy all or part of a topic note
- Paste text from other applications into the note.
- Paste text from notes into topics. See Edit topic text and Create topics by pasting text for details.

Adding Visual Information

Markers

You can code individual topics with distinctive visual elements called markers—icons, tags (text annotations), font colors and fill colors—each with an associated name or meaning.

Markers are used:

- to impart specific meaning to topics or classify them into groups;
- as criteria for topic selection and filtering;
- to organize topics in a list, categorized by the markers they include in the Map Index pane;

A markers list:

- contains a set of map markers organized into groups;
- is unique to each map;
- is displayed in the <u>Map Index</u> pane—apply these markers to map topics from the list or by using commands on the ribbon's Home and Insert tab:
- can be managed using commands in the Map Index pane.

More about markers:

- You are not restricted to the markers shown in the Markers list you can code topics with other icons from the Library, and they are added to the map's Markers list dynamically.
- You can create new marker groups on-the-fly, and <u>add</u> your own custom icons to the Library.
- Special task icons (priorities, task progress) appear automatically
 on topics when task information is assigned, and are also
 dynamically added to the markers list if they are not already
 included.
- Add a Legend topic to your map from the drop-down in Map Index pane Markers list that shows the icon, font, and fill color markers used on the map, and their meanings.
- To re-use markers on another map, copy and paste marker groups.
- Save, apply, and manage entire marker lists from the Theme
 Organizer drop-down on the Design tab. Select Marker Lists.

Resources are:

What do you want to do?

Add icons to topics

Add tags to topics
Find or filter topics with specific markers

Add font and fill color markers to topics

Add a legend to the map

See also:

Use the Map Index

Manage Markers

Use the Marker Lists Organizer

Task info

Filter topics

- special tags that are also tied to a topic's Task Info;
- applied from the Markers list in the Map Index pane, from the Task Info pane, and from the ribbon's Task tab. (See <u>Task Info</u> for more information on using resources.)

READ NOTES

Outline View displays only icon and font color markers.

You can hide some marker types in topics using Topic Info Display Settings.

Add icons to topics

You can add or remove icons on topics using the **Icons** command from the **Home** or **Insert** tab **Markers** group, or from the Markers list in the **Map Index** task pane.

- 1. Select a topic or topics that you want to assign the icon to.
- 2. On the **Home** or **Insert** tab, in the **Markers** group, click **Icons**.
- In the icon picker select the icon you want to assign to the topic. Once an icon is added, you can
 rest your pointer over it to see its meaning. You can <u>change its meaning</u> in the Map Index pane
 Markers list.
- 4. If you don't see the icon you want to add, click **More Icons...** to open the **Library** task pane. Click the icon in the **Library** task pane. The icon is automatically added to the **General icons** group in the **Markers** list.



To apply an icon from the Map Index task pane, select the target topic(s), and then click the icon in the Markers list.

Task-related icons are also available from the Tasks group on the Task tab.

If the icon you choose was already assigned to the selected topic, it is removed. This works as a toggle, so a second click on the icon will add it to all selected topics.



To copy an icon from one topic to another, drag it to the new topic.

To move it press CTRL as you drag and drop.

You can assign an icon to multiple topics, and each topic can have more than one icon, but you may not repeat the same icon on a topic.

Some icons are mutually exclusive: Only one icon from that marker group can be added to a topic. If you attempt to add a second icon from the same group, it replaces the first icon. You can change this attribute for a group. You can add multiple icons to a topic from a group that is non-exclusive.



To display larger icons on the map, use MindManager's Visual Effects option.

Change an icon on a topic

Once you have added an icon to a topic, you can change it in several ways. Do one of the following:

For icons that belong to a named group, click the icon to cycle to the next icon in the group.

Right-click the icon, then click **More Icons** to replace the current icon with a new icon from the Library. The new icon gets added to the **General icons** group in the Markers list.

Right-click the icon, then click **Replace With** to select a different icon.

Right-click the icon, then click **Edit Marker**Name to change the icon's meaning. This
new meaning will show in the Markers list
in the Map Index task pane, and in the

map legend.

Icon shortcuts

Priority icons:

• CTRL+SHIFT+1 for Priority 1, CTRL+SHIFT+2 for Priority 2 etc.

Progress icons:

- ALT+CTRL+P adds a progress icon, then cycles forward through the icons
- ALT+CTRL+SHIFT+P cycles in reverse.
- Only available Progress icons (the ones currently in the Markers list) are used.

To assign shortcut keys to other icons, in the Library pane, right-click the icon, then click **Shortcut key** in the context menu.

Copy, move or remove an icon marker on a topic

- To copy an icon, drag it to a new topic, then drop it.
- To move the icon, press CTRL as you drag and drop.
- To remove an icon, right-click on the topic's icon, and then click Remove or Remove All Icons to remove all the topic's icons.



ALT+CTRL+0 removes all icon markers.

If you prefer not to display icons but want to avoid removing them you can hide them using the Show/Hidecommand in Map View. In Outline View you can turn off the icons column - right-click the column header and clear the **Icons** checkbox.

Exporting icons - notes ▼

If you export your map to web pages an icon legend pop-up is automatically included in the export. You can disable this by using the options to customize your web pages. The Icon Legend pop-up option is in the *Show* section on the **Advanced Settings** page.

Task icons - notes ▼

The task icons (priority, progress) are dynamically linked to the task information assigned to the topic. These work in a special way:

- If you assign task info to a topic, the corresponding task icons appear automatically on the map and are added to the Markers List (if they were not already included) in the appropriate group.
- If you add a task icon (priority, task progress) from the icon picker the corresponding task info is automatically assigned to the topic.

You can "cycle" the priority and progress task icons just like other icons:

Click on the icon to change it to the next available priority or task progress setting.



You can tailor the Markers list in the Map Index pane to contain only those priorities and progress settings you want to use. For example, you can include just the 0%, 25%, 50% and 100% icons in the list rather than the whole continuum of settings. In this way you can avoid cycling through all the unused icons.

Add tags to topics

A tag is a brief notation that gives information (such as a topic category) by displaying the text below the topic. You add or remove tags on topics using the **Tags** ribbon command or from the Map Index pane.

- 1. Select a topic or topics.
- 2. On the **Home** or **Insert** tab, in the **Markers** group, click **Tags**.
 - READ NOTE

A resource is a special kind of tag that is used as <u>Task Info</u>. Resources can also be added using the **Resources** command in the **Task** tab's Tasks group, and from the Task Info pane.

- 3. In the tag picker click the group and then the tag(s) you want to assign to the topic.
- READ HINT
- ☑ READ NOTE

Some tags are mutually exclusive: Only one tag from that group can be added to a topic. If you attempt to add a second tag from the same group, it replaces the first tag. You can change this attribute.

If you are assigning a tag to multiple topics and the tag you choose was already assigned to any

of the selected topics, it is removed. This works as a toggle, so a second click on the tag will add it to all selected topics.

To add or remove a tag using the Map Index task pane, select the target topic(s), and then click the tag in the Markers list.

4. If you don't see the tag you want to use, you can add a new tag or a new tag group.



You can also add an existing tag by selecting a topic, typing **#**, and selecting the tag in the popup menu. To add a new tag, type **#**, type a tag name, and press **Enter**. For more information, see Add tags with an accelerator key.

You can also right-click a tag to remove it from the topic.

To show or hide the group names in the tags on your map, on the **View** tab, in the **Detail** group, click **Show / Hide** and select or clear the **Tag Group Names** checkbox.

Each topic can have more than one tag, but you may not repeat the same tag more than once on a single topic.

Change a tag on a topic

- Right-click the tag, click the tag group name, and then select the tag you want to display.
- You can only select one tag from a group that is mutually exclusive (see above).
- You can display tags from more than one group on a topic.

Copy or move tags

You can copy or move tags from one topic to another.

- On a topic, click the tag you want to copy and drag it to the destination topic.
 - READ HINT

Hold CTRL as you drag to move, instead of copy, the tag.

2. Release the mouse button to drop the tag on the topic.

If you drag a tag to a topic that already has tags assigned, the new tag will be added to the tag list.



Selecting a tag

Remove a tag

- To remove all tags, right-click the topic, click Tags, and then click Remove All Tags.
- To remove a specific tag, right-click on it, and then click **Remove**.



If you prefer not to display tags but want to avoid removing them you can hide them using the Show / Hide command. Tags are not displayed in Outline View.

You can also delete a tag by clicking its Close button in the Topic Info Card.

Exporting tags - notes ▼

Tags are exported to HTML5 maps and Word documents. They are not exported to Project files, and are not included when you print from outline view or save as a plain text or HTML outline.

For Word export you can choose whether to include the tags in your document on the Tags page of the Word Export Settings wizard.

Find or filter topics with specific markers

Find topics with a specific icon or tag

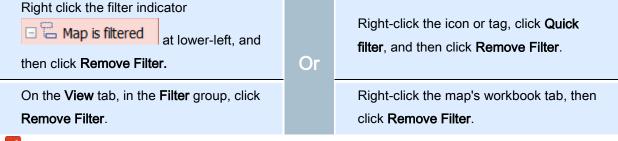
- 1. On a topic, right-click the icon or tag you want to find.
- 2. Click Find Next or Find Previous to select the next or previous topic that uses this icon or tag.

Show or hide topics with a specific marker

- 1. On a topic or in the Map Index pane Markers list, right-click the marker you want to match.
- Click Quick Filter, and then click Show Topics With This Marker or Hide Topics With This Marker.

Filtering is cumulative. Topics that are already hidden remain hidden when you apply a new filter.

To show all the topics again do one of the following:





To use additional criteria for filtering, use the Power Filter option.

Add font and fill color markers to topics

Font colors and fill colors can also be used as markers. That is, you can associate a specific meaning with the colors you use in your map. You can initially apply font and fill colors using the map formatting commands. These colors will appear in the Markers list in the Map Index task pane. From there, you can apply them to topics, and optionally assign a meaning to them.

If you name font or fill colors in the Markers list, they will appear in the map legend. Named font and fill colors remain in the list of markers even if they are not used on the map. You can <u>change the markers'</u> <u>colors and meanings</u> using commands in the Markers list.

READ NOTE

If you do not assign a meaning to the color, it will disappear from the Markers list if it is no longer used on the map.

Add a legend to the map

The legend displays the marker list groups, and all the named markers within those groups. The legend is added as a subtopic of the currently selected topic, or as a main topic if no topic is selected.

1. Select the topic to attach the legend to.



The legend is added as a new main topic or subtopic by default, but you can detach it to make it a floating topic.

2. Do one of the following:

On the Status Bar, click the Task Panes button , click Index, and then click the Markers button.



On the **Home** or **Insert** tab, in the **Markers** group, click the **Map Index** button, then click **Markers**.

- 3. Click #, then click Insert legend into map.
- 4. Choose whether to show all markers in the legend, or only those that are used on the map.

A new set of topics will be added to the map showing the marker groups and meanings. Icons in the **General icons** group will not appear in the legend. If you want to include these icons in the legend you must name them (they move into the **Single Icons** group when you name them).

READ NOTE

The legend is not automatically updated, so if you rearrange the markers in the list or rename the groups the legend will not be current. To get a current legend, delete the existing legend topic and then add the legend again from the Markers list.

Work with objects

There are a variety of object types that you can use to increase and enhance a map's visual information. You can add shapes and images to a map's background, text boxes to give extra information, and Smart Shapes to flowcharts when there are several concurrent processes. You can also add relationships to show how topics or objects are connected and boundaries to group topics and subtopics. You can modify these objects to best suit the look of your map. Depending on the object type, you can adjust transparency, fill, outline, and layering. You can also lock, align, flip and rotate objects, as well as control how they are layered. You can also quickly and accurately align two objects by dragging. To simplify working in complex maps, objects can be grouped and renamed.

What do you want to do?

Select objects
Format objects

Resize objects

Layer objects

Lock objects

Align and distribute objects

Group objects

Flip and rotate objects

Add titles to objects

Rename objects

Format boundaries and relationships

See also:

Shapes

Smart Shapes

Images

Boundaries

Relationships

Select objects

Selecting multiple objects allows you to simultaneously apply formatting to them all, lock several objects, align and distribute them, and more.

Do **one** of the following:

Hold down **Ctrl**, and click the objects' edges. When selection handles appear around an object, it is selected. Or

Hold down your left mouse button and drag over the objects. The object must be completely in the selection area to be selected.

Or

On the **Insert** tab, in the **Objects** group, click the Shapes pull down, and click **Select All**.

Format objects

You can modify an object's outline, fill, and transparency. To format your map quickly, you can select multiple objects when you apply formatting. You can use the Format Painter to transfer formatting between objects.

Format an object's outline

You can format the color, weight, and pattern of outlines for shapes, swim lanes, boundaries, and relationships.

- 1. Right-click the object that supports outline formatting, and click Format Object.
- For boundaries, click Format Boundary, and for relationships, click Format Relationships.

You can modify the outline of multiple objects simultaneously by first selecting them.

- 2. Do any of the following:
 - Open the Color drop down menu, and choose a line color.
 - Open the Weight drop down menu, and choose a line weight.
 - Open the **Pattern** drop down menu, and choose a line pattern.
- Click Apply.

Format an object's fill

You can format the fill color, weight, and pattern of outlines for circles, rectangles, swim lanes, and boundaries.

- 1. Right-click an object that supports fill formatting, and click **Format Object**.
- For boundaries, click Format Boundary.
- 2. In the Fill area, open the **Color** drop down menu, and choose a fill color.



You can modify the fill color of a single swim lane, funnel segment, or table cell by right-clicking it, choosing Format Object, and choosing a color and setting its transparency in the Format Background Object dialog.

You cannot adjust the fill color of relationship lines or horizontal or vertical divider lines.

Format an object's transparency

You can adjust the transparency of rectangles, circles, images, swim lanes, and boundaries.

Do **one** of the following:

- Right-click an object that supports transparency, and click Format Object.
 For boundaries, click Format Boundary.
- 2. Set a transparency level in the **Transparency** box.



You can also right-click rectangles, circles, images, and swim lanes, then click **Transparency**, and choose a transparency level.

READ NOTE

You cannot adjust the transparency of relationship lines, horizontal or vertical divider lines, or text boxes.

Resize objects

You can resize shapes, images, and swim lanes.

Do one of the following:

Right-click the object, click

Format Object, type the
desired number of pixels in the

Height or Width boxes.



Click the object to display handles, and drag the handles.

Layer objects

You can layer some types of objects, including shapes, images, swim lanes and text boxes, and control the stacking order of the objects.

You can place one object on top of another and reorder the stacking position.

Send an object back in the stacking order

Right-click an object, and do **one** of the following:

- Click **Send Backward** to position it the object immediately beneath it.
- Click Sent to Bottom to move it beneath all other objects.

Bring an object forward in the stacking order

Right-click an object, and do **one** of the following:

- Click Bring Forward to position it over the object immediately above it.
- Click Bring to Top to move it above all other objects.

Lock objects

You can lock shapes, swim lanes, text boxes, and images in position on a map background, which prevents you from moving them.

Lock an object

Right-click an object and click Lock.

Unlock an object

- 1. On the **Home** tab or **Insert** tab, click the **Map Index** pull down, and click **Elements**.
- 2. In the Map Index Elements pane, right-click the object, and click Unlock.

Align and distribute objects

You can align two or more shapes, swim lanes, text boxes, and images with each other. The object that has selection handles is the object to which other selected objects are aligned.

You can also distribute three or more shapes, swim lanes, text boxes, and images, evenly spacing the center points of the objects along a horizontal or vertical axis.

Align objects

- 1. Select two or more objects.
- 2. Do one of the following:

On the **Format** tab, in the **Object Format** group, click the **Align** pull down, and select an alignment option.



Right click, click **Align**, and select an alignment option.

Interactively align objects

- 1. Select the object that you want to align with another object.
- Drag the object until a green alignment guide is displayed.
 The guide displays when the edges of the objects are aligned.
- 3. Release the mouse button.

You can disable the alignment guide by clicking **File** tab > **Options** > **Edit**, and disabling the **Use Alignment Helper when dragging objects**.

Distribute objects

- 1. Select three or more objects.
- Do one of the following:

On the **Format** tab, in the **Object Format** group, click the **Align** pull down, and select a distribution option.



Right click, click **Align**, and select a distribution option.

Group objects

You can group shapes, swim lanes, funnels, tables, text boxes, and images in position on a map background. When you group two or more objects, they are treated as a single unit but retain their individual attributes. Grouping lets you move, resize, rotate, flip, and align all the objects within the group at the same time.

Group objects

- 1. Select two or more objects.
- 2. Do one of the following:

On the **Format** tab, click the **Group** pull down, and select a grouping option.



Right click, click **Group**, and select a grouping option.

Ungroup objects

- 1. Select one or more objects within an object grouping.
- 2. Do one of the following:

On the **Format** tab, click the **Group** pull down, and select an ungrouping option.



Right click, click **Group**, and select an ungrouping option.

Flip and rotate objects

You can rotate and flip objects or an object group.

Flip objects

Right-click an object or group of objects, and do one of the following:

Click Flip Vertical.



Click Flip Horizontal.

Rotate objects

Do **one** of the following:

- Click an object to display corner rotation handles, and drag the handle.
- Right-click an object, click **Format Object**, and enter the number of degrees to rotate the object in the **Rotate** box.
- Right-click an object or group of objects, and click either Rotate 45° counter clockwise or Rotate 45° clockwise.

Add titles to objects

You can add titles to most shapes and Smart Shapes. You can also format the title text and change its alignment, orientation, and its position relative to the shape or Smart Shape.

Display titles

1. Right-click the shape or Smart Shape, and click Show Titles.



You cannot display titles for tables, divider lines, or brackets.

By default, the title displays the type of shape or Smart Shape. Smart Shape segments also display titles.

2. Double-click the title, and type to add a new title.

Format title text

- 1. Select the title text.
- 2. On the Format tab, in the Font group, do any of the following:
 - Choose a font face from the Font box.
 - Choose a font size from the Size box.
 - Choose a font color from the **Font color** box.
 - Italicize the text by clicking the **Italics** button.
 - Bold the text by clicking the **Bold** button.
 - Underline the text by clicking the **Underline** button.
 - Strikethrough the text by clicking the **Strikethrough** button.



Reposition a title

- 1. Right-click the shape or Smart Shape, and click Format Object.
- 2. In the **Title** area, do any of the following:
 - Choose where to position the title relative to the shape or Smart Shape from the Location drop-down menu.
 - Click the Alignment drop-down menu, and choose how the title text is aligned relative to its shape or Smart Shape.
 - Click the Orientation drop-down menu, and choose whether to display the title text vertically
 or horizontally.

Rename objects

You can rename objects.

- 1. On the **Home** tab, click the **Map Index** pull down, and click **Elements**.
- 2. Double-click **Objects** to view a list of objects in the current map.
- 3. Click the object to rename.

When an object is selected in the Map Index pane, it is highlighted in the map.

- 4. Right-click, and click Rename.
- 5. Type a name for the object.
 - Object names cannot exceed 40 characters.



You can also right-click an object, click **Rename**, and type a name for the object.

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Format boundaries and relationships

When you select a boundary or a relationship, the formatting options on the Home tab are enabled, and you can use these to change the object's appearance. See <u>Boundaries</u> and <u>Relationships</u> for information on further modifying these objects.

Additional options are available when you right-click on the object, and then click Format Boundary or Format Relationship (or double-click, or select the object and press ALT+ENTER).

- 1. Select the formatting options you want to use.
- 2. To see how the boundary or relationship will look, click Apply.
- 3. Click the **Map Theme** button if you wish to save these settings as formatting defaults for this map, or re-set the object's formatting to the default from the theme.

Relationships

Sometimes a relationship exists between two (or more) topics or objects, and you want to illustrate this on your map. You can add a relationship line that connects two topics or objects, and label it if you wish. The default formatting for the line is determined by the map's theme settings.

Special types of relationships are used to indicate <u>Task dependencies</u>.

READ NOTE

Relationships are not shown in Outline View.

What do you want to do?

Connect topics or objects
with a relationship

Viewing partial relationships

Modify the relationship

Format the relationship

Add a label to the relationship

Jump to relationship topics

See also:

Filter topics

Task Info

Connect topics or objects with a relationship

1. On the **Home** or **Insert** tab, in the **Objects** group, click **Relationship**.



- 2. When you point to the first topic or object the cursor changes to the relationship cursor
- 3. Click the first topic or object, and then click the second.
- 4. The relationship line appears to link the two topics or objects.

Relationship lines follow an optimal path by default because their **Auto Adjust** attribute is enabled. If you move one or both of the topics or objects connected by a relationship, the line will automatically adjust to follow an optimal path between the topics.



You can also add a relationship by dragging one topic over another, releasing the mouse button when the menu button appears, and choosing **Insert Relationship**.

Add a callout (label) to the relationship

- 1. Right-click the relationship line.
- 2. Click Insert Callout.
- 3. When the generic callout appears select it to enter your text.



You can set an option to prompt for a callout for each relationship you add in the MindManager Edit options to auto-insert relationship callouts.

Viewing partial relationships



When the topic at one end of the relationship is visible but the other is not (on a collapsed branch, hidden by a filter, or on a different slide) you will see a partial relationship on the visible topic.

When you point to the partial relationship, a hint appears that shows the name of the related topic.

READ HINT

You can also see the name of a related topic that is scrolled off-screen by pointing to the visible end of the relationship.

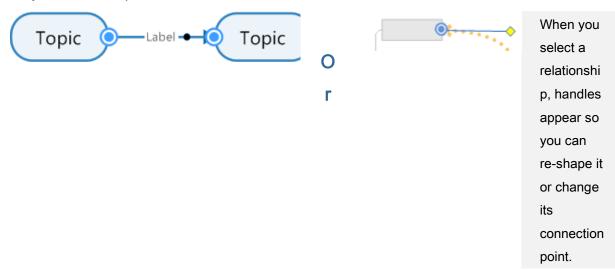
If the related topic is not visible because it is on a collapsed branch, you can show it by double-clicking the partial relationship arrow. Related topics that are not visible because they are hidden by a <u>filter</u> or by the <u>Show Branch Alone</u> command, or on a different slide will not be shown.

If you prefer not to see partial relationships, you can disable this option in the Relationship pull-down (uncheck **Show Collapsed Relationships**) or by using the MindManager View options.

READ HINT

You can use the Show / Hide command to temporarily hide relationships on your map.

Modify the relationship



Change where the relationship line connects with a topic

Select the relationship, then drag the blue dot to another part of the topic.

Connect to a different topic

Select the relationship, then drag the blue dot to another topic.

Change the shape of the line

1. Double-click the relationship.

2. In the Format Relationship dialog, choose an option from the **Line shape** drop down menu.



If you re-shape the line, the **Auto Adjust** option is automatically disabled. If you want the line to return to its optimal path you can re-enable the **Auto Adjust** option in the relationship's shortcut menu and in the **Format Relationship** dialog (described below).

When relationship lines use the **Straight**, **Angled**, or **Right Angle** line-shape style, you can select the appearance of the intersection of relationship lines. For more information, see <u>Insert line</u> jumps.

Remove a relationship

- 1. Right-click the relationship line.
- 2. Click Delete Relationship.



Use the **Show / Hide** command to temporarily hide relationships.

Format the relationship

Add a label to the line

1. Click on the relationship line to reveal the label field between the yellow diamonds:



2. Click the word "Label" and begin typing.

Change the line's style and color

- 1. Select the relationship line(s).
- On the Format tab, use commands in the Object Format group to change the Line style, and Line Color.

More formatting options

1. Do **one** of the following:

		Select the	Or	
Right-click the		relationship(s). On the		
relationship line, and	Or	Home or Insert tab,		Double-click the
then click Format		click the Relationship		relationship.
Relationship.		pull-down, then click		
		Format Relationship.		

2. Choose the desired attributes for the line(s).

3. Click **Map Theme** if you wish to save all the relationship's format settings as the automatic formatting for relationships on this map, or reset it to the default formatting from the map theme.

READ HINT

To reverse the end styles quickly, right-click the relationship line, then click Flip.

Jump to relationship topics

Once you have added a relationship you can quickly jump to the topic at either end of the line. This is especially useful on large maps where the relationship spans a long distance.

- 1. Right-click the relationship line.
- 2. Click **Jump to** { topicname}. A **Jump To** command is displayed for the topics at both ends of the arrow.

Boundaries

What do you want to do?

Boundaries come in two basic types:

Grouping boundaries can be used to emphasize the relationships between topics and subtopics with an outline surrounding an area on a map with your choice of line type and an optional fill color.

Summary boundaries can be used to reduce a set of subtopics into a single summary topic and then allow this topic to grow again.

You can add boundaries within boundaries. The default boundary formatting is determined by the theme settings. Boundaries are not shown in Outline View.

Create a boundary

- 1. Select the topic whose subtopics you want to group with the boundary.
- 2. On the **Home** or **Insert** tab, in the **Objects** group, click the **Boundary** arrow, and then click the boundary type.

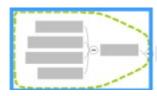
Add a summary topic to a boundary

- 1. Select the boundary (a blue box shows it is selected).
- 2. Do **one** of the following:

On the Home tab, in		On the boundary's blue		Right-click the
the Add topics group,	Or	frame, click the Add	Or	boundary and click
click Callout .		Topic tab.		Insert Summary Topic.

You can expand the summary topic into a new topic tree by adding subtopics to it.

Format a boundary



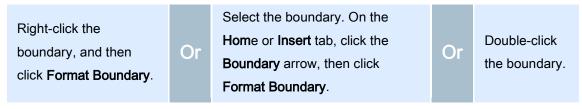
When you select a boundary, a blue box appears to show that it is selected. Then you can change the boundary's formatting.

Format a boundary

- 1. Select the boundary.
- 2. On the **Format** tab, use the **Object Format** group commands to change the **Fill Color**, **Line Color**, and **Line** type.

More formatting options

1. Do **one** of the following:



- 2. Choose the desired attributes for the boundary.
- 3. Click **Map Theme** if you wish to save all the boundary's format settings as the default formatting for boundaries on this map, or reset the boundary to the default formatting from the map's theme.

Copy or remove a boundary

Copy a boundary

To create a boundary of the same style as an existing boundary you can copy the boundary to a new topic tree.

• Right-click the boundary and use the **Cut**, **Copy**, and **Paste** commands in the **Home** tab **Clipboard** group.

Remove a boundary

Right-click the boundary, and then click Delete Boundary.

Shapes

What do you want to do?

You can insert a shape in a map background to enhance the look of your map. You can insert rectangles, rounded rectangles, triangles (isosceles and right angle), circles, right and block arrows, text bubbles, explosions, stars (4-point and 5-point), divider lines (horizontal and vertical), brackets, chevrons, trapezes, and parallelograms. You can modify a shape's outline, fill, and transparency. For more information about formatting shapes, see Work with objects.

Shapes, except for brackets and dividers, can be turned into topic containers. Topic containers allow you to group floating topics or flowchart topics. When you reposition the shape, any contained flowchart or floating topics also move. For more information, see Group floating topics or flowchart topics.



Insert shapes

- 1. On the Insert tab, in the Objects group, click Shapes.
- 2. Choose a shape type.
- 3. Click in the map where you want to add the shape, and drag.

You can insert a shape with the identical formatting of the last shape of that type that you inserted by choosing that shape option from the **Shapes** pull down and clicking on the canvas.

Insert shapes

Images

Images can be...

- either attached to a topic as a standard file or thumbnail, or added as new topics or as floating images that can be moved freely
- sourced from professionally designed map images from the MindManager Library
- your own image sourced from a file in your computer
- .bmp, emf, wmf, gif, jpeg, pcx or png formats (transparent 256 color PNGs are also supported)
- used for the map background
- added to text notes.

Commands for <u>organizing and editing</u> your images can be used from the Library task pane.



The Map Index task pane Elements list displays all the topics on your map that contain images.

READ NOTE

Images are not displayed in Outline View or on the Gantt chart.

What do you want to do?

Add images from the Library

Add images from files

Paste images from other applications

Re-size, move, copy, hide, and delete images

Export maps with images

See also:

Format background

Add images to notes

Manage Library items

Add images from the Library

Open the Library

Do **one** of the following:

On the Status Bar, click the Task

Panes button , then click Library.



On the **Insert** tab, in the **Objects** group, click the **Image** arrow, and then click **Insert From Library**.

Attach the image to a topic

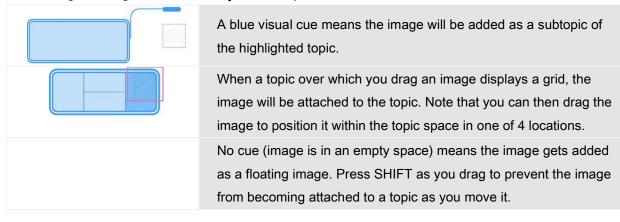
- 1. Select the topic(s).
- In the Library, click the Images category, then navigate to the image you want to add.
- 3. Click the image preview.
- 4. Re-size or reposition the image within the topic space if desired.



To search for an image enter a keyword in the **Enter image keyword** box at the top of the **Library** pane, and then click **Search**. The search results appear in the **Library** pane preview window, and you can select the image from there. You can customize image keywords.

Create a floating image

• Drag the image from the **Library** to the map.



Add images from files

You can attach images or thumbnails of images to topics or create a floating image.

Attach the image to a topic

1. Do one of the following:

Right-click a topic, click

Image, and then click

Standard Image From File.

Select a topic. On the Insert tab, in the Objects

group, click the Image arrow, and then click

Standard Image From File.

- 2. Navigate to the image file and click Insert.
- 3. Re-size or reposition the image within the topic space if desired.



MindManager automatically re-sizes images from files so that their largest dimension does not exceed 480 pixels. After import you can re-size the image as desired.

Attach a thumbnail of an image to a topic

1. Do one of the following:

Right-click a topic, click

Image, and then click

Thumbnail Image from File.

Select a topic. On the Insert tab, in the Objects

group, click the Image arrow, and then click

Thumbnail Image from File.

2. Navigate to the image file and click **Insert**.

You can preview the image by clicking the magnifier button on the thumbnail.

Re-size or reposition the image within the topic space if desired.

Create a floating image

1. Do one of the following:

Right-click the map background, click **Insert Floating Image**, then click **From File**.



Click the map background. On the **Insert** tab, in the **Objects** group, click the **Image** arrow, and then click **Standard Image From File**. Click the location for the floating image.

- 2. Navigate to the image file and click Insert.
- 3. You can drag the image to fine-tune its location. Press SHIFT as you drag to prevent the image from becoming attached to a topic as you move it.
 - ! READ NOTE✓ READ HINT

You can choose whether to show images on your map using the Show / Hide command.

You can <u>add your own images from files</u> to the MindManager Library for re-use. Images are not shown in Outline view.

Paste images from other applications

- You can paste existing images from other applications into map topics or paste other items (like tables from Word, data ranges from Excel, etc.) as an image.
- The Paste Special command indicates which formats are available.
 - READ HINT

You can set options that determine the sizing for images are copied and pasted.

Paste an existing image

- 1. Copy the image from the original application (usually CTRL+C).
- 2. Click where you want the image pasted:
 - If you select a topic, the pasted image becomes a new subtopic.
 - If you click inside the topic text, the image will be pasted inside (attached to) the topic.
 - If you click on the map background, the image is pasted as a new floating topic.
- 3. Press CTRL+V.

Paste an item as an image

- 1. Copy the item from the source application (usually CTRL+C).
- 2. Click where you want the image pasted:
 - If you select a topic, the image can be pasted inside, or as a new subtopic.
 - If you click on the map background, the image is pasted as a new floating topic.

- 3. On the Home tab, in the Clipboard group, click the Paste arrow, and then click Paste Special.
- 4. The **Paste Special As** dialog shows the available formats for the copied item. Click **Picture** or **Bitmap,** and then:
 - Click **Paste** to create a subtopic or floating image.
 - Click Paste Inside to attach the image to the selected topic.



The Picture and Bitmap selections will only display if the item is available in that format.

Resize, move, copy, and delete images

Resize an image

1. Do one of the following:

For images in topics, select the topic, then click the image.

Or

For floating images, click the image.

Handles appear to show that it is selected.

2. Drag the handles to re-size the image: corner handles maintain the aspect ratio, side handles allow stretching.



To return an image in a topic to its original size, right-click, and then click **Image > Reset Image** Size.

When resizing an image in a topic, you can specify an exact size by right-clicking the topic, choosing **Format Topic**, clicking the **Alignment & Images** tab, setting values in the **Height** and **Width** boxes.

When resizing a floating image, you can maintain its aspect ratio by right-clicking it, selecting **Format Object**, and enabling the **Lock Aspect Ratio** check box. When you type a new value in the **Width** or **Height** box, the value in the other dimension measurement box automatically updates to keep the original aspect ratio.

Move a floating image

- Floating images can be moved freely around the map using drag and drop (hold down the Shift
 key as you drag to prevent the image from becoming attached).
- Attached Images stay inside their associated topics, but they can be copied or moved to another topic, or to become a floating image.



If you want images to snap to a grid during drag and drop, enable the **Snap to grid during drag** and drop option (File > Options > Edit > Drag and drop) or click the **Snap to Grid** button on

the status bar. The default grid size is 10 mm. You can nudge an object 2 mm with an arrow key or micro-nudge it .2 mm by pressing CTRL + SHIFT as you use an arrow key.

Move or copy an attached image

- 1. Select the topic with the image you want to move or copy.
- 2. Click the image. Handles will appear to show that it is selected.
- 3. Drag the image to a new location.
- 4. Visual cues appear to show how the image will be added: green shows it will be attached to the topic (top, bottom, left or right positions), red indicates that it will become a new topic; no cue means the image will become a floating image.
- 5. Drop the image at the new location.



Hold CTRL as you drop to copy (instead of move) the image.

Hold SHIFT as you drop to create a floating image at any location.

You can set options that control the sizing of images that you copy and move.

Hide images in all map topics

- 1. On the View tab, click the Topic Info drop-down.
- 2. Choose Topic Info Display Settings.
- 3. Uncheck the **Images** check box.

All images in topics are hidden.

To show hidden images in topics, click the Show/Hide indicator Show/Hide is in Use-Click to Reset in the bottom right of the map, and choose Reset Show/Hide to Default.

Delete an image

- 1. Select the topic, then click the image. Handles appear to show that it is selected.
- 2. Press DELETE.



You can temporarily hide images in Map View using the Show / Hide command.

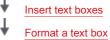
Export maps with images

- Bitmaps are converted to metafiles when they are exported to a Word document. You can switch
 off this behavior using the MindManager options settings (File > Options) for Notes Export
 conversions (RTF).
- Only PNG, GIF and JPG images are supported when you export an HTML5 map.

Text boxes

What do you want to do?

You can use text boxes to add additional information to a map.



Insert text boxes

- 1. On the **Insert** tab, in the **Objects** group, click **Text Box**.
- 2. Click in the map where you want the text box, and type.



Text boxes remain visible when filters are applied to topics.

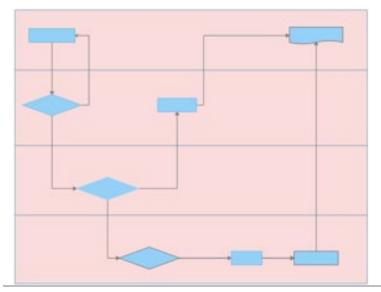
Format a text box

- 1. Click the text box, then right-click it.
- 2. Click Format Object
- 3. In the Format Font dialog, do any of the following.
 - Choose a font from the Font list.
 - Choose a font style from the Font style box.
 - Choose a font size from the Size box.
 - Choose a font color from the Font color box.
 - Underline the text by clicking the **Underline** box.
 - Strikethrough the text by clicking the Strikethrough box.



You can see how the text will look in the Preview box.

Smart Shapes



You can use Smart Shapes, such as swim lanes, funnels, or tables, in a flowchart or map to distinguish responsibility for sub-processes of a process. Swim lanes and funnels can be arranged either horizontally or vertically. For more information about formatting Smart Shapes, see Work with objects.

Smart Shapes are topic containers by default. Topic containers allow you to group floating topics or flowchart topics. When you reposition it, any contained flowchart or floating topics also move. For more information, see Group floating topics or flowchart topics.

What do you want to do?

Insert swim lanes

Change the number of swim lanes

Resize all swim lanes

Add titles to swim lanes

Insert funnels

Resize all swim lanes

Change the number of funnel segments

Resize all funnel segments

Insert a table

Change the number of table rows or columns

Resize a single swim lane, funnel segment, or table row or column

Resize a single swim lane, funnel segment, or table row or column

Name a single swim lane, funnel segment, or table cell

Change the fill color of a single swim lane, funnel segment, or table cell

Insert swim lanes

- 1. On the Insert tab, in the **Objects** group, click the **Smart Shapes** arrow, click **Swim Lanes** and then click either **Horizontal Swim Lanes** or **Vertical Swim Lanes**.
- 2. Then, click the number of swim lanes to insert.
- Click in the map where you want the swim lanes, hold down the mouse button, and drag.The more you drag, the bigger the swim lanes are.

READ HINT

You can insert swim lanes with the identical formatting of the last swim lanes that you inserted by choosing an option from the Swim Lanes pull down and clicking on the canvas.

Change the number of swim lanes

Do one of the following:

Right-click the swim lane, click **Format Object**, type the desired number of lanes in the **Lanes** box, and click **Apply**.

or

Right-click the swim lane, click **Lanes**, and choose the number of lanes you want.



You can also insert a single lane within an existing swim lane by right-clicking and choosing **Insert Lane** to the **Right** or **Insert Lane** to the **Left** for horizontal swim lanes, or **Insert Lane Above** or **Insert Lane Below** for vertical swim lanes.

You can delete a single swim lane by right-clicking it and choosing Delete Lane.

Resize all swim lanes

Do one of the following:

Right-click the swim lanes, click **Format Object**, and type the desired number of pixels in the **Height** and **Width** boxes.

or

Click the swim lanes to display handles, and drag the handles.



See Layer objects for information about layering swim lanes and other objects.

Add titles to swim lanes

1. Right-click a swim lane, and click Show Titles.

A check mark next to the command indicates that swim lanes are enabled.

- 2. Do any of the following:
 - Click a swim lane, then right-click and choose Format Object.
 - Double-click a swim lane title.

The Format Object dialog opens.

- 3. Do any of the following:
 - Click the Location drop-down menu, and choose where the titles display.
 - Click the Alignment drop-down menu, and choose how the title text is aligned relative to its swim lane.
 - Click the Orientation drop-down menu, and choose whether to display the title text vertically
 or horizontally.

Insert funnels

- 1. On the **Insert** tab, in the **Objects** group, click the **Smart Shapes** arrow, click **Funnel**, and then click either **Horizontal Funnel** or **Vertical Funnel**.
- 2. Then, click the number of funnel segments to insert.
- 3. Click in the map where you want the funnel, hold down the mouse button, and drag. The more you drag, the greater the size of the funnel.

Change the number of funnel segments

Do one of the following:

Right-click the funnel, click **Format Object**, type the desired number of segments in the **Lanes** box, and click **Apply**.

or

Right-click the funnel, click **Lanes**, and choose the number of segments you want.



You can also insert a segment within an existing funnel by right-clicking a funnel segment and choosing Insert Segment to the Right or Insert Segment to the Left for horizontal funnels, or Insert Segment Above or Insert Segment Below for vertical funnels.

You can delete a funnel segment by right-clicking it and choosing Delete Segment.

Resize all funnel segments

Do **one** of the following:

Right-click the funnel, click **Format Object**, and type the desired number of pixels in the **Height** and **Width** boxes.



Click the funnel to display handles, and drag the handles.

Insert a table

- 1. On the Insert tab, in the Objects group, click the Smart Shapes arrow, and then click Table.
- Then, click the number of rows and columns to insert.
 If you click More and drag, you can interactively set the number of rows and columns.
- 3. Click in the map where you want the table, hold down the mouse button, and drag. The more you drag, the greater the size of the table

Change the number of table rows or columns

- 1. Right-click the table, and click Format Object.
- 2. Enter a number in the Rows and Columns boxes.
- 3. Click Apply



You can also insert rows or columns by selecting a table cell, right-clicking, and choosing **Insert Row**Above, Insert Row Below, Insert Column to the Left, or Insert Column to the Right.

Delete a table row or column

- 1. Click a cell in the row or column to delete.
- **2.** Right-click, and choose **one** of the following:
 - Delete Row
 - Delete Column

Resize a single swim lane, funnel segment, or table row or column

- 1. Hover over the border of a swim lane, funnel segment, or table row or column until the cursor becomes a double arrow \hat{U} .
- 2. Drag the border to resize the swim lane.

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Name a single swim lane, funnel segment, or table cell

- 1. Right-click a single swim lane, funnel segment, or table cell, and choose Rename.
- 2. Type a name in the **Name** box.

Change the fill color of a single swim lane, funnel segment, or table cell

- 1. Right-click the swim lane, funnel segment, or table cell.
- 2. Choose Format Object.
- 3. Choose a fill color from the **Color** drop-down menu.

You can adjust the fill color transparency by moving the **Transparency** slider.

Capture content and reuse in maps

What do you want to do?

MindManager Snap lets you capture content on the web and your desktop. You can also use MindManager Snap within the MindManager Go app on Android and iOS devices.

Capture content

Work with captured content

Work with Team Snap

Queues

The content that you capture is sent to the Snap Queue in MindManager for reuse in a map. You can also send content to a Team Snap Queue, where everyone on the team can access content that other team members have captured. Search features simplify finding content quickly.

You can collect content even when MindManager isn't running.

Note: MindManager Snap is a premium collaboration feature that is only available to some MindManager licenses.

Capture content

You can capture a range of content through your desktop, browser (Chrome or Edge), or mobile device, and send that content to MindManager. You must be signed into your MindManager account to use MindManager Snap.

Capture content on your desktop

- 1. From the Windows taskbar, click Start > Programs > MindManager 21 > MindManager Snap.
- Choose a Snap Queue from the Send to drop-down.
- 3. Select **one** of the following in the **Select type of Snap** drop-down:
 - Text Note type or select text to appear in the topic in the Topic Text field.
 - Bookmark copy a URL in your browser and paste it in the Topic Link field.
 You can also type the text to appear in the topic in the Topic Text field.
- Attachment click Select File to navigate to the file, then click Open.

You can also type the text to appear in the topic in the Topic Text field and add a topic note in the **Topic Note** field.

4. Click Send.

To capture more content, click **Send More**.



To see what is in your Snap Queue, click View Queue.

Capture content in a Chrome or Edge browser

You must install either the MindManager Snap Chrome extension, which you can get from the Chrome Web Store, or the MindManager Snap Edge extension, which you can get from the Microsoft Store.

1. Do **one** of the following:

- To capture a URL, right-click anywhere on the web page, and choose MindManager Snap > Send bookmark to MindManager. The web page URL appears in the Topic Link field.
 You can also type the text to appear in the topic in the Topic Text field.
- To capture an image, right-click the image, and choose MindManager Snap > Send image to MindManager.

You can also type the text to appear in the topic in the **Topic Text** field.

 To capture text on a web page, select it, then choose MindManager Snap > Send selection to MindManager. The selected text appears in the Topic Text field.

You can also add a topic note in the **Topic Note** field.

Click Send.

Capture content on a mobile device

You must have the MindManager Go for iOS or Android installed on your mobile device.

- 1. In the Snap area, do any of the following:

 - To capture an image stored on your device, tap 🖾 and select the image.
 - To send a text note, tap and type the text.
- 2. Click Send.

Work with captured content

You can insert a piece of captured content in a map as a new topic or insert it into an existing topic. After a piece of captured content from My Snap Queue has been used in a map, it is moved from the Snap Queue to the Trash. If the captured content is from a Team Snap Queue, the content isn't deleted and remains available to other team members.

You can also share a piece of captured content from your Snap Queue with a Team Snap Queue. Before you insert or share captured content, you can preview it.

Any deleted content can be restored from the Trash for reuse.



Content moved to the Trash is permanently deleted after 24 hours.

Preview content

- 1. Select the content in the Snap Queue.
- Right-click and choose Quick View.

Insert captured content in a map

1. Do **one** of the following:

On the Insert tab, click

MindManager Snap.

On the Status Bar, click the Task Panes button

If then click Snap Queue.

2. In the **Snap Queue** pane, drag a piece of captured content onto the map to insert it as a new topic.

When you drag a piece of captured content onto an existing topic, it is inserted as a sub-topic.



When you drag a piece of captured content onto a map, by default it is deleted from the Snap Queue and moved to the Trash. You can keep captured content in the Snap Queue after it is used in a map by clicking the **Options** button and setting the **Send to Trash after dropping into a map** option to **Off**.

Share captured content

- 1. Select the content in the **Snap Queue** pane.
- 2. Right-click and choose Share.
- In the Share To window, choose a user or Team Snap Queue.
 You can also add users and teams. For more information see, Create a Team Snap Queue.

Refresh the Snap Queue

In the Snap Queue pane, click the Refresh button C.

Search captured content

- 1. In the **Snap Queue** pane, click the **Open Search** button Q.
- 2. In the Search & Filter box, type the search criteria.

You can search for text in topics, topic notes, or topic links.

In addition, you can filter for content based on its source, date of capture, and capture type.

Delete content from the Snap Queue

- Select the content in the Snap Queue, and do one of the following:
 - Press the **Delete** key on your keyboard.
 - Right-click and choose Send To Trash.

Clear the Snap Queue

- 1. In the Snap Queue pane, click the **Options** button **②**.
- Click Trash All.

Restore used content

- 1. In the **Snap Queue** pane, click the **Open Trash** button
- 2. Click the **Restore** button corresponding to the piece of content you want to reuse.



You can choose to always keep all captured content in the Snap Queue by clicking the **Options** button , and setting the **Sent to Trash after dropping into map** box to **Off.**

Work with Team Snap Queues

Team Snap Queues let you capture content and send it to other users' Snap Queues, as well as allow Team Snap Queues members to share their captured content with you. A user must have a MindManager Subscription License or an active Trial to be eligible to create or join a Team Snap Queue.

Create a Team Snap Queue

1. Do **one** of the following:

On the Insert tab, click	Or	On the Status Bar , click the Task Panes button		
MindManager Snap.		, then click Snap Queue .		

2. In the **Snap Queue** pane, click the **My Snap Queue** drop-down, and perform one of the following tasks

То	Do the following		
Share with another MindManager Snap	Choose Add/Manage Users, click Add		
user	User, and type the user's email address		
	that is associated with their MindManager		
	account		
Share with a team of MindManager Snap	Choose Add/Manage Teams, click Add,		
users	click Add Member , and type the		
	member's email		
	address that is associated with their		
	MindManager account.		

Users that you invite to join a Team Snap Queue will receive a confirmation email that will require them to authenticate the request.

Manage users and Team Snap Queues

1. Do **one** of the following:

On the Insert tab, click	0"	On the Status Bar, click the Task Panes button			
MindManager Snap.	Or	then click Snap Queue .			

2. In the **Snap Queue** pane, click the **My Snap Queue** drop-down, and perform one of the following tasks:

То	Do the following
Remove a user	Choose Add/Manage Users, and click the
	Xbutton corresponding to the user.
Remove a user from a Team Snap Queue	Choose Add/Manage Teams , click the
	button corresponding to the team, and
	click the $ imes$ button corresponding to the
	user.
Rename a team	Choose Add/Manage Teams , click the
	button corresponding to the team, click
	the 🔯 button, choose Rename , and type
	a new team name.
Delete a team	Choose Add/Manage Teams , click the
	button corresponding to the team, click
	the 🥯 button, choose Delete Team .

Working with Tasks

Task Info

Tasks are map topics that have been assigned Task Info such as Start and Due dates, Durations, Progress, Resources, etc. This information is displayed on the topic using icons and text.

Tasks on your map can come from a variety of sources. You can:

- enter them manually
- add tasks from or send tasks to Outlook or SharePoint. These task topics are linked to, and stay in sync with, their associated external tasks.
- · import them from Project.

Use the *Task Info* task pane to define or edit the information for tasks. Some Task Info can be edited interactively on the map itself. You can copy or move this information to another topic.



Use the Map Index pane to see tasks grouped by their markers (progress, priority, resource, etc.)

You can use these additional Task Management features:

- The <u>Task Management</u> options are used in concert with the map's Task Info to automatically calculate and update Task Info on the map. Calculated Task Info is shown with special markers, and it cannot be modified.
- Use Gantt Pro for an alternate view of your tasks. You can also add tasks and modify some Task Info in this view.
- Use the <u>Resource Planning</u> options to create and manage resources and analyze their utilization.

READ NOTE

You cannot change Task Info that is read-only (displayed with grayed text). All Task Info is read-only for <u>roll-up tasks</u>, and some Task Info may be read-only on task topics linked to tasks in <u>Outlook</u> and <u>SharePoint</u>.

What do you want to do?

Define Task Info

Define workdays and holidays

Define display options

Edit Task Info

Copy or move Task Info

Remove or hide Task Info

Shift an entire set of tasks forward or back (move a project)

Define Task Info

- 1. Select the topic(s) you want to define the Task Info for.
- 2. Do one of the following:

On the **Task** tab, click **Show**Task Pane.

On the **Status Bar**, click the **Task Panes** button

, then click **Task Info**.

- 3. In the **Task Info** pane define any or all of the Task Info for the selected topics.
 - Pick a Priority. A corresponding icon is automatically added to the topics on the map.
 (You can also do this by clicking Priority on the Task tab.)
 - Select the task's Progress. A corresponding icon is automatically added to the topics.
 (You can also do this by clicking Progress on the Task tab.)
 - Pick the Start date and Due date from the calendars, or select the month, day or year and enter a new value.



You can only assign Start and Due dates that are marked as workdays on the Task Info Calendar or Map Calendar.

The date format is determined by your system's **Control Panel** - **Regional and Language** options. If you change the date display format there you should re-start MindManager.

You can quickly assign a Start Date and Due Date to a topic by clicking the **Add Task Info** button on the Tasks tab or pressing Ctrl+Shift+I. By default, the task uses today's date and is one day in duration.

- Enter the **Duration** in hours, days, weeks or months (this is the number of days the task is
 expected to require). The default duration for a task with a Start date and Due date is 1
 day. Changing the Duration will change the Due date
 - To enter an **Effort** value for the task, follow these steps.
 - To display the Effort field in the Task Info pane, click the File tab, click Options, click Task Info, and select Show Effort field.
 - 2. The Effort defaults to the task Duration. The Effort defaults to the task Duration. You can enter a new value for Effort in the Task Info pane.

Effort is shown below the topic with other task info, and is rolled up if you use the <u>Task</u> Management Roll up option.

• Choose **Resources** from the drop-down list, or enter new resources. If you have multiple entries in the **Resources** field, separate the names with a comma or a semicolon.



Semi-colon delimited resource fields are only available in MindManager 14.1 or later; for maps created using earlier versions of MindManager, you will need to recreate the Task Resource list using MindManager 14.1.

You can also add an existing resource by selecting a topic, typing **@**, and selecting the resource in the popup menu. To add a new resource, type **@**, type a resource name, and press **Enter**. For more information, see <u>Add resources with an accelerator key</u>. If your resource names include commas (for example Smith, Jason, and Jones, Ashley), separate each resource with a semicolon: Smith, Jason; Jones, Ashley. You can load resources (assign a %) for tasks. See <u>Manage tasks</u> for more information.

Select Milestone to denote a milestone task. A Milestone task needs only either a Start
Date or Due Date. If it has both, the Due Date is used for Gantt display. Other Task Info on
milestone tasks is ignored by the Task and Resource Management functions. (You can
also do this by clicking Milestone on the Task tab.)



You can change any existing task to a milestone by setting its Duration to 0.

 Category information can be entered by using <u>Tags</u>. The Category information for maps from previous versions of MindManager is automatically converted to Tags.

Priority and Progress are shown by icons. Other Task Info is displayed in a small window below the topic text.



If you add task <u>icons</u> (Priority, Progress) to topics, the corresponding Task Info is automatically assigned to the topic.

You can use the <u>Power Select</u> and <u>Power Filter</u> commands to select or filter topics based on their Task Info settings.

Define Task Cost

- 1. Select the topic(s) you want to define the task cost for.
- Do one of the following:

On the Task tab, click Show

Task Pane.

On the Status Bar, click the Task Panes button

, then click Task Info.

 In the Costs area of the Task Info pane, define the General cost, which is a fixed cost associated with the selected topics or tasks.
 text. The **Resource** box displays the cost of resources assigned to the task based on assigned resources' effort for the task and standard rates for those resources. For information about assigning resources to a task, see Define Task Info. For information about setting the rate for resources, see Assign Costs to Resources.

READ HINT

You can also view a breakdown of a task's costs by hovering over the task in the map.

READ NOTE

To change the currency symbol and formatting for costs, click **Calendar & task** options in the **Task Info** pane. Then, choose an option from the **Currency Symbol** drop-down menu.

You can hide task costs by clicking **Calendar & task** options in the **Task Info** pane, clicking **View Task Info Display Settings**, and disabling the **Show Costs** check box.

The **Total** box displays the sum of the **General** and **Resource** costs for the selected task.

To display a total for all tasks in a project, select the central topic, and enable the **Roll up Costs** check box. You can also display costs for part of a project by selecting a topic and enabling the **Roll up Costs** check box. All costs in tasks in that branch are displayed in the selected task.

Define workdays and holidays

The default set of workdays (the Map Calendar) for each new map is defined by the Task Info options calendar. You can define a different set of workdays for the current map using the **Calendar & task** option in the Task Info pane.

You can only assign Task Info Start and Due dates marked as workdays (and not marked as holidays) on the Map Calendar.

The Map Calendar lets you specify which days should be considered as work days only for this map. These settings override the workdays already defined in the Task Info options. You select which days of the week are used as workdays, and add or remove holidays (non-work days) from the calendar using the **Add** and **Delete** functions.

MindManager User Guide

Define display options

You can decide how to highlight topics depending on the status of their tasks, and choose whether to display specific features.

In the Task Info pane, click **Calendar & task options**, then click **View Task Highlighting Rules**. Select the appropriate checkboxes and assign a color if you want to highlight topics whenever the status of a task is:

- past due
- at risk
- completed

You can choose to highlight roll-up branches only.

Lastly, you may choose whether critical paths display or not in map view, and even whether task info should display at all—with the option to show years or not.



By default, task info display is enabled, and the topics highlighted are those including tasks that are past-due (pink), at-risk (yellow), and completed (green).

Edit Task Info

You can edit the Task Info in several ways:

Select the topic and make changes in the Task Info pane.	Or	Select the task on the Gantt Pro and then make your changes in the task list of the Gantt Pro.	Or	Click the Start date and select a new date from the pop-up calendar. Click the Due date or Duration to select a new Due date. If multiple topics are selected the new date is applied or added to all selected topics.
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When you edit the Task Info on topics that are linked to tasks in <u>Outlook</u> or <u>SharePoint</u>, the properties on their associated linked tasks are also changed.

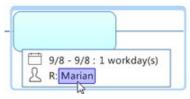
Copy or move Task Info

You can copy text-based Task Info (start date, due date, duration, effort, resources) from one topic to another.

 On a topic, click the Task Info item you want to copy and drag it to the destination topic



Hold CTRL as you drag to move, instead of copy, the Task Info.



Selecting a Task Info item

2. Release the mouse button to drop the Task Info on the topic.

If you drag a start date or due date to a topic that already has this info assigned, the date will change. If you drag a resource to a topic that already has one or more resources assigned, the new resource will be added to the list.

Task highlighting rules

Under Task Management in the Task Info panel, you can change the calendar options for the current map, decide how to highlight topics depending on the status of their tasks, and choose whether to display specific features. By default, task info display is enabled, and the topics highlighted are those including tasks that are past-due (pink), at-risk (yellow), and completed (green), but you can disable task highlighting and edit how task highlighting displays. Task highlighting is governed by Smart Rules settings. For more information, see Smart Rules.

You can choose to display task information, such as start and end dates, number of workdays, and whether the task is a milestone. By default, task information is displayed. For long projects, you can include the year in task dates.

A task is considered at risk if its elapsed duration, expressed as a percentage, is greater than the At-Risk Threshold and its Progress (both expressed as percentages). By default, the at-risk threshold is 75%, but you can modify it.

Disable a task highlighting rule

- 1. If the Task Info pane isn't open, click **Show Task Pane** on the Task tab.
- 2. Click Calendar & task options.
- 3. In the Calendar & task Options dialog, click View Task Highlighting Rules.
- 4. Select the task highlighting rule, and move the **Enable** slider to the left.

Edit a task highlighting rule

- 1. If the Task Info pane isn't open, click **Show Task Pane** on the Task tab.
- 2. Click Calendar & task options.
- 3. In the Calendar & task Options dialog, click View Task Highlighting Rules.
- Select the task highlighting rule, click Edit.
- 5. In the Edit Rule dialog, modify any of the Effect settings.

Define at-risk tasks

- 1. If the Task Info pane isn't open, click **Show Task Pane** on the Task tab.
- 2. Click Calendar & task options.
- 3. Specify the at-risk threshold in the **Threshold** box.

Remove or hide Task Info

Remove Task Info

To remove all Task Info text from a topic, right-click the topic and then click **Remove All Task Info Text Items**. (This does not remove Progress and Priority icons.)

To remove a specific Task Info item, right-click the item and then click **Remove** {item name}.

If you remove the Start Date or Due Date, the Duration is also removed.

Show or Hide Task Info in Map View

Use the <u>Show / Hide</u> command to show or hide Task Info on your map. You can also show and hide specific types of task information in topics using <u>Topic Info Display Settings</u>.

Move a project

To shift an entire set of project tasks forward—or push them all back—while retaining all task timing relationships:

- 1. In the Task tab Advanced Scheduling group, click Move Project.
- 2. The Move Project dialog opens, with the project's current start date displayed
 - Edit the date.
- 3. Click OK.

All tasks in the project will shift earlier or later depending on the new start date.

Topic alerts

MindManager's Topic Alert feature allows you to set a reminder to open and work with a specific map at an assigned date and time. This is similar to Microsoft Outlook's appointment and reminder features that you may already use. By assigning a reminder alert to a map topic, you can easily be ready to review a map, edit a map, or prepare for an appointment. You can set an alert for any map topic.

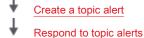
The topic alert reminders are managed by a special MindManager Reminder service that runs in the background whether or not you are using MindManager.

You can synchronize your topic alerts with Microsoft Outlook which allows you to view and edit them from either application. This means that MindManager's alerts will always reflect changes made to them in Outlook and vice versa.



You do not need to have MindManager running to receive topic alerts. The service is always available, even when you are not using MindManager. Their behavior is controlled by the Topic Alert options.

What do you want to do?



View, modify, or remove alerts

Sync topic alerts with
Outlook

See also:

Work with Microsoft Outlook

Create a topic alert

- Important. Save the map if you have not already done so. You cannot create a topic alert unless
 the map has been saved.
- 2. Select the topic
- 3. On the Insert tab, in the Topic Elements group, click Alert.
- 4. Enter the reminder information:
 - Subject: Defaults to the topic text. Choose from one of the commonly-used subjects or enter your own subject
 - Date and Time: When the event is happening or the task is due.
 - Reminder: How far in advance of the due date and time you want the reminder to appear (up to 2 weeks)
 - Add Recurrence: choose whether to repeat this reminder and how often.
- 5. Click OK.

The Topic Alert icon Appears on the topic. Use the Show / Hide command to hide or show these icons on the map.

Respond to topic alerts

When a topic alert reminder comes due you'll see the **MindManager Topic Alert** dialog appear. It shows the subject of the current alert, the associated map, the time for the reminder and whether the alert is current or past due. You'll also see any past reminders that you have not responded to. The current alert is selected, but you can respond to any of the listed alerts using the following actions:

- Open Map Opens the map that is the source of the alert and selects the associated topic. The
 Topic Alert dialog stays open so you can do one of the following actions.
- Dismiss means that you have acknowledged the reminder, and you don't want to see it again.
- Snooze lets you defer the reminder for the time you select under Snooze.

View, modify, or remove topic alerts



To modify or remove any topic alert on the current map, right-click the Alert icon ..., and then click **Modify** or **Delete**.

To see the list of all your current alerts:

On the Insert tab, in the Topic Elements group, click the Alert arrow, and then click Manage Topic
 Alerts.

The current topic alerts display their status in the "Due in" column:

- When a topic alert is shown as overdue its reminder period has already passed but it was never
 opened or dismissed. To clear these alerts you can use the **Delete** command (described below),
 or you can modify them to re-set their due date and time.
- Other Topic Alerts show when they are due. (You have the option to see only today's Topic Alerts.)
- Bold text means the Topic Alert is active (within its reminder period).

Once you select a Topic Alert in the list you can click:

- Modify the Topic Alert to change the reminder info.
- Open Map to view the map that is the source of the Topic Alert.
- Delete to remove the alert from your system.



Note that this is the only way to delete a reminder. Deleting the topic or map that is the source of the reminder does not remove the alert from the notification system.

You can hide alerts in topics using Topic Info Display Settings.

Sync topic alerts with Outlook

To sync your topic alerts with Outlook you must have the Topic alerts sync option enabled (it is enabled by default). With this option enabled, the reminders you have created using MindManager will appear as appointments in Outlook as well. You'll see them on your Outlook calendar and you can view and modify the reminder information just as you would any other appointment.

If you prefer to create topic alerts without creating corresponding Outlook appointments, disable the Topic Alert sync option.



While topic alerts can be viewed and edited in Outlook, they can only be created and removed using MindManager.

View or modify a topic alert appointment in Outlook

- 1. Open the appointment.
- 2. Right-click the topic alert icon $\stackrel{ extstyle extsty$
- 3. Modify the information.

Your changes will be automatically reflected in the Topic Alert.

READ NOTE

A reminder is not set in Outlook for any appointments created from topic alerts. The reminders you receive will be from the MindManager Topic Alert Service. If you enable Outlook's reminder feature for any appointment originating as a topic alert you will receive two reminders (one from Outlook's reminder system and one from MindManager's) for each Topic Alert.

The topic alert time's status is not automatically changed in Outlook (it shows as "Free"). You can modify this status in Outlook if desired.

Manage tasks

Tasks on your map can come from a variety of sources: you can enter them manually, link to tasks from <u>Outlook</u> or <u>SharePoint</u>, or import them from Project. Tasks have defined <u>Task Info</u> such as Start Date and Due Date. Workdays available for tasks are defined by the <u>Task Info</u> calendar.

The Task Management options are used in concert with the map's Task Info to allow you to automatically calculate and update task information on the map.

I READ NOTE

If you do not see these options, check to see that you have the corresponding add-in installed and enabled.

To automatically calculate the task info for a set of topics, you mark their parent as a roll-up topic. Calculated task info is shown on the parent topic with special markers.

You can show dependencies between tasks in roll-up branches, and specify a dependency type. When you update the task info for the independent task, the dependent task's info is automatically updated if needed, based on the type of dependency.

You can also choose to display at-risk and past-due tasks on rolled-up branches with special fill colors.



Use the Map Index pane to see tasks grouped by their markers (progress, priority, resource, etc.)

What do you want to do?

Mark roll-up topics for task management

Show at-risk and past-due tasks

Add a dependency between tasks

Manage slack time

Task Management rules

See also:

Task info

Create and manage resources

Mark roll-up topics for task management

When you mark a topic as a roll-up topic, its task info is calculated along the entire branch for all parent topics of tasks up to and including the roll-up topic. (Resources are not used, but are retained when entered.) The calculated task info is shown with special markers.

READ NOTE

Roll-ups are disabled for flowcharts.

- 1. Select a topic that has at least one subtopic.
- 2. Then do one of the following:

On the ribbon **Task** tab, click **Roll Up Task Info**.



In the Task Info pane, click Roll-up task info to here.

Roll-up topics display a special icon 🕢

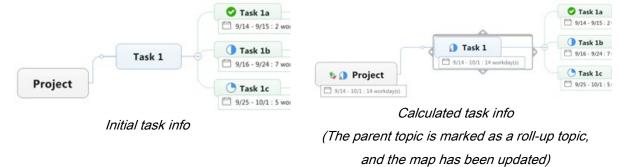
3. (Optional) Enter task info for the roll-up topic's subtopics.



If you mark task topics for roll-up that are linked to tasks in Outlook or SharePoint, they will no longer be synced with their associated external tasks.

Calculated task info

Calculated task info is shown with special markers. You cannot edit this calculated task info, but you can add and edit other task info that has not been calculated (for example, resources).



When task info is calculated:

- All tasks with only a Start date are automatically assigned a Due date that equals the Start date and a Duration of 1 day.
- Task information on topics hidden by a filter are included in the calculation.

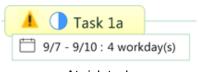
Show at-risk and past-due tasks

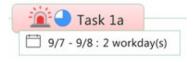
You can choose to use a specific topic fill color for at-risk and past-due tasks using the Task Management options in the Task Info pane. At risk and past-due indicators are only added to tasks on roll-up branches.

- 1. In the Task Info pane, click Calendar & task options.
- Click View Task Highlighting Rules.
- 3. Double-click **Show at-risk as** or **Show past-due as** to open the Edit Rule dialog.
- 4. Choose Fill Color from the Effect drop-down menu, and choose a color.

Tasks are considered at-risk if their current progress indicates that they may not be completed by their Due date. Specifically, if the period between the Start date and Due date is more than 75% elapsed, but the Progress is less than 75%, the task is marked as at-risk.

Tasks are past-due if they are less than 100% complete and their Due date is today or earlier.





At-risk task

Past-due task

Add a dependency between tasks

You indicate a dependency between tasks by linking the topics with a special type of relationship. You can choose the type of dependency using the Task Management options.

The dependency is defined using the order that you click on the tasks. While you create the relationship, think "This task (topic 1) determines that task (topic 2)", and click the tasks in that order. Topic 1 is the *determining* task. Topic 2 is the *dependent* task.

■ READ NOTE

Dependencies can only be created between topics in roll-up branches. Relationships that include a topic that is not in a roll-up branch are treated as normal <u>relationships</u>, and do not influence the task info calculation.

See Task Management rules below for more information.

Add a dependency in Map view

1. Select the determining task (the task that another task depends on), and assign a Start Date, Due Date, and Duration.

READ NOTE

If you do not assign Due Date or Duration, during the dependency calculation, the task is given a Due Date equal to the Start Date and a Duration of 1 day.

- 2. Select the determining task, press CTRL, and then select one or more tasks. (If you select more than two tasks, multiple dependencies will be created in the order that you selected the tasks).
- 3. In the Task Info pane, select an option from the **Dependency** drop-down.

The dependency type is indicated by an icon on the relationship line.



If you add a dependency to a relationship line that already has a label, the dependency will appear on

If there is not label on the dependency line, you can click the dependency icon to add a label.

Add a dependency in Gantt Pro

- Right-click the first task, hold down CTRL, and click on one or more Gantt bars for tasks in succession. (If you select more than two tasks, multiple dependencies will be created in the order that you selected the tasks).
- 2. Right-click and then click Edit Task.

3. Click the **Dependency** tab and choose a dependency type.

The dependency type is indicated by an icon on the relationship line.

For the purposes of explanation, we refer to the first topic selected (the determining task) as Task 1 and the second topic selected (the dependent task) as Task 2. The Start and Due dates for Task 2 (the dependent task) are adjusted according to its dependency on Task 1.

Dependency type	Meaning	Adjustments on update (Only if necessary to abide by the dependency condition.)
Finish-to-Start	Task 2 Start date cannot be earlier than Task 1 Due date	The Task 2 Start date is adjusted to be after the Task 1 Due date.
	Task 2 Due date cannot be earlier than Task 1 Start date	The Task 2 Due date is adjusted to be at or after the Task 1 Start date.
Start-to-Start	Task 2 Start date cannot be earlier than Task 1 Start date	The Task 2 Start date is adjusted to be at or after the Task 1 Start date.
Finish-to-Finish	Task 2 Due date cannot be earlier than Task 1 Due date	The Task 2 Due date is adjusted to be at or after the Task 1 Due date.

Change a dependency

You can change the dependency type by selecting the dependency line, and then selecting a new dependency type in the Task Info pane.

You can also move the end of a dependency to a different topic by selecting the dependency and dragging the red handle to a new topic.





Some dependencies are not allowed, and will be deleted if you attempt to create one. See <u>Task</u> <u>Management Rules</u> below for more information.

Manage slack time

Sometimes you may include more time between a task's start and due date than is actually needed for the task's duration. Or, a task may end earlier than planned, affecting other dependent tasks. If you have "slack" time between dependencies, you can remove it.

To remove slack time from all dependencies in a map:

• In the Task tab Advanced Scheduling group, click Remove Slack Time.

To remove slack time from selected dependent tasks in a map:

- 1. In Gantt Pro, select the topic(s) with tasks where you want to remove the slack time.
- Click Remove Slack.
- 3. In the sub-menu, select From Selected and Dependent Tasks.

READ HINT

This will remove slack time from the selected task, and any dependent tasks.

To move the timing of an entire set of tasks, use Move Project.

Format the dependency line

You can change the style of the dependency line in the same way that you format a relationship. Double-click the line to see the formatting options.

Task Management rules

Roll-up rules

- Calculations include only days marked as workdays (and not holidays) on the Calendar.
- The original Start and Due dates for parent topics along a rollup branch are lost when their Task
 Info is calculated.
- Progress is only calculated from sub-tasks that have progress assigned. Sub-tasks without
 Progress values are ignored during the calculation.
- Roll-up is not supported for callout topics.

Dependency rules

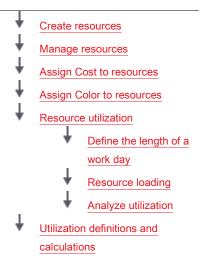
- Dependencies can only be created between topics in roll-up branches. Relationships that include
 a topic that is not in a roll-up branch are treated as normal <u>relationships</u>, and do not influence the
 task info calculation.
- You can edit the Task Info for the dependent (second) task in a dependency, but you will not be allowed to choose dates that do not abide by the dependency.
- When the Task Info for a topic is read-only (grayed) the task may only be the determining (independent) task in a dependency:
 - Tasks that are in roll-up branches, and whose Task Info is calculated
 - Tasks linked to SharePoint tasks
 - Read-only tasks linked to Outlook tasks
- Dependencies are not allowed that cause circular dependencies. A circular dependency exists when one topic influences the Start or Due date of the other topic in the dependency.
- A dependency will be deleted when it violates the rules for allowed dependencies.

Create and manage task resources

What do you want to do?

Your map can contain tasks for one or more projects. You can create and define a set of resources that are available to work on the projects on this map, and then assign them to tasks.

You can manage resources and their availability, and find under- or overutilized resources using options in the Resources task pane.



Create resources

You can create resources in four ways:

- by entering resources for tasks in the Task Info pane.
- by adding a new resource marker to a topic from the **Resource** drop down in the Task ribbon.
- by using an accelerator key.
- by defining them in the Manage Resources dialog.

The last method allows you to specify the availability for the resource. You can add or remove resources and change their Availability in the Manage Resources dialog.

Resources are automatically added to your map when you:

- Import a task from Microsoft Project
- Link to a Microsoft Outlook task
- Link to a SharePoint task



If you are using MindManager with SharePoint: when a SharePoint site is added to MindManager, the list of SharePoint users for that site is automatically loaded into MindManager's resource list.

When you create a new resource, the availability for the resource is automatically defined as 40 hours per week. You can change the resource's availability in the <u>Manage Resources</u> dialog in the Resources task pane.

Enter resources in the Task Info pane

You can enter a resource for a task in the <u>Task Info</u> pane. If the resource does not already exist, a new resource is automatically created.

Add a resource marker to a topic

- 1. Select one or more topics.
- 2. On the ribbon's **Tas**k tab, in the Tasks group, click the **Resources** arrow, and then click **Add New Resource Marker**.
- 3. Enter the marker name, and then click **Add**. You can now add another resource Marker or click **Close**.
- 4. The new resource is automatically assigned to the selected topic(s).



You can also add a new resource by selecting a topic, typing **@**, typing a resource name, and pressing **Enter**. For more information, see Add resources with an accelerator key.

The availability for the new resource is automatically defined as 40 hours per week. You can change the resource's availability in the Manage Resources dialog in the Resources task pane.

Define Resources in the Manage Resources dialog

- 1. In the Resources task pane, click **Manage Resources**.
- 2. In the Manage Resources dialog, enter the Resource name, and Availability (the total number of hours per week that this resource can work).

Manage Resources

- 1. In the Resources task pane, click Manage Resources.
- 2. In the Manage Resources dialog, you can change a resource's Availability, assign a cost to the resource, add more resources, or delete resources.

See <u>Utilization definitions and calculations</u> for more information on how Availability is used in utilization calculations.



You can also delete a tag by clicking its Close button in the Topic Info Card.

Assign Costs to Resources

1. In the Resources task pane, click **Manage Resources**.

In the Manage Resources dialog, choose the time increment to use when managing a resource's cost.

You can choose to calculate costs using hours, days, weeks, or usages.

3. Type the cost per time increment in the **Standard Rate** box.

Assign Color to Resources

- 1. In the Task Info Card or the Index pane, right-click the resource and choose **Add Resource Color**. If the resource already has an assigned color, choose **Edit Resource Color** to select a new color.
- 2. In the Marker Properties dialog, open the **Color** picker, and choose a color.

Resource utilization

The Task Info on your map can display shading to alert you to resource utilization issues. You can enable or disable the shading on the map.

Resource utilization is automatically calculated by using Task Duration, Work Hours per Day, resource Availability, and resource Loading for each resource used on the map, on both a daily and weekly basis. To see details about these issues, you can do an analysis to find over- or underutilized resources in the Resources pane.

See Utilization definitions and calculations for more information on how utilization is calculated.

Shading for utilization

You can choose whether to display shading for overutilized and underutilized resources in the map.

On the Resources task pane, in the Visibility section, click Show Over & Underutilized
 Resources in Map.

On the map, task info is shaded:



R: Boris, Axel

- Red indicates that one or more resource assigned to the task is overutilized (on either a day or week basis) at some point between the Start and Due date. The overutilized resource names are bolded.
- Tan indicates that all the resources assigned to the task are fully utilized (nether under- nor overutilized).
- Green indicates that one or more resource assigned to the task is underutilized (on either a day or week basis) at some point between the task's Start and Due date, and that no resources are overutilized at any point. (If it is a mixed case of under- and

overutilization, overutilization is indicated.) The underutilized resource names are bolded.

Change the length of a work day

This is the number of hours per day that you expect all resources to work, and the length of a workday for tasks.

- 1. On the ribbon's **File** tab, click the **Options**, and then click **Task Info**.
- 2. In the Work hours per day box, and set the number of hours per workday.

Usually, this is set to 8, but you can set it to any value between 1 and 24.

See <u>Utilization definitions and calculations</u> for more information on how this is used in utilization calculations.

Resource loading

When you assign a resource to a task, the resource loading is automatically set to 100%. This means that you expect the resource to spend the full task duration working on this task: 5 hours for a 5 hour task, 40 hours for a 40 hour task, etc.

If you change the loading to 50%, this means you expect the resource spend half the task duration working on it: 2.5 hours on a 5 hour task, 20 hours for a 40 hour task, etc.

To change the resource loading for a task:

- 1. On the map, right-click the resource name in the topic's Task Info.
- 2. In the shortcut menu, click Edit Resource Effort, and then select or enter a load value.



The load information is displayed for a task only when it is less than or greater than 100%.

See <u>Utilization definitions and calculations</u> for more information on how loading is used in utilization calculations.

Analyze Utilization

Analyzing resource utilization can help you to arrange tasks and resources to ensure a successful outcome. Utilization is analyzed over full weeks that occur during the time period you specify, on a weekly and daily basis. It is possible for a resource to be underutilized for a week, but overutilized on specific days, and vice-versa.

- 1. In the Resources pane, enter the dates for the period you want to analyze in the **From** and **To** fields. If you do not enter dates here, the analysis is conducted for all the weeks that the tasks on the map span.
- 2. Check the analysis you want to conduct: **Find overutilized resources** or **Find underutilized resources**, or both.
- Click Find.

The results are reported in the bottom part of the pane, and shown with special shading in the map and on the Gantt chart (if it is displayed).



For each entry, click to see more details about the analysis for that resource.

To select a task on the map that includes a day with an under- or overutilized resource, click the entry for that day.

Utilization definitions and calculations

Utilization is determined on both a weekly and daily basis for each resource on the map.

Weekly utilization for a resource

For each week, we calculate the number of hours the resource must work on tasks. We use the resource loading and duration (within this week) for each task to calculate the work required.

```
work required for a task = task duration this week * resource loading
```

We total the work required for all the tasks to find the work required for the week. We compare the work required this week to the Availability for the resource to arrive at a weekly utilization percentage:

```
weekly utilization = [ work required this week / availability ] * 100%
```

Overutilized resources are those whose utilization is greater than 100%. Their work required for the week exceeds their Availability.

Underutilized resources are those whose utilization is less than 100%. Their work required for the week is less than their Availability.

Daily resource utilization

For each day, we calculate the number of hours to be worked for each task. We use the resource loading and duration (for this day) for each task to calculate the work required:

```
work required for a task = task duration today * resource loading
```

We total the work required for all the tasks on that day to find the work required. We compare the work required for the day to the Work Hours per Day to arrive at a daily utilization percentage for the resource:

```
daily utilization = [ work required for the day / work hours per day ] * 100%
```

Overutilized resources are those whose utilization is greater than 100%. Their work required for the day exceeds the Work Hours per Day.

Underutilized resources are those whose utilization is less than 100%. Their work required for the day is less than the Work Hours per Day.

Use Timelines

Create a new timeline

Timeline diagrams display a series of events in chronological order. Typically, they are static diagrams.

MindManager's Timelines, unlike static diagrams limited by space and function, are dynamic and interactive. Open and close the timeline's branches, highlight events with metadata like priority or other icon markers, links, notes, attachments, and more.

Use the marker index (Map Index task pane, **Markers** tab) to navigate your timeline events or apply filters to focus the view on content that meets your desired criteria (e.g. show me all events that have a red flag or that have been marked as priority 1).

Timelines can be used for a variety of purposes:

- Project Timelines: Timelines can communicate key project milestones and present a big picture view without all the underlying tasks causing potential clutter or confusion.
- Strategic or Business Plan Timeline: Timelines can be an
 effective way to communicate milestones and goals for a
 strategy that you are implementing.
- Product Roadmap: Product visions are often expressed in the form of a visual roadmap where the future of a product portfolio is laid out and communicated via timelines.
- Marketing Strategy / Plan: Highlight your organization's key marketing events and milestones in a timeline.
- Company History: Communicate key events that contributed to the evolution of your organization, products, and services.



MindManager's Timelines can be presented in either horizontal or vertical layouts. The scale of the timeline is determined by the user and the context of the diagram being created.

What do you want to do?

Create a new timeline from a template

Create a new timeline from an existing timeline

Enter topic text

Understand timelines versus maps

Benefits of interactive timelines

See also:

Work with timeline topics

Create a map

Create a new timeline from a template

You can create a new timeline using one of the templates available in the New Map dialog.

1. Do **one** of the following:

On the Quick Access Toolbar, click the

New arrow , and then click From

Template.

Click the File tab, and then click New.

The set of built-in map templates is displayed.

2. Double-click the desired timeline template.



All timeline topics display with quick add tabs, even if you have chosen to hide the Quick Add tabs in Options.

Create a new timeline from an existing timeline

To add to or modify an existing timeline without changing the original, use the Save As command in the <u>File tab or the Quick Access Toolbar</u> to save the timeline under a new name.

Enter topic text

When you create a topic, it appears on the page and is automatically selected.

- Type the text for the new topic and press ENTER.
- To create a line break within the topic text, hold SHIFT and press ENTER.
- These additions ▼ to your Central Topic can help set the theme for your map.

You can add an image to set the tone for the timeline.

You can also display the revision number and modification date using the <u>Show / Hide</u> command. You can reset the revision number on the Map Properties - Statistics tab.

Understand timelines versus maps

Timelines in MindManager offer a level of flexibility not found in other diagramming programs.

You can switch the layout of a timeline between horizontal and vertical layouts:

- 1. Go to the **Format** tab, click the **Layout** button.
- 2. Do **one** of the following:

Select **Timeline** (horizontal), if your growth direction is vertical.

Select **Vertical Timeline**, if your growth direction is horizontal.

READ HINT

The scale of the timeline is determined by the user and the context of the diagram.

With the Layout command, you can also transform a standard map layout into a timeline. From a central or floating topic, you can just choose either a vertical or horizontal growth, using the **Layout** commands.

Benefits of interactive timelines

- Boil down multiple tasks, events, and timelines into a single document.
- Add metadata to your topics: icons, markers, notes, attachments, links, and more.
- Show/hide branches or apply filters to create alternative views of your data.



It's possible to have multiple timelines in a single map using floating topics as each timeline's starting point.

Work with timeline topics

A timeline consists of a linear series of topics regrouping various subtopics. In a blank template, the "Timeline" topic is the first topic created, starting point of a chronological suite of main topics. You can then add new topics using the Quick Add tabs, the menu commands, or keystrokes. You can even add topics "free-form," by double clicking the background to create the topics, then dragging and dropping them at the location of your choice.

What do you want to do?

Add topics using Quick Add tabs

Add topics using menu commands

Add topics and relationships
"free-form"

★ Add topics using keystrokes

See also:

Create a new timeline

Create a map

Add topics using Quick Add tabs

Once you have created a new timeline, it's easy to start building it using the Quick Add tabs, and dragging and dropping the topics into place.



If you are zoomed out to 50% or less, the Quick Add tabs may not be displayed.

Click the Timeline topic, which will display the blue topic frame and one Quick Add tab, either on the right side when the growth direction is horizontal, or at the bottom when the direction is vertical, going downward below the Central Topic.

Now click one of the Quick Add tabs on the first main topic.

There are four Quick Add tabs, one on each side of the topic, two to add Subtopics, one to add a Parent Topic, and one to add a Topic Before.

The Quick Add tabs are placed differently depending on the growth direction of your timeline.

Add topics using menu commands

When you create a timeline, some options on the **Home** or **Insert** tab (**Add Topics** group) change to reflect the unique features available with this type of map.

To add topics using the menu: in the **Home** or **Insert** tab, **Add Topics** group, do **one** of the following:

Click **New Topic** to add a topic *after* the selected topic.

or

Click the **New Topic** arrow and select **Add Topic Before** to add a topic *before* the current topic.

Add topics and relationships "free-form"

You can also place topics in the map and change their relationships to one another as needed:

- 1. Add a topic by double clicking anywhere on the map.
- 2. Then, add a second one.

Both are created as Floating Topics, with one Quick Add tab in the growth direction of the timeline, either to the right or downward.

Drag one Floating Topic onto the other.
 The topic you dragged becomes a main topic to the first one, now the Central Topic of this new timeline.

When you add this new set of topics to the first timeline, both topics are downgraded: the Central Topic becomes a Main Topic of the initial Timeline topic, and the second one becomes a Subtopic.

Add topics using keystrokes

To add:	Keystroke	Mouse
Topic after (to the right or below)	Select a topic and press ENTER	
Topic before (to the left or above)	Select a topic and press SHIFT + ENTER	
Subtopic	Select a topic and press INSERT or CTRL + ENTER	
Callout topic	Select a topic and press CTRL+SHIFT+ENTER	
Floating topic		Click the map background and type the topic text at the cue arrow Or Double-click the map background and type directly into the floating topic. You can set options to enable these features.

Edit and format timeline topics

Just as you can <u>edit</u> topics on maps, you can edit timeline topics to replace or modify the text or <u>resize</u> <u>the topic</u> to control how the text wraps. You can also <u>modify</u> and <u>format</u> relationship lines between topics, including adding text labels.

Move or copy timeline topics

Drag and drop timeline topics to a new location, "free-form" restructuring your map.

Select the topic(s) and drag them to a new position on the map. A visual cue appears showing where the topic(s) will be added.

- To copy, press CTRL as you drag and drop.
- Callouts remain attached to their parent when they are moved. Use Cut and Paste to move a
 callout to a different parent.



If you want objects to snap to a grid during drag and drop, enable the **Snap to grid during drag** and drop option (**File > Options > Edit > Drag and drop**) or click the **Snap to Grid** button on the status bar. The default grid size is 10 mm. You can nudge an object 2 mm with an arrow key or micro-nudge it .2 mm by pressing CTRL + SHIFT as you use an arrow key.

You can use drag and drop to move and copy topics between maps that you are viewing simultaneously.

Delete or remove topics

You can delete a topic (including its callouts).



If you only wish to suppress the display of certain map elements or topics, you can use the Show / Hide command and the Filter commands to hide them without removing them from the map.

1. Select the topic(s) and do **one** of the following:

Press the **Delete** key. The topic(s) (including icons, images and shapes), attached subtopics and callouts will be deleted.



On the **Home** tab, click the **Delete** button, and then select **Topic**.

Timeline layouts

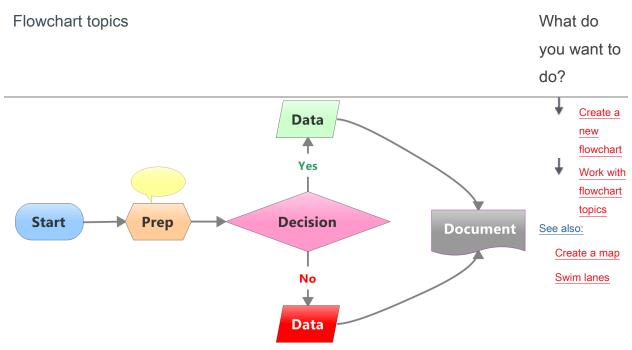
You can use the **Layout** pull-down menu in the **Design** tab to convert any timeline topic into a regular topic with the selected layout, effectively combining timeline and map layouts in one visual display.

- 1. Select the topic(s).
- 2. Click the **Layout** pull-down arrow, and select a layout from the list: Radial Map, Right Map, Tree, Split Tree, Org Chart, Up Org Chart, Split Org Chart, Timeline, Vertical Timeline.

MindManager User Guide

3. Any new subtopics added to the converted topic(s) will display in the selected layout format and growth direction.

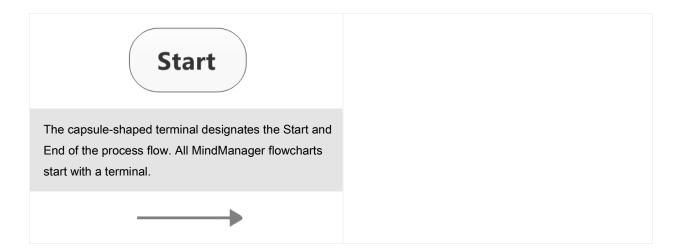
Use Flowcharts



A flowchart is a kind of map that describes a process or workflow. Like a map, the basic building-blocks of a flowchart are topics, but flowchart topics reflect the visual conventions common to this type of diagram.



See <u>Create a new flowchart</u> and <u>Work with flowcharts</u> for more about adding, moving, and modifying topics in flowcharts.



An arrow starting from one topic and ending (at the Option arrowhead) at another indicates a shift in time or control passing from the first topic to the second. **Decision Process** No **Option** The process topic—a rectangle—represents an action Diamond -shaped, decision topics indicate a place that needs to be performed for the process to move to where a decision is required The decision topic the next step. generally has two arrows leading to the two paths: Other than the initial Start topic and the Decision topic, "Yes" and "No." all added topics are in this shape, but can be changed. **Predefined Data Process** The predefined process, a rectangle with two vertical borders, references a multi-step process that may be A parallelogram topic represents data input or output. detailed in a separate flowchart. **Database**

The hexagonal preparation topic indicates preparatory steps needed prior to a process.

The database cylinder shows the role of a database in the process.

Document

Connect

The document topic references a document that is part of the process.

Circular connectors indicate places where multiple actions converge. While there may be multiple arrows going into the connector, only one arrow comes out and leads to the next step in the process flow.

Start

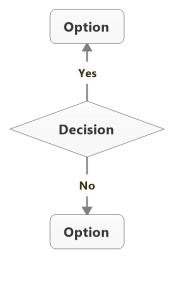
The capsule-shaped terminal designates the Start and End of the process flow.
All MindManager flowcharts start with a terminal.



An arrow starting from one topic and ending (at the arrowhead) at another indicates a shift in time or control passing from the first topic to the second.

Process

The process topic—a rectangle— represents an action that needs to be performed for the process to move to the next step. Other than the initial Start topic and the Decision topic, all added topics are in



Diamondshaped,
decision topics
indicate a
place where a
decision is
required The
decision topic
generally has
two arrows
leading to the
two paths:
"Yes" and
"No."

Predefined Process	this shape, but can be changed. The predefined process, a rectangle with two vertical borders, references a multi-step process that may be detailed in a separate flowchart.		
Data	A parallelogram topic represents data input or output.		
Prep	The hexagonal preparation topic indicates preparatory steps needed prior to a process.	Database	The database cylinder shows the role of a database in the process.
Document	The document topic references a document that is part of the process.	Connect	Circular connectors indicate places where multiple actions converge. While there may be multiple arrows going into the connector, only one arrow comes out and leads to the next step in the process flow.

Create a new flowchart

A flowchart is a diagram that represents, step by step, a process or workflow. This creates a visual model that makes it easier to get an overview of a project, process or system—and to identify problems, bottlenecks, or flaws. Flowcharts employ standardized visual shapes to convey different elements in the workflow, such as processes, decisions, documentation, and data input/output.

You can either create an empty flowchart using a template or use an existing flowchart as the basis for a new diagram.

What do you want to do?

Create a new flowchart from the template

Create a new flowchart from an existing flowchart

Enter topic text

Understanding flowcharts versus maps

See also:

Flowchart Topics

Work with flowchart topics

Create a map

Create a new flowchart from a template

You can create a new flowchart using one of the templates available in the **New Map** dialog

1. Do **one** of the following:

On the Quick Access Toolbar, click the New arrow , and then click From Template.



Click the **File** tab, and then click **New**.

The set of built-in map templates is displayed.

2. Double-click the desired flowchart template.

A new flowchart opens with a floating topic framed in green called "Start."



All flowchart topics display with quick add tabs, even if you have chosen to hide the Quick Add tabs in Options.

Create a new flowchart from an existing flowchart

To add to or modify an existing flowchart without changing the original, use the Save As command in the File tab or the Quick Access Toolbar to save the flowchart under a new name.



You cannot save a flowchart as an OPML file, an HTML file, or a PowerPoint file.

Enter topic text

When you create a topic, a placeholder topic appears, and is automatically selected.

- Type the text for the new topic and press ENTER.
- To create a line break within the topic text hold SHIFT and press ENTER.
- These <u>additions ▼</u> to your Central Topic can help set the theme for your map.
 You can <u>add an image</u> to set the tone for the flowchart.

You can also display the revision number and modification date using the Show / Hide command. You can reset the revision number on the Map Properties - Statistics tab.

Understanding flowcharts versus maps

When you create or open a flowchart, some features become available that are not present when you create or open map (and a few features become disabled).

Flowchart-specific features include:

alternate commands in the Add Topics group of the Home and Insert tabs



- insert new a flowchart topic shape to the right (the default), left, above, or below the selected topic
- insert a decision tree with multiple options to the right (the default), left, above, or below the selected topic
- drag and drop topics anywhere on the canvas
- easily connect topics and label the relationship arrows



To make it easier to distinguish between them, map topics are framed in blue, flowchart topics in green.

You can also combine flowchart and map topics in your flowchart, and modify the layout of both types of topics within the flowchart independently.

READ NOTE

If you add a flowchart topic to a regular topic within a flowchart or a regular map, the newly-added topic becomes a regular topic, framed in blue.

Disabled features include:

- Collapse and Expand map
- Show Branch Alone
- Presentation and Slides
- Balance Topics
- the **Line** style command
- Sort



Some task info features will not be available in flowcharts.

Work with flowchart topics

A flowchart consists of several different types of topics, including decisions to describe the components of a process. The capsuleshaped "Start" topic appears on a new flowchart automatically. You can then add new topics using the Fly Out Shape Picker, the Quick Add tabs, the menu commands, or keystrokes. You can even add topics and relationships "free-form," by double clicking the background to create the topics, then dragging and dropping the relationship lines between topics.

READ HINT

Flowchart topics are framed in green; regular map topics are framed in blue.

A feature that is unique to the flowchart is Add Decision. This inserts a diamond shape decision topic with rectangles above and below, linked by relationship lines labeled "Yes" and "No." Using the decision topic allows you to create forking paths in the process flow, then follow those paths to determine potential outcomes.



You can edit the text in the "Yes" and "No" box to reflect other types of forks, such as "True" or "False."

You also have the option to add a simplified version of the **Decision** topic (Add Decision Only) with only the diamond.

What do you want to do?

- Add topics using the Fly Out Shape Picker
- Add topics using Quick Add tabs
- Add topics using menu commands
- Add topics and relationships "free-form"
- Add topics using keystrokes
- Move flowchart topics
- Insert relationships
- Delete or remove topics
- Flowchart layouts and themes

See also:

Flowchart topics

Create a new flowchart

Create a map

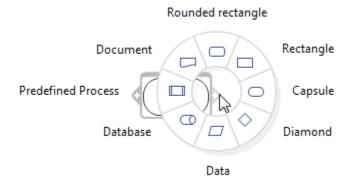
Format topics and objects

Relationships

Swim lanes

Add topics using the Fly Out Shape Picker

Once you have created a new flowchart, it's easy to start building it using the Fly Out Shape Picker. In any other type of map, you can add a topic by clicking an existing topic's Quick Add tab. With flowchart topics, when you hover over a topic's Quick Add tab, a different tool pops up: the Fly Out Shape Picker.



The picker is a contextual menu in the shape of a hollow wheel with eight quadrants. It helps you choose the exact type of topic to add to your map.

- 1. Move your cursor to the shape you want to add. The quadrant turns grey, and a tooltip with the name of the selected shape displays.
- 2. Click the desired shape, then click where you'd like to insert the new topic in your map.
- 3. Once you've added the new topic to your map, you can adjust its position and edit its relationship to the parent topic.
 - Move the topic to another location by dragging it on the map.
 - Add a label to the relationship between the two topics by clicking that relationship, clicking Label, and typing a name for your label in the empty blue box.



The Fly Out Shape Picker closes without adding a new shape when you move your mouse away from the wheel-shaped contextual menu.

You can choose to not display the Fly Out Shape Picker wheel when you hover a flowchart topic's quick add tabs by clicking the **File** tab, clicking **Options**, clicking **Edit**, and then enabling the **Hide Shape Wheel on selection frame for flowchart layouts** check box.

Add topics using Quick Add tabs

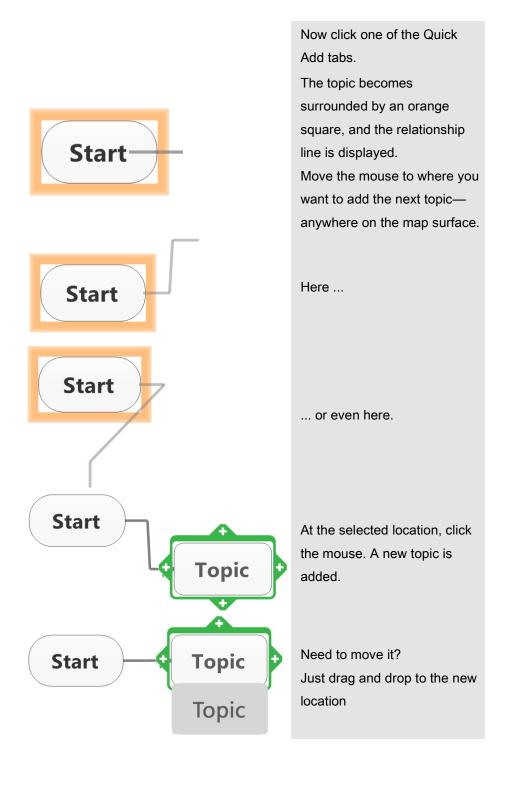
While the Fly Out Shape Picker will always pop up when you hover over a flowchart topic Quick Add tab, you can still bypass this tool and click a tab to add topics to your map. This way, you will control every step of dragging and dropping the topics into place.



If you are zoomed out to 50% or less, the Quick Add tabs may not be displayed.



Click the Start topic, which will display the green topic frame and the Quick Add tabs marked with a "+" symbol.



Add topics using menu commands

When you create a flowchart, some options on the **Home** or **Insert** tab (**Add Topics** group) change to reflect the unique features available with this type of map

To add topics using the menu: in the **Home** or **Insert** tab, **Add Topics** group, do **one** of the following:

or

Click **New Topic** to add a topic *after* the selected topic.

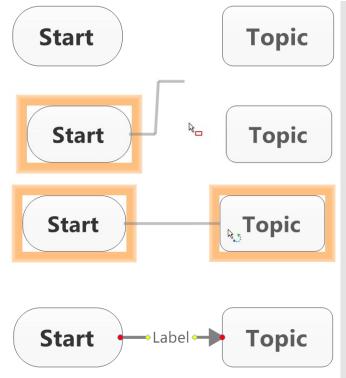
Click **New Decision** to add a decision diamond with "Yes" and "No" decision topics above and below the diamond.

Click the **New Topic** arrow and select one of the three alternate directions: **Left**, **Above**, or **Below**; or choose **Insert Topic(s) Between** to add an interstitial topic between every two contiguous selected topics.

Click the **New Decision** arrow and select one of the three alternate directions: **Left**, **Above**, or **Below**; or choose **Add Decision Only** to add a decision diamond topic without the "Yes" and "No" decision topics.

Add topics and relationships "free-form"

You can also place topics the map and then create relationships as needed:



Add a topic by double clicking anywhere on the map. Then, add a second one.

Click on of the topic's Quick Add tabs.

The topic becomes surrounded by an or

The topic becomes surrounded by an orange square, and the relationship line is displayed.

Move the mouse to the frame of the second topic until it also is surrounded by an orange square, and click.

The relationship line connects to the second topic with the label field displayed, (If you don't see the orange square on the second topic, clicking will not connect the two topics. Instead, it will create a third, new topic connected to the first one.)

Add topics using keystrokes

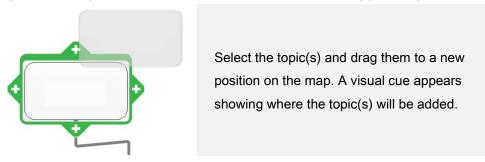
To add:	Keystroke	Mouse
Topic	Select a topic and press ENTER	
Topic before (above) a topic	Select a topic and press SHIFT+ENTER	
Decision topic	Select a topic and press INSERT or CTRL+ENTER	
Callout topic	Select a topic and press CTRL+SHIFT+ENTER	
Floating topic		Click the map background and type the topic text at the cue arrow Or Double-click the map background and type directly into the floating topic. You can set options to enable these features.

Edit and format flowchart topics

Just as you can edit topics on maps, you can edit flowchart topics to replace or modify the text or resize the topic to control how the text wraps. You can also modify and format relationship lines between topics, including adding text labels.

Move or copy flowchart topics

Drag and drop flowchart topics to a new location, "free-form" restructuring your map.



• To copy, press CTRL as you drag and drop.

Callouts remain attached to their parent when they are moved. Use Cut and Paste to move a
callout to a different parent.

While you move topics around, you may want to keep some of your map's topics static. From the topic's contextual formatting menu, click the Options icon and select **Pin Topic**. You can apply this option all at once to a selection topics.





If you want objects to snap to a grid during drag and drop, enable the **Snap to grid during drag and drop** option (**File > Options > Edit > Drag and drop**) or click the **Snap to Grid** button on the status bar. The default grid size is 10 mm. You can nudge an object 2 mm with an arrow key or micro-nudge it .2 mm by pressing CTRL + SHIFT as you use an arrow key.

You can use drag and drop to move and copy topics between maps that you are viewing simultaneously.

By default, topics automatically reposition when other topics are moved in their location. A topic moved onto the location of a pinned topic will overlap that topic.



Insert relationships

You can insert a relationship between floating topics:

1. Select your topics in the order you want them related to one another and do one of the following:

Right-click your selection and, in the contextual menu, select **Insert Relationship**.

On t

Obje

On the **Home** or **Insert** tab, in the **Objects** group, click the **Relationship** button.



You can also add a relationship by dragging one topic over another, releasing the mouse button when the menu button appears, and choosing **Insert Relationship**.

Learn more about relationships and the many ways to format relationships in their relative topics.

Insert line jumps

You can format the appearance of the intersection of relationships and connector lines when the line shape is set to Straight, Angled, or Right Angled. The default line-jump style is Horizontal Arc. For more information about setting line shape, see Change the shape of the line.

- 1. Right-click the connector line or relationship and choose Format Relationship.
- 2. Choose a line-jump style from the Line Jumps drop-down:
 - Horizontal Arc
 - Vertical Arc
 - Horizontal Gap ^{-|-}
 - Vertical Gap +
 - Horizontal Bridge □
 - Vertical Bridge □

If you don't want line jumps, choose None.

Link to a flowchart topic by dragging

- 1. Drag the topic that you want to link to over the topic where you want to insert the link.
- 2. When the menu button appears, release the mouse button, and choose **Insert Link**. To insert links between the two topics, choose **Reciprocal Link**.

Add the content of a flowchart topic as a note

- 1. Drag the topic containing the text that you want to add as a note over the topic to which you're adding the note.
- 2. When the menu button eappears, release the mouse button, and choose Drop as Notes

Delete or remove topics

You can *delete* a topic (including its callouts).



If you only wish to suppress the display of certain map elements or topics you can use the Show / Hide command and the Filter commands to hide them without removing them from the map.

1. Select the topic(s) and do **one** of the following:

Press DELETE. The topic(s) (including icons, images and shapes), attached subtopics and callouts will be deleted.

or

On the **Home** tab, click the **Delete** button, and then select **Topic**.

Flowchart themes

MindManager provides a number of flowchart themes, including swim lanes, or you can create and save your own custom themes.

Flowchart layout and themes

You can use map layout features to adjust the arrangement of flowchart topics.

Additionally, you can use the **Layout** pull-down menu on the **Format** tab to convert any flowchart topic into a regular topic with the selected layout, effectively combining flowchart and map layouts in one visual display.

- 1. Select the topic(s).
- 2. Click the **Layout** pull-down arrow, and select a layout from the list: M Radial Map, Right Map, Tree, Split Tree, Org Chart, Up Org Chart, Split Org Chart, Timeline, Vertical Timeline.
- 3. The frame around the topic(s) will change from green to blue. Any new subtopics added to the converted topic(s) will display in the selected layout format and growth direction.

Flowchart themes

MindManager provides a number of flowchart <u>themes</u>, including swim lanes, or you can create and save your own <u>custom themes</u>.

Work with Maps

Use Expanded File Management

What Is Expanded File Management?

MindManager users like to share the ideas they develop or projects they shape in their maps, and when they work in a team, they want to invite their colleagues to enrich their documents in a collaborative manner.

See also:

Add a cloud storage service

Add a SharePoint Site

Your favorite sharing services

With Expanded File Management, MindManager offers an easier way to access files whether they are stored locally, or externally in services like SharePoint, Box, DropBox, Google Drive and OneDrive. Users can easily add external storage solutions directly from MindManager's Backstage File menu, and access their remotely-stored files like they would their local files. Built to support third-party online services, this feature will add more of your favorite online storage solutions with future releases. You can also save and export your maps to cloud storage services, as well as import maps in a variety of file formats.

Invite colleagues to contribute

MindManager's Expanded File Management is also designed to help you collaborate on documents thanks to a "check out/check in" system. When you need to work on a document, check it out to lock the file, thereby preventing colleagues with access from editing the file while you are making revisions. Once you've completed your changes, you then unlock the document so others can add their input.

Add a cloud storage service

You can add SharePoint sites and third-party accounts, including Box, Dropbox, Google Drive and OneDrive, directly from the Backstage File menu, in the Open pane. When working with a cloud storage service or SharePoint site connected to MindManager, you can only open and edit MindManager files.

Connect to a cloud storage service

Share a map via a connected service

Collaborate with a connected service

View Recent Files from all locations

See also:

What is Expanded File Management?

Add a cloud storage service

Add a SharePoint site

Connect to a cloud storage service

To connect to a third-party account:

MindManager's Extended File Management feature supports third-party services, such as Box, DropBox, Google Drive, and OneDrive. To add a third-party service account to your MindManager configuration, you can either enter credentials of an account you already own or create a brand new account directly from the **File > Open** pane.

1. From the Open pane of the File menu, click Add Place.



If there are other services already registered with MindManager, the **Add Place** command will be listed below those services.

- 2. In the Add Place dialog, next to the third-party service that you want to add, click Add.
- Then, either sign in with your existing credentials or sign up for a new account.
 Follow the instructions, and MindManager will connect you to a third-party service account, which is where you will store and share your files



You can rename cloud storage places that you've added to simplify managing maps and projects. Click **File > Open** or **Save As**, click **Add Place**, click **Rename** beside the cloud storage service, and type a name in the **Display** box.

Share a map via a connected service

To share via a third-party account:

Files shared via third-party accounts are managed in accordance with the sharing principles of the service. MindManager links directly to the third-party service from the Share pane of the Backstage File menu:

1. Open the map you want to share. 🔢 READ HINT

Maps you share via a third-party service do not need to be stored in any particular location. To be shared by that service, they are first saved in that location..

- 2. Click the File tab, then click Share to display the Share pane.
- 3. Select the service you want to use to share your map. The **Save to...** dialog opens with the name of your file automatically filled in the **File name** box.
- 4. Click the **Manage Share Permissions** link. A browser window opens to the page where you can edit your share permissions.

READ HINTS

You can insert a link in a topic to a file stored on a cloud storage service. For more information see, Link to a file on a cloud storage service.

If you haven't logged in to your storage service beforehand, you will be asked for your credentials to access the page where you can manage your share permissions.

Collaborate with a connected service

When you open a shared file that is stored on an online storage service, you will see an overlay in the upper right corner informing you of its status and allowing you to lock or unlock your document for editing.

There are three different statuses:

- Editing Locked by me: You have opened the shared document and only you can edit it at this time.
- Read Only Locked by ___: A colleague has opened the shared document and only he or she can edit it at
 this time.
- Read Only Unlocked (Click to Lock/Edit): The document has been unlocked or closed by your colleague.
 You can lock it to start editing it. Click the down arrow and select Lock from the Lock/Unlock drop-down menu.

View Recent Files from all locations

In the **File** tab, the **Open** pane offers a view of the recently-opened files from all locations, marked with the icon of the respective service where they are stored. This way, users have a single place to view and pin the most current and important documents they're working on.

In addition to the files you have saved there, you can open files stored by other applications or users from within MindManager when you are logged into your cloud storage account.

Add a SharePoint site

If you're using SharePoint sites within your organization, you can add a site from the Backstage File menu, in the Open pane. Once your site has been added, you can navigate to and open SharePoint files from within MindManager.

See also:
What is Expanded File
Management?
Add a cloud storage service

To add a SharePoint site:

- From the Backstage File menu, select Open and click Add Place: the Add Place dialog opens with a selection of services
- 2. Click the Add button next to SharePoint; the Add SharePoint Document Library dialog opens.
- Enter your SharePoint site address in the empty box and click Next: SharePoint will display a prompt for you to enter your User name and Password for this site.
- 4. Click **OK** to connect to your SharePoint site.

To remove a SharePoint site:

- 1. Go to the Add Place dialog, repeating the first two steps detailed above; opposite the SharePoint icon and label, the **Add** button is now marked **Remove**.
- 2. Click the Remove button to disconnect from the SharePoint site.

When viewing a map, users can also quickly check in and check out SharePoint files.

View and Navigate Maps

MindManager views—and how you use them

MindManager offers several views for working with your map.



The program starts in Map view. This is the best view for creating and editing your map and for getting the big picture of what the map covers. This view displays all the components of your map including floating topics, relationships, images and boundaries. You will probably do most of your work in this view.



The Linked Maps view is used to view maps that are linked together by links. It displays preview images of the current map and all the maps that it links to. (Other linked documents are displayed as placeholders). You can choose to display only the first level maps - those directly linked to this map - or maps at the second, third, or all levels. In this view you can issue commands on all of the maps or on only a selected subset.

What do you want to do?

Switch between views

View multiple maps

Navigate between maps

View maps in cascading or tiled windows

See the location of a map



Gantt Pro delivers smart controls for managing tasks and resources. It makes it easy to stay on top of resource allocation and the progress of critical-path tasks.



In <u>Slides view</u> you can create a set of slides that display different parts of the map, to help focus attention for printing or presentation. You can start a full-screen slide show from this view.



Tag view

Tag view lets you quickly visualize the status, progress, and issues of elements within a project or worklfow.



Schedule View

Schedule view lets you view your map by task times.



Icon View

Icon view lets you quickly assign priorities to topics and tasks in your diagrams.



The Outline view allows you to display and edit maps using a familiar visual form: topics are listed linearly from top to bottom. This view can be a helpful reference if you are just beginning to use MindManager.

If you plan to use an outline export format, (like Word) the outline view can be used to preview the map in a linear arrangement so you can make any necessary adjustments before the export. You may also print the map outline directly from this view.

This view is more limited than Map view: It excludes certain map components (floating topics, relationships, images and boundaries).



Analysis views let you make better decisions by helping you to prioritize and categorize your mapped topics. In this view you can drag and drop the topics you want to evaluate into an analytic chart and position them to reflect their relative qualities. Once the topics are positioned on the chart, you can automatically assign markers to the associated map topics based on their chart locations.

You can create multiple Analysis Views from a single map, and any map topic can appear in multiple views. These views are saved with the map, and they can be modified at any time.



Walk Through view

Walk Through view allows you to display a map for presentation so you can navigate through the map with a minimum of distraction. It switches to a full screen view for maximum map space, hides all menus and toolbars and provides shortcuts and options to make navigation smooth. You can view multiple maps in MindManager and switch between them using their tabs. You can tile maps in the main window to see two or more maps at the same time.

Switch between views

Use the commands on the View tab, in the Document Views group.



You can also switch between Map view, Outline view, Schedule view, Icon view and Tag view using the buttons on the Status Bar at the bottom of the application window.

View multiple maps at the same time

Sometimes you want to view multiple maps side-by-side, or across multiple display screens. You can do this by detaching the map's workbook tab and relocating it

Display two or more maps simultaneously

- 1. Click the workbook tab for an open map.
- Click the **Detach To Main Window** button

MindManager User Guide

The map is displayed in the new location. Use the mouse to navigate between multiple maps; ribbon commands, task panes, and footer buttons will apply to the selected map.

Cancel multiple map display

- 1. Click the workbook tab for the detached map.
- 2. Click the **Reattach To Main Window** button ...

Navigate between maps

The easiest way to navigate between open maps is to use the workbook tabs at the top or bottom of the map window. These are enabled using the **MindManager View** options, and you can choose to display either the Central Topic text or the map filename on the tab. Workbook tabs can be positioned at the top or bottom of the map window.



Click and drag workbook tabs to reorder them.

To control their position, right-click a tab, and set the Workbook Tabs Placement.

Right-click a tab to <u>Save</u>, <u>Print</u> or Close the map, reveal all map elements that were hidden using the <u>Filter</u> command, or change the map <u>Properties</u>.

Switch to a different map

- Click its workbook tab.
- On the View tab, in the Window pull down, under Switch, click the name of the map name you
 want to switch to.
- Press CTRL+F6 or CTRL+TAB to view the next map
- Press CTRL+SHIFT+F6 or CTRL+SHIFT+TAB to view the previous map.
- READ HINT

When you switch to a different map, it will be displayed in the view (Map view, Linked Maps view, or Outline view) last used for it.

View maps in cascading or tiled windows



You cannot view maps in cascading or tiled windows when using workbook tabs. You can turn off workbook tabs in the view options dialog.

By default, maps are displayed one at a time in either Map view or Outline view with workbook tabs across the top or bottom of the window.

1. Do **one** of the following:

Right-click a map's workbook tab, and then click **Arrange**.



On the **View** tab, in the **Window** pull down, click **Arrange**.

- 2. Optional in the list of open maps, select any maps you want to close and click Close Window.
- 3. Select the maps you want to arrange. Maps you do not select will be minimized.
- 4. Click the arrangement you prefer (tiled or cascading).



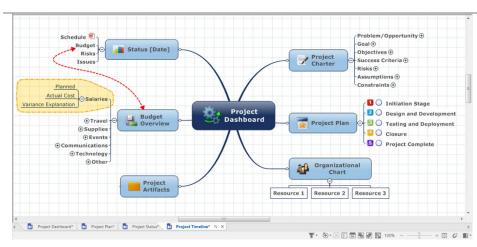
To arrange maps manually click the map window's Restore Down button (at the upper-right of the map window) and drag to size and place the window for each map.

See the location of a map

If you have a map open in the map window you can view its location on your system.

- 1. Right-click on the map's document tab at the bottom of the window.
- 2. Click Show in Explorer.

Use Map view



MindManager starts in Map view. This is the best view for creating and editing your maps and for getting the big picture of what the map covers. This view displays all the components of your map including floating topics, relationships, images and boundaries. You will probably do most of your work in this view.

For smaller maps, navigation is straightforward using the mouse. For large maps you may find it helpful to <u>collapse and expand topics</u> to make it easier to move around the map.



You can also use <u>keyboard shortcuts</u> to navigate through maps and adjust the view.

What do you want to do?

Orient a map (pan, zoom or center)

Use the Mini View

Switch to Map view

Focus on a topic

Show or hide map elements

♣ Split the map view

See also:

Document views

Filter topics

Collapse and expand topics

Switch to Map view

To switch to Map view from another view click **Map** in the **View** tab **Document Views** group, or click **Map** view in the **Status Bar**.

Navigate in Map view

You can also navigate through maps efficiently using the keyboard:

Keystroke	Action
Arrow keys	Select the topic above or below or to the left or right of the current topic. (For left and right arrows, the selection begins at the top main topic after you pass through the central topic to the other side of the map.)
TAB, SHIFT+TAB	Move to the next or previous topic, callout or subtopic. Use this method to visit each topic on the map in order. Floating topics and callouts attached to relationship lines are skipped.
BACKSPACE, SHIFT+BACKSPACE	Move back or forward through the history of topics you have selected.

For more information see Keyboard shortcuts.

Orient a map

There are several ways to orient the map in Map view.

Pan and zoom

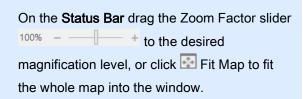
To move the map use the scroll bars along the map sides and bottom, or click on the map background or on the central topic and drag it.



You can vertically pan a map using your mouse wheel. To pan horizontally, hold down Shift while using your mouse wheel.

Set the zoom factor for the map

Do **one** of the following:



Or

On the **View** tab, in the **Zoom** pull down, click the **Zoom In / Zoom Out** buttons, or click **Fit Map**.

On the **Status Bar**, click the **Zoom Level** button 100%, click a value in the Zoom dialog or enter a value in the **Percent** box, and press ENTER.

For wheel-mouse users, hold down the right mouse button **OR** the CTRL key, then use the wheel to zoom in and out.

Press CTRL+F5 to fit the whole map into the window.

Press CTRL+0 (zero) for 100% zoom



If you are working on a large map, try using the Mini View window.

Center an object or the entire map

Press ALT+ F3.



Use the <u>Focus on Topic</u> command to center and expand the current topic while collapsing all other topics.

Center the map and collapse all topics to one level

Do one of the following:

On the **Status Bar**, click the **Expand** arrow arrow, and then click **Collapse Map**.



On the **View** tab, in the **Detail** group, click **Collapse Map**.

Use the Mini View

Use the Mini View window to navigate quickly through large maps.

Display the Mini View window

On the View tab, in the Zoom group, click Mini View.

When you first open the Mini View window, you'll sees a small simplified version of your map with a boundary line enclosing the active viewing area. You can move this window to keep it out of the way as you work on the map.

Use the Mini View window

- Use the controls and to collapse or expand the window.
- Click and drag the view area rectangle to another portion of the map.



Focus on a topic

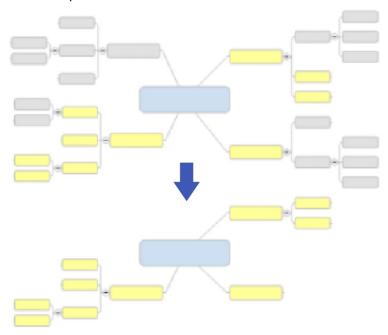
The Focus on Topic command is especially useful for presenting larger maps in meetings, to enable the viewer to see the topic's details without being distracted by the rest of the map. It shows the selected topic expanded to an optimum level, its sibling topics (collapsed), main topics (collapsed) and the central topic.

- 1. Select the topic.
- 2. Do **one** of the following:



If you want to expand the topic completely, press ALT+SHIFT+. (period).

The <u>Show Branch Alone</u> command (available in both Map view and Outline view) shows only the selected topic and its descendants.



Show or hide map elements

It is not necessary to delete map elements that you do not want shown on your map. Instead, you can use the **Show/Hide** command to hide elements or topics in Map view. This can be convenient when you add information that is for your own reference and you want to print or distribute the map or use it in a presentation.

Note that Walk Through view has its own Show/Hide command.

Show or hide a particular class of map elements

1. On the View tab, in the **Detail** group, click **Show/Hide**.

2. Click the elements you want to show or hide.

The filter indicator Show/Hide is in use at lower-left shows when some map elements are hidden.

To see the default set of map elements again, do one of the following:

Right-click the indicator and then click **Reset** Show/Hide to Default.



On the **View** tab, in the **Detail** group, click **Show/Hide**, and then click **Reset to Default**.



This command applies to the entire map.

You can also set which map elements to display in the Topic Info Box of any topic containing map elements. For more information, see Show or hide specific types of information.



Use the <u>Filter</u> commands to show or hide selected groups of topics or objects, or to show or hide topics based on their task info or other properties.

Split the map view

You can split the map view either horizontally or vertically so you can see different sections of the map at the same time.

When the map view is split, the two panes can be viewed independently. This means in each pane you can select different objects, use a different zoom factor or <u>level of detail</u>, and even use different <u>filters</u>, or different <u>views</u>. The two views are kept in sync: Any changes you make to the map are immediately reflected in the other pane.

This is especially convenient when working with large maps. For example, you can display the entire map in one window to get an overview, and work on it, zoomed in, in the other window.

Do one of the following:

On the **View** tab, in the **Window** drop down, click **Split**, and then click **Horizontal** or **Vertical**.



Right-click the map's workbook tab and under **Split Window**, click **Horizontal** or Vertical



You can drag the splitter bar between the windows to change their size.

Remove the split:

- On the View tab, in the Window pull down, under Split Window, and click Remove Split.
- Right-click the map's workbook tab and click Remove Split.

Use Linked Maps view

What do you want to do?



The Linked Maps view is used to view maps that are linked together by links. Linked Maps can be created by two methods:

- By adding links to link existing maps together
- By <u>exporting topics</u> from a map to a new map using the **Send To** command

This view displays preview images of the current map and all the maps that it links to. You can choose to display only the first level maps - those directly linked to this map - or maps at the second, third, or all levels. The map's "level' in relation to the parent is displayed as a small number in the lower-right of the map thumbnail.

See maps in Linked Maps view

• On the View tab, in the Document Views group, click Linked Maps.

A new workbook tab will appear, with the parent map name prefixed by "M:". For example, a workbook tab labeled M:My Map is created when the map My Map is displayed in Linked Maps view along with its linked maps.

In this view you can issue commands on all of the maps or on only a selected subset. Note that these maps are shown as previews: only the first map is opened unless you subsequently open the others.

Linked Maps view commands

Once you have selected one or more maps in the Linked Maps view you can use the Linked Maps commands to execute perform the actions listed below. Many of these are also available when you right-click on a map preview.

Group	Command	Action	
Мар	Open Map	Opens the selected map in the normal Map view so you can view and edit it. READ HINT Double-click on the preview image to open the map.	
	Close Map	Closes the map but does not remove its preview from the Linked Maps view. If you made changes to the map, use the Refresh command (below) to see a current preview.	
Linked Maps	Send as Email	Zips the selected maps and attaches them to an email using the <u>Send to wizard</u> .	
	Pack and Go	Uses the Pack and Go wizard to archive maps in a. zip file.	
	Quick Print	Prints the selected maps immediately.	
	Search	Opens the <u>Search Files</u> task pane so you can search the selected maps for a specific word or phrase.	
	Web Export	Export the selected maps as web pages.	
Edit	Rename	Renames the selected map. If other maps link to this map, you will have to repair their links.	
	Select All Deselect All	Select or deselect all maps in the view.	
	Refresh	Refreshes the thumbnail previews for linked maps. If these maps have been opened, modified and then saved, you must refresh the previews to see the changes.	
View	Map Levels	Displays maps linked directly to the parent map (first level), or includes second, third, or all levels of maps. The map's "level' in relation to the parent is displayed as a small number in the lower-right of the map thumbnail image.	
	Thumbnails	Use large thumbnails if you only have a few maps.	

Assign	Markers, Map themes	Lets you assign a <u>Theme</u> or a <u>Marker List</u> to selected maps
Combine	Combine all	Combines all the displayed maps into one "super" map that you can save with a new name. This map is static - it does not contain any links to the maps that were combined to create it. If the individual maps change after combining them, you will not see the changes reflected in the combined map.

Encrypt maps

You can encrypt multiple maps with passwords from the Linked Maps View.

- 1. Select the map(s)
- 2. Click the File tab, click Info, and then click Encrypt Document.

The maps will be protected with the passwords you enter. If you want to view previews of the password-protected maps in Linked Maps view you'll need to open them first.

Linked Maps troubleshooting

Broken Links

If you delete or rename a map that is the target of a link, the link will be broken.

The Linked Maps View **Rename** command helps you avoid broken links: it allows you to rename the selected map and automatically updates all links in the maps that link to it, so no links are broken. (You can also right-click a map and choose **Rename**.)

When you open a map with broken links in Linked Maps View the map preview displays a broken link message. To repair the link, click on the thumbnail and either remove the link (also removes the map from the view) or update the map path to link to the correct file again.

Click **Refresh** to see an updated view of all the maps (for example, if you edit one of the maps in Map View).

Missing Preview Image

If you see a message that there is no preview image for the map, that means the map Properties Save preview image setting was disabled when the map was saved. You can remedy this by opening the map, enabling this setting, and re-saving the map.

Map is Password Protected

If you see an indicator that tells you a map is <u>password protected</u> instead of the map preview, you can double-click on the indicator and open the map (you must provide the password), then return to Linked Maps View.

Gantt Pro delivers smart controls for managing tasks and resources. It launches in a standalone window, ideal for users working with dual monitors. Gantt Pro makes it easy to stay on top of resource allocation and the progress of critical-path tasks.

Gantt Pro includes features for modifying task scheduling to achieve the earliest end date, exporting reports, and visualizing resources based on their allocation.



Launch Gantt Pro

• On the **View** tab, in the **Documents Views** group, click the **Show Gantt Pro.**Gantt Pro opens in its own window. To return to the map, click **Back to Map**.

Modify tasks

- 1. In Gantt Pro view, right-click a task, and choose **Edit Task**.
- 2. In the dialog, click the **Task** tab.
- 3. Do any of the following:
 - Set the task's progress by choosing a percentage from the Progress drop-down.
 - Set the start date by choosing a date in the **Start date** drop-down.
 - Set the due date by choosing a date in the **Due date** drop-down.
 - Set the task duration by choosing a time increment and number in the Duration area.
 - Set the task as a milestone by clicking the Milestone box. A milestone is a status that does
 not have any duration or any work associated with it. They can have dependencies, but no
 resources.

READ NOTE

Gantt Pro also displays information about a task's costs and effort. For information about setting task costs, see Define Task Cost. For more information about specifying task effort, Define Task Info.

Manage resources

- 1. In Gantt Pro view, right-click a task, and choose **Edit Task**.
- 2. In the Gantt Pro dialog, click the **Resources** tab.
- 3. Do **any** of the following:
 - Add a resource by typing the resource name in the bottom drop-down, and clicking Add.
 - Remove the resource by clicking the **X** button next to the resource.
 - Specify the percentage of the resource's time you expect the resource to spend working on the task over the course of the full task duration by choosing a percentage from the Load % drop-down.



To see a list of resources and how they are allocated, click Resource Chart.

Set task dependencies

- 1. In Gantt Pro view, right-click a task, and choose Edit Task.
- 2. In the Gantt Pro dialog, click the **Dependencies** tab.
- 3. Do any of the following:
- Set predecessor or successor tasks by choosing tasks from the drop-down and choosing an option from the Dependency Type drop-down.

Finish-to-

Start

Task 2 Start date cannot be earlier than Task 1 Due date

Start-to-

Task 2 Due date cannot be earlier than Task 1 Start date

Finish

Start-to-Start Task 2 Start date cannot be earlier than Task 1 Start date

Finish-to-

Task 2 Due date cannot be earlier than Task 1 Due date

Finish

Add another predecessor or successor task by choosing a task, and clicking Add.

Modify task scheduling to achieve the earliest end date

• In Gantt Pro, click Solve.

Insert a task

- 1. In Gantt Pro view, right-click a task, and choose Edit Task.
- 2. Right-click, and choose Insert Task

Insert sub-tasks and sibling, predecessor or successor tasks

- 1. In Gantt Pro, right-click a task, and choose **Edit Task**.
- 2. Right-click, click Insert, and choose any of the following:
 - Sub-task
 - Sibling Task
 - Predecessor Task
 - Successor Task

Remove task information

- 1. In Gantt Pro view, select a task.
- 2. Right-click, and choose Remove.

Manage slack time

In Gantt Pro view, click a task, click Remove Slack, and then do one of the following:

- Click From selected and dependent tasks to remove slack time only from the selected task.
- Click From all tasks to remove slack from all tasks in the map.

Change project dates

In Gantt Pro, click **Move Project**, and then do **one** of the following:

- Click Change start date, choose a new date from the drop-down in the Project Start Date dialog, and click OK.
- Click Change end date, choose a new date from the drop-down in the Project End Date dialog, and click OK.

Export Gantt charts

Export a Gantt chart as an image

- 1. In Gantt Pro, click **Export**.
- 2. Click **Export images**, and click **one** of the following:
 - Chart only to export the chart.
 - Grid and chart to export both grid and chart.
- 3. Click **one** of the following:
- Copy to Clipboard to paste the image in another document.

• Save as file to save as a JPEG, GIF, PNG, TIFF, or BMP.

Export a Gantt chart as a report

- 1. In Gantt Pro, click Export.
- 2. Click **Export reports**, and click **one** of the following:
 - Project report
 - Summaries report
 - Milestones report
 - Tasks report
 - Grid report
- 3. Click **one** of the following:
 - **Preview** to view the report in its own window.
 - Copy to Clipboard to paste the report in another document.
 - Save as file to save a report as a CSV file. You cannot save project reports as a CSV file.

Customize Gantt Pro

- 1. In Gantt Pro, click Options.
- 2. Uncheck the Use the default options for this map box.
- 3. Do any of the following:
 - In the **Project Visualization** area, specify what to do with tasks that don't have an owner, and whether to include regular relationships as start-to-finish dependencies.
 - In the Charting area, choose the level of granularity to determine how far you can zoom in.
 - In the Columns to show in grids area, specify what columns to display in the grid.
 - You can also set topic filtering, specify whether to show topic formatting, specify how text
 displays next to task bars, highlight tasks that could make the project late, specify how
 tooltips are displayed, and specify how the chart is sorted.

Navigate a Gantt chart

In Gantt Pro, click **Go to**, and choose **one** of the following:

- Click Today to go today's date.
- Click **Start of Project** to go to the first day of the project.
- Click End of Project to go to the last day of the project.

Change the Gantt Pro view

In Gantt Pro, do one of the following:

- Click Zoom in.
- Click Zoom out.
- Click Zoom to fit to have the chart span the width of the Gantt Pro window.



You can locate a specific task in Map View from the Gantt Chart by right-clicking the task and choosing **Show Topic in Map**.

Use Analysis Views

What do you want to do?

Create a new View



Modify or remove an existing
View

Save and manage Analysis
View templates

Copy the Analysis View chart

Analysis Views can help you make better decisions by prioritizing and categorizing your mapped topics. This feature allows you to display topics of your choosing on a customizable 2x2 analytic chart, and position them to reflect their relative rankings using the chart's axes values as criteria. Markers are applied to the topics based on their chart positions.

Using this qualitative, visual method (as opposed to a method based solely on numerical data) allows you to evaluate information and ideas using criteria that are not easily quantified. Unlike standard "table generation" products, an Analysis View allows you to dynamically add, remove, and move topics on the chart to reflect your evaluation based on these criteria.



Brainstorming, and then creating an Analysis View as a group activity, provides visual feedback that encourages productive, focused discussion, thus allowing you to reach alignment within your team quickly and easily.

You can create multiple Analysis Views on a map, and these Views can use any map topics you choose. That is, a topic on the map may appear in one, several, or no Analysis Views. This offers you a variety of ways to evaluate distinct or overlapping sets of topics using different criteria. The Views you create are automatically saved with the map, and you can create a template from any view to use its settings again on another map. You can also copy any View as a graphic that you can paste into your map or another document to demonstrate your decision-making process.

This feature is disabled by default. To see these options click the **File** tab, click **Options**, and then click **Add-Ins**.

Create a new View

When you create a new Analysis View, you select the topics to use in the View, configure the View's parameters, and then position the topics in the View to reflect their rankings. Markers that indicate these rankings are automatically added to the topics in the View based on their positions. Once you are finished with your analysis, you can apply the markers shown in the View to the topics on your map.

Select topics to include in the View.

 Select the topics you want to include on your map. See <u>Select topics and objects</u> for hints on how to select multiple topics.

These can be from various locations on your map (they do not all need to be from a single branch) and can include floating topics and callouts. You can add or remove topics from the View later, so you are not "locked into" using only the topics that you add now.

- 2. On the **Advanced** tab, click the **Analysis** arrow, then click **New**.
- 3. When the Analysis Window appears, you'll see a tab for the new View with the topics you selected in the Unsorted Topics list.

If this map already has other Analysis Views defined, they will each display a tab in the Analysis Window.

Configure the view

In the Analysis Window, at the top of the tab for the new View, click **Configure** to set the View's parameters:

View Name - Enter the name for the View. This will be displayed as the View's title.

View Template – Select a template to use its pre-defined configuration settings. You can customize these at will for this View.

View Type – Determines how the axes are configured. 2-Axis and Segmented views allow either quadrant or subjective groupings defined by bands. (Bands divide the chart diagonally into 3 regions used for applying markers, in contrast to the quadrant view with 4 regions.)

Axis Labels or **Quadrant Labels** – Define the criteria you use for ranking your ideas, and the directions of arrows on 2-Axis Views.

Markers – Select the markers that will be applied to topics based on their positions in the View. You can choose from any of the markers that are in the current map's marker list. If your View Type can use bands, you can choose **Bands** and select 3 markers (assigned from lower-left to upper-right), or select **Quadrants** and select 4 markers.

When you are satisfied with the View's configuration settings, click **Done**. You can modify these settings again at any time to fine-tune your View by clicking **Configure** again.

Position topics in the View

Once you have set the initial configuration options, you can move topics from the Unsorted Topics list into the View and then position them to reflect their ranking. You do not have to include all the Unsorted Topics in the View.

To move topics into or out of the View:

- Select one or more topics in the Unsorted Topics list, and then click Move Topic into View.
- Select a topic in the View, and then press Delete.

To rank topics:

 Drag the topics within the View to position them at locations that reflect their rankings based on the axis criteria. You'll see their markers change when you drag them to different regions in the View.

If you have configured your chart to use Bands to define regions for applying markers, you can adjust their position on the View to fine-tune the subjective grouping of your topics. As you adjust them, the topic markers will change to reflect this grouping.

To adjust Bands:

In the Analysis Window, click Adjust Marker Regions below the Unsorted Topics list to begin the
Adjust Bands mode. While in this mode you can drag the handles at the end of each band to
adjust it. Click Adjust Marker Regions again to exit this mode.



You cannot move topics within the View while you are in Adjust Bands mode.

Apply the View markers to the map

To apply the markers you see in the Analysis View to the topics on your map:

- Click Apply Markers below the View.
- If you continue to adjust the topic positions in the View, or if you change the markers used by the View configuration, the markers on your map will be updated automatically.

Modify or remove an existing View

Once you have created an Analysis View, you can modify it by adding more topics to it from the map. You can open the View to further configure it by adding, editing, or removing topics directly in the Analysis Window, or by changing the configuration settings.

Add more map topics to the View

On your map, select the topics you want to add to the View.

On the ribbon's Advanced tab, click the Analysis arrow, then click Add and select a view from the list of existing views.

The topics are added to the Unsorted Topics list for the View. You can add them to the View, position them, and then apply the markers from the View to the map topics.

Open an existing Analysis View

To open the View:

 On the ribbon's Advanced tab, click the Analysis arrow, then click View and select the View in the list.

The View will open in the Analysis Window.

To switch to another View:

In the Analysis Window, click a different View's tab at the top of the window.

Add, edit, or remove topics used in the View

To add a new topic to the list of unsorted topics:

• Click "+" then enter the new topic name. You can then add this topic to the View and position it.

The new topic is also added to the map under a parent topic named after the View Name.

To edit a topic in the Unsorted Topics list or in the View:

Double-click the topic, and edit its name. The topic will also be changed on your map.

To remove a topic from the View, move it back to the Unsorted Topics list:

 Select the topic in the View and press DELETE. This does not remove any markers that were already applied to the topic on the map.

To remove topics from the Unsorted Topics list:

 Select one or more topics in the Unsorted Topics list, and then click "-" or press DELETE to remove it from the list.



This only removes the topic from the current Analysis View: it does not remove it from other Analysis Views in this map or from the map itself. This does not remove any markers that were already applied to the topic on the map.

Change the View Configuration

You can change the configuration settings used by a view at any time.

- 1. In the Analysis Window, select the View, and click **Configure**.
- You can select a different template, or modify the configuration settings manually. If you select a new template or change the View Type, you will be asked whether you want to keep the current topic positions on the View, or discard them.
 - If you keep the positions, the topics remain in the view where you placed them.

 If you discard the positions, all topics in the View are moved back into the Unsorted Topics list.

Click Done.

The view will be updated to show the new configuration settings.

Remove an Analysis View from the map

When you remove an Analysis View from a map, only the view is removed. The map topics and any markers that have already been applied from the view are not affected.

In the Analysis Window, click the View's tab, and then click **Delete**.

Save and manage Analysis View templates

You can save the configuration settings from any View you have created as a template for re-use on other maps. In addition, you can modify any of the standard templates or the templates that you have created, create a new template from scratch, and delete templates.

Save a template

To save the current View configuration settings as a template:

In the Analysis Window, click Save as Analysis View Template.

A new template will be created with the current configuration settings. This template will be available on any map, each time you create a new Analysis View or modify an existing View.

Edit a template

To edit an existing template:

- 1. In the Analysis window click Manage Templates.
- 2. In the Manage Templates dialog, select the template you want to change.
- 3. At the bottom of the dialog, click .
- 4. Modify the information in the Configuration dialog, and then click **Done**.

Delete a template

When you delete a template it is deleted from disk, and is no longer available for use on any map. To delete a template:

- 1. In the Analysis Window, click Manage Templates.
- 2. In the Manage Templates dialog, select the template you want to remove and then click

Copy the Analysis View chart

Once you have conducted your analysis, you may want to show how it was conducted. You can copy any Analysis View chart as a graphic that you can paste into your map or another document to demonstrate your decision-making process.

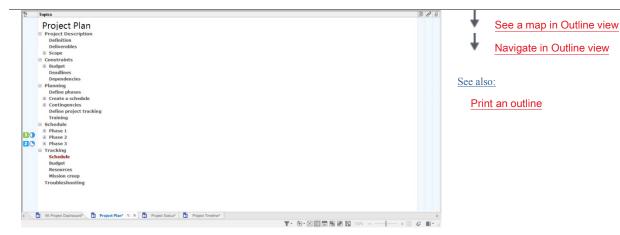
To copy the chart as an image:

• In the Analysis Window, select the View you want to copy, and then click .

The image of the chart is copied to the Clipboard. You can paste the image into your map or into another document.

Use Outline view

What do you want to do?



The Outline view allows you to see maps using a familiar visual form so you can read and navigate through the document from top to bottom. This view can be a helpful reference if you are just beginning to use MindManager.

If you plan to use a linear export format, like Word or Project, the outline view can be used to preview the map in a linear arrangement so you can make any necessary adjustments before the export. If you print the map from this view it will be printed in outline form. See Print an outline for more info. You can use the Topic Numbering option to add numbers to your outline before you print it.



Some map elements are not displayed in Outline view: Fill colors, Relationships, Boundaries, Task info, Labels, and Images.

See a map in Outline view

On the View tab, in the Document Views group, click Outline, or click Outline view on the Status Bar.

The outline view shows a **Topics** column showing the topic text. You can expand or collapse topics using the + and - icons here. In addition, these other columns are shown:



Links column, showing an icon if one or more links are included with the topic

Notes column, showing an icon if a topic contains notes text



Attached files column indicating whether the topic has attached files.

Right-click on any column heading to choose which columns you want to show or hide.

Click on any of these columns to quickly add, remove or modify this information for the current topic.

Use the <u>Detail</u> and <u>Filter</u> commands to control which topics are visible here.

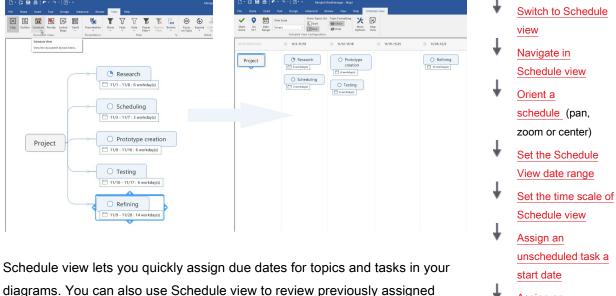
Navigate in Outline view

You can navigate through topics in Outline view using the mouse or the keyboard:

Action	Result
Click on any topic	Selects the topic
UP and DOWN ARROWS	Select next or previous topic
HOME	Selects first sibling topic
END	Selects last sibling topic
LEFT ARROW	Selects parent topic
RIGHT ARROW	Selects first subtopic
SHIFT+click	Select all topics between the current and the previously selected topic
CTRL+click	Select or de-select additional topics individually

What do you want to do?

Use Schedule view



Schedule view lets you quickly assign due dates for topics and tasks in your diagrams. You can also use Schedule view to review previously assigned dates and mark items complete. A count of the number of topics in each column is displayed at the top of the column.

You can customize many elements of Schedule view. You have the option of displaying topic formatting, such as shape or font. You can also choose how to sort topics choose whether to show or hide subtopics.

start date Assign an unscheduled task a due date Mark a task as complete

Customize Schedule view

Switch to Schedule view

To switch to Schedule view from another view, click **Schedule** in the **View** tab **Document Views** group, click **Schedule** in the **Task** tab, or click **Schedule view** in the **Status Bar**.

To return to Map view, click **Map View** on the **Schedule view** tab.

Navigate in Schedule view

You can also navigate through schedules efficiently using the keyboard:

Keystroke	Action
Arrow keys	Select the topic above or below or to the left or right of the current topic. (For left and right arrows, the selection begins at the top main topic after you pass through the central topic to the other side of the map.)
TAB, SHIFT+TAB	Move to the next or previous topic, callout or subtopic. Use this method to visit each topic on the schedule in order of task dates. Floating topics and callouts attached to relationship lines are skipped.
BACKSPACE, SHIFT+BACKSPACE	Move back or forward through the history of topics you have selected.

For more information see Keyboard shortcuts.



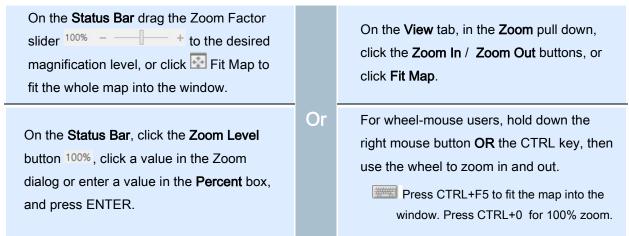
You can navigate to the earliest assigned start date, end date, or today's date by clicking the **Go To** pulldown, and choosing the appropriate option.

Orient a schedule

There are several ways to orient the map in Schedule view.

Set the zoom factor for the schedule

Do **one** of the following:





If you are working on a large schedule, try using the Mini View window.

Set the Schedule view date range

- 1. On the Schedule View tab, click View Tools, click Date Range.
- In the Date Range dialog, click the start date in the From calendar and the end date in the To calendar.

Set the time scale of Schedule view

On the **Schedule View** tab, click **View Tools**, open the **Time Scale** drop-down, and choose a time scale unit.

Assign an unscheduled task a start date

- 1. On the Schedule View tab, click View Tools, in the Show Topics On group, click Start.
- 2. Drag the task from the **Unscheduled** column to the date when you want the task to start.

Assign an unscheduled task a due date

- 1. On the Schedule View tab, click View Tools, in the Show Topics On group, click Due.
- 2. Drag the task from the **Unscheduled** column to the date when you want the task to be due.

Mark a task as complete

- 1. Click the task.
- 2. On the Schedule View tab, click View Tools, click Mark Done .

Customize Schedule view

Rename the view title

- Right-click the view title, and click Edit Title.
 By default, the title is the text in the map's central topic.
- 2. Type a new title in the box, and click **OK**.



You can hide the view title by right-clicking it and choosing Hide.

Show or hide topic formatting

- 1. On the Schedule View tab, click View Tools.
- In the Topic Formatting group, click Hide to hide topic formatting, such as shapes and fonts, and use standard formatting instead.

You can reactivate topic formatting by clicking Show.

Show subtopics

1. On the Schedule View tab, click More Options.

2. Check the Show Subtopics Icon box.

Hide parts of the schedule

- 1. On the Schedule View tab, click More Options.
- 2. Do any of the following:
 - Check Hide Start & End Dates on Topics.
 - Check Hide Non-Working Days.
 - Check Hide Columns With Nothing Scheduled.

Set the calendar location

- 1. On the Schedule View tab, click More Options.
- 2. Click the Calendar Location drop-down, and choose Bottom or Top.

Set how topics are sorted

- 1. On the **Schedule View** tab, click **View Tools**,.
- 2. Click the **Sort Topics** drop-down, and choose **one** of the following:
 - · Sort By Start Date
 - · Sort By Due Date
 - Sort By Topic Text
 - Sort By Priority
 - Sort By Progress
 - Sort By Resources

Set the vertical distance between topics

- 1. On the Icon View tab, click View Tools, and click More Options.
- 2. Specify the distance in the **Distance Between Topics** box.

The default vertical distance is 2 mm. The maximum is 9999.9 mm; the minimum is 0.

What do you want to do?

Use Icon view



Icon view lets you quickly assign icon to topics and tasks to indicate their priority, progress, status, and more. You can also use Icon view to review previously assigned icons. Maps can be viewed a map based on a variety of icons, including Priority, Progress, Flags, Arrows, Smileys, and more. Priority icons are the default marker in Icon view. A count of the number of topics in each column is displayed at the top of the column.

Icon view is customizable. You can move, rename, and delete Icon view columns. There are also options for displaying topic formatting, such as shape or font. You can choose how to sort topic, and choose whether to show or hide subtopics.

In previous versions of MindManager, this feature was called *Priority View*.

Switch to Icon view

- Choose an Icon
 view display mode
- Assign an icon to an uncategorized task or topic
- Recategorize a

 task or topic or
 topic
- Mark a task as complete
- Navigate in Icon view
- Orient Icon view
 (pan, zoom or center)
- Customize Icon view

Switch to Icon view

• To switch to Icon view from another view, click Icon in the View tab Document Views group.

To return to Map view, click Map View on the Icon view tab.

Choose an Icon view display mode

 On the Icon View tab, click View Tools, and choose a category from the Icon Group drop-down menu.

The view is modified based on the icon category chosen and the number of those icons in the map.

Assign an icon to an uncategorized task or topic

 Drag the task or topic from the Uncategorized column to the column associated with the icon type that you want to assign. Recategorize a task or topic

Drag the task or topic from its current icon-type column to another icon-type column.

Mark a task as complete

- 1. Click the task.
- 2. On the Icon View tab, click View Tools, and click Mark Done



Navigate in Icon view

You can also navigate through Icon view efficiently using the keyboard:

Keystroke	Action
Arrow keys	Select the topic above or below or to the left or right of the current topic. (For left and right arrows, the selection begins at the top main topic after you pass through the central topic to the other side of the map.)
TAB, SHIFT+TAB	Move to the next or previous topic, callout or subtopic. Use this method to visit each topic on the map in order of priority. Floating topics and callouts attached to relationship lines are skipped.
BACKSPACE, SHIFT+BACKSPACE	Move back or forward through the history of topics you have selected.

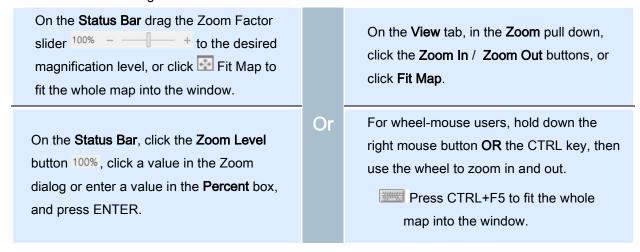
For more information see Keyboard shortcuts.

Orient Icon view

There are several ways to orient Icon view.

Set the zoom factor for Icon view

Do one of the following:



Press CTRL+0 for 100% zoom.

Customize Icon view

Rename the view title

- Right-click the view title, and click Edit Title.
 By default, the title is the text in the map's central topic.
- 2. Type a new title in the box, and click **OK**.



You can hide the view title by right-clicking it and choosing Hide.

Delete Icon view columns

Right-click the column header. and click Delete

Rename Icon View columns

- 1. Right-click the column header, and click **Rename**.
- 2. Type a new name in the Name box, and click OK

Choose a different icon group for Icon view

- 1. On the Icon View tab, click View Tools.
- 2. In the Icon Group drop-down menu, choose an icon group.

Add an icon group to Icon view

- 1. On the Icon View tab, click View Tools.
- 2. In the Icon Group drop-down menu, click **Add New**, and then choose an icon group.

Hide topic formatting

On the Icon View tab, click View Tools, and in the Topic Formatting group, click Hide.

Show subtopics

- 1. On the Icon View tab, click View Tools. and click More Options.
- 2. Check the Show Subtopics Icon box.

Hide a column

 On the Icon View tab, click Collapse button in the column header. To show the column, click the Expand button.

Set how topics are sorted

1. On the Icon View tab, click View Tools.

- 2. Click the **Sort Topics** drop-down, and choose **one** of the following:
 - Sort By Start Date
 - Sort By Due Date
 - Sort By Topic Text
 - Sort By Priority
 - Sort By Progress
 - Sort By Resources

Set the vertical distance between topics

- 1. On the Icon View tab, click View Tools, and click More Options.
- 2. Specify the distance in the **Distance Between Topics** box.

The default vertical distance is 2 mm. The maximum is 9999.9 mm; the minimum is 0.

What do you want to do?

Use Tag view

Tag view lets you quickly visualize the status, progress, and issues of elements within a project or worklfow. You can sort a map based on tag groups within a map. This feature works well within workflow and process planning. A count of the number of topics in each column is displayed at the top of the column.

You can customize many elements of Tag view. You can move, rename, delete, add color to Tag view columns. You also have the option of displaying topic formatting, such as shape or font. You can choose how to sort topics choose whether to show or hide subtopics.

- Choose an Tagview display mode
- Tag an uncategorized task or topic
- Retag a task or topic
- Mark a task as complete
 - Navigate in Icon view
 - Orient Icon view (pan, zoom or center)
 - Customize Tag view

Switch to Icon view

• To switch to Tag view from another view, click **Icon** in the **View** tab **Document Views** group.

To return to Map view, click **Map View** on the **Icon view** tab.

Choose a Tag view display mode

 On the Tag View tab, click View Tools, and choose a category from the Tag Group drop-down menu.

Kanban is the default tag group, which allows you to tag tasks as complete (Done) in progress (Doing), or not yet started (To Do). The view is modified based on the Tag category chosen and the number of those Tags in the map.

Tag an uncategorized task or topic

 Drag the task or topic from the Uncategorized column to the column associated with the tag type that you want to assign.

Retag a task or topic

Drag the task or topic from its current tag-type column to another tag-type column.

Mark a task as complete

- 1. Click the task.
- 2. On the **Tag View** tab, click **View Tools**, and click **Mark Done** .

Navigate in Tag view

You can also navigate through Icon view efficiently using the keyboard:

Keystroke	Action
Arrow keys	Select the topic above or below or to the left or right of the current topic. (For left and right arrows, the selection begins at the top main topic after you pass through the central topic to the other side of the map.)
TAB, SHIFT+TAB	Move to the next or previous topic, callout or subtopic. Use this method to visit each topic on the map in order of priority. Floating topics and callouts attached to relationship lines are skipped.
BACKSPACE, SHIFT+BACKSPACE	Move back or forward through the history of topics you have selected.

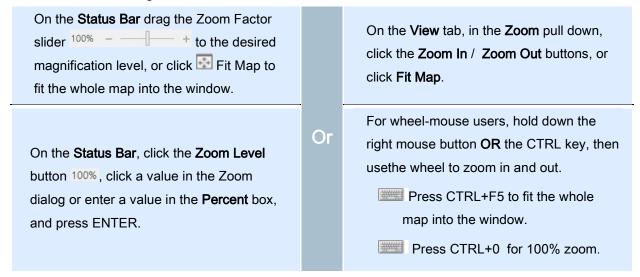
For more information see Keyboard shortcuts.

Orient Tag view

There are several ways to orient Icon view.

Set the zoom factor for Icon view

Do **one** of the following:



Customize Tag view

Rename the view title

- Right-click the view title, and click Edit Title.
 By default, the title is the text in the map's central topic.
- 2. Type a new title in the box, and click **OK**.



You can hide the view title by right-clicking it and choosing Hide.

Set how topics are sorted

- 1. Right-click the column header.
- 2. Click the **Sort Topics** drop-down, and choose **one** of the following:
 - Move Left
 - Move Right

Delete Tag view columns

• Right-click the column header. and click Delete

Rename Tag View columns

- 1. Right-click the column header, and click Rename.
- 2. In the Marker Properties dialog, open the Color picker, and choose a color.

Add color to a Tag View column

- 1. Right-click the column header, and click **Add Tag Color**.
- 2. In the Marker Properties dialog, open the **Color** picker, and choose a color.

Add a tag group to Tag view

- 1. On the Tag View tab, click View Tools.
- 2. In the Tag Group drop-down menu, click Add New, and then choose a tag group.



The color that you choose for tags in the Topic Info Box is used for Tag view columns. Adding a color to a Tag view column overrides the tag color set for the Topic Info Box for that tag type in both Tag view and in topics. For more information, see To change the color to tags.

Hide topic formatting

On the Tag View tab, click View Tools, and in the Topic Formatting group, click Hide.

Show subtopics

- 1. On the Tag View tab, click View Tools, click More Options.
- 2. Check the Show Subtopics Icon box.

Hide a column

• On the **Tag View** tab, click Collapse button in the column header. To show the column, click the Expand button.

Set how topics are sorted

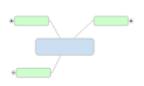
- 1. On the **Tag View** tab, click **View Tools**.
- 2. Click the **Sort Topics** drop-down, and choose **one** of the following:
 - Sort By Start Date
 - Sort By Due Date
 - Sort By Topic Text
 - Sort By Priority
 - Sort By Progress
 - Sort By Resources

Set the vertical distance between topics

- 1. On the Tag View tab, click View Tools, and click More Options.
- 2. Specify the distance in the **Distance Between Topics** box.

The default vertical distance is 2 mm. The maximum is 9999.9 mm; the minimum is 0.

Collapse and expand topics



Collapse or expand topics to help focus on specific topics. The map prints and exports as displayed - collapsed topics are not expanded before printing or exporting.

When viewing the map, you can also Focus on a specific topic.



You can also use keyboard shortcuts to adjust the map's level of detail.



The collapse and expand features are disabled for flowcharts.

What do you want to do?

†

Collapse or expand a topic

Use collapse or expand shortcuts

See also:

Use Map view

Use Outline view

Print

Collapse or expand topics

You can collapse and expand individual topics interactively using the "+" and "-" icons that appear on each topic with subtopics. This can be convenient while working on a map or to open or close individual topics on smaller maps during a meeting.

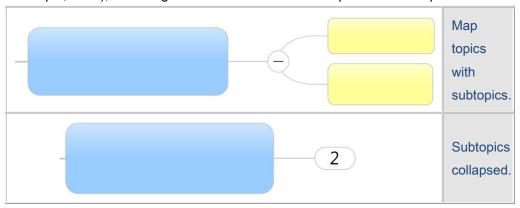


Press CTRL as you click the *expand* or *collapse* icons to cycle through the topic levels one level at a time.

Press SHIFT as you click the expand or collapse icons to show all levels or collapse all levels.

Subtopic counter

When topics are collapsed, the expand icon (previously a "+" symbol) converts to a number icon (for example, 2), indicating the number of unseen subtopics in the collapsed branch:



The subtopic counter is enabled by default. You can disable or re-enable it.

- 1. Right click either the collapse icon ("-") or the number icon to open the context menu.
- 2. In the context menu, uncheck **Count Subtopics** to disable the subtopic counter; check **Count Subtopics** to enable it.

Expand to a specific level

In some views, you expand or collapse topics to a specific level by using the menu and toolbar commands.

- 1. Select a topic or topic(s).
- 2. Do one of the following:





On the **View** tab, in the **Detail** group, click the **Expand** arrow, and then click the command you want to use.

Collapse topic - hides the subtopics but does not collapse them individually.

Collapse branch - collapses all the subtopics individually and then hides them.

Collapse map - collapses all the subtopics and shows only main topics; centers the map

Next Level - expands the topic by one level

1 Level, 2 Level, All Levels - shows 1, 2, or all levels



Using the collapse commands with the Central Topic selected always shows the main (first-level) topics.

Use collapse or expand shortcuts

Action	Keystroke	Click
Show next level (expand one level at a time)	CTRL+D	CTRL + ⊕ or ⊕
Collapse topic	ALT + SHIFT + 0	⊖ _{or} ⊟
Show level 1	ALT + SHIFT + 1	
Show level 2	ALT + SHIFT + 2	
Show level 3 etc. Up to level 9	ALT + SHIFT + 3 etc.	
Show all levels	ALT + SHIFT + . (period)	SHIFT + + or +
Collapse Branch	ALT + SHIFT + , (comma)	SHIFT + O or 🗉
Collapse Map	CTRL + F3	

Work with HTML5 maps

What do you want to do?

The HTML5 map export option allows you to easily share the content of your maps with anyone, leveraging the rich interactive format available in MindManager.

Note that not all map elements are supported. See the HTML map feature support table for more details.

HTML5 maps open in their own windows in your preferred browser.

There are two viewing modes: Standard View and Presentation View.

Exported maps using the new HTML5 format can be opened in any major browser. See Supported environments for details. Read Note

The user interface supports English, French, German, and Russian. The

language is selected based on the system/browser language settings.

Map content can be exported in any language.

Change viewing modes

Navigate a map in Standard

View

Navigate a map in Standard

Navigate a map in Presentation View

Filter HTML5 maps

View topic information in HTML5 maps

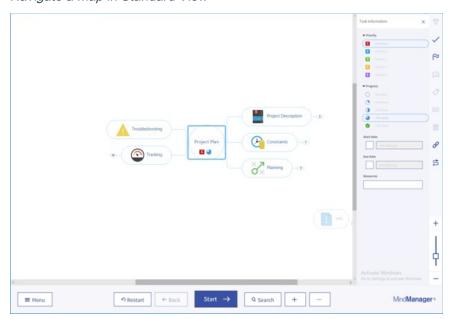
Supported environments

Download release notes

Change viewing modes

There are two viewing modes: <u>Standard View</u> and <u>Presentation View</u>. By default, when you export a map, it opens in Standard View. When you publish a map, it opens in Presentation View. In either view mode, click the <u>Menu button</u>, and choose either <u>Presentation</u> or <u>Standard</u> in the <u>View Mode</u> area.

Navigate a map in Standard View



By default, maps open in Standard View, which allows you to expand and collapse the branches of the map and focus on a particular topic with one click.

When you hover on a map item or the various controls in the window, tooltips inform you of the features under your pointer. Notes, links, and other information displays in a sliding pane on the right.

Overview of the Standard View map window

The Standard View map reader window offers the following navigation and viewing controls:

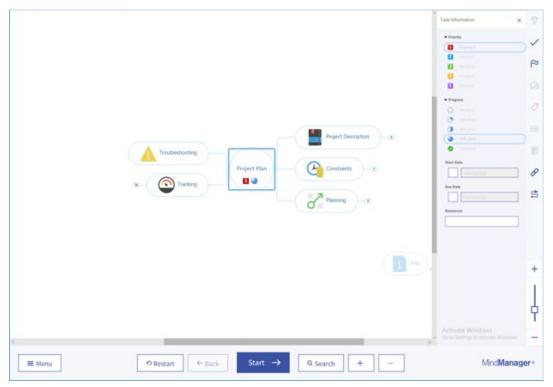
	Main menu	Opens a sliding pane on the left that gives access to settings for switching viewing modes, printing, getting help, and more viewing options.	
	Search	Allows you to search for text in the map.	
Bottom	Collapse	Collapse map and focus on central topic.	
left	Transform	Contains commands for collapsing (Collapse All) and expanding (Expand All) topics; centering map on topic, expanding selected branch, and collapsing all other branches (Focus); adjusting the size of the map in its current display to the dimensions of the window (Fit).	
Bottom right	MindManager link	Opens the official MindManager product web page.	
Right	Filter pane or Content Inspector pane	Allows you to filter a map by icons and tags or to select a topic and view information about its contents.	
Right bottom	Zoom slider	Magnifies or reduces the size of the map in the window.	

Standard View keyboard shortcuts

Navigation	
Select topic above, below, left or right	Arrow keys
Move to top-level sibling topic	Home
Move to bottom-level sibling topic	End

Viewing	
Zoom in	Ctrl+=
Zoom out	Ctrl+- (minus)
Fit map to screen	F5
Scroll the map by small increments	Arrow keys (when no topic is selected)
Center map on topic, expand selected branch, collapse all other branches	F3
Colleges was and frame an acutual tanks	Ctrl+F3 (Windows)
Collapse map and focus on central topic	Ctrl+Esc (Mac)
Collapse branch	Ctrl+0
Collapse branch, open to level 1	Ctrl+1
Collapse branch, open to level 2	Ctrl+2
Collapse branch, open to level 3	Ctrl+3
Collapse branch, open to level 4	Ctrl+4
Collapse branch, open to level 5	Ctrl+5
Collapse branch, open to level 6	Ctrl+6
Collapse branch, open to level 7	Ctrl+7
Collapse branch, open to level 8	Ctrl+8
Show all levels	Ctrl+9

Navigate a map in Presentation View



Presentation View provides easy-to-use navigation controls, so your audience can focus on the diagram content. Presentations start at the top-right topic and move down through the topics on the right side of the map. If there are topics on the left side of the map, the presentation moves from the bottom-most topic on the right to the top-left topic.

For organizational charts, the presentation starts at the top. When there are multiple topics on the same level, focus starts on the right and moves left.

For flowcharts, concepts maps, and floating topics, the presentation goes in the order the topics were created.

When you hover on a map item or the various controls in the window, tool tips inform you of the features under your pointer. Notes, links, and other information displays in a sliding pane on the right.

Overview of the Presentation View map window

The Presentation View map reader window offers the following navigation and viewing controls:

Bottom left	Main menu	Opens a sliding pane on the left that gives access to settings for switching viewing modes, printing, getting help, and more viewing options.	
Bottom	Restart	Restarts the presentation at the first topic.	
center	Back	Moves focus to the previous topic in the presentation.	

	Start	Launches the map presentation.		
	Search	Allows you to search for text in the map.		
	+ (zoom in)	Magnifies the size of the map in the window.		
	- (zoom out)	Reduces the size of the map in the window.		
Bottom right	Help button	Opens this help topic in MindManager Help.		
Right	Content Inspector pane	Allows you to select a topic and view information about its contents		
Right bottom	Zoom slider	Magnifies or reduces the size of the map in the window.		

Filter HTML5 maps

- 2. Enable any of the corresponding check boxes.
- 3. In the Match area, enable either **Any** or **All**.
- 4. Click one of the following filtering options:
 - Show
- Fade
- Hide

Saved filters and queries in MindManager maps can be viewed in HTML5 maps. By default, HTML5 maps open with the save filter or query applied. To view the map without the filter, move the **Saved Filter** slider in the **Filter** pane to **Off**.

View topic information in HTML5 maps

1. Select the topic.

If the topic contains additional information, a button corresponding to that type of information is highlighted on the right side of the window:

Task Information ✓, Icons [™], Comments [™], Tags ^ℳ, Properties [™], Notes [™], Attachments & Links ^ℳ, Related Topics [™].

2. Click the highlighted button to view the details of the additional information in corresponding Content Inspector pane.

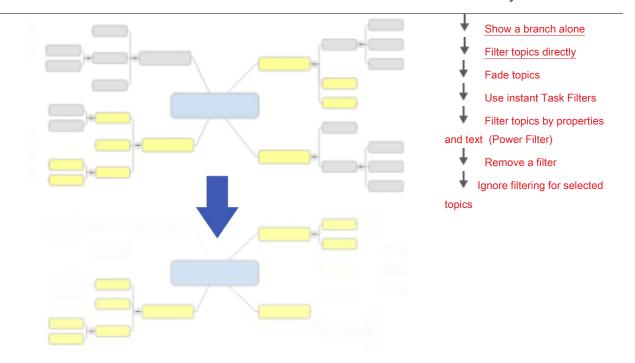
Supported environments

Windows	
Windows 7	I.E. 11Chrome (latest version)Firefox (latest version)
Windows 8.1	I.E. 11Chrome (latest version)Firefox (latest version)
Windows 10	 Edge I.E. 11 Chrome (latest version) Firefox (latest version)
Mac	
OS X 10.9 or greater	Safari (latest version)Chrome (latest version)Firefox (latest version)

Filter Maps

Filter topics

What do you want to do?



Filtering is a convenient way to view only a subset of the topics on your map. This eliminates the need to delete topics that are not currently of interest, but remain valid map content.

Filtering effects how the map is displayed in Map view, Outline view, Linked Maps view and Walk Through view. By default, the filter is also applied to the Gantt Chart view.

There are four ways to filter your map:

- Show branch alone: select a topic and then use this command to show the branch only, (the selected topic and its subtopics) without the central topic, parents or siblings.
- Direct filtering: select a set of topics and then use the Show, Hide, or Fade commands to show, hide, or fade those topics.
- Use instant Task Filters: these are shown in the **Show** or **Hide** pull-down menus, and allow you to filter the map's topics based on specific task conditions.

Use Power Filters: available from the **Show** or **Hide** pull-down menu, this
command lets you specify the filter criteria (including a variety of
properties and text) to use.



You can also use the <u>Quick Filter</u> command to simply show or hide topics coded with a specific icon or tag.

Filtering is cumulative. Topics that are already hidden remain hidden when you apply a new filter. You must remove any filter you've previously applied to apply a new filter to all the map topics. The filter indicator Map is filtered is displayed at lower-left, and the Remove Filter command (on the View tab, and in the Filter group) is active when a filter is active.

When the map is saved, it is saved in a filtered state. All topics are still in the map, but hidden topics are not visible until you remove the filter. You can save a copy of the filtered map - topics hidden by the filter are not included in the new copy of the map.

You can also choose to <u>ignore the filter</u> on selected topics. These "ignored" topics will be identified in Elements list in the Map Index.



You can choose to show or hide other classes of map elements using the Show / Hide command.

Show a branch alone

You can show a branch by itself to focus attention on a specific topic. This is especially useful for presenting larger maps in meetings, to enable the viewer to see the topic's details without being distracted by the rest of the map.

The Show Branch Alone command shows only the selected topic and its descendants.

- 1. Select a topic.
- 2. On the View tab, in the Filter group, click the Branch pull down and select Show Branch Alone.



The filter indicator Show Branch Alone is in use displays at lower left

Show topics one level higher

- 1. On the View tab, in the Filter group, click the Branch pull down.
- 2. Click Show One Level Up.

You can continue to reveal levels in this way until you reach the map's central topic.

Show all topics

To see the hidden parent topics again, do one of the following:

- On the View tab, click Show Other Branches.

Filter topics directly

You can filter topics directly by selecting topics to show or hide, or by selecting a single topic to display, along with all its descendants. To filter topics based on their properties use the Power Filter option.

Show or hide a set of topics

- 1. Select the set of topics or elements on the map.
- 2. On the View tab, in the Filter group, click Show or Hide.

Show shows only those topics that *are* selected (hides all those that are not selected)

Hide shows only those topics *not* selected (hides all those that are selected)

Filtering is cumulative. If you add more topics to the map, or you want to further refine your view of the map, you can filter the remaining visible topics.



You can show or hide specific topic information. For more information, see Show or hide specific types of information.

Fade topics

The Fade command fades topics that meet the filter criteria, while the rest appear unchanged. This allows you to see filtered topics in context of the entire map.

Fade a set of topics

- 1. Select the set of topics or elements on the map.
- 2. On the View tab, in the Filter group, click Fade.
- 3. Choose the criteria type and specify your match criteria.

Filtering is cumulative. If you add more topics to the map, or you want to further refine your view of the map, you can filter the remaining visible topics.

Use instant Task Filters

Task Filters provide a convenient way to see tasks that meet specific criteria. You do not need to select a topic to use these filters - they filter all the topics on the map.

- 1. On the View tab, in the Filter group, click the Show or Hide pull-down.
- 2. Click the Task Filter you want to use.

Topics that match the filter criteria will be shown or hidden.

Filtering is cumulative. If you add more topics to the map, or you want to further refine your view of the map, you can filter the remaining visible topics.

Filter topics by properties and text

The **Power Filter** command lets you filter a set of topics based on a query to match the properties you specify by selecting match criteria. You can choose to:

Show only those topics that match the criteria (hides non-matching topics)

Hide topics that match the criteria (shows only non-matching topics).



You can also use the **Quick Filter** command to show or hide topics that contain a specific icon or tag markers.

Use the Power Filter command

- 1. On the **View** tab, in the **Filter** group, click the **Hide** or **Show** arrow.
- 2. Click Power Filter.
- 3. Do one of the following:

Choose the criteria type and specify your match criteria. Note that you can select a combination of properties from different categories.



Click **Saved Queries** to use match criteria stored as a Saved Query, or to save your current selections as a Saved Query that you can use again.

- 4. Check **Expand branches to show all matches** if you want branches that contain matches to expand automatically.
- 5. Check **Remove filter first** if you want to remove a filter you have already applied. (You'll see the filter indicator Map is filtered at lower-left if you have a filter applied.)
- 6. Click Filter, and then click Hide Matching Topics or click Show Matching Topics.



Filtering is cumulative. If you add more topics to the map, or if you want to further refine your view of the map, you can filter the remaining visible topics.

Remove a filter (show the whole map)

Do one of the following:





If you used the **Show Branch Alone** command to hide other topics, you must click **Show Other Branches** to see the whole map again.

Ignore filtering for selected topics

You can disable filtering on a specified topic (or topics) so that they will not be including in the filtering:

Select the topic or topics, then do one of the following.

Right-click a selected topic and in the context menu, select **Options**, then select **Ignore Filters**.



Right-click a selected topic and on the mini-toolbar, click the **Options** icon and select **Ignore Filters**.



Ignore Filters does not affect topics filtered using **Show Branch Alone**.

View topics ignored by filters

Once "Ignore Filter" has been applied to a topic, it is displayed in the **Map Index** pane **Elements** list in the **Ignored by Filters** group . Need to locate an ignored topic quickly? Clicking a topic in the **Ignored by Filters** group will navigate to that topic in the map.

Use the Map Index

The Map Index pane displays a pivot view that shows your map topics categorized by their markers and elements, providing a fast and easy way to see and navigate to your map's important content.

You can use the controls at the top of the pane to view the Markers list or Elements list, and customize the view. In the Markers list you can also add new markers and marker groups, paste an existing marker group, and add a legend to the map.

See also:

Markers

Task Info

Manage Markers

Use the Map Index pane

To see the Map Index task pane:

Click the Map Index button on the Home or Insert tab in the Markers group.



If you do not see this button on the ribbon, you may need to enable the Map Index add-in.

- To choose a view, click the Markers button or the Elements button.
- The customize the view, click the View pull-down.

To select a topic from the list in your map:

 Click any topic in the pane to immediately select the topic in the map (especially useful for navigating in large maps).



Topics that are hidden by a Filter are not displayed in either list.

Format and Layout

Map layout

options.

The arrangement of topics is controlled by the map's general layout

The layout options let you control:

growth direction - map, tree, org-chart, or flowchart layout



The flowchart layout option is only displayed in the Layout pull down if are working from a flowchart template.

- line style the shape of the connecting lines
- line anchor the originating point on the parent topic for subtopic connecting lines
- spacing the distance from the parent topic to its subtopic and the distance between its sibling topics

You can align a set of topics, and enable an option to snap topics and objects to a pre-defined grid (File > Options > Edit > Drag and drop).

What do you want to do?

Change the general layout of the map

Change the layout of subtopics

★ Align topics

See also:

Reorganize topics

Change the general layout of the map

The **General Layout** options are only available if you have the central topic selected. These options apply to the entire map. You can only set these options in Map View.



The General Layout Options tab is not available if you are using a flowchart.

- 1. Select the central topic.
- On the Format tab, click the Object Format dialog launcher. Or, click the Topic Shape arrow and select Format Topic.
- 3. On the General Layout tab, choose the desired attributes for the map.
 - Organic appearance makes the main topic connecting lines look more like hand-drawn lines.
 - **Display shadow** adds a shadow to the topic connecting lines and topic shapes.
 - Main Topic Line Width controls the thickness of lines connecting the central topics and main topics.
 - Main Topic Spacing controls the spacing between the main topics.

4. Click the **Map Theme** button if you wish to save these settings as theme defaults for this map, or re-set the topic's formatting to the default formatting from the theme.



To distribute main topics evenly around the central topic, right-click on the map background, and then click **Balance Map**.

Change the layout of subtopics

These options apply to the subtopics of the currently selected topic, or to the whole map if you select the Central Topic. You can only set these options in Map View.

Growth direction and line style

- 1. Select the topic(s).
- 2. To change growth direction: On the **Format** tab, click the **Object Format** dialog launcher. Select the Subtopics Layout tab, then click the desired growth direction.
- 3. To change line style: On the **Format** tab, in the **Object Format** group, click **Layout** to change the layout, and click the **Lines** pull down, then select the desired line style.



Or, you can right-click a topic and use the Layout 萒 and Topic Lines 🎜 commands in the mini-toolbar.

READ NOTE

The **Lines** pull down is not available if you are using a flowchart.

For Org-chart topics, the **Layout** growth direction applies to 3 levels by default, but you may choose the number of levels to include. Topics below this level return to Map topics unless you specify a different format for them.

The **Line** style command is disabled for flowchart topics; however, if there are regular map topics included in the flowchart, **Line** style will function *for those topics only*.

More layout options

- 1. Select the topic(s).
- 2. On the **Format** tab, click the **Object Format** dialog launcher.
- 3. Change the settings on the **Subtopics Layout** tab to meet your needs.
 - READ HINT

Some experimentation may be required to get just the right "look" for your map - click **Apply** to see how your settings will look without leaving the dialog.

4. Click the **Map Theme** button if you wish to save these settings as theme defaults for this map, or re-set the topic's formatting to the default from the theme.

Align topics

You can align two or more topics with each other.

- 1. Select two or more topics.
- 2. Do one of the following:

On the **Format** tab, in the **Layout** group, click the **Align** *pull down, then Select* **Align Topics**.



For a flowchart topic: right click, then select Align Topics.

3. Select how you want the topics aligned on the map.

Format topics

The automatic formatting for topics on the map is determined by the map's theme. It's a good idea to decide on an overall look for your map before formatting topics individually. You can apply a suitable Map Theme or modify the current theme to suit your needs.

After selecting a theme you can apply formatting to topics and other objects on the map. The formatting you choose is applied to the currently selected topics or objects.

For information about formatting objects, see Format objects.

To format topics, you can:

- select it and then use the buttons on the ribbon
- right-click a topic to see the mini-toolbar with formatting commands

The mini-toolbar for map topics:

The mini-toolbar for flowchart topics:



 select an object (such as a relationship or boundary) and press ALT+ENTER, or double-click to see the formatting options

When you set new formatting options in the format dialogs, you can save the settings as the new default formatting for that object type in the current map's theme.

To format your map quickly, you can select multiple topics when you apply formatting. The Format Painter lets you transfer formatting between topics, boundaries or relationships. If you find yourself using a particular set of formatting attributes frequently, you can create a <u>topic style</u> with these attributes for easy re-use on other topics.

Some formatting options (font color, fill color) can be used as map markers to classify topics on your map (for example a topic in green text means "Michael's task"), but you can also use these

attributes casually to add visual interest and clarity to your map. See <u>Map markers</u> for more information on using these attributes as markers.

Set the topic shape and color

You can set the topic shape and fill color for individual topics using the commands on the **Format** tab, in the **Object Format** group, or on the mini-toolbar. More options (such as transparency and using a custom shape) are available from the **Object Format** dialog launcher.

You can only set these options when viewing the map.

Change topic shape and color

- 1. Select the topic(s).
- 2. To change the shape, do one of the following:

On the **Format** tab, in the **Object Format** group, click the **Topic Shape** arrow.



For a flowchart topic: right click, then select **Topic Shape**.

List of flowchart shapes

- 3. Then click a topic shape, or click Image from Library ▼.
 - The Library pane will open, displaying the **Topic Shapes** folder.
 - Click a shape in the lower pane.
 - Line color and Fill color do not apply to custom shapes.
 - You can adjust the content margins for any shape.
- 4. To change fill or line color, do one of the following:

On the **Format** tab, in the **Object Format** group, click **Fill Color**or **Line Color**



For a flowchart topic. Right click, then select Fill Color or Line Color.

5. On the Format tab, in the Object Format group, click Fill Color [™] or Line Color [™].



Or, you can right-click the topic and use the mini-toolbar's **Topic Shape** , **Line Color** , and **Fill Color** options.

Your choice of **Line color** effects the topic's connecting lines and shape outline color. The **Fill color** is used inside the topic shape or as a highlight (for topics without shapes). You can set the fill transparency using the **Object Format** dialog launcher.



Fill colors can be used as map markers to classify topics on your map (for example a topic in with red fill means "critical task"). See Markers for more information on using markers.

You can enable or disable gradient fills using the Visual Effects options.

More shape and color options

- 1. On the **Format** tab, click the **Object Format** dialog launcher **S**.
- 2. On the **Shape and Color** tab, choose the desired attributes for the topic.
 - You can set the **Fill Transparency** here.
 - You can use a <u>Custom Image shape</u> ▼.
 - Under Custom image shape click Select Image, then navigate to the image file and click Insert.
 - b. If you want to save this image to the MindManager Library for re-use, click Save Image, navigate to the target folder, then click Save. If you save the image to the default location, it will appear in the Library's Shapes folder.
 - c. The image is used for the topic shape, and will stretch or compress to accommodate the topic text. The topic text is superimposed over the shape.
- Click the Map Theme button if you wish to save these settings as theme defaults for this map, or re-set the topic's formatting to the default from the theme.

Set the topic font

You can set the font face and font attributes for a single topic, and the capitalization style for all topics. The Capitalization settings are map theme settings, and so, they apply to existing topics and all new topics you create. You can set these options when viewing the map or in Outline View.

Change the topic font

- 1. Select the topic (s).
- 2. On the **Format** tab, in the **Font** group use the commands to change the topic font's attributes.



Right-click the topic and use the mini-toolbar commands.

Font colors can be used as map markers to classify topics on your map (for example a topic in green text means "Michael's task"). See Markers for more information on using markers.

Change topic text capitalization

1. Select a topic.

Selected topic	Changes capitalization for
Central Topic in a map	Central topic only
Main Topic in a map or Topic or Decision in a flowchart	All Main Topics only

Callout Topic	All callout topics only
Floating Topic	All floating topics
Subtopic, floating-topic subtopic, callout subtopic	All subtopics at this level and their subtopics

- 2. On the **Format** tab, click the **Font** dialog launcher.
- 3. On the **Capitalization** tab, choose the capitalization style for topics.
- 4. Click the **Map Theme** button if you wish to save these settings as theme defaults for this map, or re-set the topic's formatting to the default from the theme.



You can apply different styles of capitalization to various subtopic levels. For example, if the capitalization was already set for subtopics at level 4 and beyond, setting the capitalization with a level 2 subtopic selected will only affect levels 2 and 3. The capitalization for level 4 and beyond remains unchanged.

Set default placeholder text

- 1. On the **Design** tab, click **Edit Default Text**.
- 2. In the Edit Default Text dialog, enter new placeholder text in the corresponding topic field.

Set topic size

There are a number of options for controlling the size of topics. You can choose to automatically resize topics based on their contents or set a specific topic size for individual topics. You can give a map a cleaner look and make it more presentable by increasing the size of smaller topics to match the width of the largest topic within the same branch. It also aligns the beginning of text in each level.

Size topics based on their contents

- 1. Select a topic or multiple topics, right-click and choose Format Topic.
- 2. In the Format Topic dialog, click the Size and Margins tab.
- 3. Enable the **Automatic Topic Size** option.

Set the size of a specific topic

- 1. Select a topic or multiple topics, right-click and choose **Format Topic**.
- 2. In the Format Topic dialog, click the **Size and Margins** tab.
- 3. Enable the **Fixed Topic Size** option and set the topic size in the **Height** and **Width** boxes to create topics of a specific size.

If the amount of content exceeds the size of the topic, the content is truncated and a blue triangle appears in the lower right corner of the topic. You can view the whole topic by hovering over the icon.

Match topic widths

Do one of the following:

Select a topic Select multiple topics, then branch, then on the On the Format tab, click on the Format tab, click the **Match Width** arrow, Format tab, click the Or the **Match Width** arrow. Or and choose Match Width Match Width arrow, and and choose Match Width for All Topics choose Match Width for for Selected Topics. Selected Branch(es).

To reset topics to their original width, choose Reset Widths.

Set default line thickness

You can set the default connector-line thickness in central topics, main topics, floating topics, callout topics, org-chart topics, and all levels of subtopics.

- 1. Right-click the central topic, and choose Format Topic.
- 2. In the Format Topic dialog, click the General Layout tab.
- 3. Choose one of the following options from the Line thickness applies to drop-down list:
- All Topics applies to lines to all topics
- Main Topic Lines applies to lines between the central topic and main topics
- Organic Lines thickness settings for topic levels below the central topic are ignored

Set default topic style

You can set the default style for topics of the same type.

- 1. Select the topic containing style to set as the default style.
- On the Format tab, click Set Default Style.

To reset the topic style to the default theme, select a topic and click **Reset to Default** on the **Format** tab.

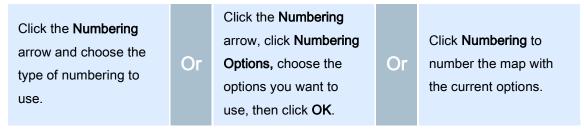
Number topics

The Topic Numbering command can be used in Map View or Outline View to add a numbering scheme to the subtopics of the selected topic. If the central topic is selected the numbering is applied to the whole map.



Numbering is disabled for flowcharts.

- 1. Select one or more topics whose subtopics you want to number. (Numbering can only be applied to topics with subtopics).
- 2. Do one of the following on the Insert tab, in the Topic Elements group:



Numbering is added at the start of the topic text for all subtopics up to the specified depth. If you add, remove, or reorganize topics your map will be automatically renumbered. If you switch to Outline View, the same numbering scheme will be used for your outline.



Once numbers are added they cannot be directly edited. (You can still edit the rest of the topic text.) If you want to delete the numbers you must use the Remove Numbering command to delete the numbering.

READ HINT

You can apply different types of numbering to different sections of your map.

You can change, expand or reduce the numbering scheme at any time by repeating the initial numbering steps. If you add numbering for a topic (or the entire map) that already contains numbered subtopics, the new numbering scheme will override the old and the subtopics will be renumbered.

Remove numbering

- 1. Select the root topic for the numbering.
 - If you numbered the whole map or outline at once you should select the central topic.
 - If you numbered a portion of your map or outline, and you want to remove this portion's numbers, you must select the root (source) topic of the numbered section.
 - If you numbered the whole map or outline first, and then re-numbered several sections separately you can remove all the numbering by selecting the Central Topic.

2. On the **Insert** tab, in the **Topic Elements** group, click the **Numbering** arrow, then click **Remove Numbering**.

Notes on exporting numbered maps ▼

Numbering is included:

- When you Print the map or outline.
- When you copy the topics to a new map.
- When you export the map to a PDF file, a graphics file (BMP, GIF, JPG, etc.) Excel spreadsheet, or a Word document.



You can choose your own numbering scheme that is independent from the map numbering during Word Export.

Numbering is ignored:

- When you export tasks to Outlook or Project.
- When you save your map as an <u>outline</u> (using the Save As command) in either plain text or html format. Numbering is replaced by automatic numbering (1, 1.1, 1.11 etc...)
- When you save your map as Web pages: The text is not numbered (or numbered independently if you use one of the web export options to add numbering).

Include hidden topics in numbering

By default, hidden topics are excluded from topic numbering. However, you can modify map settings to include topics hidden by filters.

1. Do **one** of the following:

On the **File** tab, click **Info**, and then click **Map Settings**.

Right-click the map's workbook tab, and choose **Map Settings**.

2. Disable the Renumber topics when there are topics are hidden by filters check box.

Topic size and margins

You can set the topic size and margins for individual topics using the **Object Format** dialog launcher. You can only set these options in Map View.

- 1. Select the topic(s).
- 2. On the Format tab, click the Object Format dialog launcher.

3. On the Size and Margins tab, choose settings to apply to a standard topic shape. If a Custom shape is used, you'll see a preview image where you can set the text area. Padding applies to topics with images. The measurement units used (in or mm) are set using MindManager's General options.



Some experimentation may be required to get just the right "look" for your map - click **Apply** to see how your settings will look without leaving the dialog. Also, some settings, such as **Preferred Width,** which controls the width at which text wraps, will not display until you add content.

4. Click the **Map theme** button if you wish to save these settings as theme defaults for this map, or re-set the topic's formatting to the default from the theme.

Topic text and image alignment

You can set the topic text and image alignment for individual or multiple topics in a variety of ways. You can only set these options in Map View.

Change the alignment of topic text and images

- 1. Select the topic(s).
- 2. For text alignment, on the **Home** tab or **Format** tab, in the **Font** group, click the **Alignment** arrow and select how you want the text aligned within the topic.



Or, you can right-click the topic and use the alignment command in the mini-toolbar.

3. For image alignment, in the **Format** tab, **Layout** group, click the **Align** pull down, then select **Align Image** to set the options.



You can drag an image inside the topic to change its placement.

You can click the **Theme** button here if you wish to save these settings as the formatting defaults for this map, or re-set the topic's formatting to the default for the theme.

Format boundaries and relationships

When you select a boundary or a relationship, the formatting options on the Format tab are enabled, and you can use these to change the object's appearance. See Boundaries and Relationships for information on further modifying these objects.

Additional options are available when you right-click on the object, and then click Format Boundary or Format Relationship (or double-click, or select the object and press ALT+ENTER).

1. Select the formatting options you want to use.

- To see how the boundary or relationship will look, click Apply.
- Click the Map Theme button if you wish to save these settings as formatting defaults for this map, or re-set the object's formatting to the default from the theme.

Use the Format Painter

The **Format Painter** transfers format settings from one object (the source object) to another (the target object). Usually, you will paint the format to another object of the same type (e.g. from one topic to another, or from one text selection to another), but you can also paint the format to a different object type (e.g. from a boundary to a topic). In the second case, only the types of formatting supported in the target object will be applied.

Format a single object with the format painter

- 1. Select the object or text whose format you want to duplicate (the source object).
- 2. On the **Home** tab, in the **Clipboard** group, click **Format Painter** . You'll see the cursor change to a paintbrush .



Or, you can right-click the topic and use the Format Painter command in the mini-toolbar.

- 3. Paint the format to the target object(s):
 - Click on the target object.
 - For text, drag to select the target text.

Format multiple objects with the format painter

- On the **Home** tab, in the **Clipboard** group, click **Format Painter** , then press CTRL and click to paint the same format on several objects.
- On the **Home** tab, in the **Clipboard** group, double- click **Format Painter**, then click to paint the same format on several objects.

Stop the Format Painter

Click on an empty space on the map.



If you find yourself using the Format Painter to apply the same formatting to a large part of the map, you may want to consider creating a <u>topic style</u> or modifying the map's <u>theme</u> settings (the automatic map formatting) to achieve the same effect more easily.

Remove formatting

You can remove the formatting that you have applied to any map object and return it to the default formatting (determined by the map's theme).

1. Select the topic or the text within a note or topic.



Or, for regular map topics, you can right-click a topic and use the **Clear Formats** command in the mini-toolbar. (This command is not present on the flowchart topic mini-toolbar.)

2. On the **Home** tab, click the **Delete** button, and then select **Formats**.

Format the map background

MindManager comes with a wide assortment of suitable background images designed to enhance the look of your map. You can add these background images from the MindManager **Library** pane, or use your own image from a file. You can combine a background image with a solid color by adjusting the image transparency.

Add a background from the Library

- 1. Right-click the map background, click Background, and then click Assign Image from Library
- 2. In the **Library** pane, locate the image you want to use.
- 3. Click the preview image in the lower part of the **Library** pane to add the image to your map.

Add a background image from a file

You can use a background image from a file in one of the following formats:

bmp, emf, wmf, gif, jpeg/jpg, pcx, png

1. Do **one** of the following:

On the **Design** tab, click **Edit Background**.



Right-click the map background, click **Background**, and then click **Background Properties**.

- 2. Click **Select Image** and navigate to the image file.
- 3. You can drag an image from a file list (for example, from Windows Explorer) into the image preview area in the dialog to add it as a map background.

Change background color, transparency and image tiling

1. Do **one** of the following:

On the **Design** tab, click **Edit Background**.



Right-click the map background, click **Background**, and then click **Background Properties**.

- 2. Select the background Color if desired.
- 3. Select a background image file. (If you've already selected an image, you'll see its name here.) You can use transparency to "fade" it so it doesn't detract from the map.

- 4. The image will be tiled according to the **Tile options** you select.
- 5. Set the image transparency (0% is opaque).



The background image is drawn on top of the color, so if you make the image semi- transparent, the background color will show through.

Remove the background

1. Do one of the following:

On the **Design** tab, click **Edit Background**.



Right-click the map background, click **Background**, and then click **Background Properties**.

- 2. To remove the image, click Remove Background Image.
- 3. To remove the color, set the Color to None.

Use topic styles

A topic style is a set of formatting attributes that can be saved with a unique name, and repeatedly applied to topics. Topic styles are saved with the map, and can be applied and managed from the **Topic Styles** pane. You can also apply topic styles from the **Object Format** group on the **Format** tab.

Creating a named topic style makes a distinct set of formatting attributes easily available, and the topic style can easily be applied to many topics (in contrast to using the Format Painter, which is suited to copying the format from a single topic to another). The formatting used by a topic style can be modified, and all topics using the style will reflect the new formatting.

The map's default format settings, including its topic styles, can be saved in a Map Theme and re-used on other maps.



The Map Index task pane Elements list displays all the topics on your map that are formatted by topic styles.

What do you want to do?

Display the Topic Styles pane

Create topic styles

Apply and use topic styles

Modify and manage topic styles

Reuse topic styles on another map

Display the Topic Styles pane

- On the Format tab, in the Object Format group, click Topic Style, then click Organize Topic Styles.
- On the Status Bar, click Task Panes, then click Topic Styles.
- For a flowchart: right-click the topic, select **Topic Styles**, then click **Organize Topic Styles**

Create topic styles

You can create a Topic Style from a topic that you've already formatted.

- 1. Format a topic with the attributes you want to use. (These include the topic font, shape and color, alignment, size and margins, and subtopics layout.)
- 2. Select the formatted topic.

3. Do one of the following

On the **Display** tab, in the **Object Format** group, click the **Topic Style** arrow, and then click **New Style From Selected Topic**.



For a flowchart topic: right-click the topic select **Topic Styles**, then click **New Style From Selected Topic.**



If the Topic Styles pane is already open, at the top of the pane, click New style from selected topic.

The new style will appear in the **Topic Styles** pane with a unique, generic name. You can rename, modify, or remove the style after it has been created.

Use topic styles

You can apply topic styles using commands on the **Format** tab, in the **Object Format** group, or from the **Topic Styles** pane.



To open the **Topic Styles** pane, on the **Format** tab, click the **Topic Style** pull-down, and then click **Organize Styles**.

Apply a topic style

- 1. Select one or more topics.
- 2. Open the Topic Styles pane.
- 3. Click the style you want to use for the selected topics.

When you apply a topic style, any formatting you have already applied is not changed. If you want to topic to reflect only the formatting of the topic style you should first remove the topic's formatting.



You cannot apply a topic style to override the font and fill colors for topics created or modified in Review Mode.

Remove a topic style from a topic

- 1. Select one or more topics.
- 2. Do one of the following:

In the Topic Styles pane, under Selected Topic , click Clear	Or	On the Format tab, in the Object Format group, click the Topic Style arrow, then click Clear	OR	For a flowchart topic: right-click the topic select Topic Styles, then click
topic, click Clear		Topic Style.		Clear Topic Styles.

The topic will display the default Map Theme's formatting.



If you no longer wish to use a topic style on the map you can delete it.

Select all topics that use the same topic style

- 1. In the **Topic Styles** pane click the style's arrow.
- 2. Click Select all topics that use this style.



You can use topic styles as a criteria to choose which topics to display. For more information, see Add a SmartRule.

Modify and manage topic styles

You can manage topic styles from the Topic Styles pane.

Modify a topic style

- 1. Select a topic that uses the style you want to modify, and format it with the attributes you want to use.
- 2. Do one of the following:

In the Topic Styles pane,		On the ribbon's		For a flowchart topic:
click the arrow for the style	Or	Format tab, click the	OR	right-click the topic
you want to change.		Topic Style arrow.		select Topic Styles.

3. Click Update Style to Match Selected topic.

The style will reflect the new formatting attributes, as will topics that use this style.

Delete a topic style

- 1. In the **Topic Styles** pane, click the arrow for the style you want to delete.
- 2. Click Delete.

The topic style will be removed from the **Topic Styles** pane, and topics that use this style will return to automatic formatting.

Rename a topic style

- 1. In the **Topic Styles** pane, click the arrow for the style you want to rename.
- Click Rename.
- 3. Enter the new name for the style and click **OK**.

Reuse topic styles on another map

If you want to reuse the topic styles of the current map on other maps, you can <u>create a Map Theme</u> that includes the topic styles along with the default format settings for map objects.

When you <u>create a new map using this theme</u>, or <u>apply the theme</u> to an existing map, the topic styles will appear in the **Topic Styles** pane.

If you <u>create a Map Template</u> from the current map, the topic styles are saved as part of the template, and will be available when you create a new map using that template

Apply and modify map themes

A map's overall appearance or default "look" is determined by its underlying Map Theme.

A map theme is a collection of the default format settings used for the various types of elements your map. When you add a new map object, its appearance is determined by the map's theme. The Map Theme contains settings for:

- Central topic, main topics and subtopics (by level)
- Org-chart topics and their subtopics
- Callout topics and their subtopics
- Floating topics and their subtopics
- Floating Org-chart topics and their subtopics
- Flowchart topics (via the settings for floating topics), callouts, and relationships
- Boundaries
- Relationships
- Map background
- Notes (the default font)

The Map Theme may also include a set of topic styles.

If you want to change the default format settings for the current map you can modify the theme, or you can apply a different Map Theme.

Each new map you create uses the theme of the blank map or the template you use to create it.

Once you've chosen the map's theme you can then go on to change individual topics by applying topic styles or formatting. This individual formatting overrides the theme's automatic format settings and persists if you modify the current theme or assign a new theme to the map. (Note that you can remove the map's formatting first if you want to return all topics to their automatic formatting.)

You can use the Easy Editor or Advanced Editor in Map Theme view to modify the default theme settings for a map, Map Template, or Map Theme. This view shows an overview of all the current theme settings and lets you change them interactively.

In the Advanced Editor you'll see a generic map that displays all the map objects formatted in accordance with the current theme settings.

What do you want to do?

Apply a Map Theme

Use the default Map Theme

Modify map themes

Open Map Theme Easy
Editor

Open Map Theme AdvancedEditor

Create a theme from the current map's default format settings

***** + +



This view allows you to select an object and set the automatic formatting options for it, as well as setting the format for the map background and the automatic notes font.

Apply a Map Theme

You can apply a different Map Theme to your map at any time. If you have already applied formatting to individual topics, these topics will not be changed by applying a new Map Theme unless you first remove the formatting you've applied. (see below)

On the **Design** tab, click a theme in the **Theme** gallery.
 Click a theme name to see a generic preview of it.



In <u>Linked Maps View</u>, you can quickly apply a new theme to one or more linked maps. Select the maps, then, in the **Assign** group, click **Map Themes**. Select the style in the organizer and click **Apply**.

Clear the map formatting

When you apply a new Map Theme, the theme's settings will not override any formatting that you have already applied. If you have already been working on the map for a while and decide to use a different theme, you may wish to clear the formatting that you've applied before applying the new theme.

- Select the topics, boundaries or relationships whose formatting you want to clear (press CTRL+A
 to select all objects).
- 2. On the **Home** tab or on the **Format** tab, in the **Font** group, click **Clear** $\stackrel{\text{def}}{\longrightarrow}$.



Use the default Map Theme

A default Map Theme, <code>Default.mmas</code>, is provided with MindManager. You can reset the map to use this default theme, modify it like any other theme, or use the theme of the current map as the default from now on.

Reset the current map to the default Map Theme

On the Design tab, click the Themes arrow, and then click Reset Current Map Theme to Default.

Replace the default Map Theme with the style of the current map

On the Design tab, click the Themes arrow, and then click Make Current Map Theme the Default.

A "backup" copy of this theme, Default (original).mmas, is included with MindManager

Modify map themes

Modify the theme of a Map Template

- Click the File tab, click Open, and then in the file type drop-down list, select MindManager Template.
- 2. Navigate to the template file and click Open.
- On the **Design** tab, click **Edit Theme**.
 Use either the Easy Editor or Advanced Editor in Map Theme view to set the new automatic formatting options.

Modify an existing Map Theme

- Click the File tab, click Open, and then in the file type drop-down list, select MindManager Theme.
- Navigate to the theme file and click Open.
 The Theme opens in the Map Theme view. Use either the Easy Editor or Advanced Editor in Map
 Theme view to set the new automatic formatting options

Save new theme settings on-the-fly

Use the **Map Theme** command in any of the format dialogs to save the formatting of the selected topic, boundary, or relationship as the new style default.

In any format dialog, click Map Theme, and then click Save as Default Theme for This Map.

What gets saved? ▼

To save	Click	Dialog (click Map Theme, Save as New Theme Default)	
Topic formatting	Format tab, Object Format dialog launcher	Format Topic	
Font formatting	Format tab, Font dialog launcher	Format Font	
Boundary formatting	Insert tab, Boundary, Format Boundary	Format Boundary	
Relationship formatting	Insert tab, Relationship, Format Relationship	Format Relationship	

READ NOTE

When you save the topic formatting as a new theme default, *all* the topic formatting settings are saved, not just the settings in the current dialog.

Any topics or objects using the default theme formatting (without additional formatting applied) and any topics or objects you add will display using the theme's default formatting.

Open Map Theme Easy Editor

- 1. Open the map.
- 2. On the **Design** tab, click **Edit Theme** to open Map Theme view.
- 3. In the Editor Type area, click Easy Editor.

The Advanced Editor pane opens on the left side of the workspace.

When you've finished editing, you can update your current map's theme by clicking **Apply and Close**, or save the theme for reuse by clicking **Save to Gallery**,

Modify text and fonts in the current map's theme

Do any of the following:

- Choose a font for the central topic from the Heading Font drop-down list.
- Choose a font for the map with the exception of the central topic from the Body Font drop-down list
- Choose how font size decreases between topic levels in the map from the Cascading Text Sizes
 drop-down list.
- Choose a text color from the **Text Color** drop-down list.

Modify topic shapes in the current map's theme

Do any of the following:

- Choose a shape for the central topic from the Central Topic drop-down list.
- Choose a color for the central topic from the Central Topic Color drop-down list.
- Choose a shape for floating, main, and callout topics from the Floating, Main & Callout Topics
 drop-down list.
- Choose a color for floating and main, topics from the Floating & Main Topics drop-down list.
- Choose a shape for the subtopics from the **Subtopics** drop-down list.
- Choose a color for the subtopics from the **Subtopic Color** drop-down list.
- Choose an outline color for topics from the **Outline Colors** drop-down list.
- Choose a topic size from the Topic Size drop-down list.
- Choose an option to set the space between topics from the Map Density drop-down list.

Modify topic lines in the current map's theme

Do any of the following:

- Choose a connector line style from the Topic Connector Style drop-down list.
- Choose a connector line thickness option from the Line Thickness drop-down list.
- Choose a connector line pattern option from the Line Pattern drop-down list.

Modify the background in the current map's theme

Do any of the following:

- Choose a background color from the Color drop-down list.
- Choose an image for the background by clicking Select Image. You can adjust the background image transparency and set tiling options.

Open Map Theme Advanced Editor

- 1. Open the map.
- On the **Design** tab, click **Edit Theme** to open Map Theme view.
- In the Editor Type area, click Advanced Editor.

The Advanced Editor pane opens on the left side of the workspace.

When you've finished editing, you can update your current map's theme by clicking **Apply and Close**, or save the theme for reuse by clicking **Save to Gallery**,

Modify an object's theme

If you see the object whose theme you want to change, double-click on the sample object, choose the formatting options from the Style Topic Layout dialog, and click **Apply**. You can set the automatic formatting for:

- topic font and text including the automatic text for new topics, such as subtopics, in the **Font** group.
- topic format, such as a shape's fill and color or a connector line's pattern and color, in the **Object Format** group.

If you need help identifying an object, use the list in the upper left to locate it on the **Select style group to** modify pane.

You can also modify formatting for boundaries and relationships in a theme. In the **Select style group to modify** pane, choose **Boundaries** or **Relationships**, and modify any of their properties

Set the number of subtopic levels in a theme

Adjust the slider in the Define number of style levels pane.

Select a specific subtopic level to format

• Click the sample topic at that level or choose an option from the Select style group level pane.

Return an object to the system default formatting settings

Click Reset Object Theme. Then you can start over and apply new settings.

Modify the theme of the background

- 1. In the More Options group, click Edit Background.
- 2. In the Background dialog, do any of the following:
- Choose a background color from the Select color drop-down list.
- Choose an image for the background by clicking Select Image. You can adjust the background image transparency and set tiling options.
- Click Apply.

Modify the automatic font settings for topic notes

- 1. In the More Options group, click Notes Theme.
- 2. In the Format Notes dialog, choose a font, font size, and color.
- Click Apply.

Add a description or comment to a Map Theme

- 1. Click the File tab.
- Click Info.
- 3. Click Properties.
- 4. In the Properties dialog, enter a theme description, such as its intended use or the project it was designed for, in the **Comments** field.

Create a theme from the current map's default format settings

You can save the current map's theme to the folder used by the organizer, or to a different location.

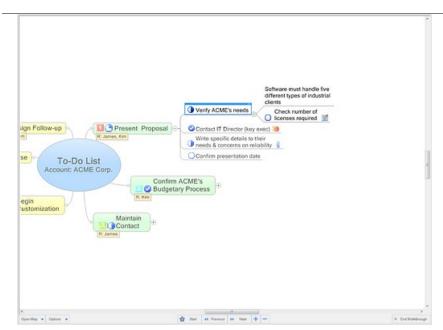
- 1. Adjust the map's default formatting settings to your liking.
- 2. On the **File** tab, click **Save As**, click **Save As** again, click **Save As Type**, and then click **MindManager Map Theme**.
- 3. Save the file.
 - READ NOTE
 - READ HINT

You can also create Map Themes and manage them from the Organizer.

The Theme you save will not appear in the Organizer unless you save it in the default location.

Presentations

Use Walk Through View



See also:

Collapse and expand topics

Use Map View

Keyboard shortcuts

The Walk Through view is an alternative view that allows you to browse with a minimum of distraction. It switches from normal Map View to a full screen mode for maximum map space and hides all menus and toolbars. It also has options for automatically collapsing topics to make your presentation run more smoothly. The presentation toolbar at the bottom of the screen lets you navigate through and between maps. You can also use the shortcut keys in this mode to view, navigate, edit and even create new maps on the fly.

Start Walk Through view

On the View tab, in the Presentation group, click Walk Through.

The buttons across the bottom of the Walk Through screen control the view:

Start resets the map to presentation-ready state: Collapses all main topics, centers the map, and switches focus to the central topic

Previous (or press SHIFT+TAB) moves backward (inward, then counter-clockwise) to the next collapsed topic and expands it.

Next (or press TAB) moves forward (outward, then clockwise) to the next collapsed topic and expands it. Topics are expanded as you specify in the **Options** (below).

Zoom in, out (or press CTRL+'=' and CTRL+'-')

Open Map shows a menu with a list of all open maps. Use this list to switch between open maps or open a different map.

Options:

- Expand options control whether selected main topics are expanded one or two levels.
- Visit All Topics causes the **Next** button to visit each topic (normally the last level of topics is skipped). Topics are expanded one level at a time.
- Auto-Collapse Topics automatically collapses topics when a new topic is selected. This
 option can make your presentation run much more smoothly with fewer mouse clicks.
- ribbon displays the ribbon. this can be convenient for temporary access to commands.
- Transparent Fade Out fades topics that are not the current focus.
- **Highlight Topic, Highlight Topic Frames** highlights either the topic text or the topic frame when you rest your pointer over a topic.



If you are zoomed out to 50% or less, the blue topic frame and the Quick Add tabs will not be displayed.

Show / Hide - hides classes of map elements that may prove distracting without having
to edit the map to remove them (similar to using the Show / Hide command). Check only
the map elements that you want to display during your presentation.

End Walk Through closes the presentation and returns to the regular Map View (or press ESC).

Editing during your presentation

You can still edit the map in Walk Through view - use the MindManager shortcut keys to add topics. For temporary access to commands you can switch on the ribbon by clicking the **Options** button.

Switching to other maps or applications during a presentation

In Walk Through view the MindManager window is automatically maximized and hides the Windows task bar.

Its a good idea to open all the maps you need in your presentation before you start. Switching between maps is smoother (requires fewer steps) than opening them.

Likewise, you should open any related applications you may want to switch to during your presentation before you start. Switching to a different application is smoother than opening one. The exception are applications that can be launched by links on your map. These open automatically as soon as you click the link icon.

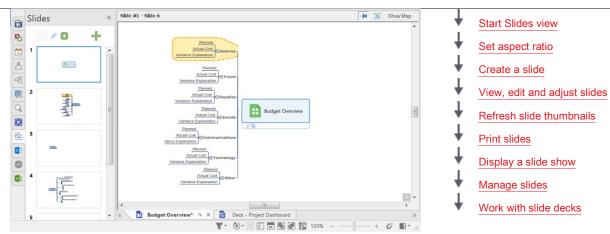
Since the Windows task bar is usually hidden in this mode, you must use ALT+TAB to switch to a different active application (Hold down the ALT key and continue to press TAB to cycle through all open applications.) When you return to MindManager it will still be in Walk Through view.



Use the Timer feature to keep track of the length of your presentation.

Use Slides View

What do you want to do?



In Slides view, you can create and manage a set of slides for a map. Each slide can show a branch or sub-branch of the map, expanded or collapsed as you desire. This can help focus attention on a specific part of the map for presentation or printing.

When you start Slides View, the Slide pane appears at the left of your screen. This is where you create and manage your slides. Topics with associated slides are marked with a special icon .

You can save slides in a map as a MindManager Slide Deck (MDECK) file. Deck files can be opened and modified in MindManager 21 (Licensed or with active Trial).



The Map Index task pane Elements list displays all the topics on your map that contain slides.

Start Slides View

• On the View tab, in the Presentation group, click Slides.

The Slides pane will appear at the left of the screen.



If your map already contains slides, right-click a slide icon on the map, and then click **Show Slides**. You can display the filter indicator at lower-left to show if a <u>filter</u> is active, or if some map elements are <u>hidden</u> using the Filter option **Show filter overlay in slides**.

Set the aspect ratio for slides

You can change the aspect ratio for slides. Any changes you make are applied to all slides in the map. The default aspect ratio is 16:9.

- In the Slides pane, click the Slide Settings button Q, choose Aspect Ratio, and choose one of the following:
 - 16:9
 - 4:3

Create a slide

Do **one** of the following:

- To create an empty slide, click the New Empty Slide button in the Slides pane.
- To create a slide from a topic, right-click a topic in the map, and choose Create Slide.
- To create a slide for every topic in the map, do one of the following:
 - In the Slides pane, click the Slide Settings button (2), and choose Auto Create Slides.
 - On the View tab, in the Slides pull down, choose Auto Create Slides.
- To create a slide from selected map content, select the content, then do one of the following:
 - In the Slides pane, click the Slide Settings button , and choose Create Slide from Selection.
 - On the View tab, in the Slides pull down, choose Create Slide from Selection.
- To create a slide from a topic container and its contents, right-click the topic container and choose Create Slide.
- To create a slide from an object, right-click the object and choose Create Slide.
- To create a duplicate of a slide, right-click the slide thumbnail in the Slides pane and choose
 Duplicate Slide.

You can also create a new slide by dragging a piece of content from the map to an empty area of the **Slides** pane.

The new slide thumbnail will appear in the Slides pane. Each slide you create is the same size, but you can adjust the size and position of its content.

On the map, the topic is marked with a special icon that indicates that this topic has a slide associated with it. If the topic has more than one associated slide, it is marked with a multiple slide icon.

A topic can appear on multiple slides, either alone, or on a sub-branch on another slide.

View, edit and adjust slides

When you click a slide thumbnail in the Slides pane it is displayed in the main window. The title bar at the top of the main window displays the name of the slide you reviewing, the Pin button to unpin the

boundary and adjust the size and position of the slide content, and a button to return to viewing the whole map.

When you format a connected topic or modify an object in Slide or Map view, those changes are reflected in both views. However when you reposition connected topics or objects in Slide view, their position in Map view is not changed.

To return to the full map view, click **Show Map** at the top of the main window when viewing a slide.

Edit slide content

You can change how branches are displayed (<u>expanded or collapsed</u>) on the slide, and edit topics using the normal editing commands.

Add content from maps to slides

You can add topics and objects to slides, whether the slide is empty or already has content, by dragging the content from the map onto a slide in the Slides pane.

Add slide-only content

You can add topics and objects to slides that do not appear in the map.

1. In the Slides pane, click the slide.

The view switches to Slide view.

2. On the **Insert** tab, use the options in the **Objects** group to add a floating topic, shape, Smart Shape, relationship, boundary, text box or image.

Change the size and position of slide content

When you are viewing a slide, the gray box indicates its boundary. The boundary is like a window through which you view the map content. Slide boundaries are fixed or "pinned" as indicated by the Pin button on the Slides view title bar. In "pinned" mode, the zoom and pan controls adjust your view of the slide. When boundaries are unpinned, you can zoom and pan to adjust the position and size of the content on each slide.

It's easiest to adjust slide content when you can see the entire slide. Before you begin, pan and zoom the view to see all 4 boundaries of the slides you want to modify: While still in "pinned" mode , use the zoom control on the bottom toolbar, the zoom commands on the ribbon's View tab, or use zoom keyboard shortcuts (CTRL + = , CTRL + -), and use the scrollbars to pan the slide.

Unpin all slide boundaries

• On the Slides view top toolbar, click the Pin button .

The Pin button changes to to indicate that the boundaries are now unpinned, and each boundary is highlighted in yellow in the main window.

In "unpinned" mode 🛁, you can drag the boundary to change its position, or drag its corners to resize it:

- You can drag the slide boundary to change its location relative to the map content.
- Drag the corners of the slide boundary to change its size relative to the map content. the aspect ratio of the slide always remains constant.



To reset the boundaries for all slides to their original location and size, click the **Slide Settings** button and choose click **Reset Page Boundaries**.

Refresh slide thumbnails

To ensure that your slides reflect the current state of the map, you can refresh them.

• In the Slides pane, click the Slide Settings button and choose Refresh Slide Thumbnails.

Print slides

- 1. On the View tab, in the Presentation group, click Slides.
- 2. Do one of the following:



- 3. In the **Print** dialog, under **Print Range**, select **All Slides**, **Range**, or **Selected Slide**.
- 4. Click **Preview** if you want to verify what will be printed.
- 5. Click **OK** to print the slide(s).



To print all the slides immediately, click **Quick Print** on the Quick Access toolbar.

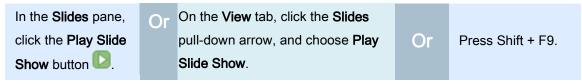
If you prefer not to include the slide icons on your printout, you can use the Show / Hide command.



If you are viewing a slide, the **Print** command on the File tab will print slides.

Display a slide show

1. Do **one** of the following:



2. Use the controls at the bottom of the screen to step through your slides and zoom in or out.

While you're displaying a slide show, you can launch the slide editor by clicking the **Open Slide Editor** button .

Press **Esc** to exit the slide show.



You can start a slide show with any slide in your map by right-clicking the slide in the **Slide** pane and choosing **Start Presentation Here**.

Your slides are dynamic in slide show mode: you can pan the slide by dragging on the background, or expand / collapse / edit topics, but changes to topics will not be reflected on all the slides until you refresh them.

The underlying map is changed when you edit topic text, add or remove topics, or change topic formatting, and these changes are also shown on slides that contain the edited topics.

You can hide the slide icons and other map elements when you play a slide show by using the Show / Hide command.

Manage slides

- Click and drag to re-order your slides.
- Click a slide in the Slides pane and use the context menu to Rename or Delete the slide.
- Deleting a slide does not remove the topics from the map.
- To remove all slides from the map, click the Slide Settings button in the Slides pan, and choose Delete All Slides.

Work with slide decks

You can save slides in a map as a Deck file (.mdeck). You can also create Deck files from scratch. All the slide-editing capabilities in a map file are available when working with a Deck file.

When a Deck file is opened in MindManager 21, Slide view is automatically displayed. If you created the Deck from slides connected to map topics, none of the changes you make to the Deck file will affect the Map file.

A Deck file open in MindManager 21 has a deck icon on its Workbook tab. A Map file has a map icon

Save existing slides as a Deck

1. Do **one** of the following:

In the Slides pane, click the Slide Settings button and choose Save as Deck.



On the **View** tab, click the **Slides** pull-down arrow and choose **Save as Deck.**

Choose the location to save the Deck.

If you choose **Local**, the default save location is **My Maps/My Slide Decks** folder, which is created when you install MindManager 21.

3. Enter the File name, then click Save.

Create a Deck

1. Do **one** of the following:



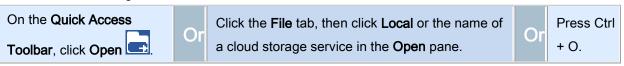
2. Choose the location to save the Deck.

If you choose **Local**, the default save location is **My Maps/My Slide Decks** folder, which is created when you install MindManager 21.

3. Enter the File name, then click Save.

Open a Deck file

1. Do **one** of the following:



2. Navigate to the Deck file.

By default, Deck files are saved to **My Maps/My Slide Decks** folder, which is created when you install MindManager 21.

- 3. Choose MindManager Slide Deck (*.mdeck; *.xmdeck) from the file type drop-down.
- 4. Click Open.

Use the timer

The Timer feature lets you set a countdown timer for the length of your presentation, brainstorming session, or meeting. The clock lets you see the amount of time left in a subtle way without asking anyone else in the group for reminders or distracting from the presentation, and gives a visual cue when the time is up. You can move the timer display to a convenient location on the screen.

Start the timer

- 1. Right-click the status bar, and choose Timer.
- 2. The Timer appears on the bottom status bar. \$\div 00:00:00 \tag{00:00:00}
- 3. To set the countdown time, click the menu arrow, and select a time, or use the arrows to increase or decrease the time. Click the timer to start it.



If you want to use the timer in <u>Walk Through view</u>, and you will not be displaying the ribbon during your presentation, start it before switching to Walk Through view if (the timer can only be enabled from the ribbon).

Pause the timer

While the timer is running, click on it to pause. Click it again when you want to resume.

Timer options

To set the timer options, click the Timer menu arrow, and then click Options

Audio Alarm - Select this option to get an audio alarm when the timer is up.

Show Seconds - Turn off this option if you do not wish to see the seconds passing.

Hide above 5:00 - This option will hide the timer until five minutes remain. You can re-display the timer at any time by clicking the **Timer** button on the ribbon.

Don't go below 0:00 - If this option is checked, the timer flashes when it reaches 0:00. If unchecked, the timer flashes when time is up but continues the countdown with negative numbers to indicate the elapsed time past 0.

Reset - Stops the timer and resets it to 00:00:00. Use the incremental scroll buttons on the timer or use the **Timer** menu to set a new time.

Collaborate

Collaborate using Content Control

When you activate Content Control within a map that you've created, you can control what other users can modify in the map. If you share the map password with others, they have full editing capabilities. People who don't have the password will only be able to update the map elements that you've specified.

When a map that has been set to Content Control is opened in MindManager 21 for Windows, an overlay appears in the top-left corner of the map window. If you know the map password, you can enable full editing. You can also view the Content Control settings that were specified by the map creator.

READ NOTES

After Content Control has been activated, you can allow contribution from others on a map by map basis.

Content Control is not supported in MindManager 2019 for Windows and earlier or any macOS version of MindManager. However, when you open a map set to Content Control in MindManager for Windows (version 2019 or earlier), you will be prompted to enter the map password. If you enter the map password, you can open with full editing capabilities. If you don't have the password, you can click **Read Only** to view the map. If you open a map set to Content Control in any macOS version of MindManager, you can view the diagram as a read-only file.

Activate Content Control

- 1. Click the File tab, and then click one of the following:
- Info
- Share
- Click Content Control Settings.
- 3. In the Content Control Settings dialog, enable the **Enable Content Control** check box.
- 4. Type a password in the **Set Password** box, and retype it in the **Confirm Password** box.

- 5. Enable any of following check boxes corresponding to the map elements or markers that you want to allow contributors to edit:
 - Add Comments
- Edit Icons
- Edit Tags
- Edit Progress
- Edit Priority
- Edit Start and Due Dates
- Edit Resources
- Edit Properties
- Add Links and Attachments
- Add and Edit Notes
- Click Save.

Enable full editing for a map set to Content Control

- 1. Click the Content Control overlay, and choose Enable Full Editing.
- 2. Enter the map password.

You can revert the editing privileges by clicking the Content Control overlay, and choosing **Disable Full Editing**.

Edit map elements or markers in maps set to Content Control

When working with a map set to *Content Control - Limited Editing*, you can make the following modifications if permitted by the map author:

- Add comments
- Edit icons
- Edit tags
- Edit progress
- Edit priority
- Edit start and due dates
- Edit resources
- Edit properties
- Add links and attachments
- Add and edit notes

To view what map elements the map's author has allowed to editing, click the Content Control overlay, and choose **Content Control Settings**.

Disable Content Control

- 1. Click the Content Control overlay, and choose Content Control Settings.
- 2. Enter the map password.
- 3. In the Contributor Settings dialog, disable the Enable Content Control check box.

Co-Editing

Co-Editing is a secure cloud-based service that eliminates version conflicts and allows multiple users to work on the same file at the same time.



All co-editors must use MindManager 2020 or higher to reopen and edit maps from a Co-Editing session.

Co-Editing takes place in your browser, giving you the flexibility to collaborate with people who don't have MindManager installed. Co-Editing requires files to be stored in OneDrive, Google Drive, SharePoint, Box, or Dropbox.

Start a Co-Editing session

- 1. Save the map to cloud storage service. For more information, see Share a map via a cloud storage service.
- 2. On the Home tab, click the Co-Edit drop-down, click Start Co-Editing Session.



If you are working in SharePoint and start a Co-Editing session with a file that is checked out, a dialog will appear. Click Yes to check the map back into SharePoint so that co-editors with Edit permission can also save changes to the map. Otherwise, only the user who checked out the file can save changes during a Co-Editing session.

The first time that you start a Co-Editing session using a cloud storage service, you must sign in to authorize MindManager to access the file. You will not need to do this for subsequent maps saved to this cloud storage service.

3. On the Invite Others To Co-Edit This File page, enable the Anyone with link can co-edit check box.

READ NOTES

You can choose the other options to have Co-Editing sessions where some people can edit the file, while others can only view it. You can also let the file-privilege settings in the cloud storage service determine what invitees can do.

Anyone taking part in a Co-Editing session must be signed into their MindManager Cloud account. If they don't have one, they can create one.

- 4. Click **Copy Link**, and share the link with your co-editors.
- 5. Click Done.

The map opens in an online Co-Editing window, and editing in MindManager is paused. For more information, see Edit a map in a Co-Editing session.



If you open a file in MindManager that is being edited by someone else, you are notified and the file opens as a read-only file. You can request a Co-Editing session with the person editing the map.

Resume working on a map from Co-Editing session

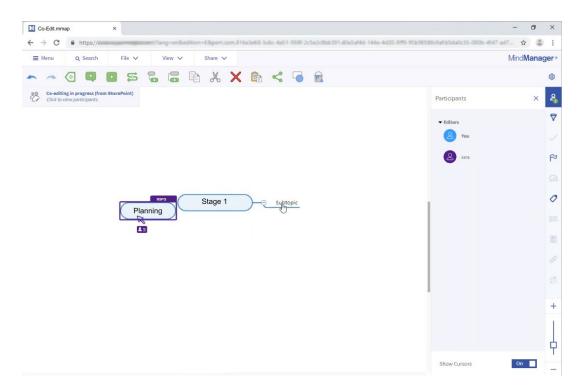
After a Co-Editing session, you can keep on working on the map in MindManager.

- If the map used in the Co-Editing session is still open in the MindManager desktop application, a red overlay is displayed in the top-left corner of the map window to indicate there is a newer version.
- 2. Click the overlay, and click Load Latest Version.

Edit a map in a Co-Editing session

During a Co-Editing session, multiple users can work on the same file at the same time. Teams can work remotely in real time, seeing changes to the map as they are made. Each participant has a unique mouse cursor.

For information about starting a Co-Editing session and resuming editing in MindManager on your desktop, see Co-Editing.



Overview of the Co-Editing window

The Presentation View map reader window offers the following navigation and viewing controls:

Menu opens a sliding pane on the left that gives access to settings for switching viewing modes, printing, getting help, and more viewing options.

Search allows you to search for text in the map.

File offers options for saving maps during a Co-Editing session.

View contains commands for changing magnification levels (**Zoom** In or **Zoom** Out), collapsing (**Collapse** All) and expanding (**Expand** All) topics; centering map on topic, expanding selected branch, and collapsing all other branches (**Focus**); adjusting the size of the map in its current display to the dimensions of the window (**Fit**).

Share lets you invite more people to the Co-Editing session and choose export options.

Contains tools for adding boundaries, relationships and callouts; inserting and editing topics; copying, cutting, pasting, deleting map elements; as well as inviting more people to the Co-Editing session.

Top left Menu bar

Tool Panel

	Filter pane, Participants pane or Content Editing pane	Allows you to filter a map by icons and tags, view who is participating in the Co-Editing session, or view and edit the contents of the selected topic.
Right	Zoom slider	Magnifies or reduces the size of the map in the window.

Co-Edit a map

When you select an element in a map, buttons corresponding to what is editable are highlighted on the right side of the window:

Task Information \checkmark , Icons $\stackrel{\frown}{\sim}$, Comments $\stackrel{\frown}{\sim}$, Tags $\stackrel{\frown}{\sim}$, Properties $\stackrel{\longleftarrow}{=}$, Notes $\stackrel{\boxdot}{=}$, Attachments & Links $\stackrel{\frown}{\sim}$, Related Topics $\stackrel{\frown}{=}$.

You can also modify a map in a Co-Editing session using the Tool Panel, which contains tools for adding boundaries , relationships and callouts; inserting topics, subtopics and floating topics; editing topic shape and fill color; copying, cutting, pasting, deleting map elements; as well as inviting more people to the Co-Editing session.

Co-Editing sessions automatically end after a period of inactivity. Before a session is ended due to inactivity, a warning appears that allows you to keep the session active.

To add more people to the Co-Editing session, click **Share > Invite Others to Edit** to copy a session URL that can be shared.

See who is participating in a Co-Editing session

Click Participants and of the window.
 The Participants pane opens and displays a list of co-editors.

Hide your co-editors cursors

- Click Participants on the right side of the window.
 The Participants pane opens.
- 2. Set the Show Cursors control to Off.

Filter maps in a Co-Editing session

When a filter is used during a Co-Editing session, only the co-editor who applied it sees the filtered version of the file.

- Click Filter on the right side of the window.
 Any type of icon in the map is displayed in the Filter pane.
- 2. Enable any of the corresponding check boxes.
- 3. In the Match area, enable either Any or All.
- 4. Click one of the following filtering options:
 - Show
 - Fade
 - Hide

Save changes during a Co-Editing session

- Click the **File** menu, and choose **one** of the following:
 - Save to save the file changes during a Co-Editing session
 - Save As to save the file with a new name.
 - Save To > [name of cloud storage service].

Close a Co-Editing session

Note: Before closing a Co-Editing session, you must save the file, otherwise any changes made since the last time that you saved are lost.

Close the browser tab for the Co-Editing session.

When the Co-Editing host leaves a session, the session will end unless there is another eligible host to continue the session. Eligible hosts must have edit permission for the file and an active Co-Editing subscription.

To continue editing the map on your desktop in MindManager, see Resume working on a map from Co-Editing session.

Co-Editing supported editing functionality

Content	
Topics	Add, delete, move, change shape, change color
Comments	Add, delete, edit
Icons	Add, delete, edit

Tasks	Set priority and progress; add, delete, edit resources; add, delete, edit start/due dates	
Properties	Edit or delete existing properties	
Links	Add, delete, edit	
Attachments	Add, delete, edit	
Notes	Add, delete, edit	
Objects	Select, add, move, edit path, delete relationships; select, add, delete boundaries	
Topic Text	Add, delete, copy/paste, edit, size	

Formatting	
Themes	View, apply
Layouts	View, apply
Font	Bold, italics, underline, strikethrough, size, color

Filter	Search
Tags	Topic Text
Icons	Notes
Resources	

Proof, Review, and Save

Proof and prepare a map

To finalize a map, you may want to add comments about why the map was created and what it is used for in the Map Properties dialog, check for spelling errors using the **Spell Check** feature, and check the links to other files with the Repair Links command.

If you need to find and change specific topic text, use the <u>Find and Replace</u> command.

What do you want to do?

Set the map properties

Spell check a map

Repair the map's links

Add comments to the map

See also:

Find and replace topic text

Select topics and objects

Filter topics

Review a map

Set the map properties

Every map contains a set of Properties that provides information about the map. You can update the Map Properties at any time while you work on the map. In addition, you can configure MindManager so that the first time you save a map or a Map Template you are automatically shown the Properties Summary dialog: Use the MindManager Save option: Prompt for map properties on first save.

Change map properties

1. Do **one** of the following:

Right-click on the map's workbook tab and select **Properties**.



On the **File** tab, click **Info**, and then click **Properties**.

- 2. Modify the properties as needed.
- 3. Click **Save** to use the new properties. These new properties will be saved with the map the next time you save it.

Click **Cancel** to return the properties to their previous values.

Options for the **Summary** Pane.

Options for the **General** pane.

Options for the **Statistics** pane.

You can also enter properties when you modify Map Templates and Themes.

Spell check a map

The spell check feature in MindManager is like most standard spell checkers so it should be familiar. You run the spell check to check through all the topic text and notes text on the map. You can also use

the auto-spelling feature to check spelling as you type text and the Auto-correct feature to automatically replace typically misspelled words with their corrected versions.

Start Spell Check

• On the Review tab, in the Proofing group, click Spelling.



The spell check checks all topics in the map (regular topics, callouts, and floating topics) and their attached notes, even if they are collapsed. Collapsed topics are expanded only when misspelled or repeated words are found.

If the spell check finds a misspelling▼

The Spelling dialog opens and the word appears in the Not in dictionary field.

If the word is misspelled you can:

- Choose to replace it with any of the **Suggestions** shown (click the suggested word)
- Type the corrected word in the Change to box.

Then click:

- Change to change it
- Change All to correct all the occurences of the word on the entire map.
- AutoCorrect to change the word and add the misspelled word and its corrected version to the AutoCorrect list.

Or, you can correct the word directly by editing the topic text. Then, click **Resume** in the Spelling dialog to resume the spell check.

If the "Not in dictionary" word is correct, you can:

 Add it to the dictionary. Select the dictionary file under Add words to then click Add to Dictionary.

If you add words to the CUSTOM.DIC dictionary (a Microsoft Office file) any words added to it in MindManager will also be used by your Office applications.

Click Ignore once to leave the word unchanged and continue, or Ignore All to leave all
occurrences of the word unchanged for this spell check session. (If you want to ignore
the word permanently you must add it to the dictionary).

If the spell check finds a doubled word ▼

The Spelling dialog opens and the word appears in the **Repeated word** field.

- Select Ignore once to ignore this instance
- Select **Delete** to remove the repeated word.

You'll see a message when the spell check is finished checking the map.



To stop the spell check at any time, click the Close button in the Spelling dialog.

Check spelling as you type

When the Auto-spelling feature is enabled, the text you enter is checked as you type. Misspellings and doubled words are noted by a red underline. You can right-click on the word to correct it. A context menu appears with a list of suggestions at the top.

- Enable or disable this feature for *all maps* using the MindManager Spelling option **Correct spelling** as you type.
- To disable this feature for the current map only, click Spelling and then clear the Check spelling as you type in this document option in the Spelling dialog.

Correct a misspelling ▼

- 1. Right-click on the misspelled word.
- 2. In the context menu that appears, do any of the following:
 - Select from the list of suggested words at the top of the menu to replace the misspelled word.
 - Select Ignore once or Skip once to ignore this instance of the word.
 - Select Ignore all to ignore this word on the entire map.
 - Click Add to Dictionary to add the word to the default dictionary (to add to a different dictionary, click Spelling to open the Spelling dialog with more options). It will not be counted as a misspelling on any maps you subsequently open.
 - Click Spelling to enter your own correction.
 - Click AutoCorrect and select one of the suggested words. The misspelled word and its
 corrected version are added to the AutoCorrect list. (Click AutoCorrect options if you want to
 add this or other entries manually.)

Correct a doubled word ▼

- 1. Right-click on the doubled word.
- 2. In the context menu that appears, do any of the following:
 - Select Delete repeated word to remove the duplicate word.
 - Select Ignore to leave both words in place.
 - Click Spelling to see the Spelling dialog with more options.

Customize AutoCorrect list entries

You have the option of adding entries to the AutoCorrect list while you are doing a spell check, based on the misspellings and replacements you choose, or you can update this list manually at any time.

- 1. On the **Review** tab, in the **Proofing** group, click **AutoCorrect Options.**
- 2. Modify the list as you like:
 - To add a new entry, enter a misspelled word and its correct version and click Add

- To modify an entry select it, modify it, and then click **Replace**.
- To remove an entry, select it from the list, and then click **Delete**.

Options for using AutoCorrect.

Languages and Dictionaries ▼

The spelling dictionary language is determined by the document language. To change the language for the current map, on the **Review** tab, in the **Proofing** group, click **Set Language**.



Click the **Default** button to make this the default language used for all new documents. You can also change the default language for new maps (but not the current map) in the MindManager Spelling options dialog.

Custom Dictionaries

MindManager comes with its own dictionaries for all supported languages. To expand the list of known words you have the option to add custom dictionaries to the spelling process.

MindManager uses the standard MS Office CUSTOM.DIC dictionary, and you can set options to use additional custom dictionaries in the Spelling Options dialog. A custom dictionary is a simple text file (file extension is *. DIC) that contains a list of correct words (each word in one single text line) with a blank line at the end. The spelling engine recognizes those words as correctly spelled.

The spell checker uses all custom dictionaries at the same time, when checking for misspelled words. When the user adds new misspelled words to the custom dictionary, they are added only to the dictionary selected in the Spelling dialog **Add words to** field.

Repair the map's links

If you move, rename, or delete a document that is a link destination, all links to it will be "broken." You can check the map for broken links to files and folders.

- On the Insert tab, in the Topic Elements group, click the Link arrow, and then click Check File & Folder Links.
- 2. If a broken link is found, you can choose to browse for the file to repair the link or remove the link from the map.



If you click a broken link you'll see a message that offers you the opportunity to repair it immediately.

Add comments to the map



You can add short remarks to your map in the form of comments. These can be used like "sticky notes" as short temporary notes or reminders. For larger, more detailed amounts of text, you can use a topic note.

Comments are primarily used during the <u>Review</u> process, but you can add them casually, without conducting a formal review.

Successive comments are added to topics as a list. Each includes the author's User Name (as defined in the MindManager User Information options) and the date and time they were added so you can track their origin. A count of the number of comments in a topic is displayed on the Comment icon .

Add Comment to a topic

- 1. Select the topic.
- 2. On the **Review** tab, in the **Comments** group, click **New Comment**.



If you have not entered your name and email address you will be prompted for this information now. This information is used solely to identify your comments on the map. This is helpful on maps that have comments collected from several users.

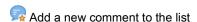
3. In the **Topic Comments** window, enter your comment text.

You can see the comments for a topic when you rest your pointer over the Comments icon . The list of comments will pop up.

Modify the comments list for a topic

After you add a comment, the Comments window remains open. If you close it you can click a topic's comments icon to re-open it.

Use the buttons at the top of the window or the commands in the **Review** tab, **Comments** group to:



Remove the selected comment from the list

Jump to next comment

Jump to previous comment

Remove comments list

- For a single topic, right-click the topic's comment icon, and then click **Remove Comments**.
- For multiple topics, select the topics. Then, on the Home tab, click the Delete button, and then select Comments.



You can suppress the display of comment icons on topics in Map view (for example if you want to print the map without them) using the Show / Hide command.

You can use the <u>Power Filter</u> command to see only topics with or without comments, or use the <u>Power Select</u> command to select all topics with comments.

Review a map

The Review command enables you to collaborate on maps with colleagues. The process works in this way: the primary contributor creates a map and then passes the map to the next contributor who adds topics and comments, then passes it to the next contributor. The process continues thus, and when all contributors have finished, the map goes back to the primary contributor who assesses the collective review topics and comments and modifies the map accordingly. Topics added during the review appear as visually distinctive using text and fill colors automatically assigned to each reviewer. You can adjust the review settings to choose specific colors for review topics and notes that you add and if you desire, mark your topics with an icon or a prefix. You can enable a setting to automatically track changes to the map with comments when topics are modified or removed.

When the primary contributor receives the map after review, the review topics stand out from the original map content. He/she can then decide whether to accept or delete the review topics.



You can also just add comments casually.

You can hide all comments in a map by clicking the **View** tab, and clicking the **Topic Info** drop-down, choosing **Topic Info Display Settings**, and unchecking the **Comments** check box.

What do you want to do?



Begin your review session

Add review topics and comments



End your review session

Finish the review

See also:

Send maps by email

Filter topics

Begin your review session

On the Review tab, in the Tracking group, click Start Review.

You will be prompted for your name and email address when you begin the review session if you have not already entered your user information in the MindManager options User Information fields. This information is used to identify your comments and allows the next reviewer to reply to you if needed. The Review Mode Action Bar appears at the top of the map window to indicate that you are in Review Mode.

View review topics and comments

You'll probably want to start your review by seeing what topics and comments have already been added to the map. You'll be able to see Review topics (added during a review session) easily - they are colored and may contain a prefix or special icon marking them. You can see the comments by hovering over the

comments icon . Some comments are added automatically during the review process and some may be actual input from the group.

A count of the number of comments in a topic is displayed on the Comment icon <a>!.



You can use the <u>Power Filter</u> command to show only the topics with comments and/or only the Review topics (useful for large maps). When you are done inspecting the comments and Review topics remove the filter so you can see the whole map again.

Step through comments

- Click on any Comments icon to open the Comments window.
- In the **Comments** window, or in the **Review** tab **Comments** group, click the **Next** and **Previous** buttons to move through the comments.

Add review topics and comments

During your review session, you can edit the map as usual. New topics are shown as visually distinctive Review Topics so they can be seen easily by other reviewers. Similarly, new paragraphs in the notes are shown as colored Review Notes.

You can add your own comment at any time.

Colors for Review Topics and Notes are automatically assigned to each reviewer. You can pick your own colors and choose to include a prefix or an icon using the Review Settings. In addition, you can enable a review setting to automatically insert comments for topics that you add, modify or remove.

Change Review Settings

On the Review tab, in the Tracking group, click Settings.

Add or modify a comment

- 1. Select a topic either with or without comments
- On the Review tab, in the Comments group, click New Comment.
- 3. Enter your comment. It will be identified with your user information.



To modify a comment you've already added, click the topic's Comment in the **Comment** window.

Remove a comment

- 1. Select the topic, and if the **Comments** window is not already open, click the Comment icon
- 2. Select the comment in the list.
- 3. Click Remove Comment in the Comments window.



While you can remove other reviewer's comments, etiquette dictates that only the primary contributor should do this after everyone has reviewed the map.

End your review session

The Review session remains active until you end it:

• On the Review tab, in the Tracking group, click End Review.

Send the map to the next reviewer

- 1. On the Review tab, in the Tracking group, click Send Map.
- 2. Then do one of the following:

Click Reply to Sender to send the map back to the reviewer who sent it to you.

Click Forward to send the map to a new reviewer (you'll enter their email address on the message that is created).

Click Forward to, and then click the reviewer's name to send the map back to a different colleague who has already reviewed the map.

On the File tab, click Share, Email, and then click Send as Attachment for Review.

3. The Send To wizard creates an email message with the map as an attachment (or with a link to the map) for review. When the recipient opens the map it will automatically start a review session.



You may want to let the next reviewer know how to identify topics you added (for example, "My additions are in green.") if you do not have the **Record all map changes in comments** setting enabled in the Review Settings. You can add this information to the email message you send.

Need to take a break from the review? Save the map before leaving the review session (i.e. before you click **End Review**. The next time you open the map it will start the review session automatically.

Finish the review

Once everyone has reviewed the map, one person (usually the primary contributor) can do the final editing: accept or reject review topics, make other modifications in accordance with the comments, remove all the comments, and then send the finalized map to all reviewers.

Accept or reject Review Topics

- 1. On the Review tab, in the Tracking group, click Start Review.
- 2. Use the commands in the **Changes** group to move to the **Next** 2 or **Previous** 2 Review Topic.

- 3. For each topic choose either:
 - **Accept** changes the topic to a "normal" topic, removing review colors, prefixes and icons. Click the command's arrow to **Accept All Review Topics**.
 - Delete Review Topic- removes the topic from the map. Click the command's arrow to Delete All Review Topics in Document.

Then you can click **End Review** and go on to inspect the comments and modify the map accordingly. Rest your pointer over any Comment icon to see its content, and modify the map as you desire. When you are finished you can optionally remove all Comments from the map. (You will probably want to do this if reviewers inserted comments automatically to record their changes.)

Remove all comments

 On the Review tab, in the Comments group, click the Remove arrow, and then click Remove Comments in All Topics.

What do you want to do?

You can save a map that you create or modify as you usually save any document, using the **Save** and **Save As** commands In addition to saving the current map in its native format (.mmap file) you can use the commands under the Save tab in **Save As** to:

- Save all maps
- Save a copy of the current map
- Save a filtered copy of the current map
- Save all maps

In Save As, under the Change File Type tab you can also

- Save the map in the default format
- Save the map in XML format
- Save the map as a template (.mmat) which can be used as the basis for creating maps,
- Save the map as a theme file (.mmas) containing just the map's default formatting information
- Open the Save As dialog to select from other possible file types

To save only a part of the map, you can <u>export topics to a new map</u> (for example, if your map becomes large, or if you just want to duplicate the topics). You can also select a topic to <u>save as a Map</u> Part for easy re-use on this or other maps.

You can change options for how your maps are saved. You can also modify map settings for saving your current map to share with macOS users and saving a preview image of the file.

See Export maps for more information on exporting both partial and complete maps to a variety of formats.

Save the current map

You can save the currently-open map in several ways:

- The Save command saves the map with the same name and location and the current map remains open.
- The **Save as** command saves the map with a different name or in a different location, the current map closes, and newly-saved map opens.

Save the map with the same name



1. Do any of the following:

Click the Save button on the Quick Access toolbar.	Or -	Click the File tab, and then click Save As .
Right-click the map's workbook tab, and then click Save .		Press CTRL+S

2. If this is a new map:

- If you have enabled the prompt option, the **Properties Summary** page will appear so you can enter information about the map.
- If you use cloud storage services, you can save the map directly to a place online. See Add a cloud storage service for more information about working with cloud storage services in MindManager.
- Enter the file name and location in the Save As dialog, then click Save.



Use the MindManager **Save** options to set the default folder for saving maps.

The map remains open in the MindManager mapping window.

Save the map with a different name or in a different location

- 1. Click the File tab, click Save As, then select Save As to open the Save As dialog.
- 2. In the **Save As** dialog, choose a folder, enter the **File name**, then click **Save**.

The new map opens in the MindManager mapping window.



To export your map in another format you can choose a different format in the **Save As** dialog **Save as type** list or use the Export command in the File menu.

Save a copy of the map

When you save a copy of a map, the current map remains open. Any changes you subsequently make to the map will not affect the copy you've saved.

- 1. Click the File tab, click Save As, and then select Save a Copy.
- 2. Enter the file name and location in the **Save As** dialog, then click **Save**.

Save the map as a filtered copy

If you have filtered the map, you can save just the visible topics in a new map.

- 1. Click the File tab, click Save As, and then click Save a Copy of Filtered Map.
- 2. In the Save As dialog, choose a folder, enter the File name, then click Save.

Save all open maps

• Click the File tab, click Save As, and then select Save All.

Encrypt map with passwords

You can protect your map so that no one can open it without knowing the password.

- 1. Click the File tab, click Info, and then click Encrypt Document.
- 2. Enter the password(s) for the map and click **OK**.
- 3. Save the map.
 - I READ NOTE

From now on, you cannot open the map or modify it without entering the password (s).

Save the map in XML format

- 1. Click the File tab, click Save As and then select Change File Type.
- 2. Click Save as MindManager Map (XML).
- 3. In the Save As dialog, choose a folder, enter the File name, then click Save.

The map is saved as an ".xmmap" file. If you continue to edit the map, then use the Save command, your changes will be saved to this file in xml format. You can save this map in .mmap format again by using the **Change File Type** - **Save as MindManager Map** command.

Save the map as a template

- Click the File tab, click Save As and Save As again, click Save As Type, and then click MindManager Template (*.mmat; *.xmmat). In the Save As dialog, choose a folder, enter the File name, and then click Save.
- 2. If this is a new template, you may see the *Properties Summary* page where you can enter comments and other information about the template. When you click **OK**, the template is saved.

Make a note of this location in case you want to add the Template to the New Map dialog (it will be shown whenever you create a new map), add it to the Organizer, or send it to another user.

Save the map's default format settings as a theme

- 1. Click the **File** tab, click **Save As** and **Save As** again, click **Save As Type**, and then click **MindManager Theme (*.mmas; *.xmmas)**.
- 2. In the Save As dialog, choose a folder, enter the File name, then click Save.
- 3. If this is a new theme, you may see the *Properties Summary* page where you can enter comments and other information about the theme. When you click **OK**, the theme is saved.

Make a note of this location in case you want to <u>apply this theme</u> to another map from the file, <u>add it to</u> the Organizer, or send it to another user.

MindManager User Guide

Save AutoRecovery information for maps

MindManager provides protection from abnormal shutdown (eg if the power goes out or your system crashes) by automatically saving <u>AutoRecovery</u> information at regular intervals. If your system shuts down before you save your map, MindManager will offer to <u>restore it</u> when you re-start your system and start MindManager again.

Print, Export, and Send

Print

What do you want to do?

Printing a map from MindManager is similar to printing in most other applications.

You can print:

- The entire map, or just selected topics
- · One or more slides
- The map (or selected topics) in outline form
- The Notes for selected topics or all topics
- The Gantt Chart for the map

Topics print as they are displayed (<u>expanded or collapsed</u>). Topics hidden by a <u>Filter</u> do not print.



Use the Show / Hide command to temporarily hide any map elements you don't want to print.

Use the **Print** options to select the printer, print range, number of copies and scaling (multiple page) options. There are special options for printing large maps.

The **Page Setup** options control the map's orientation, page margins, headers and footers, border and more.

Print Preview lets you see how the printed map will look with the print and page setup options you've chosen.

Buttons in each of these dialogs let you switch between the various option screens.

Print the map

Print selected topics

Print slides

Print an outline

Print Notes

Print tasks as a Gantt Chart

Change Page Setup options

Display the Print Preview

Print the map

Do one of the following:

To print the map immediately on the default printer, click **Quick Print** on the Quick Access Toolbar, or click **File**, **Print**, **Quick Print**.

To adjust the Print options before you print, click **File**, then click **Print** to see the **Print** dialog. There, you can specify the printer, print range, number of copies and scaling options.

- Use the High-contrast topic lines option to print topic lines in black or white (depending on background color). This can make topic lines more visible on highresolution printers.
- Click Page Setup to set additional options, or click
 Preview to see the print preview.

Print a large map

If a map is large, the print can become difficult to read if it is printed on a single letter-sized page. If you don't have access to a large-format printer, you can create a poster-sized version of your map by printing it on several pages, "billboard style".

1. Click the File tab, click Print, and then click Print to see the Print dialog.

Or

2. Under **Scaling** choose the number of pages and the arrangement you want to use to print the map.



To check the output, click **Preview** to see the Print Preview. You can view two pages at a time or step through the pages.

Use the Page Setup options to add page separators and page numbering if desired.

Print selected topics

You can choose to print only a selected topic and its subtopics. This is the simplest way to print a single topic tree. If you want to print several topics, but not the entire map, you can filter out the other topics and then print the map.

- 1. Select the topic you want to print.
- 2. Click the File tab, click Print, and then click Print.
- 3. In the **Print** dialog, under **Print Range**, select **Primary selected topic**.
- 4. Click **Preview** if you want to verify what will be printed.
- 5. Click **OK** to print the map.



You can also print just the notes for any topic.

Print slides

You can print a single slide, a range of slides, or all slides. Each slide is printed on a separate page. The gray box on each slide indicates the area that will be printed.

- 1. Use <u>Slides View</u> to view the slide you want to print (If you want to print a single slide), or view any slide (if you want to print a range or all slides).
- 2. Do one of the following:

In the **Slides** pane, click the **Slide Settings** button and choose **Print Slides**.



On the **View** tab, click the **Slides** pull-down arrow and choose **Print Slides**.

- 3. In the Print dialog, under Print Range, select All Slides, Range, or Selected Slide.
- 4. Click **Preview** if you want to verify what will be printed.
- 5. Click **OK** to print the slide(s).



To print all the slides immediately, click **Quick Print** on the Quick Access toolbar.

If you prefer not to include the slide icons on your printout, you can use the Show / Hide command.



If you are viewing a slide, the **Print** command on the File tab will print slides.

Print an outline

You can print an outline from Outline view.

Printing from Outline View offers the advantage of printing topics with varying levels of detail, and (like Word export) you can choose to print only the topics you select.

When MindManager prints a map displayed in Outline View, it prints just what you see. This means that if a topic is collapsed, it's subtopics are not printed. This allows you to print the outline with varying levels of detail for individual topics. You can also choose to print only the topics you have selected, or choose to print only the topics with specific content.



You can also create a simple outline or export the map to Word to create a more detailed outline.

Print a map as an outline

- 2. Click the File tab, click Print, and then click Print to see the Outline Print dialog. Options

- 3. Optional Click **Page Setup** to choose margins and other settings for your printed outline. These settings are saved with the map, so the next time you print the same settings will be used.
- 4. Make your selections in the dialog and click **Print**.

Print Notes

You can quickly print the Notes for any single topic or print all the Notes on the map.

1. Do one of the following:



2. Click either:

- Quick Print Notes (sends the notes for the current topic directly to the default printer)
- Print Notes to print the notes for the selected topic or all topics (displays the Print dialog so you can adjust the Print options).



MindManager uses Microsoft Word for this function.

Print tasks as a Gantt Chart

If your map contains <u>tasks</u>, you can print them as a Gantt chart. You must <u>display the Gantt chart</u> to print it.

Click the View tab, click Gantt Pro, and then click Print.

Change the Page Setup options

You can configure the Page Setup options before you print or access these options from the Print or Print Preview dialogs.

The page setup options let you choose the following options.

- the paper size to use
- the orientation (portrait, landscape or automatic)
- the page margins (units used are determined by your system settings)
- whether to print the...

```
background image (turn this off to reduce printing time or to print a PDF file), page separators (registration marks for multi-page maps), page numbers (i.e. "Page 2 of 4" for multi-page maps) or a border.
```

headers or footers with a choice of font and justification. Enter your own text or click the arrow to
choose from a set of standard annotations such as the date and time, file name, etc. The Author
information comes from the map's General Properties settings.

Other options such as Print Range, Copies and Scaling (multiple pages) are set in the Print dialog.

Change the Page Setup

1. Do **one** of the following:

Click the **File** tab, click **Print**, and then click **Page Setup** (or **Gantt Page Setup** if you are printing a Gantt chart).



Click **Page Setup** (or Gantt Page Setup) from within the **Print** or **Print Preview** dialog.

2. Choose the options you want to use for printing. These options are saved with the map.



The **Automatic** orientation option allows MindManager to choose the best fit for your map on the page.

3. Click **Print** to print the map or **Preview** to verify the Page Setup.

These settings are saved with the map so the next time you print, the same settings are used.

Display the Print Preview

The Print Preview options shows you how the map will look when printed according to the Print settings and Page Setup options you have selected.

1. Do **one** of the following:

Click the **File** tab, click **Print**, and then click **Print Preview**.



Click **Preview** from within the Print or Page Setup dialog.

- If you have chosen to print the map on more than one page (for large maps or multiple slides) you
 can view the individual pages here using the Next Page and Previous Page commands to step
 through them, or click Two Page to see two pages at a time.
 - Use the **Zoom** commands to see more or less detail.
- 3. When you're ready to print, click **Print**, or click **Page Setup** to go back and modify the page options.

The map is displayed in the Print Preview window until you close it or print the map.

Export maps

You can export your map (or in some cases just the selected topics) to a variety of other formats. You can also create read-only, interactive files in HTML5 format.



You will find all your available export options on the **File** tab's **Export** pane.



If the export you want to use does not appear in either place, you must enable the corresponding export add-in using the Add-ins options.

Simple outlines (only in the Save as type list) are enabled using the Transformations options.

You can export maps directly to a cloud storage service.

Standard export options

Export option	What is created
Export as HTML5 map	Interactive, read-only map displays in modern browsers. Lets you expand/collapse topics and view major map features such as notes, markers, task info, etc.
Export as Image	Bitmap image in BMP, GIF, JPEG, PNG with choice of color depth, size and resolution. Vector image in EMF or WMF formats
Export to Microsoft Word	A DOCX file that can be opened in Microsoft Word
Export to Microsoft Excel	An XLSX or XLS spreadsheet file that can be opened by Microsoft Excel
Export to Spreadsheet (CSV)	A CSV (comma-separated-value) spreadsheet file that can be opened by many popular spreadsheet programs, including Microsoft Excel.
Export to OPML document	Map is converted to an OPML document. Resulting OMPL map is grey-scale; icons and other visual markers are removed.

Pack and Go

ZIP file of .mmap files, with option to include linked maps and documents, and password protection

Export an HTML5 map

When you create an HTML5 map, MindManager exports the current map as an .html file in HTML5 format that can be viewed independently from MindManager. The exported map is self-contained and interactive: Viewers can expand and collapse branches, view notes, attachments, links, comments, and more. You can modify the default HTML5 export options (**File > Options**, **HTML5 Export**).

Not all map elements are supported. See the HTML5 map feature support table for more details.



You can use the <u>Send as Attachment</u> command to automatically create an email message with the HTML5 map as an attachment.

- 1. Click the File tab, click Export, choose HTML5 Interactive Map.
- 2. Choose the location for the exported file, and enter its name.
 - READ NOTE

HTML5 maps cannot be edited.

Export the map as an image file

MindManager can export maps to various graphics formats:

BMP GIF JPEG PNG WMF EMF

This command exports the entire map. If you only want an image of a part of the map you can copy topics then paste them as a bitmap in the target application.

- 1. Click the **File** tab, click **Export**, then under **Export**, select **Image**.
- 2. In the **Save As Type** list, click the image format you want to export.
- 2. Choose a folder, enter the File name, then click Save.
- 4. An option dialog is shown where you can define the color resolution, transparency, and size for bitmap files.

Copy map or topics as a bitmap

In many applications you can paste your map, or selected topics, as a bitmap image:

- 1. In MindManager, select the central topic (copies the whole map) or the topics you want to copy, and then press CTRL+C.
- 2. Switch to the target application, then use the **Paste Special** command to paste the map or topics as a bitmap.

Export to Microsoft Word

You can export your map to a Microsoft Word document.

Export a map to a Word document

1. Open the map.



Only visible topics are exported. This means you can apply a <u>filter</u> to hide a set of topics you don't want to include in the file.

2. Do one of the following:

Click the **File** tab, click **Export**, then under **Export**, select **Microsoft Word**.



Click the **File** tab, click **Save As**, then under **Local** select **Save As**, and in the dialog's **Save as type** list choose **Microsoft Word Document.**



If you do not see this option, check to see that you have the corresponding add-in installed and enabled.

- 3. In the **Word Export Settings** wizard choose one of the following options:
 - Quick export to use the default export settings
- Custom export to tailor the export to your liking.
 Use the Next and Back buttons to scroll between the settings pages.
- 4. Click **Export** when you have set the options to your liking.
- 5. A message appears when the export is done. You can **Open** the file to check it, **Open Folder** where it was saved, or **Close** to return to MindManager.

Export to Microsoft Excel

You can export your map to a Microsoft Excel spreadsheet.

Export an entire map to an Excel spreadsheet

1. Open the map.



Only visible topics are exported. This means you can apply a <u>filter</u> to hide a set of topics you don't want to include in the file.

2. Do one of the following:

Click the **File** tab, click **Export**, then under **Export**, select **Microsoft Excel**.



Click the **File** tab, click **Save As**, then under **Local** select **Save As**, and in the



READ NOTE

If you do not see this option, check to see that you have the corresponding add-in installed and enabled.

- 3. In the **Excel Export Settings** wizard choose one of the following options:
 - Quick export to use the default export settings
 - Custom export to tailor the export to your liking.
 Use the Next and Back buttons to scroll between the settings pages.
- 4. Click **Export** when you have set the options to your liking.
- 5. A message appears when the export is done. You can **Open** the file to check it, **Open Folder** where it was saved, or **Close** to return to MindManager.

Export selected topics to an Excel spreadsheet

- 1. In MindManager, open the map and select the topics you want to export. (The export will include the subtopics the topics you select.)
- 2. Right-click on one of the topics, click Send Topic(s) To, and then click Microsoft Excel.
 - I READ NOTE

If you do not see this option, check to see that you have the corresponding <u>add-in</u> installed and enabled.

- 3. Select the export options in the **Excel Export Settings** wizard.
- 4. A message appears when the export is done. You can **Open** the file to check it, **Open Folder** where it was saved or **Close** to return to MindManager.

Export to Spreadsheet (CSV)

You can export your entire map or only a portion of it to a CSV (comma-separated-value) file that can be imported by Excel and many other popular spreadsheet programs.

Export an entire map to a CSV file

1. Open the map.



Only visible topics are exported. This means you can apply a <u>filter</u> to hide a set of topics you don't want to include in the file.

2. Do one of the following:

Click the File tab, click Save As, then under Export, select Spreadsheet (CSV).

Click the File tab, click Save As, and in the dialog's Save as type list choose Comma-Separated Values.



If you do not see this option, check to see that you have the corresponding add-in installed and enabled.

- 3. In the **CSV Export Settings** wizard choose one of the following options:
 - Quick export to use the default export settings
 - Custom export to tailor the export to your liking.
 Use the Next and Back buttons to scroll between the settings pages.
- 4. Click **Export** when you have set the options to your liking.
- A message appears when the export is done. You can Open the file to check it, Open Folder where it was saved, or Close to return to MindManager.

Export selected topics to a CSV spreadsheet

- 1. In MindManager, open the map and select the topics you want to export. (The export will include the subtopics the topics you select.)
- 2. Right-click on one of the topics, click **Send Topic(s) To**, and then click **New Spreadsheet (CSV) File.**
 - READ NOTE

If you do not see this option, check to see that you have the corresponding <u>add-in</u> installed and enabled.

- 3. Select the export options in the CSV Export Settings wizard.
- 4. A message appears when the export is done. You can **Open** the file to check it, **Open Folder** where it was saved or **Close** to return to MindManager.

Export to OPML document

You can export your entire map or only a portion of it to an OPML document. Because OPML is a very simplified format, the resulting OPML map will be grey-scale with icons and other visual markers removed.

Export an entire map to an OPML file

1. Open the map.



Only visible topics are exported. This means you can apply a <u>filter</u> to hide a set of topics you don't want to include in the file.

2. Do one of the following:

Click the **File** tab, click **Export**, then under **Export**, select **OPML**.



Click the **File** tab, click **Save As**, then under **Local** select **Save As**, and in the



3. The default name for the document will be the map name, but you can change this and the location where it is saved. Click **Save**.

Export selected topics to an OPML document

- 1. In MindManager, open the map and select the topics you want to export. (The export will include the subtopics the topics you select.)
- 2. Right-click on one of the topics, click **Send to**, and then click **OPML Document**.

Pack and Go

The **Pack and Go** command is used to add maps, and optionally, linked documents to a ZIP file. A Wizard guides you through the steps to package the maps. You can use this command to package a single map and its linked documents in Map View or for multiple maps in Linked Maps View. This makes it easy to move the map to a different location (for example, to a central location on your intranet, or to a different system if you are doing a presentation on a different computer).

These same steps are used to create an archive when using the Send feature to email a map or maps.

Package maps and documents

1. Click the File tab, click Export, then select Pack and Go.



In the Linked Maps View, click the **Pack and Go** command.

- 2. The Pack and Go wizard starts.
 - On the first screen you can choose which files to add to the ZIP archive. Options
 - If you do not include the linked documents, the links remain in the map, but do not function. Only the first level of linked maps is included - this means that if the main map links to a child map, the child map is included, but any maps that the child map links to are not.
 - On the second screen you enter the path and filename for the ZIP file. You can also add
 a comment to display when the files are unpacked form the archive. Click finish to start
 the packaging process. Options
- 3. When the packaging is complete, a message appears, and you can open the archive, open the target folder or close the wizard.



If the packaged map includes links to maps or documents and you include these in the archive, the links will not function unless you first extract the files from the archive.

Export to Microsoft Office applications

Export option	What is created
Export to Microsoft Word See Work with Microsoft Word	Microsoft Word document with choice of outline settings, map elements, Word template, link, graphics and header / footer options
Export a map to Microsoft Excel See Work with Microsoft Excel	Microsoft Excel document with choice of icon, tags, map elements, properties, content order, layout, formatting and header options
Export Task Info to a Microsoft Project file See Work with Microsoft Project	Microsoft Project file with choice of task and priority settings

Create a simple outline

MindManager can export your map to a simple outline in HTML or text format.

Export a map as a simple outline

- 1. Click the File tab, and then click Save As.
- 2. In the Save As dialog choose the format you want to export from the Save as type list: Outlines Plain text or Outlines Web Page.
- 3. Choose folder, enter the File name, then click Save.

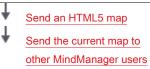


For a more sophisticated outline export, you can use the <u>Microsoft Word export</u> feature, or export your map as web pages.

Send maps

What do you want to do?

The best method to use for distributing your maps to others depends on whether the recipients are MindManager users.



Everyone:

See also:

Export maps

You can send the map as a self-contained HTML5 map for viewing. HTML5 maps are interactive: recipients can expand and collapse topics, read topic notes, and more. HTML5 maps can be viewed in a standard browser—no special software is required.

MindManager users only:

You can send a packaged map (and, optionally, its linked documents) in a .zip archive for viewing and editing. The recipients can unpack the map and related documents, and then view and edit them using MindManager.

Send an HTML5 map

You can send your map as a self-contained document in HTML5 format for viewing. HTML5 maps include an interactive map: recipients can orient it, expand and collapse topics, read topic notes, search for text, and print selected topics or the entire map.

- Open the map.
- Click the File tab, click Share, Email, then in the Email list, and select Send as Attachment (HTML5 Interactive Map).

An email message will automatically appear, with a .html file version of you map attached, and the standard instruction "I've shared a MindManager map with you. You can view it using your browser" in the body of the message. Simply add recipients, edit your message as needed, and send it.



Your email program must be set up as a MAPI server to use this feature. Most email clients have this option. These commands will not work with web-based email such as Gmail, Yahoo Mail, Outlook.com, or AOL. In these cases, you can <u>create the HTML5 map</u>, and then send it as an email attachment to the desired recipients.

HTML5 maps cannot be edited and do not support all map elements. See the HTML map feature support table for more details.

Send the current map to other MindManager users

You can send the current map, Map Template, or Map Theme to other recipients who are MindManager users. If you are conducting a review you can use the "for Review" option when you mail the map. When you send a map, the current map, template or theme (and optionally, its linked documents) are used to create a ZIP archive.

In the Linked Maps View the **Send as Email** command combines multiple linked map files into one ZIP file.

Send a map, template or theme

- 1. Open the map, template or theme.
- 2. Do one of the following:

Click the File tab, click Share, Email, then in the Email list, select Send as Attachment.



Click the File tab, click Share, Email, then in the Email list, select Send as Attachment For Review.

The two "Send" commands are similar. The "For Review" command adds a Review follow-up flag to the Outlook email and changes the subject line to "Review ..." . Also, the map automatically opens in Review mode on the recipient's system.

Send maps from the Linked Maps view

- In Linked Maps view, select one or more maps. In the Linked Maps group, click Send as Email.
- If you select the parent map, only the parent and level 1 maps will be sent. To send maps at level 2 and beyond you must select them.

Create the ZIP archive

You will be prompted for options to use for the ZIP archive. These are the same steps used by the Pack and Go feature to create an archive.



Since attachments are stored within the map file itself, and not as separate files, they are always included automatically when you send a map.

The map(s) and documents are compressed into a ZIP archive, and an email message is created with the archive included as an attachment.



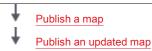
Your email program must be set up as a MAPI server to use this feature. Most email clients have this option. These commands will not work with web-based email such as MS Hotmail or AOL. In these

cases, you can use the <u>Pack and Go</u> command to create the archive and then send it as an email attachment to the desired recipients.

Publish map online

What do you want to do?

You can publish MindManager maps online. Only people that you have shared the link with can access your online map. It's viewable in their browser, without having MindManager installed.



You must be signed in to your free MindManager account to publish maps online. If you don't have an account, you can create one the first time you publish a map.

Publish a map

- 1. Open the file that you want to publish.
- 2. On the Home tab, click the Publish drop-down, click Start New Publish.
- 3. On the Publish Preview page, and choose one of the following:
- Publish Privately only those with the link can view
- Publish Privately with Password, and type a password in the Enter Password box only those
 with the link and password can view

You can share the online map by doing any of the following:

- share the link click Copy Link, and paste it in an email.
- embed in a website or blog click **Copy**, and paste the published map code in a website or blog.
- post to social media sites click the corresponding social-media site button, such as Facebook,
 Twitter or LinkedIn, and signing in.

Click **Advanced Options** to access settings for allowing commenting and downloads, automatically displaying the online map in Presentation mode, disabling the password, and choosing a storage location



You can preview the online map by clicking **View**. If you want to delete the online map, click **Undo**. You can delete an online map at anytime by opening the map file and clicking **Published** in the top-left corner of the map, and clicking **Un-publish**.

Publish an updated map

After you've made changes to the map, click **Published** in the top-left corner of the map, and clicking **Publish Update**.



You can view, undo or modify sharing options after publishing an update.



The Publish Update option is only available when changes have been made to the map.

Use Zapier

What is Zapier?

Using Zapier, leverage your MindManager maps and your favorite productivity apps for increased efficiency. Zapier is an online tool that allows you to connect two supported applications using automation. Many MindManager users employ maps to create project and task plans. Now, with Zapier integration, a MindManager user can send selected map topic or task data to, and receive queried third-party data in their map from, over 700 other applications (including dozens of project and task management applications):

Project	Management	Email /	Messaging	Social M Publish		Offic	e to	ols
•	Trello	•	Gmail	•	LinkedIn		•	Dropbox
•	Asana	•	Slack	•	Facebook		•	Google
•	Todoist	•	MailChimp	•	Twitter			Drive
•	Basecamp			•	Instagram		•	ZenDesk
•	Salesforce			•	WordPress		•	Google
•	GitHub							Docs
•	Jira						•	Office 365

Zapier offers free and paid plans to support your integration requirements, and new Zapier-supported applications are frequently added. For more information, and to see if your favorite app is supported, visit Zapier.com.

How do I use MindManager with Zapier?

It's easy! Use MindManager to develop plans using maps and flowcharts, then Zap topics (and the data they contain) to:

- assign tasks in your favorite task management application, like Trello or Basecamp
- generate emails based on topic information
- create Google documents that can be shared with your team

And so much more—there are dozens of ways to use leverage MindManager task data using Zapier! Let's say you want to share map data with Trello:



Add topic tags, resources, notes or hyperlinks whatever you need to keep your team on task and on time

Set up your Zaps:

maybe you want to be able to convert topics into boards, and subtopics into cards, with all the associated topic data transferred from MindManager to Trello. Simply build one Zap to create Trello boards, and another to create cards within those boards

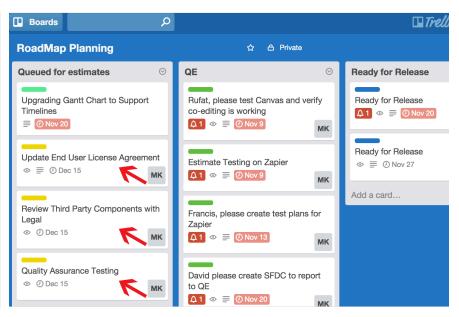
Zap topic data: now,
when you're in your
map, click the Zapier button
to send the selected
content directly to Trello,
updating you team and
assigning tasks as needed

Make a New Zap

or Explore Zaps



The result? Here's your Trello board, with individual cards that display topic data Zapped from your MindManager map.



Note: Zapier and other referenced applications may not be currently localized. To provide accurate on-screen guidance, on-screen text prompts and screen captures that reference Zapier or other applications' on-screen prompts are in English.

How do I get started with Zapier?

To use Zapier, first set it up (connect accounts and create a Zap). Once set-up is completed, you can start sending map topics to, and receiving map data from, your favorite applications.

To access the most current information on MindManager's Zapier integration, be sure to enable online help.

Set up Zapier

What's a Zap?

Zaps are automations that follow If/then rules. Each Zap consists of one trigger ("if this happens") and one action ("then do this") that work via a connection between two applications, the *trigger* app (the application that Zaps are *sent from*) and the *action* app (the application that Zaps are sent to).

To use Zapier, you'll need to:

- Connect two supported applications via Zapier (in this case MindManager and another Zapier-supported application).
- Set up the rules for each Zap you create.

READ HINT

What do you want to do?



Send map data using Zapier

Receive map data using Zapier

If you need help, check out "<u>How to Use Zapier</u>" in the Zapier <u>Learning</u>

<u>Center</u> or search the Zapier <u>Help Center</u> for common topics and guidance on connecting specific applications.

To access the most current information on MindManager's Zapier integration, be sure to enable online help.

Create a MindManager Account

To use Zapier, you'll first need to create a MindManager account. This account will be used to allow Zapier access to your maps.



You will need to have online access to set up a MindManager account or to use Zapier.

1. Do one of the following:

On the Tasks tab, in the Send
Tasks To group, click the Zapier
drop down then click Set Up
Account.



On the **Advanced** tab, in the **Zapier** group, click the **Zapier** drop down then click **Set Up Account.**



If you have already created a MindManager account, click Sign In and skip to step 3.

- 2. In the Set Up Account dialog, enter:
 - name
 - email
 - password

Or sign in using Google+.

- 3. Click Sign In to create your Zapier account.
- 4. Once your MindManager account is set up, you will see a confirmation message.

Create a Zapier account

Once you've created your MindManager account, you need create an account in Zapier.

1. Do **one** of the following:

In the MindManager Account
Confirmation dialog box, click
Launch to open the Zapier website
in your designated browser.



Navigate directly to the Zapier website in your preferred browser.

2. Follow the instructions on the Zapier website to create an account; if you already have an account, log into it.

With both accounts created, you can now create Zaps.

Create a Zap

Setting up Zapier is done on the <u>Zapier website</u> in a guided, step-by-step process. Because there are hundreds of applications you can link to using Zapier, creating a Zap will vary depending upon the applications you wish to connect.

Let's look at a test case: setting up a Zap between MindManager and Trello.

Note: Zapier is not currently localized. To provide accurate on-screen guidance, text and screen captures that reference Zapier on-screen prompts are in English.

1. In Zapier navigation bar, click **Make a Zap**. The Zapier interface asks you to choose a trigger and action:

First:

Choose a Trigger app: When creating a Zap that allows you to send topic information from MindManager to another app, the trigger app is always MindManager. Choose an Action app: choose the app where you want to send MindManager map topic data, for example, Trello.

Then:

Choose a trigger: While some Zapier-enabled applications allow you to choose from a variety of trigger activities, when you select MindManager, you will be offered one selection, **Zap topics**.

Choose an action: You choose the action you want to occur. The potential action will vary, depending upon the application you are

linking to. For example, if the action app is:

- Gmail, you can choose "send email" (create and send an email message that contains the map topics info) or "create draft" (create an email message with the map topic info, but do not send it).
- Evernote, you have the option of "create note,"
 "create tag," "create reminder," or "append to note."
- Slack, you can select "send direct message" or "send channel message."

Since we're linking to Trello in the example above, we'll choose "Create Board." This means that the topic information Zapped to Trello will be used to create a new Trello Board.

2. Connect accounts:



Select a MindManager account

Connect your MindManager account to allow Zapier access to it.

Select the Action application account

Connect Zapier to the account you have for the action application and allow access to it.

In this case, we'll be linking to a Trello account.

Test this account

 To ensure the accounts have been correctly accessed by Zapier, click the Test This Account button.



You can opt to skip testing altogether.

Now, you need to set up your Trigger Filters. Zapier lets you set conditions so that the Zap will only activate if those conditions are met.

First:

In the Filter section, click **+ Add Custom Filter**. The **Add a Filter** section opens with three entry fields:

- Field lets you select from a list of MindManager topic information, including Topic Text,
 Due Date, Tags, Priority, Resources, Notes, Hyperlink, Subtopics Text, Milestone,
 Progress, Start Date, and others. Choose the topic information that you want to use as the
 filter.
- Condition allows you to set the parameters of the content entered in Value. For example, if
 value contains a date, you can set the condition to (Date/Time) Greater Than, (Date/Time)
 Less Than, or (Date/Time) Equals.

• Value lets you type in the specific value the field must meet for the topic information to be Zappable. This could be a text string, a date, or a numeric.

Select the criteria you wish to use. Once you create a filter, *every* topic you wish to send using this Zap must meet the criteria defined in the filter, or you will get a Zapier error message.

In the example above, a Zap will be sent from MindManager to Trello to create a new card *only* if the selected topic has a priority marker of 1 or 2. Topics with a lower priority can not be Zapped.



You can set filters when you create the Zap, or later edit the Zap to add or change filters.

4. Customize the Action by matching up the MindManager topic information to target fields in the Action app.



For the Trello Board Zap above, the Organization name is skipped; Topic Text is used for the name of the new board, and the board's description includes the Resources included in the topic, the topic's Start and Due dates, any Notes or Links, and the current Progress of the topic.

When you send a Zap, MindManager information is sent and used by the Action application. How the information is employed varies depending upon the application—and the instructions you give Zapier in this step. Each application will offer a specific selection of information fields, some required, and others optional.

Some fields must have information typed into them.

• Others include a drop down menu of MindManager topic data. Click the Insert Fields

button to access the options and select the one(s) you want to associate with the field:

- topic text
- due date
- tags
- o resources
- priority
- o notes
- hyperlink
- subtopics text
- all branch info (this includes all the topic and subtopic info, and all markers for the branch)
- o milestones
- progress
- o start date

For example, when creating a Zap that will build a Trello board from a MindManager map topic, you are offered three fields:

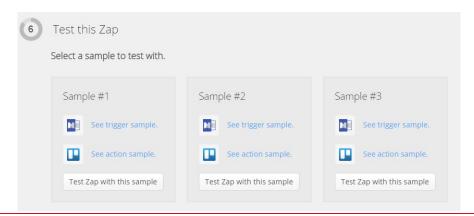
- Organization (optional)
- Name (of the board—required)
- o Description (of the board—required)

Note: Once you match the MindManager map data to the Action applications fields, your map topic *must* include all the designated types of data, *or you will get a Zapier error message*. In the Trello example above, if you do not have a "Due Date" set for the topic, you will receive an error message when you try to Zap that topic.

After customizing the Action, test the Zap.



Click the Test button.



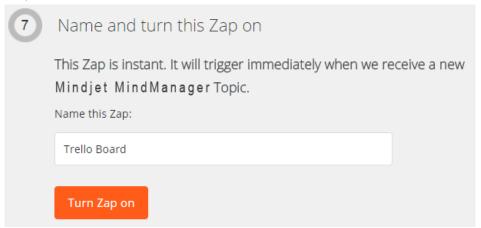
Note: You may need to return to your MindManager map and Zap a topic to successfully complete this test.

- Zapier will offer 1-3 samples to test.
 - o Click See trigger sample to review the trigger data that will be included in the Zap.
 - Click See action sample to review the actions that will be taken by the Zap.
- Click Test Zap with this sample to run a test of the Zap.
 - o If the test is successful, you will receive a notification:



 If the Zap is not successful, you will receive an error message noting the specific problem and telling you what to do next.

Name the Zap and turn it on.



Many people set up more than one Zap.

- For example, you may create a Zap to convert MindManager topic data into a Trello card, and another to send reminder emails via Gmail.
- You may even have more than one type of Zap for the same application: one to create a
 Trello card, one to create a Trello board, and one to create a Trello list

To keep track of your different Zaps be sure to give each Zap a distinctive name.

We made a Zap that used MindManager topic data to create a new board in Trello so a good name might be "Trello Board."

Click Turn Zap on to activate it.

Note: Data sent using Zapier is not synced to the map. If you make changes on your map, it will not be updated in the Action app. You must re-send the Zap to update the information.

Zapier Dashboard

Once you have successfully set up your Zap, you will see your it listed on your Zapier dashboard, under the name you gave it. You can then start Zapping from MindManager topics.

If you have set up more than one Zap, use the dashboard to manage them

- Turn Zaps on or off
- Delete Zaps
- Create new Zaps
- Save draft Zaps before activating
- Track your account usage

Send map data using Zapier

Once you have <u>set up Zapier</u>, you can start using your Zap to send topic data from MindManager to the Zap-enabled application(s) in your Zapier account.



If you need help, check out "<u>How to Use Zapier</u>" in the Zapier <u>Learning</u>

<u>Center</u> or search the Zapier <u>Help Center</u> for common topics and guidance on connecting specific applications.

To access the most current information on MindManager's Zapier integration, be sure to enable online help.

Note: Data sent using Zapier is not synced to the map. If you make changes on your map, it will not be updated in the Action app. You must re-send the Zap to update the information.

What do you want to do?

Send selected topics to
Zapier

Show/hide Zapier icons

Zapier History

Sign out of Zapier

See also:

Zapier set-up

Send selected Topics to Zapier

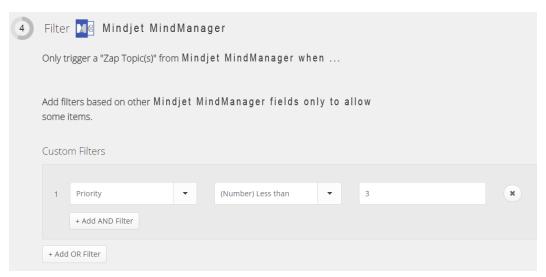
To send a topic using Zapier, you need to have set up Zapier and created a Zap.

Send a Zap

Note: Zapier is not currently localized. To provide accurate on-screen guidance, text and screen captures that reference Zapier on-screen prompts are in English.

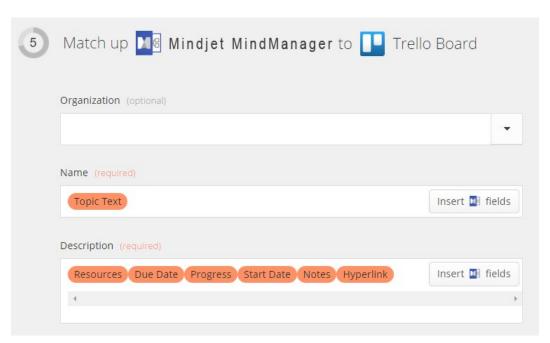
- 1. Select a topic. Before Zapping, check your topic to make sure that it:
 - Meets the criteria of the filter you set up (if you set up one).

 For example, for a Zap with a filter that states *only run the Zap* if the topic has a priority that is less than 3, your selected topic must have a Priority marker of 1 or 2 or you will get a Zapier error message.



 Includes all the topic information that has been "matched" to target fields in the Action app.

Suppose you have created a Zap for Trello that creates a new board with the following map data associated with the board's three fields: Organization, Name, and Description.



Before you use this Zap with a topic, ensure that the topic has:

- o Topic Text that will name the new board
- o Resources indicated
- A start and due date for the topic
- Notes (even if blank)
- A link

o A progress marker

If the topic does not include the items selected during setup, you will receive a Zapier error.



If you want to use a Zap that does not meet all criteria, you can go into the Zapier dashboard and edit the filter.

2. Do one of the following:

On the Tasks tab, in the Send
Tasks To group, click the Zapier
drop down then click Send
Selected Topics to Zapier.



On the **Advanced** tab, in the **Zapier** group, click the **Zapier** drop down then click **Send Selected Topics to Zapier**.

If your zap is successful, you will receive a confirmation message, and the Zapier icon is displayed on the topic. Hovering over the topic will open a tool tip indicating the Zapier status, and the topic will also be listed Under **Sent to Zapier** in the Elements tab on the Map Index.



Zapier icons are not listed in the Marker Index, and do not work with filters.

If your Zap is *not* successful, you will receive an error message and your topic will display the Zapier error icon . Hovering over the topic will display an error tool tip; the topic will also be listed Under **Sent to Zapier** in the Elements tab on the Map Index with an error icon.

Note: Data sent using Zapier is not synced to the map. If you make changes on your map, it will not be updated in the Action app. You must re-send the Zap to update the information.

Re-Zapping Topics

If you have already Zapped a topic, and you choose to Zap it again, you will receive an message warning you that re-Zapping may create duplicate information. You can choose to send anyway, or cancel.

Show/hide Zapier Icons

After you send a topic to Zapier, the topic displays a Zapier icon. You can turn this feature on or off by clicking **Show Zapier Icons in Map** in the **Zapier** drop-down menu.

1. Do **one** of the following:

On the **Tasks** tab, in the **Send Tasks To** group, click the **Zapier**drop down then click **Show Zapier Icons in Map.**



On the **Advanced** tab, in the **Zapier** group, click the **Zapier** drop down then click **Show Zapier Icons in Map.**

If you uncheck this option, the Zapier icon will not be displayed on topics that have been sent to Zapier. However, Zapped topics will be listed in the Map Index's Elements tab.



Zapier icons are not listed in the Marker Index, and do not work with filters.

Zapier History

Select View Zapier History from the Zapier drop-down to open the Map Index's Elements tab to see a list of all topics that have been sent to Zapier.

To remove Zapier History from a selected topic

- 1. Select the topic(s) where you want to remove Zapier history.
- Right click the Zapier icon in the topic and in the context menu, click Remove Zapier History from This Topic.

The Zapier icon is removed from the selected topic(s) and those topics are deleted from the Elements tab in the Map Index.

To remove Zapier History from the entire map

Do one of the following:

Right click the		On the Tasks tab, in		On the Advanced	
topic and in		the Send Tasks To		tab, in the Zapier	
the context		group, click the		group, click the	
menu, click	Or	Zapier drop down	Or	Zapier drop down	
Remove		then click Remove		then click Remove	
Zapier History		Zapier History from		Zapier History from	
from Map.		Мар.		Мар.	

The icon is removed from all topic(s) and all topics are deleted from the Elements tab in the Map Index.



You can use **Remove Zapier History from This Topic** or **Remove Zapier History from Map** to eliminate Zapier error icons.

Sign Out

To sign out of your MindManager account:

- In the Zapier drop-down menu, click **Sign Out**. Once you are signed out, you cannot send Zaps. To sign into your MindManager account:
 - In the Zapier drop-down menu, click **Set Up Account**. In the Account setup window, select **Sign In**, and enter your credentials (username and password.).

Receive map data using Zapier

Once you have <u>set up Zapier</u>, you can start using your Zap to receive topic data in MindManager from the Zap-enabled application(s) in your Zapier account.



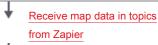
If you need help, check out "<u>How to Use Zapier</u>" in the Zapier <u>Learning</u>

<u>Center</u> or search the Zapier <u>Help Center</u> for common topics and guidance on connecting specific applications.

To access the most current information on MindManager's Zapier integration, be sure to enable online help.

Note: Data received using Zapier is not synced to the map. If you make changes to your Trigger app, they will not appear automatically on your map. You must run the Zap again to update the information.

What do you want to do?



Show/hide Zapier icons

Zapier History

Sign out of Zapier

See also:

Set up Zapier

Receive map data in topics from Zapier

For a topic to receive map data using Zapier, you must first <u>set up Zapier</u>, register the topic with the service, and then <u>create a Zap</u>.

Receive a Zap

Note: Zapier is not currently localized. To provide accurate on-screen guidance, text and screen captures that reference Zapier on-screen prompts are in English.

1. Do **one** of the following:

On the **Task** tab, in the **Send Tasks To** group, click the **Zapier** drop down and select **Make Receiving Topic**.



Or on the **Advanced** tab, in the **Zapier** group, click the **Zapier** drop down and select **Make Receiving Topic**.

- 2. When your topic's registration with the server is successful, the Zapier receiver button is attached to the topic, and a confirmation dialog gives you instructions on how to create a Zap.
- Click the Don't show this again checkbox to prevent this dialog from popping up every time you
 make a new receiving topic.
 - I READ NOTE

If there is a problem contacting the server, you receive an error message letting you know that your receiving topic could not be made and inviting you to try again.

- 4. In your Zapier account online, create a Zap using MindManager as the Action app and your topic as the Parent Topic.
- 5. On your map, click the topic's Zapier button and select **Receive Zaps for This Topic**. A progress dialog pops up to confirm receipt from Zapier, and success of the operation.
- 6. Subtopics are added to the map with the information from Zapier, marked with a **Received from Zapier** icon, and listed in the corresponding group in the Elements tab of the Map Index.



Hovering over the topic's Zapier button displays a status tooltip.

Note: Data received using Zapier is not synced to the map. If you make changes to your Trigger app, they will not appear automatically on your map. You must run the Zap again to update the information.

Remove the receiver

To remove the ability of your parent topic to receive information from Zapier, click the Zapier button and select **Remove Receiver**.

Your topic converts back to a regular topic, its button is removed, and it can no longer receive Zaps.

Show/hide Zapier Icons

When your topic has received data from Zapier, it is marked with a Zapier-receiving icon displaying a Zapier logo with a superimposed green down arrow. You can turn this feature on or off by clicking **Show Zapier Icons in Map** in the **Zapier** drop-down menu.

Do one of the following:

On the **Tasks** tab, in the **Send Tasks To** group, click the **Zapier** drop down then click **Show Zapier Icons in Map**.

or

On the **Advanced** tab, in the **Zapier** group, click the **Zapier** drop down then click **Show Zapier Icons in Map**.

If you uncheck this option, the Zapier icon will not be displayed on topics that have received Zaps. However, Zapped topics will be listed in the Map Index's Elements tab.

READ NOTE

Zapier icons are not listed in the Marker Index, and do not work with filters.

Zapier History

Select View Zapier History from the Zapier drop-down to open the Map Index's Elements tab to see a list of all topics that have received Zaps.

To remove Zapier History from a selected topic

- 1. Select the topic(s) where you want to remove Zapier history.
- Right click the Zapier icon in the topic and in the context menu, click Remove Zapier History from This Topic.

The Zapier icon is removed from the selected topic(s) and those topics are deleted from the Elements tab in the Map Index.

To remove Zapier History from the entire map

1. Do one of the following:

Right click the		On the Tasks tab, in		On the Advanced
topic and in		the Send Tasks To		tab, in the Zapier
the context		group, click the		group, click the
menu, click	or	Zapier drop down	or	Zapier drop down
Remove		then click Remove		then click Remove
Zapier History		Zapier History from		Zapier History from
from Map.		Мар.		Мар.

The icon is removed from all topic(s) and all topics are deleted from the Elements tab in the Map Index.



You can use **Remove Zapier History from This Topic** or **Remove Zapier History from Map** to eliminate Zapier error icons.

Sign Out

To sign out of your MindManager account:

 In the Zapier drop-down menu, click Sign Out. Once you are signed out, you cannot receive Zaps.

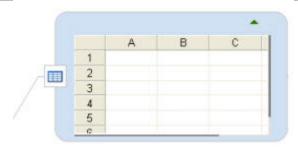
To sign into your MindManager account:

In the Zapier drop-down menu, click Set Up Account. In the Account setup window, select Sign In, and enter your credentials (username and password.).

Incorporate data, Microsoft Office, or SharePoint

Adding Topic data

Spreadsheets



What do you want to do?

Insert a spreadsheet

Format and customize the spreadsheet

View the spreadsheet as a

See also:

Work with Excel

chart

MindManager's spreadsheet feature provides a method for including topic-specific numeric data. It uses a standard interface similar to other spreadsheets you have used, and provides basic spreadsheet functions and the ability to display the data as a chart.

The spreadsheet can be sized and displayed or hidden. The data can be shown in spreadsheet form (a data table) or, in chart form (graphical representation).



If you already have data entered in Excel, you can link to the Excel data.

Insert a spreadsheet

- 1. Select the topic(s). On the **Advanced** tab, in the **Topic Data** group, click **Spreadsheet**. An empty spreadsheet will appear on the topic(s).
- 2. To enter spreadsheet data you must start the spreadsheet edit mode. Do one of the following:



Once the edit mode is started you'll see a toolbar with buttons for the spreadsheet commands, and **OK** or **Cancel** options for ending the edit mode. In edit mode you can type in the data, or paste it from another application.



You can paste data from another spreadsheet, or from a document that has data values separated by tabs.

To see more rows or columns select the spreadsheet and enlarge it by dragging the bottom or right margins.

Show or hide the spreadsheet

Click the topic's show or hide button.

Remove the spreadsheet from the topic

• Right-click the Spreadsheet topic icon | , then click **Remove Spreadsheet from Topic**.

Format and customize the spreadsheet

Once the data is entered, you can go on to rearrange and format it to suit your needs. The spreadsheet functions are based on standard spreadsheet conventions so they will be familiar to you. Options To further customize the spreadsheet, you can set the spreadsheet properties. Right-click on the topic's spreadsheet icon, and click **Spreadsheet Properties**.

After you've entered and formatted the spreadsheet data you can choose to display only the data, or, if you prefer to show a graphical representation of that data, you can create a chart.

View the spreadsheet as a chart

1. Optional If you are not already in spreadsheet edit mode do one of the following:

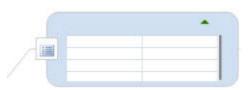


- 2. Click Chart View
- 3. To select the chart's data range enter the range limits, or click and drag to select the data, then press **Enter**.
- 4. You'll see a default chart displayed. Click **Chart Properties** to customize the chart to your liking. Some options can be set directly using the Chart toolbar buttons, or, right-click the chart, and then click **Properties** for the full set of options.

Switch between chart view and spreadsheet view

- 1. Optional If you are not already in spreadsheet edit mode do one of the following:
 - Right-click the topic's Spreadsheet icon , and then click Edit Spreadsheet
 - Select the topic then double-click the spreadsheet.
- 2. Choose the view to display:
 - Click the spreadsheet toolbar's Chart View button to see the chart.
 - Click the spreadsheet toolbar's **Spreadsheet View** button to see the spreadsheet.

Topic properties



One way to include data in a map is by adding properties sets to your topics. A topic properties set is an object included within a topic that contains a list of property names and their values. You can create and re-use topic properties sets to standardize the entry of data for topics of a specific type. For example you could create a topic properties set with fields for standard employee data such as department, manager, title, employee number, etc.

Within the set, you can classify some properties as Hidden. Hidden properties are not shown, by default, but you can choose to display them.

Creating a topic properties set involves two steps:

- A. Define a list of properties of various data types.
 At this point, you have a list of properties without values ready for data entry. If you'd like to use this list of properties for other topics you can duplicate it by copying the topic or by <u>creating a</u>
 Map Part.
- B. Edit the topic properties to populate the fields with data specific to this topic.

Once the topic properties set has been created you can choose to show or hide it, and if it's no longer needed, you can remove it from the topic.

You can also calculate a topic property based on the values of other properties used on the map. See <u>Use Formulas</u> to learn more.



The Map Index task pane Elements list displays all the topics on your map that contain topic properties.

What do you want to do?

Define a list of topic properties



View and modify topic properties

Copy and paste topic properties

See also:

Use formulas

Use map parts

Define a list of topic properties

- 1. Select a topic.
- 2. On the **Advanced** tab, in the **Topic Data** group, click the Properties icon ...
- 3. Click Define Topic Properties.

The placeholder "Property" appears as the first entry in the properties list

4. In the **Name** filed, enter the name for the property.



Topic properties must have unique names. You will not be permitted to enter a property name if it is already used in the topic.

5. Choose its data **Type** and **options**. The data type and options you choose will determine how the property's data is displayed and what type of data entry field is used. (See <u>Use Formulas</u> for information on Calculated properties.)



The **Hidden** checkbox determines whether this data is shown by default. If checked, the property is only shown when you choose to view Hidden properties.

- To define another property, click **New**, then repeat steps 3 and 4.Continue until you have added all the properties you want.
- 7. Click **OK** to exit the dialog.



If you want to re-use this set of properties for other topics, you can duplicate this topic before entering the data. You can either copy the topic or, if you plan to use it frequently, create a Map Part from it.

Enter data for topic properties

1. Select the topic where you have defined the properties, then do **one** of the following:



2. Enter the data for the properties. The data entry is controlled by the property's data format and options. If you have entered data that is not valid for the property type, the OK button will be disabled.



To see more properties, select the properties list and drag the corner handles.

3. When you are finished entering the data click **OK**.

View and modify topic properties

View the topic properties

- Click the show or hide button on the topic.
- To see more or fewer properties, click the properties box and drag to resize it.

READ HINT

Right-click the topic's Properties icon is to enable **Auto-Fit** - this will automatically size the box to show all properties.

Show hidden properties

Right-click the topic's Properties icon , then click Show Hidden Topic Properties.

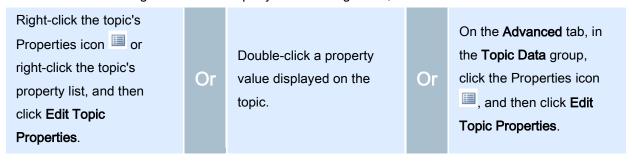
Hide properties in all map topics

- 1. On the View tab, click the Topic Info drop-down.
- 2. Choose Topic Info Display Settings.
- Uncheck the **Properties** check box.
 All properties in topics are hidden.

To show hidden properties in topics, click the Show/Hide indicator in the bottom right of the map, and choose **Reset Show/Hide to Default**.

Enter or edit property values

Do one of the following to switch to Property value editing mode, then enter new values:



READ NOTE

You cannot directly edit the value of a property that is calculated from other properties (indicated by next to the value).

Modify property names and definitions

Do **one** of the following to switch to Property definition mode:

Double-click a property name displayed on the topic.



Right-click the topic's Properties icon or right-click the topic's properties list, and then click **Define Topic Properties**.

READ HINT

You can change the numeric property types (Number, Currency, Percentage, or Integer) to any one of the other three without deleting any data that has already been entered into the property.

Changing between a numeric property type and a non-numeric one will result in the loss of any data that has been entered in the property.

READ NOTE

Topic properties must have unique names. You will not be permitted to enter a property name if it is already used in the topic.

If you rename a property that is used in a <u>formula</u> to calculate another property, the formula is not automatically updated to use the new property name. You must update the formula with the new name, or the property will not be used.

You can rename a property that is calculated by a formula in the Define Topic Properties dialog, or in the Formula Builder or Formula Editor.

If you un-check the Calculated option for a property calculated by a formula, the formula is removed from the topic, and the property assumes its current value which becomes static.

Remove topic properties or values from a topic

- To remove all properties and their values, right-click the topic's Properties icon [15], then click Remove All Topic Properties.
- To remove a single property and its value, right-click the property in the displayed properties, and then click Remove Topic Property. *
- To remove only the value for a property, right-click the property in the displayed properties, and then click Clear Topic Property Value. *
- * To perform this operation on multiple properties, CTRL+click the properties you want to select first.



If you delete a property that is calculated from a formula, that formula is also deleted from the topic.

Copy and paste topic properties

You can copy and paste a property value, a property name, or both the property name and value.

- To copy only the property value, right-click the value on the topic, and then click Copy Topic
 Property Value. To paste the value anywhere, press Ctrl+V.
- To copy both the name and value, right-click the topic property on the topic, and then click Copy
 Topic Property. To paste the copied properties, select a topic, and on the Home tab, click Paste,
 Paste Topic Properties.
- You can also paste the copied properties or values anywhere as text using the basic Paste (Ctrl+V) command.

You can also copy properties from one topic to another using drag and drop.

- Select the topic property and drag it to a new topic.
- To drag and drop more than one property, press CTRL as you select the properties, then drag and drop to the new topic.

Use formulas

Formulas let you calculate the value of a topic property by evaluating an expression that uses other topic properties from specific topics, task attributes, or a range of topics on your map. The properties used in the calculation are called input properties, and the resulting property is called a calculated property. Any topic on your map can contain one or more formulas to define one or more calculated properties.

Calculated properties are updated dynamically, so their values are automatically updated as you add or edit the input properties, or move, add or remove their topics.

Formulas can use input properties whose type is number, currency, integer, percentage or calculated.

READ NOTE

If you used AutoCalc in an earlier version of MindManager, a formula is created for each calculated property you defined. If you edit these formulas in MindManager 14, they will not be supported in earlier versions of MindManager.

What do you want to do?

Create a simple formula with AutoCalc

Create a formula with the Formula Editor

Edit or remove a formula

Hide formulas

Include hidden topics in

Formula elements and syntax

What is a formula?

Example of a simple formulas are:

[unit cost] = 22 + 3

```
Meaning: the "unit_cost" topic property is equal to 22 plus 3.

[unit_price] = [unit_cost] * 1.25

Meaning: the "unit_price" topic property for this topic equals the "unit_cost" property times 1.25.

[product_profit] = ([unit_price] - [unit_cost]) *[units]

Meaning: the "product_profit" topic property equals the "unit_price" property minus the
```

You can use topics anywhere on the map in the calculation, by using a formula like this:

"unit cost" property times the number of units.

```
[total_profit] = SUM (MapTopics [product_profit])
Meaning: the "total_profit" topic property for this topic equals the sum of the
"product profit" properties of all topics in all map topics.
```

You can also create more complex calculations that can evaluate a range of topics anywhere on the map and include only specific topics or topic types.

An example of a more sophisticated formula that you can create in the Formula Editor is:

```
[total_budget_surplus] = SUM (MapTopics [budget]) - SUM
(MapTopics[travel_expense], MapTopics[equipment_expense], MapTopics[salar
ies], topic[operations_expense])

Meaning: the "total_budget_surplus" topic property for this topic equals the sum of the
"budget" property on all map topics, minus the sum of the "travel_expense",
"equipment_expense", and "salaries" properties on all map topics, and the
"operations_expense" property on a specific map topic.
```

How do I create formulas?

Use the buttons on the **Advanced** tab to enter formulas: **AutoCalc** provides an interface for easy formula creation, or click **Formulas** to use the Formula Editor to create or edit more complex formulas.



The choice of decimal separators (period or comma) and list separators (comma or semicolon) is determined by the Windows **Control Panel** Region and Language settings for your computer.

Create a simple formula with AutoCalc

Autocalc lets you create simple formulas that include a single function, one input property, and one range.

To create more sophisticated formulas, use the Formula Editor:

- 1. Select a topic on the map.
- 2. On the ribbon's Advanced tab, click AutoCalc.
- 3. In the dialog, select:
 - The calculated property to be created on this topic by the formula.
 - The Function to use in the calculation.

- The input property used by the function.
- The topic range to evaluate.
- 4. Select the checkbox to add the input property to topics that are used in the calculation but do not already contain this property. Select the property type for these properties.
 (Use this option if you expect all the topics used in the calculation to contain the input property you can fill in the input property values at any time. If the input property is not present on a topic, that topic is ignored by the calculation)
- 5. Click OK.

Once you have created the formula, the topic will display a formula icon f^{x} . You can see a list of the topic's formulas by pointing to this icon.

If you want to change the formula you created, you can edit it in the Formula Editor.



You can see all the topics that contain formulas on the Map Index Elements tab.

Create a formula with the Formula Editor

The Formula Editor lets you create sophisticated formulas that include multiple functions (with grouping for precedence), input properties, and ranges.

- 1. Select a topic on the map.
- 2. On the ribbon's **Advanced** tab click **Formulas**.
- 3. The Formula Bar appears, and shows all the formulas contained on the selected topic.
- 4. Click + to open the Formula Editor and enter the new formula.
- 5. On the Formula Editor Insert bar, click to choose the topic property you want to define by the calculation (this is the formula's left-hand side). If you choose Other, enter the name for the new property between the brackets that appear [].
- 6. Click to the right of the = and type the formula. For speedier entry, you can use the Insert bar buttons to choose functions ∑ , ranges , task attributes , or select specific map topics to use in the calculation.

See Formula elements and syntax in this topic for details.

7. Click validate the formula. Errors will appear on the Formula Editor status bar.

To cancel changes you made using the Formula Editor, click . You can close the Formula Editor by pressing **Esc**.

Once you have created the formula, the topic will display a formula icon f.



You can duplicate the formula on other topics by copying the property that it calculates.

You can see all the topics that contain formulas on the Map Index Elements tab.

Edit or remove a formula

- 1. Select the topic that contains the formula you want to change or delete.
- 2. If the Formula Bar is not displayed, on the ribbon's **Advanced** tab click **Formulas**, or click the formula icon formula
- 3. On the Formula Bar select the formula you want to edit or remove. The Formula Editor starts.
- To edit the formula, modify the formula text manually or by using the Formula Editor buttons to specify Topic Properties , Functions , Ranges , Task attributes , and to select topics .

To remove the formula, click . You can close the Formula Editor by pressing Esc.



You can also remove a formula from a topic by deleting the topic property that it defines.

Hide formulas in all map topics

You can hide formulas inserted in topics.

- 1. On the View tab, click the Topic Info drop-down.
- 2. Choose Topic Info Display Settings.
- 3. Uncheck the Formulas check box.

All formulas in topics are hidden.

To show hidden formulas in topics, click the Show/Hide indicator Show/Hide is in Use-Click to Reset in the bottom right of the map, and choose **Reset Show/Hide to Default**.

Include hidden topics in formulas

By default, hidden topics are excluded from calculations. However, you can modify map settings to include topics hidden by filters.

- 1. Do **one** of the following:
 - On the File tab, click Info, and then click Map Settings.
 - Right-click the map's workbook tab, and choose Map Settings.
- 2. Disable the Recalculate formulas when there are topics are hidden by filters check box.



The properties of any topic referenced in a formula are always used in the calculation regardless of whether the topic is hidden or not.

Formula elements and syntax

General form

The general form for a formula is: lhs = rhs

lhs (left-hand side) specifies the calculated topic property to be defined by this formula. It will receive the results of the rhs (right-hand side).

rhs (right-hand side) is an expression that is evaluated to produce a numeric value. This value is assigned to the calculated topic property specified by lhs.

This expression usually acts on a range of topics and / or on specific topics.

Topic properties

In the Formula Editor, click to insert a topic property in the equation. On the lhs, you can select only properties in the current topic or create a new property. On the rhs, you can select any property used in the map.

Topic properties are always enclosed in square brackets [].

Examples: [cost] [unit cost] [all costs]

Topic properties used in formula calculations must be of one of the following numeric types:

- Number
- Currency
- Percentage
- Integer
- Calculated (a property whose value is determined by another formula)



You can change the numeric property types (Number, Currency, Percentage, or Integer) to any one of the other three without deleting any data that has already been entered into the property.

Operators and numbers

+	addition
- (hyphen)	subtraction
* (asterisk)	multiplication
/ (forward slash)	division
۸	exponentiation
() (parentheses)	grouping for precedence and enclose function arguments

You can use numbers in equations and group operations with parentheses.

Example:

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```
[Total] = 3*(5+2)+10*(2+2)
[Weighted Profit] = 3*[Profit] - (2*([Cost] / 15))
```

Topic ranges or selection

Topic ranges are used in the formula's right-hand side to specify a set of topics to use in the calculation.

You can specify the range by clicking in the Formula Editor, or by typing the keywords below.

To refer to specific topics, click and then select the topic in the map. If you do not specify a range for a property the calculation uses that property from the current topic. This is displayed in the formula as <u>topic</u>. You can see the name of the map topic by pointing to this text in the Formula Editor, or double-click it to navigate to the topic it references.

I READ NOTE

If you use a range that contains topics hidden by a <u>filter</u>, the properties on those topics are ignored during the formula calculation. If you reference a specific topic, its properties are always included in the calculation even if the topic is hidden.

Self	this topic; implicit, if range is not otherwise specified
Parent	parent of this topic; evaluates to nothing for the Central Topic
Branch	this topic and all its descendants
Children	the immediate subtopics (1 level) of this topic
Descendants	all subtopics (multiple levels) of this topic
Siblings	all other topics that have the same parent as this topic (not including this topic)
Ancestors	all topics (multiple levels) from which this topic descends, not including this topic
CentralTopic	the map's central topic
MapTopics	all topics in the map, including callouts and floating topics
Callouts	callouts on this topic; does not include callouts on boundaries and relationships

Floating	all floating topics in map, not including their
Floating	descendants

Range Examples

[cost] - "The cost property of this topic." (No range is specified, so "self" is implied.)
Siblings [cost] - "The cost property of the siblings of this topic."

topic [cost] - "The cost property of the topic that was selected." (Point to topic to see the name of the topic referenced.)

Task attributes

Task attributes can be used in the formula's right-hand side. You can insert a task attribute by clicking in the Formula Editor, or by typing the keywords below.

EffortMinutes	the amount of actual work time required to complete a task measured in minutes The effort for a specific resource can be specified by adding [R], where [R] is the resource name.
EffortHours	the amount of actual work time required to complete a task measured in hours The effort in hours for a specific resource can be specified by adding $[R]$, where $[R]$ is the resource name.
EffortDays	the amount of actual work time required to complete a task measured in days The effort in days for a specific resource can be specified by adding $[R]$, where $[R]$ is the resource name.
DurationMinutes	the span of time during which the task will be completed measured in minutes
DurationDays	the span of time during which the task will be completed measured in days
DurationHours	the span of time during which the task will be completed measured in hours

Progress	the amount of work completed on a task, expressed as a percentage
Priority	the priority level assigned to the task
GeneralCost	a fixed amount associated with the task
ResourceCost [R]	the resource cost for a resource where $[\mathbb{R}]$ is the resource name
TotalResourceCost	an amount associated with a task based on the amount of effort of a resource and the resource's rate
TotalCost	all costs associated with a task

Function arguments are enclosed in parentheses. Unlike topic properties, task attributes must not be enclosed in square brackets.

Example: [Resource Average cost] = AVERAGE (MapTopics.TotalResourceCost)

Meaning: the "Resource Average cost" topic property for this topic equals the AVERAGE of the "

TotalResourceCost" task attribute of all topics in all Map Topics.

Built-in functions

SUM	The sum of the property values.
AVERAGE	The sum of the property values divided by the number of properties.
COUNT	The number of properties.
MIN	The smallest value of the property within the range.
MAX	The largest value of the property within the range.

Function arguments are enclosed in parentheses.

```
Example: [Total cost] = SUM ( Descendants [cost] )
```

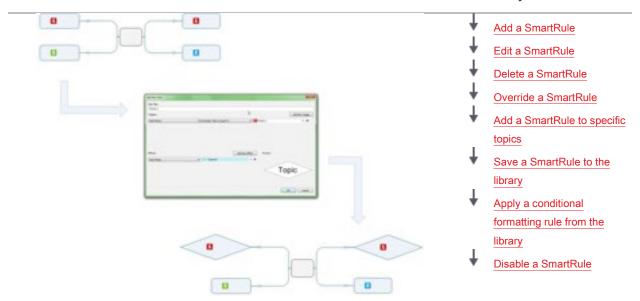
Multiple arguments are separated by, (commas).

Examples:

```
[Project_expense] = SUM ([travel_expense], [equipment_expense], [salaries])
[Total_expense] = SUM (MapTopics[Project_expense],
topic[Operations expense])
```

SmartRules

What do you want to do?



You can make data in topics more identifiable by changing how topic data is displayed when it meets criteria set in SmartRules. You first select a trigger, which is the criteria that must be met for the SmartRule to be applied. Next, you choose the effect to be applied if the trigger criteria is met. You can apply SmartRules to all topics in a map or only to ones that you specify.

You can have multiple SmartRules. The order in which the rules are applied is based on their priority, which you can modify. The number next to the rule in the SmartRules dialog defines its priority and controls the order in which rule effects are applied. The rule with a higher priority always has its effects applied in the event that more than one rule is trying to apply an effect to the same attribute.. For example, if rule 1 and rule 2 apply different fill colors to a topic, the color specified by rule 1 is used.

You can also choose whether a SmartRule effect can be manually overridden by other input. You can save a SmartRule to the library for reuse in new maps. By default, hidden topics are excluded from

SmartRules. However, you can modify map settings to include topics hidden by filters.

In previous versions of MindManager, this feature was called *Conditional Formatting*.

Add a SmartRule

- On the Advanced tab, in the Dashboards group, click the SmartRules arrow, and then click Add Rule.
- 2. Type a name for the rule in the **Rule Title** box.
 - By default, the rule is applied to all topics in the map. If you want to apply the rule only to specific topics, click **Advanced Options**, enable the **Specific Topics** option, click **Select Topic**, and choose the topics in the Select Topic dialog box, and click **OK**. These selected topics are locked for "Topic Belongs to Branch" trigger.
- 3. Open the **Triggers** drop-down, and choose one of the following:
 - Icons, and then choose an icon from the Select Icon drop-down.
 If you want to display topics to which no icons have been added, choose Doesn't exist.
 - Number of Attachments, and then choose an operator and number of attachments.
 - Number of Links, and then choose an operator and number of links.
 - Number of Subtopics, and then choose an operator and number of subtopics.
 - Part of Task Info Roll-up Branch, and then choose operators.
 - Resources, and then choose an operator and the text to match in the resource.
 If you want to display topics to which no resources have been assigned, choose Doesn't exist.
 - Tags, and then choose an operator and the text to match in the tag.
 If you want to display topics to which no tags have been assigned, choose Doesn't exist.
 - Task At-Risk, and then choose operators.
 - Task Cost General, Task Cost Resource, or Task Cost Total, and then choose an
 operator and a cost amount.
 - Task Start Date or Task Due Date, and then choose an operator and a date.
 If you want to display topics to which no start or due dates have been assigned, choose Doesn't exist.
 - Task Effort or Task Duration, and then choose an operator and a time increment.
 - **Task Milestone**, and then choose an operator.
 - Task Priority, and then choose an operator and a priority level.
 If you want to display topics to which no priority levels have been assigned, choose
 Doesn't exist.
 - Task Progress, and then choose an operator and a progress level.

- Topic Belongs to Branch, and then choose an operator and a branch.
- **Topic Location,** and choose an operator, and then choose an object in the map.
- Task Notes, and then choose an operator and the text to match in the topic.
- **Topic Text**, and then choose an operator and the text to match in the topic.
- **Topic Style**, and then choose an operator and the topic style to match.

The map must contain a topic style for this option to be available

A rule can have multiple triggers. To add another trigger, click **Add New Trigger**, and set the trigger criteria. You can choose to apply the SmartRule when the criteria for one trigger or for all triggers is met.

- 4. Open the **Effects** drop-down, and choose any of the following effects that you can apply to text in a topic or subtopic:
 - Font Bold
 - Font Color
 - Font Italic
 - Font Size
 - Font Strikethrough
 - Font Underline
- 5. Open the **Effects** drop-down, and choose any of the following effects that you can apply to a topic or subtopic:
 - Fill Color
 - Line Color
 - Topic Shape

You can use multiple effects for the same trigger. To add an effect, click **New Effect**, and choose effect settings.

Add a SmartRule to specific topics

Do one of the following:

- Click the **SmartRules** arrow, click **Add Rule**, set the rule criteria, enable the **Specific Topics** option, click **Select Topics**, and choose the topics in the Select Topic dialog box, and click **OK**.
- Select the topics to which you want rules applied, click the **SmartRules** arrow, click **Add Rule for Selected Topics**, set the rule criteria, and click **OK**.

Edit a SmartRule

- On the Advanced tab, in the Dashboards group, click the SmartRules arrow, and then click Edit Rule.
- 2. In the SmartRules dialog, select the rule to edit.

- 3. Click Edit.
- 4. In the Edit Rule dialog, modify the rule settings.

Override a SmartRule

- 1. On the Advanced tab, in the Dashboards group, click SmartRules, and then click Edit Rule.
- 2. In the SmartRules dialog, select the rule to override, and then click Edit.
- 3. In the Edit Rule dialog, enable the Allow Manual Override for Effects check box, and click OK.

Delete a SmartRule

- 1. On the Advanced tab, in the Dashboards group, click SmartRules.
- 2. In the SmartRules dialog, select the rule to delete.
- 3. Click Delete.

Modify the priority of SmartRule

- 1. On the Advanced tab, in the Dashboards group, click SmartRules.
- 2. In the SmartRules dialog, select a rule.
- 3. Click the **Up Arrow** or **Down Arrow** buttons to move the rule within the list.

Save a SmartRule to the library

- 1. On the Advanced tab, in the Dashboards group, click SmartRules.
- 2. In the SmartRules dialog, select the rule to save.
- 3. Click Save To Library.

Apply a SmartRule from the library

- 1. On the Advanced tab, in the Dashboards group, click SmartRules.
- In the SmartRules dialog, click the Add New arrow, and click Add From Library.
- 3. In the Add From Library dialog, select the rule.
- Click Add.

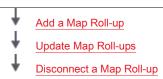
Disable a SmartRule

- 1. On the Advanced tab, in the Dashboards group, click SmartRules.
- 2. In the SmartRules dialog, select the rule to disable.
- 3. Click the **Enable** button. If the button is gray, the rule is disabled.

Map Roll-ups

What do you want to do?

You can roll-up topics or branches from other maps into topics in your active map. Map roll-up topics can be refreshed to show the latest updates in the original map.



Add a Map Roll-up

- 1. Select a topic on the map where you want to roll-up a topic from another map.
- 2. On the ribbon's **Advanced** tab, click **Map Roll-up**.
- 3. Click Insert New Map Roll-up.
- 4. In the Choose Location dialog, do one of the following:
- Choose Local to select a map on your system, then in the Open dialog, select the map containing the topic that you want to roll up.
- Choose a cloud storage service where a map is stored, then in the Open From [cloud storage service] dialog, select the map containing the topic that you want to roll up.
- 5. In the Select Topic to Roll-up dialog, select the topic, and then click **OK**.

A Map Roll-up icon appears in the topic. If you want to include subtopics within the Roll-up, right-click the Map Roll-up icon, and click **Show Topic and Branch**.

Update Map Roll-ups

Do any of the following:



Update all Map Roll-ups

- 1. On the ribbon's Advanced tab, click Map Roll-up.
- 2. Click Refresh All Map Roll-ups in Map.



You can automatically refresh all map roll-ups when you open the map by clicking **Map Roll-up** on the ribbon's **Advanced** tab, and then clicking **Refresh Map Roll-ups on Open**.

Disconnect a Map Roll-up



Right-click a Map Roll-up, and click **Disconnect Map Roll-up**.

Working with Microsoft Office

Troubleshooting Microsoft Office add-ins

MindManager provides a variety of ways to integrate data from Microsoft Office applications into your maps, or add map content to new or existing Office documents:

Excel	Create an active, two-way link between an existing map topic and a range of Excel data.
	Import a Microsoft Excel (XLSX) spreadsheet into a topic in an existing map or create a new map based on the file.
	Export your entire map or only selected topics to a Microsoft Excel spreadsheet.
	Export your entire map or only selected topics to a CSV file that Excel can import.
Outlook	Query Outlook for matching items and use them to create new map topics with active links to their associated items.
	Send a map topic to Outlook to create a new Outlook item and an active two-way link between the topic and the new item.
	Send items from Outlook to a map to create new, linked map topics.
Project	Import tasks from a Project file to a map.
	Send tasks from Project to create topics in a MindManager map.
	Export topics from a map to create tasks in Project.
Word	Import a Word document to a map to create new topics.
	Export a map (or selected topics) to Word.

The Microsoft Office integration features are provided by add-ins that are installed when you install MindManager.



Add-ins will only activate features in MindManager if you have the supporting program installed. For example, you will not see any commands in MindManager for using Microsoft Word if you do not have Word installed on your system.

Troubleshooting Office add-ins

Missing commands in MindManager

The Microsoft Office add-ins add entries in:

- The File tab Export and Import menus
- The File tab Save As, Save As Save as type: list.
- The MindManager ribbon the Tasks tab, Send Tasks To group, and the Advanced tab, Queries
 group.
- Topic shortcut (right-click) menu Send to ... command.

If you do not see the command you want to use, the add-in may be disabled, and you must enable it in MindManager.

- Click the File tab, click Options, and then click Add-ins.
- Verify that the add-ins you want to use are checked.

If you do not see the add-in you want to use listed, it may not have been installed properly: Perform a repair of MindManager as detailed in our <u>online</u> support pages. This will attempt to re-install and reregister the add-ins in the Office programs. It is very important that all Office programs are closed at the time of installation or repairing.

In addition to having the Add-in installed, you must also have the supporting program installed on your system.

Missing commands in Office applications

The Microsoft Office add-ins add "Send to MindManager" buttons to the interfaces of the Office applications. Depending on which version of the applications you are using, you'll see these buttons either on the main toolbar, or the ribbon. If these commands are missing from the Office application you want to use, the add-in may be disabled, and you must enable it in the Office application.



The add-ins will not add buttons to applications from the 64-bit edition of Office. If you are running the 32-bit version of Office on either a 32-bit or 64-bit system, you should see buttons from the add-ins if they are enabled. Consult the Microsoft Office Help for more information on using Add-ins with Office

Check the application's add-ins

- Office 2003 and 2007 users: Click Help Disabled items
- Office 2010 and later users: Click the File tab, click Options, and then click Add-ins. From the Manage list, select Disabled items, and then click Go.

If you see the MindManager add-in listed, click to enable it and then restart the application. The add-in button should reappear on the ribbon.

If you do not see the MindManager add-in listed, perform a repair of MindManager as detailed in our online support section. This will attempt to re-register the add-ins in the Office programs. It is very important that all Office programs are closed at the time of installation or repairing.

Additional steps for troubleshooting add-ins can be found in the Support section of our website.

Work with Microsoft Excel

The Microsoft Excel Linker allows you to create topics with spreadsheets or charts that are linked to data in Microsoft Excel.



You must have Excel 2003 or later installed on your system to use this feature.

You can include a range of data from an Excel worksheet as an object on a map topic. A link is maintained to the Excel worksheet: any changes made to the data in Excel will be reflected in MindManager. This data can only be edited in Excel. When you begin editing the data in MindManager, Excel opens so you can edit the data there. You can use the MindManager spreadsheet charting feature to create a chart from the data. You can also choose to show or hide the data on the map.

You can break the link to the Excel data so that the MindManager spreadsheet is independent of Excel. The data then becomes normal spreadsheet data and can be edited in MindManager.



You can also export your entire map or only selected topics to a <u>CSV</u> file that Excel can import.

The Map Index task pane Elements list Business Topics group displays all the linked Excel topics on your map.

What do you want to do?



Link to Excel data

View and modify the data

Disconnect the topic from Excel

See also:

Spreadsheets

Work with Microsoft Office

Import from and export to Microsoft Excel

MindManager lets you import and export Excel files:

Import

To import an Excel spreadsheet into a topic in an existing map or create a new map based on the file, see Import a Microsoft file.

Export your entire map or only selected topics to a Microsoft Excel spreadsheet.

Export your entire map or only selected topics to a CSV file that Excel can import.

Export

To export your entire map or only selected topics to a Microsoft Excel spreadsheet, see Export to Microsoft Excel.

You can also export your entire map or only selected topics to a <u>CSV file</u> that Excel can import.

Link to Excel data

Your map can include topics that link to and display Excel data. You can establish the link to the data from either MindManager or Excel.

Link topics to Excel data from Excel

- 1. Highlight a range in the Excel worksheet.
- 2. Click the **Send to MindManager Map** button on the Excel ribbon.

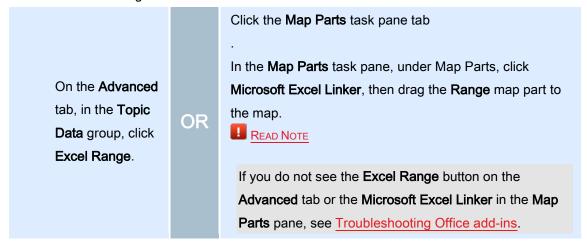
If MindManager is open a new topic is added to the current map as either a main topic (nothing selected) or as a subtopic of the currently selected topic. The new topic contains the worksheet data. If MindManager is not open, it opens and begins a new map with a main topic that contains the worksheet data.



If you do not see the **Send to MindManager Map** button in Excel, see Troubleshooting Office add-ins.

Link topics to Excel data from MindManager

- 1. Optional Select a topic. A new subtopic will be created with the data.
- 2. Do one of the following:



- 3. If Excel is not open it will start and prompt you to open a worksheet. Otherwise, it displays the current worksheet.
- 4. You will be prompted to highlight a data range in Excel. Highlight the range and click **OK**.

 ✓ READ HINT

You can modify the selected range later, if you wish.

5. Switch back to MindManager. You'll see the Excel data included as a spreadsheet on a new topic.



If only a portion of your data is shown you can re-size the spreadsheet as described below.

You can close Excel at any time. You will be prompted to save the worksheet to save the MindManager links.



MindManager does not support Excel formulas.

View and modify the data

Resize the spreadsheet

Initially, you may only see a portion of your data. To see all the data, you can resize the spreadsheet.

- 1. Select the topic then click again to select the spreadsheet.
- 2. Use the corner handles to resize the data area.



MindManager displays the data as shown in the spreadsheet - its formatting, row height, and column widths are determined there.

Modify the selected range

- 1. Right-click the topic's Microsoft Excel 🔟 icon.
- 2. Click Update Microsoft Excel Range.
- 3. Excel will open and prompt you for the new range.

Edit the worksheet data

When you link to worksheet data in Excel, you can edit the data in one of the following ways.

Edit the worksheet directly in Excel, then update the data in MindManager

- 1. Open and edit the worksheet as you normally would in Excel, and save it.
- 2. In MindManager, right-click the Excel topic and click **Refresh**.



To refresh multiple topics with Excel links right-click the map background, and then click **Refresh All Topics** or press SHIFT+F5.

Start the editing process from within MindManager.

- 1. Double-click on the spreadsheet on the topic.
- 2. The spreadsheet will open in Excel. Switch to Excel and edit the data, then save the worksheet.
- 3. In MindManager, right-click the Excel topic and click **Refresh**.

View the data as a chart

- 1. Right-click on the Excel topic icon and click Chart View.
- 2. Highlight the data range for the chart in the topic spreadsheet.

Change the look of the chart

• Right-click on the Excel topic icon I and click Chart Properties.

Some options can be set directly using the Chart toolbar buttons, or, right-click on the chart and select **Properties** for the full set of options.

Disconnect the topic from Excel

You can disconnect the map spreadsheet from Excel - this breaks the link but the data remains in the map as a MindManager spreadsheet. Changes to the data in MindManager will no longer affect the Excel spreadsheet and vice-versa.

- 1. Right-click the Microsoft Excel icon 🗷 on the topic.
- 2. Click Disconnect from Microsoft Excel.

The data is retained in the map as a spreadsheet.

Work with Microsoft Outlook

Maps can contain topics that are linked to and synchronized with their Outlook counterparts. These are called linked Outlook item topics You can then edit the associated Outlook items directly from within MindManager by editing the linked topic - your changes are synced to the Outlook item. Likewise if the item is edited in Outlook, those changes are synced to the map, and the topic will change.

READ NOTE

You must have Outlook 2003 or later installed on your system to use these features.

Linked Outlook item topics show special icons that indicate the type of item they are linked to:

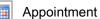












There are several ways to add linked Outlook item topics to your maps:

- Conduct an Outlook query in MindManager to find Outlook items that match criteria you specify and then:
 - Add the query and its results to your map
 - Add select items from the guery results to your map
- Send a topic from your map to create an Outlook task or appointment
- Send items or folders from Outlook to create linked Outlook item topics on your map
- Drag an Outlook item into your map.

READ HINT

You can also create Outlook appointments by creating reminders on topics using MindManager's Topic Alert feature. When you create a reminder, a corresponding Outlook appointment is automatically created. Topic Alerts are kept in sync and can be edited from either application.

The Map Index task pane Elements list Business Topics group displays all the topics on your map that contain Outlook queries, query results, and linked Outlook topics.

What do you want to do?

- Add an Outlook query to your map
- Add select Outlook query results to a map
- Create, edit and manage queries
- Send a topic from your map to create an Outlook task or appointment
- Send Outlook items or folders to a map
- Drag Outlook items into your
- Edit Outlook query and linked Outlook item topics
- Sync queries and linked Outlook item topics

Add an Outlook query topic to your map

MindManager comes with a set of pre-defined Outlook queries that you can use. You can use these asis, edit them to suit your needs, or create your own queries.

READ NOTE

Outlook queries are disabled for flowcharts

When you add an Outlook query topic to your map it returns all matching Outlook items as linked Outlook item subtopics. You can sync the query at any time to see updated results.

- 1. *Optional* Select a topic (the query will be added as a subtopic of this topic)
- On the Task tab, Send Tasks To group or the Advanced tab, Dashboards group, click Outlook Items.
 - READ NOTE

If you do not see these commands, see Troubleshooting Office add-ins.

- 3. Click the query you want to use, or click **New Outlook Query** to design your own.
 - READ HINT

By default, queries that return tasks or appointments add the task assignees or appointment invitees to your map's Resources list. If you design your own query, you can disable this.

4. The Outlook query topic and its results (linked Outlook item topics) are added to your map.

You can also add a query topic from the Outlook task pane. Using this method allows you to run the query to preview its results before adding the topics to the map.

- On the Task tab, Send Tasks To group or the Advanced tab, Dashboards group, click Outlook Items.
- Click Outlook Query Organizer.
- 3. In the Outlook task pane, select the query you want to use and drag it to your map, or right-click it and then select **Add to Map**.
 - Click to run the query first, if you want to see what results it will produce before adding it to the map.
- 4. The Outlook query topic and its results (linked Outlook item topics) are added to your map.
 - READ HINT

By default, queries that return tasks or appointments add the task assignees or appointment invitees to your map's Resources list. You can disable this option by editing the query before you add the query topic to your map.

Add select Outlook query results to your map

You can add specific items from a query you've run in the task pane to your map:

 On the Task tab, Send Tasks To group or the Advanced tab, Dashboards group, do one of the following: Click **Outlook Items**, then enable **Outlook Query Organizer**



Click the **Task Panes** button **1** at lowerright, and select **Outlook**.

- 2. In the Outlook task pane, select the query you want to use and click b to run the query.
- 3. The query results appear in the lower section of the pane.
- 4. Drag any item from the results onto your map. These become linked Outlook item topics.



You can sort the items in the Results list by clicking on the column headers.

To open an item in Outlook, double-click its name.

Create, edit, and manage queries

You work with Outlook queries by using the Outlook Queries task pane. To see this pane, do **one** of the following:

On the Task tab, Send Tasks To group or the Advanced tab, Dashboards group, click Outlook Items. Enable Outlook Query Organizer.



Click the **Task Panes** button **■** on the bottom status bar, and then click **Outlook**.

READ NOTE

If you do not see these commands, see Troubleshooting Office add-ins.

Change the order of queries in the list

• In the Outlook Queries task pane, drag query names up or down to reorder the list.

Create a new query

- 1. In the Outlook Queries task pane, click , or right-click on an empty space in the list of queries, and then click **New Outlook Query**.
- 2. Enter information for these fields.
- 3. Click OK.

MindManager automatically runs the query and displays the matching items in the **Results** list in the lower section of the pane so you can see if the query works as expected.



You can sort the items in the Results list by clicking on the column headers.

To open an item in Outlook, double-click its name.

Edit an existing query

- Optional If you want to create a new query from an existing query without changing the original, in the Outlook Queries task pane, right click the query and then in the shortcut menu, click Duplicate.
- 2. In the Outlook Queries task pane, select the query you want to edit, and click Edit Outlook Query, or right-click the query you want to edit, and then click Edit Outlook Query.
- 3. Modify the information in these fields.
- 4. Click OK.

MindManager automatically runs the query and displays the matching items in the **Results** list in the lower section of the pane so you can see if the query works as expected.

You can also edit queries that you have already added to your map.

Delete queries

• In the Outlook Queries task pane, select the query you want to delete (press CTRL to select additional queries, or press SHIFT to select a range), and click Delete Outlook Query, or right-click the query and then click Delete.

READ HINT

Deleting a query does not affect queries you have already added to your map. To delete a query on the map, select it and then press DEL.

If you accidentally delete one of the default queries, you can restore it: right-click the queries list background, and then click **Restore Default Queries**.

Send a topic from your map to create an Outlook task or appointment

When you send a topic to Outlook, a new task or appointment is created in Outlook. The topic becomes a linked Outlook item topic that is synced with its corresponding Outlook item.

- 1. (optional) To send multiple topics to Outlook, select them now.
- 2. Do one of the following:

Right-click on a topic, click **Send to**, and then click **Microsoft Outlook as Task** or **Microsoft Outlook as Appointment**.



On the ribbon's **Task tab, Send Tasks To** group or the **Advanced** tab, **Dashboards** group, click **Outlook**.



If you do not see these commands, see Troubleshooting Office add-ins.

If you send a single topic:

 A new Outlook item is created and the appropriate Outlook form pops up to let you enter the necessary item data.

- Click Save and Close to save the new item in Outlook.
- Click Cancel to cancel creating the Outlook item.



Outlook 2003 and Outlook 2013 do not display the form. The new item is simply created, and the topic becomes a linked Outlook item topic.

If you send multiple topics:

New Outlook items are created with these default properties ▼. You can then edit the items in Outlook individually to adjust their properties.

```
For Outlook appointments
Start =
topic start date (if present)
otherwise, use topic due date (if present)
otherwise, use today
Start time =
current time, rounded up to closest 1/2 hour (as in Outlook)
Duration =
topic duration (if present)
otherwise, 30 minutes
For Outlook tasks
Start =
topic start date (if present)
otherwise, no start date
Due=
topic due date (if present)
otherwise, topic start date (if present)
otherwise no due date
```

The topics become linked Outlook item topics that are synced with their corresponding Outlook items.

Send Outlook items or folders to a map

When you send items from Outlook to a map, new Outlook topics are created on the map. These topics are linked to the corresponding Outlook items.

- 1. Open the target map in MindManager or, if this is a new map, save it. Select a topic if you want the new Outlook item topics to become its subtopics.
- 2. In Outlook do **one** of the following:

Select one or more items, then click

Send to MindManager Map on the ribbon.

Click on a folder and then click Send

Folder to MindManager Map on the ribbon or on Standard toolbar.



If you do not see these buttons in Outlook, see Troubleshooting Office add-ins.

The Outlook items are added as Outlook topics: as subtopics below the selected topic, or as main topics if nothing is selected.

Drag Outlook items into your map

When you drag items from Outlook to a map, new Outlook topics are created on the map. These topics are linked to the corresponding Outlook items.

- 1. Open the target map in MindManager or, if this is a new map, save it.
- 2. In Outlook, select one or more items (message, note, task, appointment, or contact) and drag them into the map in Map view or Outline view.
 - If you drag the item(s) onto a topic, the new Outlook topics become subtopics.
 - If you drag the item(s) onto the map background, the new Outlook topics become main topics.

Edit Outlook query and linked Outlook item topics

Edit a query on the map

Once you have added a query to your map, you can edit it.



This only changes the map query, it does not affect the original query in the Outlook queries task pane.

- 1. Click the Outlook Query topic icon, and then click Edit Query.
- 2. Modify the information in these fields.
- 3. Click OK.

MindManager automatically runs the modified query and displays the new results as linked Outlook item subtopics.



You can add your own subtopics to the Outlook Query results topics. These will be retained on sync, unless their parent is no longer included in the query results.

Edit Outlook items

When you edit an item in Outlook that is linked to a map topic, you'll see the changes on your map the next time you sync the item or its parent query topic.

You can also edit Outlook items directly from the map by doing one of the following:

Edit the item attributes and properties on the linked Outlook item map topic. Your changes are sent to Outlook the next time you sync the topic. Some information is read-only in MindManager.



Open the item in Outlook from
MindManager and edit it. Your
changes are recorded in Outlook
immediately, and will show on your
map the next time you sync the topic.

Edit item attributes and properties on a linked Outlook item topic

You can edit linked Outlook item topics in the same way that you edit normal map topics. For example, you can change the topic text, or change the task info, and then sync the topic to change the corresponding Outlook item's properties.

Some item properties are included as Topic Properties. To show or hide these:

Click or on the linked Outlook item topic.

To edit these:

• Select the topic, then double-click on a property value (right-hand column) to start edit mode.



Some attributes and properties of Outlook topics will be read-only: all information that is read-only in Outlook will also be read-only on the topic. For example, an appointment is read-only for everyone but its owner. Some other information on the map topics may be read-only, but can still be edited by opening the item in Outlook.

Your changes are sent to Outlook the next time you sync the topic.

Open the Outlook item from MindManager

- 1. Click the topic's Outlook item icon.
- 2. Click Open Microsoft Outlook item.

The item opens in Outlook so you can edit it. Your changes will appear on the map when you sync the topic.

Disconnect an Outlook query or linked Outlook item topic

- 1. Click the topic's Outlook query or Outlook item icon.
- 2. Click Disconnect from Microsoft Outlook.

If you disconnect a query topic, the query definition will be removed from the topic. Its icon will change from (Outlook query) to (topic with Topic Properties). Its existing results topics will remain linked to and stay in sync with their corresponding Outlook items.

If you disconnect a linked Outlook item topic, its icon changes to [48] (topic with Topic Properties). Its properties are retained as Topic Properties, but it is no longer linked to or synced with its corresponding Outlook item.

Sync queries and linked Outlook item topics

You can sync a query that you have added to your map to get updated results, or sync the query's individual results topics. You can also sync individual linked Outlook item topics that you have added directly to the map. If you have edited the properties on any linked Outlook item topic, your changes will be sent to Outlook, and vice versa.

Sync a query

On your map, click the Outlook Query topic icon , and then click Sync query topics with Outlook.

MindManager will re-run the query to show you the most current results.

Sync all Outlook items - all queries and individual linked Outlook item topics

On the Task tab, Send Tasks To group or the Advanced tab, Dashboards group, click Outlook
 Items, and then click Sync All Outlook Items in Map.

Sync specific items

- Select the topics you want to sync. On the Task tab, Send Tasks To group or the Advanced tab,
 Dashboards group, click Outlook Items, and then click Sync Selected Outlook Items.
- On a linked Outlook item topic, click the Outlook item icon, and then click Sync with Outlook.



Sync rules

In some cases, if an item has been changed in both Outlook and in MindManager since the last sync, you will be asked to resolve the conflict. Syncing follows these rules.

Work with Microsoft Project

MindManager can export tasks from a map to Microsoft Project, and import tasks from Project into a map.



READ NOTE

You must have Microsoft Project 2003 or later installed on your system to use these features.

The Project import and export is a one-time operation, and no link is retained between the Project tasks and the MindManager topics. When you begin the Project export, MindManager will prompt you for some Export Format Settings.

When MindManager imports a set of tasks from Project, it translates the task information from Project into the corresponding MindManager Task Info, and creates a new map with one topic for each task.

What do you want to do?

Prepare the map for export Export an entire map to Microsoft Project

Export selected topics to a Microsoft Project file

Import an entire Project file Import only selected Project tasks

See also:

Work with Microsoft Office

Task info

Prepare the map for export

Project uses the MindManager Task Info to fill in the task details, but your topics are not required to have task info defined for them. In other words, you can export a basic set of tasks from MindManager and fill in the information for them in Project.



READ NOTE

MindManager's Project export does not use task due dates when it creates new tasks in Project. You should assign a Start Date and Duration value to the task in MindManager. Tasks that contain only Start Dates and Due Dates will result in "0 hrs duration" tasks when exported to Project.

Project can only support a single link per task. If any of your map topics have multiple links, only the first (primary) link is exported. You can re-order the links on a topic if the link you want to export is not the topic's primary link.

Export an entire map to a Microsoft Project file

1. Open the map in MindManager.



READ HINT

Only visible topics are exported. This means you can apply a filter to hide topics you don't want to include in the project.

2. Do one of the following:

On the **Home** tab. click the arrow next to the



Click the File tab, and click Share. Then



Click the File tab. click Save As, and in the

Share button. In the	under Export , click	Save as type list select
Share drop-down,	select Export to	Microsoft Project Files.
select Export Task Info	Microsoft Project.	
to Microsoft Project.		

- 3. In the export dialog, the default name for the project will be the map name, but you can change this and the location where it is saved.
- Click Save.
- 5. A dialog appears with the export settings. Check the options you want to use.

A new Project file is created. You can **Open** the project to check it, **Open Folder** where it was saved or **Close** to return to MindManager.

Export selected topics to a Microsoft Project file

- 1. In Project, open the file that you want to add the tasks to. If no project is opened, a new project will be created.
- 2. In MindManager select the map topics to export.
- 3. Right-click, click Send to, and then click Microsoft Project.
- I READ NOTE

If you do not see Microsoft Project on the File tab Export menu, or in the **Save as type** list, or in the shortcut menu under **Send To**, see **Troubleshooting Office add-ins**.

The topics will be exported and added to the end of current project.

The Project export is a one-time operation, and no link is retained between the Project tasks and the MindManager topics. If you export tasks from Project and then make changes to the tasks in MindManager you cannot export the tasks back to Project to update them there. Instead, you can delete the old tasks, then export again. The exported tasks will be added at the end of the project as new tasks.

Import an entire Project file

- 1. Click the File tab, click Import, and then click Import Microsoft Project File.
 - READ NOTE

If you do not see Microsoft Project in the list, see Troubleshooting Office add-ins.

- 2. Select the file you want to import and click **Open**.
- 3. A dialog appears to let you customize the Import Settings. Once the settings have been adjusted to your liking, click **Import**.

You'll see a status message appear as the file is processed, then the new map will appear.

Import only selected Project tasks

 To add the tasks to an existing map, open the map in MindManager and select a target topic if desired.

- 2. Select the tasks in Project.
- 3. Click the **Send to MindManager Map** button on the Project ribbon, or click **File**, click **Send to**, then click **MindManager**. MindManager will start and open a new map if its not already active.
 - READ NOTE

If you do not see the **Send to MindManager Map** button on the Project ribbon or in the File menu, see **Troubleshooting Office add-ins**.

4. A dialog appears to let you customize the Import Settings. Once the settings have been adjusted to your liking, click **Import**.

The Project import is a one-time operation, and no link is retained between the Project tasks and the MindManager topics. If you import tasks from Project and then make changes to the tasks in MindManager you cannot export the tasks back to Project to update the existing Project tasks. Instead, the existing tasks will remain and the exported tasks will be added at the end of the project as new tasks.

Work with Microsoft Word

What do you want to do?

The Word Export feature exports your map in outline form to Word. You can export the entire map, or just selected topics.



Import a DOC file
Import only selected Word
paragraphs



You must have Microsoft Word 2003 or later installed to use these features.

If you want to include a graphical image of your map in a Word document, you can achieve this by <u>creating an image file</u> from your map and then inserting this into Word.

MindManager can import a Word document and transform the text into a map. An essential part of this process is the proper structuring of the Word document.

The document is processed according to the styles it contains. MindManager uses the Heading styles to determine the map topic hierarchy: text in Heading 1 style becomes Main topics, Heading 2 and greater are subtopics. Text in the Normal style (or any other style that is not a Heading style) is included as text notes for the topic directly preceding it.

Import from and export to Microsoft Word

MindManager lets you import and export Word files:

<u>Import</u>	To import a Word document into an existing map, see Import an entire Word docum	
Export	To export your map to a Microsoft Word document, see Export to Microsoft Word.	

Import an entire Word document

1. Click the File tab, click Import, and then click Import Microsoft Word Document.



If you do not see Microsoft Word Document in the list, see Troubleshooting Office add-ins.

2. Select the file you want to import and click Open.

You'll see a status message appear as the file is processed, then the new map will appear in MindManager's Map View window.



You can also paste text from Word (and other applications) to create a topic on your current map.

Working with SharePoint

Work with SharePoint

By itself, SharePoint does a great job of storing data, tasks, documents, and other information in a highly structured manner that aligns with your organization's structure, projects, and functions. But, operating only within the structure imposed by SharePoint is not always the most efficient way to gather and process the information you need in order to see the "big picture".

MindManager offers you a new way to organize and use SharePoint data for optimal results. It allows you to aggregate items from multiple SharePoint sites in a single, personalized view, by adding SharePoint items to your map. How does this work?

You can also <u>create</u> new SharePoint items, and <u>send</u> existing tasks from a map to SharePoint, all without leaving the MindManager application.

Items you add to your map from SharePoint and topics you send to SharePoint as tasks maintain live links to their corresponding SharePoint items. You can edit the associated SharePoint items without leaving MindManager.

Your results are <u>updated</u> automatically each time you open the map or change the filter criteria, and by an automatic timed refresh while you work. You can also see updated results at any time by manually refreshing topics.

READ HINT

The Map Index task pane Elements list Business Topics group displays all the topics on your map that contain SharePoint queries, query results, and linked SharePoint topics.

For more information on using maps and files stored on SharePoint servers, see Use maps and files from SharePoint or Web locations.

See also:

Work with SharePoint Items queries

Create SharePoint items and tasks

Work with linked SharePoint topics

Distribute maps with SharePoint topics

SharePoint site connections and options

Work with SharePoint Items queries

What do you want to do?

You can modify the filter criteria for SharePoint Items query topics on your map, and see the new results when you refresh the topic. You can also edit the topic text, and add other subtopics (in addition to the results topics).



SharePoint queries are disabled for flowcharts.

SharePoint Items query topics can be moved or copied just like other map topics. When moved or copied, the topic retains its functionality: its results topics remain linked to their associated SharePoint items, and they are refreshed when you refresh their parent topic.

For more information about modifying results topics, see Work with linked SharePoint topics.

The Map Index task pane Elements list Business Topics group displays all the topics on your map that contain SharePoint queries, query results, and linked SharePoint topics.

Edit SharePoint Items query topics

Add other topics

Modify a SharePoint Items query

Refresh a SharePoint Items query

Move or copy SharePoint
Items query and results
topics

Disconnect a SharePoint
Items query topic

See also:

Work with linked SharePoint topics

Create SharePoint items and tasks

Edit SharePoint Items query topics

SharePoint Items query topics display the query type as the topic text. You can edit this text to reflect the filter you are using, for example to change "Tasks" to "High Priority Tasks".

The source site used for this topic is displayed in the Topic Properties. You can show or hide this using the **Show** / **Hide** icon on the topic. You cannot edit this information.

Add other topics

You can add other topics at the same level as the query results topics, and these are not affected when the query is refreshed.

If you add subtopics to any of the SharePoint query result topics, they will be removed on refresh only when their parent is no longer displayed as a result. This can happen when:

- the item no longer meets the filter criteria
- the item was deleted in SharePoint.

Modify a SharePoint Items query

You can change the site connection and filter criteria used by a SharePoint Items query topic at any time. For example, if you want to show fewer results, more results, or results from a different site, you can adjust the site connection and filter criteria accordingly.

Change filter properties

- 1. Right-click the SharePoint icon on the query topic.
- 2. Click Edit SharePoint Query.
- Use the wizard to change the filter criteria such as the source site, type of items, dates, etc.
 SharePoint query wizard hints

You can skip to the information you want to change using the buttons at the left side of the wizard, or step through all the wizard pages by clicking **Next**.

4. Click **Finish** at any time.

The topic automatically refreshes, showing you the new set of items that match the filter criteria.

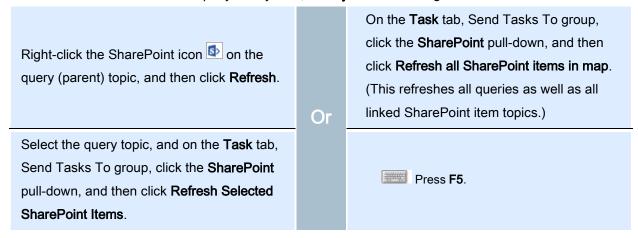


If your system can't connect to the SharePoint server (due to an error in the URL or an interrupted connection) the parent topic will display an icon showing that the map is disconnected.

Refresh a SharePoint Items query

SharePoint Item queries automatically refresh when you open the map that contains them (if this option is enabled), and individual results topics automatically refresh when their properties change.

To refresh a SharePoint Items query at any time, do any of the following:



When the query is refreshed, subtopics you have added will be retained, unless they are subtopics of results that are no longer displayed.

While the results are being refreshed, the topic displays the "loading" icon .

READ NOTE

If your system can't connect to the SharePoint server (due to an error in the URL or an interrupted connection) the parent topic will display an icon showing that the map part is disconnected.

If you have used the MindManager <u>Task Management</u> options (in the Task Info pane) to designate any of your SharePoint tasks as Roll-up tasks, they will not be synced with SharePoint when the query is refreshed.

Move or copy SharePoint Items query and results topics

You can move or copy the parent query topic freely without affecting its functionality.

If you move a results topic out of the query branch it retains its functionality as well: its properties are kept in sync, its link still connects to the corresponding SharePoint item, and bi-directional sync of task info (for tasks and issues) is retained. But, when you refresh the original query topic, a new results topic is added to replace the one you moved. This can create duplicate items on your map.

Disconnect a SharePoint Items query topic

When you disconnect a SharePoint Items query topic, its results topics will no longer be kept in sync with SharePoint, but they will retain their links to their associated SharePoint items.

To disconnect a topic:

- Click the topic's SharePoint icon , and then click **Disconnect from Microsoft SharePoint**.
- If you disconnect a query topic, the query definition will be removed from the topic. Its icon will change from (SharePoint query) to (topic with Topic Properties). The site connection address is retained as a Topic Property. Its existing results topics will remain linked to and stay in sync with their corresponding SharePoint items.

For more information on disconnecting query results topics, see Work with linked SharePoint topics.

Create new SharePoint tasks

What do you want to do?

Send tasks to SharePoint
See also:

Add SharePoint Items queries and dashboards

Work with SharePoint Items queries

Work with linked SharePoint topics

Distribute maps with SharePoint topics

You can send tasks from your map to create new tasks in SharePoint. The topics on your map become linked SharePoint task topics that include a link to their corresponding SharePoint task.

READ HINT

Task topics feature <u>two-way communication</u> for their Priority and Progress attributes, and you can change these directly in MindManager.

The Map Index task pane Elements list Business Topics group displays all the linked SharePoint topics on your map.

Send tasks to SharePoint

You can send any topic on your map to SharePoint to create a new task. the topic you send can just have the task name (as the topic text) but can also contain Task Info and Notes. The following information is sent to SharePoint:

Map topic	SharePoint task property
Topic text	Title
Priority	Priority
Progress	% Complete
Start Date	Start Date
Due Date	Due Date

Other Task info on the topic is ignored by SharePoint. Task Info Resource assignments will be overwritten by the Assigned To task property from SharePoint. You are automatically assigned as the task creator.

To send a topic to SharePoint to create a new task:

- 1. Select a topic.
- On the Task tab, Send Tasks To group or the Advanced tab, Dashboards group, click SharePoint, and click Send Items to SharePoint.

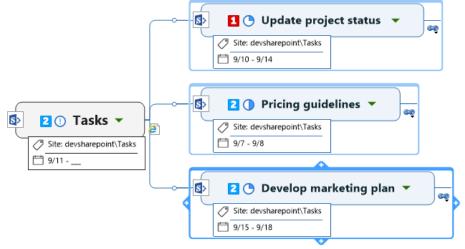
- 3. In the dialog, choose whether to send only the selected topic(s), or to include subtopics.
- 4. Choose a site from the list of existing site connections, or enter a new SharePoint site address.
- 5. Choose a Task List on the selected site, and then click **Send**.

The topic on your map becomes a <u>linked SharePoint task topic</u>. It includes a link to the new task you just created. When you update the Task Info on the topic, the changes are synced to the corresponding SharePoint task.

Work with linked SharePoint topics

You can create topics on your map that are dynamically linked to their corresponding SharePoint items in two ways:

- By creating a SharePoint Items query topic the query results topics are linked to corresponding SharePoint items.
- By sending a task to SharePoint the task topic is linked to its corresponding SharePoint task.



Linked topics include a link that connects it to its associated SharePoint item (shown as a browser icon, for example (a)). You can click the link icon to view and edit the item in the built-in MindManager Browser or in your system browser (depending on your setting for opening links).

The Map Index task pane Elements list Business Topics group displays all the linked SharePoint topics on your map.

What do you want to do?



View item

View and edit
SharePoint items

Refresh linked
SharePoint item
topics

Disconnect a linked topic

See also:

Add SharePoint Items
queries and dashboards

Work with SharePoint
Items queries

Create SharePoint items and tasks

View item properties

In linked topics, the properties of the corresponding SharePoint item are displayed as Topic Properties. You can show or hide these using the **Show** / **Hide** icon on the topic. This information is kept in sync with the item's properties in SharePoint. You cannot edit this information.

Edit linked Task and Issue topics

Linked SharePoint task and issue topics are the only topics that feature two-way communication (syncing) with SharePoint. You cannot edit other types of linked topics. These topics display their editable SharePoint properties in the following ways:

Tasks

- Task Title as the topic text
- Priority and % complete as Priority and Progress map markers
- Start and Due dates as Task Info

Issues

Priority as Priority map marker

When you change this information on a linked SharePoint topic in MindManager, the associated item is immediately updated in SharePoint.

View and edit SharePoint items

Each linked SharePoint topic has a link (shown as a browser icon, for example) that connects it to its associated SharePoint item. You can click this icon to edit the item. These links also connect topics to SharePoint folders (if the guery results are grouped by folder).

Topics with additional links will display the MindManager link icon a.

- 1. Click the link icon and on the topic, or click the multiple links icon and then click the link to the item in the list of links.
- 2. The next steps depend on the type of item you are opening, and your option settings:
 - Calendar Items, Tasks, Issues, and List Items

Open in SharePoint in the mode (View mode or Edit mode) specified by the <u>option</u> Open SharePoint Item In: These items open in MindManager's built-in browser, or in your external browser depending on the setting you have chosen for opening links in the **Link** pull-down menu on the **Home** or **Insert** tab.

Maps

Open in MindManager for editing. The map is locked on the server so no other user can edit it. You can <u>check out</u> the map (on the **File** tab **Info** menu) to let other users see that you are working on it. See Edit a map from SharePoint or a Web location for more information.

• Microsoft Office documents

Open in their respective applications. The document is opened from the server in Read-only mode. Click **Edit document** to make changes. When you are finished editing, Save the document to send your changes back to the server.

Other files that can be displayed in a browser

Display in MindManager's built-in browser, or in your external browser depending on the setting you have chosen for opening links in the **Link** pull-down menu on the **Home** or **Insert** tab. You cannot edit these files.

Files that cannot be displayed in a browser

These can be downloaded and opened in their native applications. Editing the file does not

change the source file on the server, but you can upload the edited version to SharePoint to replace the previous version.

Refresh linked SharePoint item topics

Linked SharePoint item topics automatically refresh when you open the map that contains them (if this option is enabled), and whenever their synced properties change.

To refresh linked SharePoint item topics at any time:

- To refresh a single topic, click the SharePoint icon on the topic, and then click Refresh.
- To refresh specific linked SharePoint item topics or <u>SharePoint queries</u> on your map, select the
 topics, and then click <u>Refresh Selected SharePoint items</u> in the SharePoint pull-down on the
 Home tab or the Insert tab.
- To refresh all the linked SharePoint item topics and all the <u>SharePoint queries</u> on your map, click Refresh All SharePoint items in Map in the SharePoint pull-down on the Home tab.

While the topics are being refreshed, the topic displays the "loading" icon .



If your system can't connect to the SharePoint server (due to an interrupted connection) the topic will display an icon showing that the topic is disconnected.

Disconnect a linked topic

If you disconnect a linked SharePoint topic, it becomes a normal topic that is no longer synced with its associated SharePoint item. It retains the item's properties as Topic Properties, and a link to the item. To disconnect a topic:

- Click the topic's SharePoint icon , and then click Disconnect from Microsoft SharePoint.
- You'll see the topic icon change from (topic linked to SharePoint) to (topic with Topic Properties). If the topic is a query results topic, it will remain in the branch until you move or delete it. Refreshing the query will not remove it, and may result in an identical linked topic in the query results.

Distribute maps with SharePoint topics

The easiest way to make your maps available to other SharePoint users is by saving them to a SharePoint site.

You can also distribute maps that contain SharePoint queries and tasks to other users by <u>sending them</u> as email attachments or by copying them to a shared network drive. If the other users are connected to the SharePoint sites that the map topics use, they will see current results. If users do not have a connection to the sites used by the SharePoint queries and tasks, they will see static topics - the parent SharePoint topics will be shown as disconnected [[52]], and cannot be refreshed until a connection to the site is established.

See also:

SharePoint site connections and options

Send maps

READ HINT

You can share your list of site connections with other users by exporting the list to a file, and then sending the file to them. This file contains only the site connection URL's, and the names you have assigned to the connections. It does not contain your SharePoint login credentials. Users who receive the site connections file can import it to add the sites to their own SharePoint site connections list, but they must provide the proper credentials when connecting.

SharePoint site connections and options

You do not have to define a site in advance to use it - each <u>wizard</u> gives you the opportunity to define new sites as you need them, and automatically adds them to the list.

See also:

Use SharePoint map parts

View and modify SharePoint map topics

Create, view, and edit SharePoint items

Distribute maps with SharePoint topics

Add and manage sites

The SharePoint sites list shows all your available sites.



MindManager features automatic SharePoint site discovery in a MOSS environment. (If you are working in this type of environment, you see "My Sites" as a location on your computer.) MindManager will prepopulate your SharePoint sites list with your available sites.

Create a site connection

- 1. In the wizard, to create a new entry in the site list click **Add**.
- 2. Enter a name for the new connection, (for example Alpha Project SharePoint Site).
- 3. Enter the URL for the connection (for example: http://project sites/alpha project/).



If you usually connect to the site through your browser, you may find it easiest to copy and paste the URL from your browser's address field.

If you are not already connected to the SharePoint site, you'll be asked to provide your login credentials.



Once you define these sites, anyone who has access to your system can use them, as long as they are connected to SharePoint and logged in.

Manage sites

 To manage your site list, select a site in the list and then click Edit (to modify the site's name or URL), or Delete to remove a site from the list.

Export and import site lists

- Share sites creates an .xml file with the names and URL's of your current SharePoint sites. You can <u>send</u> this list to a colleague, or use it on another system as a shortcut for re-creating your site list. This file does not include your SharePoint login credentials for the sites.
- Import sites reads a list of sites from a file created using the Share sites option. The imported sites are added to your list of existing sites. This can result in duplicate sites in your SharePoint Sites list, but you can remove the duplicates by using the Delete command.

Options

Open SharePoint item in: determines how SharePoint items are displayed in the browser when you click the link to open the item on your map in SharePoint. Choose the mode that best suits your needs

- View Mode shows item in the browser in SharePoint's View mode. Use this mode if you primarily
 want to view, not edit items. You can still edit the item by clicking the SharePoint Edit item button.
- Edit Mode shows the item in SharePoint's edit mode. Use this mode if you frequently edit items.

Display SharePoint Map Part as: determines whether the map parts are initially shown as expanded or collapsed topics.

- **Expanded Topic** shows the results subtopics as they are added or updated. You see the results immediately, but the map view may be adjusted as the new topics are created.
- Collapsed Topic hides the results topics until you expand the map part topic. You don't see the results immediately, but you can continue working without distraction.

Enable Periodic Refresh Interval: determines how often the map parts refresh automatically. Frequently refreshing a map with many SharePoint topics can slow your system's performance. If you are working with large maps, you may prefer to disable this feature and refresh your map manually.

Refresh on Map Open: automatically refreshes SharePoint topics on the map when you open it. You may prefer to disable this option when working with large maps.

Use maps and files from SharePoint or web locations

Create a new map in SharePoint or a web location

You can save a new map that you have just created to SharePoint or a Web location, and then continue to work on it, or close it.

1. Do **one** of the following:



- 2. In the dialog, navigate to the location where you want to save the map, and enter a File name.
- 3. Click Save.

MindManager User Guide

The new map is saved to the server. It remains locked until you close it. You can continue to work on the map and save it when you are finished.

If you are using a SharePoint server, you may want to <u>check out</u> the map while you continue to work on it.

Save a local map to SharePoint or a web location

You can save an existing local map to SharePoint or a Web location.

- 1. Click the File tab, and then click Save As.
- 2. In the dialog, navigate to the location where you want to save the map, and enter a **File name**.
- 3. Click Save.

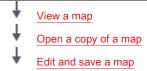
The map is saved to the server. It remains locked until you close it. You can continue to work on the map and save it when you are finished.

If you are using a SharePoint server, you may want to <u>check out</u> the map while you continue to work on it.

View or edit a map from SharePoint or a web location

What do you want to do?

You can view and edit maps from a SharePoint or a Web location using the Open and Save commands in MindManager. In addition, you can check out a map that you have opened for editing "offline" - that is, you can continue to edit and save the map even if you do not have a connection to the server. When a connection is available, you check in the map to save the changes to the server.





If you open a map from the SharePoint web page in your browser, a local copy of the map is created and opened in MindManager. If you edit this map, your changes will only be saved to the local copy of the map.

Maps that are opened as link targets will open for editing (like using the Open command): the map will be locked on the server.

View a map

• Click File > Open, click the Open button pull-down, and then click Open as Read-Only.

This does not lock the file on the server, and opens the map as a read-only file that you can view, but not edit. You will see a Map Status indicator in the upper-left mapping window indicating that the map is read-only. You cannot edit this map, but you can save a local copy of it.

Open a copy of a map

• Click **File > Open**, click the **Open** button pull-down, and then click **Open as Copy**This creates a new, unnamed map by duplicating the original from the server. This new map is independent of the original. You can edit the map and save it wherever you choose.

Edit and save a map

When you want to edit a map, you open it:

• Click File > Open, click the Open button pull-down, and then click Open.



If the map you are opening is locked or checked out by another user, you are given the option to open the map in read-only mode. In this mode, you can view, but not save the map.

This locks the file on the server so you can edit it. Other users cannot edit the map while it is locked.

You can now edit the map, or you may decide to check it out first:

Edit without check-out	Edit with checkout
The map is locked on the server, but users do not see who is editing it.	The map is locked on the server, and shown as checked out to you.
When you save the map, changes are sent directly to the server (may be slow).	When you save the map, your changes are saved locally by default (faster than saving to the server). The changed map is not saved to the server until you check it in.
You cannot save your changes as you edit unless you are connected to the server.	You can save changes (locally) as you edit without being connected to the server. You can check in the map when you have a connection to save your changes to the server.
Users who view the map see the changes you have saved.	Users who view the map do not see the changes you have saved until you check in the map.
The map stays locked until you close it.	The map stays locked until you check it in.

Edit a map without check-out

Edit the map as usual. Other users cannot edit it as long as you have the map open.

To save your changes to the server, but continue working on the map, do one of the following:



When you are finished editing, close the map by doing **one** of the following:



You will be prompted to save your changes. When the map closes, it will be unlocked on the server.

Edit a map with check-out



To enable features for map check-out and check-in, you should enable this option for opening SharePoint files.

To check out the map:

Click the File > Info > Check Out.

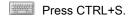
The first time you check out a SharePoint map, MindManager shows you the "Drafts" location, and gives you a chance to change the Offline editing options for SharePoint servers. By default, MindManager stores drafts locally. This can make editing your map faster, and allows you to edit it "offline" when you don't have an internet connection (for example, if you are on a plane).

In the upper-left mapping window you'll see that the map is checked out:



To save your changes to the "Drafts" location, but continue working on the map, do one of the following:

- Click the File tab, and then click Save.
- Click Save on the Quick Access toolbar.



READ NOTE

If the option to save drafts locally is enabled (the default), other users who view the map from SharePoint will not see these changes until you check in the map.

READ HINT

If the option to save Drafts locally is enabled you can close the map, then resume editing later. (See Offline editing below.)

To check in changes to the server:

- 1. Click the File tab, click Info, and then click Check In.
- 2. You will be prompted to enter a comment for this version of the file.
- 3. If you want to keep working on the map, select "Keep the document checked out after checking in this version". The map stays open and checked out.
- 4. The map is checked in and unlocked (unless you opted to keep it checked out). The map remains open in read-only mode. You can view, but not edit this map.

READ NOTE

If you simply close a map that is checked out, you will be prompted to check it in.

Offline editing

If you have set the offline editing options to save drafts locally, you can continue to edit and save the map even when you don't have an Internet connection.

To edit a map offline:

• Open the map from the SharePoint Drafts folder, edit as usual, and save it back to this folder. When your Internet connection is restored, you can open the map again, then check it in to send your edited map back to the SharePoint server.

Use other files from a SharePoint or web location

In addition to storing maps on a SharePoint or Web location, you can also use files at these locations with MindManager in the following ways:

Attachments	Add files from the server as attachments that are stored inside the map			
Images from files	Add images to topics from SharePoint or Web locations.			
	If you link to a folder at a SharePoint location, the folder contents show in			
	SharePoint's web view.			
	Links to files behave differently depending on the file type:			
	Maps			
	Open in MindManager for editing. The map is locked on the			
	server so no other user can edit it. You can check out the map			
	(on the File tab Info menu) to let other users see that you are			
	working on it. See Edit a map from SharePoint or a Web location			
	for more information.			
	Microsoft Office documents			
	Open in their respective applications. The document is opened			
	from the server in Read-only mode. Click Edit document to make			
Links to files or folders	changes. When you are finished editing, Save the document to			
	send your changes back to the server.			
	Other files that can be displayed in a browser			
	Display in MindManager's built-in browser, or in your external			
	browser depending on the setting you have chosen for opening			
	links in the Link pull-down menu on the Insert tab. You cannot			
•	edit these files.			
	= 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4			
	These can be downloaded and opened in their native			
	applications. Editing the file does not change the source file on			
	the server, but you can upload the edited version to the server			
	·			
	replace the previous version.			

Export	Export your map in a different format (for example as a Word document, or as	
Ехроп	an image) to a SharePoint or Web location.	
	Insert a map from a SharePoint or Web location into another map.	
Insert map	PEAD NOTE	
	Insert Map is disabled for flowcharts	
Template organizer items	Create map templates and themes, map marker lists, and web templates at a	
	SharePoint or Web location, and add them to the organizer from these locations.	
	Create and use map parts, and add them to the Map Parts task pane from these	
Map Parts	locations.	
	Use a SharePoint or Web location as a source for the File Explorer Smart Map	
	Parts.*	
My Maps	Add shortcuts to maps or folders at these locations. *	
Search	Search folders at these locations. *	

^{*} These features only function for SharePoint and Web locations if you have mapped a drive letter to the location you want to use.

Customize MindManager

It's easy to customize MindManager to suit your work style—and your needs.

Manage Creative Resources

Manage markers

You can manage markers by right-clicking the marker to open the menu, or by opening the Markers list in the Map Index task pane, which displays the list of icons, tags, and other markers that you can use on the current map.

The markers list is pre-populated with groups of markers of a single type (Task info, icons, tags, font color, fill color). Some groups are default groups (they appear in every markers list) and may be empty in some lists. Markers within each group can be mutually exclusive (only one marker from this group can be used on a topic) or not (multiple markers from this group can be used on a topic). You can change this attribute for user-defined icon groups and for tag groups.

Unnamed icons in the General Icons group and other groups display "Marker name" in gray. These disappear from the list when they are no longer used on the map, and are not included in the legend. You can name them to keep them in the list. When named, the General Icons move into the Single Icons group.

Named markers remain in the markers list whether or not they are used on the map. You can modify their meaning and content, or remove them from the list (and legend) if they are not used.

Group Definitions ▼

Group name	Default group?	Contents
Task Priorities	yes	The whole set or a subset of the standard Priority icons (1-9). Mutually exclusive.

What do you want to do?

Open the Markers list in the Map Index task pane

Add a marker on-the-fly

Edit tags and tag groups dynamically

Add a marker in the Map
Index task pane

Modify a marker

Modify a marker group

Copy a marker group to a different map

Copy markers to the clipboard

See also:

Markers

Use the Map Index

Task info

Task Progress	yes	The whole set or a subset of standard Task Progress icons (0% to 100%) Mutually exclusive.
Resources	yes	All resources used on the map - you must rename dynamic resources (names are grayed) to keep them in the group if not used on the map. Not mutually exclusive.
{various tag groups}	no	Tags Can be set to mutually exclusive or not mutually exclusive.
{various icon groups}	no	Named icons (named by user) Can be set to mutually exclusive or not mutually exclusive.
Single Icons General Tags	yes	Named icons and tags that don't belong to any group. Not mutually exclusive.
General Icons	yes	Icons that are used on the map but have no meaning assigned (names are grayed). If you delete the marker on the map it is removed from the list. You must move these markers to another group to keep them in the list. They are not included in the legend. Not mutually exclusive.
Fill Colors	yes	A selection of fill colors, may be named or unnamed (unnamed colors disappear from the list if not used on the map and are not included in the legend). Mutually exclusive (one color per topic).

Font Colors ye	es	A selection of font colors, may be named or unnamed (unnamed colors disappear from the list if not used on the map and are not included in the legend). Mutually exclusive (one color per topic).
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READ HINT

The **Priority**, **Progress**, and **Resources** are default groups that work in conjunction with MindManager's <u>Task info</u> and <u>Resource management</u> features. When you add a marker from one of these groups to a topic the corresponding task info is also added to the topic.

This list can be customized in the Map Index task pane Markers list to your specific needs. You can:

- add new markers to the list
- create new icon and tag groups
- move icons and tags between groups using drag and drop
- modify the group names, marker names, and colors used for fill and font color markers.
- · copy a marker group to a different map



You can <u>save</u>, <u>apply</u>, <u>and manage</u> entire lists of markers in the Marker Lists Organizer.

Open the Markers list in the Map Index task pane

Do **one** of the following:

Right-click a marker on a topic, and then click Organize Markers.	OR	On the Home or Insert tab, click Icons or Tags , and then click Organize Markers .	OR	On the Status Bar, click the Task Panes button T, click Index, and then in the task pane click Markers.
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You can add new markers to the marker list dynamically by using them on your map, or by defining them in the Markers list in the Map Index task pane.

Add a marker on-the fly

Markers are added to the list automatically when you use a new marker on your map (apply a new icon from the library, create a new tag, or use a new font color or fill color).

New markers are added to the Markers list as follows:

Marker type	Marker group
Priority icons	Priority
Progress icons	Progress
Fill color	Fill Colors
Font color	Font Colors
Icons (except priority and % complete)	General Icons
Tags	Single Tags

Add new icon, fill color, and font color markers dynamically

Icon, fill color and font color markers are added to the list in a dynamic state (indicated by the gray label "Marker name"), and remain dynamic until you name them. If you remove all occurrences of an unnamed marker from the map, the marker also disappears from the markers list. Unnamed markers are also omitted from the legend.

You can manage these in the Markers list of the Map Index pane.

- To make General Icons permanent entries, drag them to a marker group (new or existing). You
 will be prompted to name the icons (assign a meaning) when you move them.
- To make unnamed markers in other groups permanent, name them (right-click and then click Rename).
- To add markers to a new group, create the group first in the Markers list, and then drag the markers to the new group.

Add new tags and groups dynamically

You can add both tag groups and individual tags dynamically.

- 1. Select a topic.
- 2. On the **Home** or **Insert** tab, in the **Markers** group, click the **Tags** arrow.
- 3. Do **one** of the following:

Click **Add New Tag**, and in the Group drop-down, select an existing marker group or enter a new group name to create a new group. (For example *Sample size*).

OR

Click **General Tags**, and then click **Add New Tag**.

- 4. Enter the name of the tag (for example <15 grams).
- 5. Click the **Color** button to select a color for the tag or select **None**.
- 6. Click Add.
- 7. You'll see the new tag added to the topic, and it will also appear in the Markers list in the Map Index task pane.
- 8. Repeat these steps to add more tags.
- 9. Click Close when you are finished.



You can also add a new tag by selecting a topic, typing **#**, typing a tag name, and pressing **Enter**. For more information, see Add tags with an accelerator key.

You can also add new resource tags by using the Resources command in the Tasks group.

Edit tags and tag groups dynamically

You can edit both tag groups and individual tags dynamically.

Edit the tag name

- 1. On a tagged topic, right-click on the tag name.
- 2. In the menu, select Edit Tag Name.
- 3. The Map Index opens to the tag name field. Type in the new name.

Edit the tag color

- 1. On a tagged topic, right-click on the tag name.
- 2. In the menu, select Edit Tag Color
- 3. The **Marker Properties** dialog opens. In the **Color** field, select the desire color.
- 4. Click OK.

Edit the group name

- 1. On a tagged topic, right-click on the tag group name.
- 2. In the menu, select the tag group name, then select Edit Tag Group Name.
- 3. The Map Index opens to the tag group name field. Type in the new name.

Customize topic info

You can also make global setting choices for task information, including font color, background color, or tag color, by modifying the default settings for topic info.

- 1. On a tagged topic, right-click any task info (date, duration, resources, tags).
- 2. In the menu, select Customize Topic Info.
- 3. in the dialog, change the font color, background color, or tag color, or reset the colors to their default.
- 4. Click OK.



Changing the *default* settings for tags will override changes made when creating or editing the individual topics.

Add a marker in the Map Index task pane

Add new icons or tags

- 1. In the **Markers** list in the **Map Index** task pane, right-click the group name, and then click **New** *marker* (where *marker* is the name of the type of marker you are adding).
- 2. Enter the new marker's name. For icons, choose from the selection shown.
- Click Add.
- 4. Repeat these steps to add more markers if desired. When you are finished click Close.



You do not need to use the marker on your map to add it to the list.

Create a new marker group

- In the Markers list in the Map Index task pane, click +, then click Add new icon group or Add new tag group*.
- 2. Enter the name for the new group.
- 3. Build up the group by one of these methods:

Right-click the group name and add a new marker to the group.



Drag markers from the another group into the new group. (You will need to name General icons when you move them.)

READ NOTE

You can't use the same icon in different groups.

4. *Optional* Right-click the group name and select **Mutually Exclusive -** this means you can add only one marker from this group to any topic.

Modify a marker

- 1. Right-click on the marker in the Markers list in the Map Index task pane.
- 2. Click Modify, Rename, or Delete.

3. Do one of the following:

Enter a new name for the marker.

OR

Select a new icon, fill color or font color for the marker.



Right-click any icon on the map and then click **Edit Icon Name**. Enter the new meaning for the icon in the **Markers** list.

To move a marker to a different group, drag it to the new group. You may not drag markers into mandatory groups (Task Priorities, Task Progress, Single Icons, General Icons, General Tags, Font Colors, Fill Colors).

Modify a marker group

You can modify the current markers list in the Markers list in the Map Index task pane. You can:

Rename groups ▼

- 1. In the Markers list of the Map Index task pane, right-click the group name.
- Click Rename.
- 3. Enter the new name for the group.
- You may not change the name of the General Icon group, but you may change the names of the markers it contains. When you name icon markers, they are automatically moved to the Single Icons group.

Make markers within groups mutually exclusive ▼

Markers within each group can be mutually exclusive (only one marker from this group can be used on a topic) or not (multiple markers from this group can be used on a topic). You can change this attribute only for user-defined icon and tag groups.

- 1. In the Markers list of the Map Index task pane, right-click the marker group name.
- 2. Click Mutually exclusive.

Sort Icon and Tag groups ▼

- 1. In the Markers list of the Map Index task pane, right click the group name.
- 2. Click Sort A-Z or Sort Z-A.

The group will be sorted by marker name in ascending or descending alphanumeric order.

I You cannot sort the **Priority** or **Progress** groups.

Delete markers or marker groups from the list •

You can delete entire groups of markers from the list, or individual markers from any group. If the deleted marker(s) is not used on the map, it is deleted from the list. If the marker is used on the map, it is changed to an unnamed (general) marker.

- 1. In the Markers list of the Map Index task pane, right-click the group or marker name.
- Click Delete.

You cannot delete any of the mandatory marker groups (Task Priorities, Task Progress, Resources, Single Icons, General Icons, Single Tags, Fill colors, Font colors)

If you delete an icon or tag group but have used some of its markers on the map, the "orphaned" markers will be added to the General icons or Single tags groups.

Copy a marker group to a different map

If you want to use a marker group from your map on a different map, you can copy the group to the other map.



You can also copy and paste marker groups in templates.

- 1. In the Markers list in the Map Index task pane, right-click the marker group name, and then click **Copy**.
- 2. Switch to the target map, and in the Markers list in the Map Index task pane, click \$\display\$, and then click **Paste marker group**.

Pasting a marker group will not change (overwrite, move, or rename) any of the map's existing markers. In the event of a conflict (for example, if the marker already exists, but in a different group) that marker will not be included in the pasted group. If a group of the same name already exists, markers from the pasted group will be added to the existing group.



You can save and apply entire lists of markers in the Marker Lists Organizer.

Copy markers to the clipboard

Copy Index lets you copy a list of all topics that use markers to the clipboard as text. You can then paste this information into an email, document, text file, spreadsheet, or a map to make it easier to view, organize, and share marker information.

- 1. In the Markers list in the Map Index task pane, click 🖶, then click Copy Index.
- 2. Open the email, document, spreadsheet, or map where you want to copy the marker index.
- 3. Paste the clipboard contents into the new location.

Once you have the marker index information in the new file, you can edit as needed.

Use the Marker Lists Organizer

The Template Organizer **Marker Lists** tab shows a selection of existing map marker lists. Here you can browse through the lists and choose one to use on the current map. If you are working on a map, and you want to use the same set of markers on another map, you can save the current markers list for re-use. You can also duplicate, delete, or rename lists, add comments, and organize them into folders for easier reference.

Each map contains a marker list and begins with the default list from the template that is used to create the map.

What do you want to do?

Choose a marker list for the current map

Save the current markers list for re-use

Manage map marker lists

See also:

Markers

Manage markers

Choose a marker list for the current map

- On the Design tab, click the Theme Organizer pull-down, and then click Marker Lists.
 The Template Organizer's Marker Lists tab left side shows the map marker list names and their folders. The right side shows a preview of the selected list's contents.
- Click the name of the list you want to use, and then click Apply. If you don't see a list with all the
 markers you want to use, choose the list that best meets your needs. You can customize it (add
 and remove markers, reorganize groups) in the Map Index pane Markers list, and save it for later
 re-use.



In Linked Maps View, you can apply a new marker list to some or all of the maps. Select the maps, and on the **Linked Maps** tab, in the **Assign** group, click **Markers**. Then, select the marker list in the dialog and click **Apply**.

Save the current markers list for re-use

You can save the current set of map markers in a markers list file .mmms that can be applied to other maps.

- On the Design tab, click the Theme Organizer pull-down, and then click Marker Lists.
 The Template Organizer's Marker Lists tab left side shows the map marker list names and their folders. The right side shows a preview of the selected list's contents.
- 2. If you want to add the new markers list to a specific folder, select it in the folder listing, or use the **Folder commands** to create a new folder.
- 3. At the top of the tree listing, click Add New Marker List, and then click From Current Map.



You can save the map marker list in more than one folder, if desired.

Manage lists

Rename a markers list

You can rename or add a comment to any existing Markers list.

- 1. In the organizer, click on the list name.
- 2. Under List commands, click Rename.
- 3. Enter the new name for the list.

Add or modify the comment for a list

- 1. In the organizer, click on the list name.
- 2. Click Modify.
- 3. Enter your comment for the list (for example, its intended use, specific project, date created).

Organize lists

• The Folder commands let you add a New folder, Delete a folder or Rename a folder.



If you delete a folder you will also delete all the marker lists it contains - all are deleted from disk

- Drag and drop lists between folders to organize them.
- The Template command **Duplicate** creates a copy of the list (Copy of...) in case you want to add it to more than one folder, or modify it without changing the original.
- The Template command Delete removes the marker list from the Organizer and deletes it from disk.

Manage Library items

You can use the MindManager Library task pane to organize a variety of elements that you can add to your maps like images, shapes, etc., referred to generally as *items*.

The panes' primary purpose is to help you keep these items organized. As a convenience, you can add any of these elements to your map directly from the task pane, but you can also add them in other ways. You can manage the Library content by adding or renaming folders and items, moving items, and modifying them. Some items have special item-specific commands.

What do you want to do?

<u>∨</u> L

View the Library pane

Add, remove, or rename a folder



Use, modify, and organize items

See also:

Markers

Images

Format topics

View the Library pane

On the Status Bar, click Task Panes , and then click Library.

The Library has categories for all the following items:

- Icons
- Images
- Background Images
- Topcic Shapes

These categories are listed at the bottom of the Library pane. Items are stored in folders by theme (e.g. Buttons). When you click on a folder in the top section, previews of the items it contains are shown in the lower half of the pane.

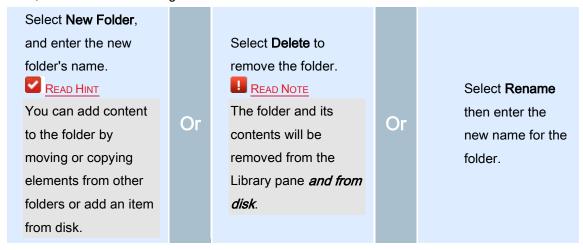


The **Search** field appears at the top of the Library **Images** pane to let you locate images by their keywords. See <u>images</u> for more information on using the Search option. Information on editing keywords follows below.

Add. remove or rename a folder

1. Right-click on any folder.

2. Then, do one of the following:



Add new items from disk

You can add items to any Library folder from files on disk:

- 1. Right-click on the folder in the Library task pane.
- Click Add item (where item is the type of item you are adding).
 - Click **Add Image, Add Icon,** or **Add Shape** above the Library preview pane.
- 3. Navigate to the file you want to add and click Open.

The new item appears as the last item in the lower preview window (you may need to scroll down to see it).

Use, modify, and organize items

You can reorganize existing items using drag and drop, and by using commands in each item's menu. When you rest your pointer over a preview image in the lower pane you'll see an arrow for a pull-down menu. The commands are divided into groups:

Add item commands

The first command group lets you add the item to the map in one or more ways or remove it from the selected topic. You must select a topic to activate these commands.

Modify item commands

The **Open in** command allow you to open the item in the application associated with it on your system so you can edit it and save it (for example, in an image editor).



To edit a item it must be associated with an application on your system. If this application can edit the file, you can modify it. If the application can only view the file, you cannot modify it.

- 1. Optional If you want to leave the original item unchanged, right-click and click **Duplicate**.
- 2. Right-click the item, then click **Open in**.

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- 3. The application associated with the item type will start.
- 4. Edit the item and save it. (Note that some applications only allow viewing. If the associated application does not allow editing, you can drag the item from the Library to another application that does.)
- 5. The edited item will show in the Library when you click the folder containing it again, or right-click the Library background and click **Refresh**. (This refreshes the item preview.)

Organize items commands

Copy - Copies the item. You can paste it into another folder of the same item type (Right-click on the target folder, and then click **Paste**.) or into another application.

Duplicate - Duplicates the item in the same folder so you can modify it without changing the original. The copy will appear as the last item in the folder

Delete - Removes the item from the task pane, and from disk.

Rename - Lets you change the file name of the item.

Item type-specific commands

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Item type	Command	Actions	
Icons	Shortcut key	Assign a shortcut key to the icon (you can choose from CTRL+1-9)	
Images	Add to Favorites	Adds the image to the Favorites folder for quick access.	
	Edit keywords	Edit the keywords used by the Library pane's Search function.	
Shapes	Edit content margins	Adjust the area used for text inside any shape.	

Manage map parts

The Map Parts pane shows the current available selection of Map Parts.

These include both static map parts (topic templates) and Smart Map

Parts with dynamic content linked to an external source.

The panes' primary purpose is to help you keep these items organized. You can manage the Map Parts Pane content by adding or renaming folders and map parts, moving the parts, and modifying them.

You can also <u>create</u> new map parts from topics on the map, or modify them to suit your needs.

What do you want to do?

View the Map Parts pane

Add, remove, or rename a folder

Add a new map part from disk

Use, modify, and organize map parts

See also:

Use map parts

View the Map Parts pane

Do one of the following:

On the Status Bar, click Task Panes , then click Map Parts.



On the **Insert** tab, in the **Branch** group, click **Map Parts**.

Add, remove, or rename a folder

- 1. Right-click on any folder.
- 2. Then, do one of the following:



Add a new map part from disk

You can add a Map Part to any Map Parts folder from a file on disk:

- 1. Right-click on the folder in the Map Parts task pane.
- 2. Click Add Map Part

3. Navigate to the file you want to add and click Open.

The new map part appears as the last item in the lower preview window (you may need to scroll down to see it).



See Create or Modify a Map Part for information on creating static map parts.

Use, modify, and organize map parts

You can reorganize existing map parts in the Library using drag and drop, and by using commands in each part's pull-down menu.

When you rest your pointer over a preview image in the lower pane you'll see an arrow for the pull-down menu. The commands are divided into groups:

Add map part command

The first command lets you add the map part to the map as a new topic. You must select a topic to activate this command.

Modify map part command

The **Modify** command allow you to modify the map part's formatting and content within MindManager. You cannot change the code for Smart Map Parts in this way.

You can modify map parts using the same commands you use to edit a map. (You can even use this method to combine several static map parts into one part.)

When you are done, Save the map part using the **Save** command on the Quick Access Toolbar or in the **File** tab's menu. You can use the **Save As** command to change its name to create a new version of the part, but be sure to save the part in the same location as the original - this way it will automatically appear in the Map Parts pane.

To see the new preview of the edited map part, right-click the folder that contains it, then click **Refresh**.

Organize map parts commands

Copy - Copies the map part. You can paste it into another folder of the same map part type (Right-click on the target folder, and then click **Paste**.) or into another application.

Duplicate - Duplicates the map part in the same folder so you can modify it without changing the original.

The copy will appear as the last map part in the folder

Delete - Removes the map part from the task pane, and from disk.

Rename - Lets you change the file name of the map part.

Add to Favorites - Copies the part to the Favorites folder for easy access.

Create and modify map templates

Map templates can help you get a jump-start on creating a new map, and help you standardize the content of maps that you create frequently. MindManager comes with a set of commonly-used templates that appear automatically whenever you start a new map from the **File** tab menu. You can modify any of these templates to better suit your needs, or create your own templates.

What do you want to do?



Create a map template

Modify an existing map template

See also:

Create a new map

Use the Map Templates
Organizer

Create a Map Template

You can save any map you create as a Template.

- 1. Create a map with the content and formatting you want to use for the Template.
- 2. Click the File tab, click Save As and Save As again, click Save As Type, and then click MindManager Template (*.mmat; *.xmmat).
- 3. Navigate to the location where you want to save the file, enter the File name, and then click Save.
- 4. If this is a new template, you may see the *Properties Summary* page where you can enter comments and other information about the template. When you click **OK**, the template is saved.

Make a note of this location in case you want to <u>add the Template to the New Map dialog</u> (it will be shown whenever you create a new map), <u>add it to the Organizer</u>, or send it to another user.



You can also create Map Templates and manage them from the Organizer.

Modify an existing map template

When you open an existing Map Template, it is displayed in Map View, where you can edit its content like any map.

Click Open, and in the Files of Type list select Mindmanager Template.
 Navigate to the template you want to modify, and then click Open.

The template opens in Map View, were you can edit it like any other map. When you are done editing, save the template using the steps above.



You can also modify Map Templates and manage them from the Organizer.

Use the Map Templates Organizer

A Map Template is, basically, a map that contains some pre-defined content. Map templates can give you a jump-start on creating frequently-used maps and can provide consistency in content and structure.

MindManager comes with a set of Map Templates to help you create maps quickly. One special template, called New Blank Map, is used by default each time you create a new, blank map, or you can choose to begin a map with another template. See Create a new map for more information on creating a map from a template.

A subset of templates appears in the **New Map** dialog. To see the entire collection of templates, you use the Template Organizer.

What do you want to do?

Use the Organizer

Modify an existing Map
Template

Create a new Map Template from scratch

Add a Map Template to the Organizer from a file (*.mmat)

See also:

Create a new map

Create and modify Map
Templates

Use the Organizer

You can view and manage your entire collection of Map Templates in the Template Organizer:

On the Design tab, click the Theme Organizer pull-down, and then click Map Templates. Options

Collections and folders

The template list shows all the available collections and the templates they contain. To further organize your templates, you may create folders within the collections, and move templates between the folders. To create a new folder:

- 1. On the Template Organizer **Map Templates** tab, click the collection where you want to add the folder.
- 2. Under Folder commands click New.

Enter the name for the new folder.



Under **Folder commands**, the **Delete** and **Rename** commands in this group apply to entire folders. If you delete a folder, all the templates it contains will also be deleted.

To reorganize templates:

- Move templates by dragging to a new folder or collection.
- To modify, duplicate, delete or rename a template, click its name and then use the commands under Template commands.

I READ NOTE

The Template command **Delete** removes the template from the Organizer and *deletes it from disk*.

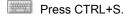
Modify an existing template from the Organizer

- 1. On the **Design** tab, click the **Theme Organizer** to open the Template Organizer.
- 2. On the Template Organizer **Map Templates** tab, click the template you want to modify. (The default template used for new maps is called New Blank Map.)



If you want to modify a copy of the template and keep the original, under **Template Commands**, click **Duplicate** to create a copy, then select the copy you just created.

- 3. Click Modify.
- 4. Make changes to the Map Template as desired, using the normal map editing commands.
- 5. Map Templates also contain their own theme settings for default formatting of topics and objects. When you use a Map Template as the basis for a new map, the theme of the new map comes from the template. You can modify these settings just as you would for any map.
- 6. To change the template's description, click the **File** tab, click **Info**, and then click **Properties**. On the **Summary** tab, enter a description in the **Comments** field.
- 7. To save the modified template, on the Quick Access Toolbar, click Save





See <u>Create and modify Map Templates</u> for how to modify a Map Template that does not appear in the Organizer.

Create and save a new Map Template in the Organizer

- First, create a map with the content you want to include in the template.
- To include a description in the template, click the File tab, click Info, and then click Properties. On the Summary tab, and enter a description in the Comments field.

Save the template in the organizer

You can save a new template so that it automatically appears in the Organizer using commands there:

- 1. On the **Design** tab, click the **Theme Organizer**.
- On the Organizer's Map Templates tab click Add New Map Template, and then click From Current Map.
- 3. The template is automatically saved using the current map name. If you want to change this, under **Template Commands** click **Rename** and enter a new name.

READ HINT

To save a template in a different location, use the **File** tab's **Save As** command. If you use the Organizer to save the template it is automatically saved in the default template location and is also available again from the Organizer. Using the File tab commands lets you save the template file in a different location, but it does not add the template to the Organizer.

Add a Map Template to the Organizer from a file (*.mmat)

You can add a template to the organizer from a template file (*.mmat). This may be a file that you have received from a colleague, or a standard template that's been designed for use on all corporate maps, or just for a particular project. Adding it to the organizer makes it easier to locate and use.

- 1. On the **Design** tab, click the **Theme Organizer**.
- 2. On the Organizer's **Map Templates** tab, in the list of templates, click the folder where you want to add the new template.
- 3. Click **Add New Map Template**, and then click **From Existing Template**. Navigate to the template file in the dialog box, and then click **Open**.
- 4. Once the template is added to the list, you can rename it by clicking **Rename** under **Template Commands**.



You can use the Template Organizer to further manage your templates by grouping them into collections.

Use the Web Templates Organizer

The **Template Organizer's Web Templates** tab lets you organize your templates into folders, and add new templates to the list. It also lets you rename, delete, or modify existing templates. Note that the templates themselves are folders that contain all the files required to format the Web pages. Each Web template folder appears as a single entry in the template list, and uses a special template icon to identify it. If you have modified the export settings for the current map, you can save these changes for re-use by creating a new Web template file.

What do you want to do?

Save the current Web export settings in a new template

Add a Web template to the Organizer

Organize the templates list

Modify Web templates

See also:

Export maps

Save the current Web export settings in a new template

- 1. On the **Design** tab, click the **Theme Organizer** pull-down, and then click **Web Templates**. Options
- 2. Click Add New Web Template, then click From Web Format of Current Map.

The template will be created, using the name of the current map. You can Rename it if you desire.

Add a Web template to the Organizer

If you receive a customized MindManager Web template from a third party or from another user (for example, a standard template used for your company's Web pages) you can add it to the Template Organizer.

- 1. On the **Design** tab, click the **Theme Organizer** pull-down, and then click **Web Templates**. Options
- Click Add New Web Template, and then click From Existing Web Template.
- 3. Navigate to the template folder and click OK.

The template will be added to the Organizer's template list.

Organize the templates list

If your template collection becomes large, you may want to organize the templates into parent folders.

• Use the **Folder** commands to create new folders, rename existing folders, or delete a folder.



If you delete a folder, the folder and all the templates it contains will be deleted from disk.

Drag and drop templates between folders to re-organize them.

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Modify Web templates

Each template consists of a set of CSS style sheets, HTML templates and MindManager macros that can be modified by the advanced user or third-parties. If you are familiar with modifying these types of files you can edit them to fit your needs.

If you want to modify an existing template, its a good idea to make a copy of it first and customize the new version.

Modify an existing template

- 1. On the **Design** tab, click the **Theme Organizer** pull-down, and then click **Web Templates**. Options
- 2. Select a template in the list, and then click **Duplicate**.
- 3. The template appears as "Copy of....", but you can **Rename** it.
- 4. Click **Modify**, then click **Open Web Template Folder** button to see the folder containing the files used by the template.

Since the export templates all use CSS (Cascading Style Sheet) technology, many of the features of an export (fonts, colors etc.) can be adjusted by CSS-savvy users simply by editing the CSS file(s) in the template (or the final generated output). Minor modifications can be made to the HTML template files without editing the macros.

Use the Map Themes Organizer

Map theme files (*.mmas files) contain settings for default formatting that you can re-use by applying them to other maps. This makes it easy to standardize the formatting of maps for your project, department, or company. MindManager comes with a good variety of themes. In addition, you can create a new map theme by saving the automatic theme settings from the current map to a file. You can modify an existing map theme directly.



You can create standard map themes and distribute them to other users to keep map formatting consistent. Users can <u>add</u> these themes to the New map dialog in their own copy of MindManager, and <u>apply</u> them to their own maps.

You can use the Template Organizer's **Map Theme** tab to manage your map themes.

Use the Organizer

On the Design tab, click the Theme Organizer pull-down, and then click Map Themes. Options

Collections and folders

The list shows all the available collections and the map themes they contain. You can add or remove entire collections from the Organizer using the Package folders option. To further organize your themes, you may create folders within the collections.

• Click the commands under **Folder Commands** to create a new folder, rename a folder, or delete a folder.



Delete and **Rename** apply to entire folders. If you delete a folder, all the templates it contains will also be deleted.

Reorganize map themes

- Move themes by dragging to a new folder or collection.
- To modify, duplicate, delete or rename a theme, select it in the list, and then use the Template Commands.

Manage map themes

Right-click on the theme preview, then click Rename, Modify, or Delete.

What do you want to do?

†

Use the Organizer

Create or add new map themes from the Organizer



Modify a map theme from the Organizer

See also:

Apply map themes

• The Template command **Delete** removes the Theme from the Organizer and *deletes it from disk*.

I READ NOTE

You cannot Rename, Modify, or Delete the map theme Default.

Create or add new map themes from the Organizer

You can add map themes in the Organizer for re-use on other maps. You can add:

- A "blank" map theme that uses the system defaults and contains no additional formatting. This is
 a good way to start from scratch to create a new theme. You can go on to modify this theme and
 save it for re-use.
- A new map theme that uses the automatic theme settings of the current map. Use this option if
 you modified the current map theme and want to save it as a separate map theme for re-use on
 other maps.
- A theme from a theme file. This may be a file that you have received from a colleague, or a standard theme that's been designed for use on all corporate maps or just for a particular project.
 Adding it to the organizer makes it easier to locate and use.

Add a new theme to the Organizer

- 1. On the **Design** tab, click the **Theme Organizer** pull-down, and then click **Map Themes**.
- 2. Select a folder where you want to add the new theme. (You can always drag it to a different folder later.)
- 3. Click Add New Map Theme.
- 4. Then click on:
 - New Blank Theme to add a theme that uses the system defaults for all formatting.
 - From Theme of Current Map to save the theme settings from the current map as a
 discreet theme and add it to the organizer list.
 - From Existing Theme to add a theme from a file to the organizer. Choose the theme file from the dialog that appears.
- Once the theme is added to the list, you can rename it by clicking Rename under Template commands.



You can also create a theme from the current map without using the Organizer.

Modify a map theme from the Organizer

- 1. On the **Design** tab, click the **Theme Organizer** pull-down, and then click **Map Themes**.
- 2. In the **Template Organizer**, on the **Map Themes** tab, select the theme you want to edit.
- 3. If you want to keep the original theme you can modify a copy of it: select **Duplicate** and give the theme a new name.
- 4. Click Modify.

5. Use the **Map Theme** view to set the new automatic formatting options.

READ HINT

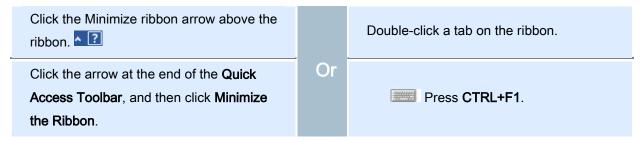
See <u>Modify an existing map theme</u> for information on how to modify a theme that does not appear in the Organizer.

Customize MindManager

Customize the ribbon

Minimize the ribbon

You can minimize the ribbon to maximize your work area. In the minimized state, the ribbon appears when you click on a tab, but disappears again when you click on the map. Do **one** of the following to minimize the ribbon:



Customize ribbon tabs and groups

You can customize the ribbon to:

- Show or hide tabs
- Rename tabs, groups and commands
- Change the order of tabs, groups and commands
- Add or remove commands and groups
- Create new, custom groups
- Create new, custom tabs that contain default or custom groups

You cannot rename, re-order, remove or add any commands within default groups. The default commands appear in gray text.

To help you identify a custom tab or group and to distinguish from a default tab or group, the custom tabs and groups in the Customize the ribbon list have (Custom) after the name, but the word (Custom) does not appear in the ribbon.

Open the Customize window

Right-click any tab on the ribbon, and then click Customize the Ribbon.

To see groups and commands:

Click next to the tab names in the Customize the Ribbon Tabs list to see their groups, and click
 next to a group name to see the commands it contains.

Show or hide tabs in the application

In the Customize the Ribbon Tabs list, check the tabs you want to see, uncheck those you don't.

Change the order of tabs, groups and commands

 Select the tab, group or command in the Customize the Ribbon Tabs list and then use the arrow buttons to the right of the list to move it up or down.

Commands in default groups (shown in gray) cannot be re-ordered. Only commands in custom groups can be re-ordered.

Rename tabs, groups and commands

Select the item in the Tabs list and then click Rename.

Commands in default groups (shown in gray) cannot be renamed. Only commands in custom groups can be renamed.

Create a custom group

You can create a custom group with commands that can be re-ordered or renamed on a default tab or on a Custom tab.

- 1. In the Customize the Ribbon Tabs list, select the tab where you want to add the custom group.
- Click New Group below the Tabs list.
 - New Group (Custom) appears in the tab's list of groups.
- 3. Click **Rename** to enter the name for your new group.
 - The notation (Custom) will not appear on the ribbon.
- 4. While the new group is still selected in the Customize the Ribbon Tabs list, on the left side of the dialog, use the **Choose commands from**: pull-down menu to select the group of commands you want to use to populate the new group.
- 5. Select a command from the list, then click Add.
- 6. Repeat until you have populated the group.

You can re-order and rename commands in the new group.

Create a custom tab

- In the Customize dialog, click New Tab below the Customize the Ribbon Tabs list.
 New Tab (Custom) appears in the tab list. The new tab contains an empty group named New Group (Custom).
- 2. With the new tab selected, click **Rename** to enter the name for your new tab. The notation (Custom) will not appear on the ribbon.
- 3. You can populate the tab with default groups or create custom groups.

Add default groups to a tab

- 1. With the tab selected in the Customize the Ribbon Tabs list, use the **Choose commands from** pulldown menu to select **Main Tabs**.
- 2. To see the groups on each tab, click ⋅ then click ⋅ on the group name to see its commands.
- 3. Select the group you want to add to the tab, and then click **Add**.

Remove a tab, group, or command

 In the Customize the Ribbon Tabs list, select the item you want to remove, and then click Remove.

You cannot remove the default tabs, but you can choose not to display them. You cannot remove commands from default groups.

Remove customizations

At the bottom of the Customize the Ribbon Tabs list, click Reset.

Customize the Quick Access Toolbar and other interface items

You can customize the Quick Access toolbar by adding or removing commands and by changing its position. Adding commands give you 1-click access to frequently-used commands.

Add or remove commands



Click the arrow at the end of the Quick Access toolbar and select the commands that you want to add, clear those you want to remove.

If you don't see the command you want to add, click **More Commands** to see the **Customize Quick Access Toolbar** dialog.

- 1. Under **Choose commands from,** select **All Commands** or select a tab name to see only the commands on that tab.
- 2. Under Commands, select the command you want to add, then click Add.
- 3. To remove a command, select it in the list on the right and click **Remove**.
- 4. To return the toolbar to its original configuration click **Reset**.



To quickly add a command from the ribbon to the Quick Access toolbar: right-click the command on the ribbon, and then click **Add to Quick Access Toolbar**. You will only see this option for commands that can be added to the toolbar.

To quickly add a command form the File menu to the Quick Access toolbar: click the **File** tab, right-click on a command in the menu, and then click **Add to Quick Access Toolbar**. You will only see this option for commands that can be added to the toolbar.

Change the order of commands

Commands appear on the Quick Access toolbar in the order shown in the list. Use the arrows to the right of the list to change the order of the commands.

Change the Quick Access Toolbar position

Do one of the following:

Click the arrow at the end of the Quick Access toolbar, then click **Show Below the ribbon**.



In the Customize Quick Access Toolbar dialog check Show Below the ribbon to change the toolbar's position.

Customize other interface items

Status Bar

You can choose which commands to show on the bottom Status Bar.

Right-click on the Status Bar and check or uncheck commands as desired.

Workbook tabs

You can display workbook tabs at the top or bottom of the window and turn them off or on. Do one of the following:

- Right-click any workbook tab, then click Workbook Tabs Placement and choose the display option.
- Click the File tab, click Options, click View, and then choose the display options.

More options

Explore the Options for even more ways to customize MindManager.

Set options

There are a wide variety of options that control the behavior of MindManager desktop.

To see the Options dialog:

Click the File tab, then click Options.

Add-ins and transformations

Add-ins

MindManager comes with a set of pre-installed add-ins that extend its functionality. These software modules add commands to the MindManager ribbon, and to the Microsoft Office applications ribbons (or menus). Additional add-ins may be provided by MindManager or third-party vendors.

MindManager commands that come from add-ins include:

Features

Sort Topics

MindManager User Guide

Browser

Analytic views

Brainstorming

Gantt Pro

Imports and exports

Save as Web Pages

MPX Import

Microsoft Project Import and Export

Microsoft Word Export and Import

Microsoft Excel

FreeMind Import

XMind Import

HTML5 Map Export

OPML Import and Export

Spreadsheet (CSV) Export

Map data and topic data

File Explorer

Microsoft Excel Linker and Excel Range

Microsoft Outlook Map Parts

Microsoft SharePoint Linker

Smart Map Parts

Database Linker

These features are automatically enabled when you install MindManager. You can see the list of installed add-ins, and disable or enable them in the MindManager Add-Ins options dialog.

Buttons added to Microsoft applications by the add-ins

In the Microsoft Office applications, the **Send to MindManager Map** commands come from add-ins and are automatically enabled when you install MindManager.

If you are experiencing difficulties using the Microsoft Office add-ins see Troubleshooting Office add-ins.

Transformations

Transformations enable the conversion of a map to a text-based format and vice-versa. Like Add-ins, transformations add commands to the MindManager interface and appear as an integrated part of the application.

You can choose **Outlines - Plain Text** to create a text outline of your map; **Outlines - OPML** to create an OPML (Outline Processor Markup Language) outline, an XML format for outlines, of your map; or **Outlines - Web Page** to create an HTML outline. Additional transformations may also be provided by MindManager and by third-party vendors.

You can enable or disable transformations in the MindManager Transformations options dialog.

Create and organize macros

Additional capabilities can be added to MindManager through the use of MindManager Macros. Macros differ from add-ins in that they are not separate applications: they are a set of commands that direct MindManager to perform certain actions. Macros, like add-ins can be provided by MindManager or third-party vendors, but they can also be created using the Macro Editor provided with MindManager. To add, delete, and modify macros on the **Advanced** tab, click the **Macro** arrow, then click **Organize Macros**.

Use the Macro editor

On the Advanced tab, click Macro, then click Macro Editor.

Note: The editor's built-in help may not function on systems using Windows 7 and later. A compatible copy of the Help file SBE6_000.chm, is installed in top level of the MindManager installation folder. Double-click this file to see the Macro Editor Help.

Reference

Use a Tablet PC or Touchscreen

Get started with Pen Mode

MindManager has a special Pen Mode for running on the Tablet PC. In the Pen Mode you can use pen gestures to create and edit your maps. When you are finished, you may choose to switch back to Mouse Mode and convert the ink text in your maps into regular text.

What do you want to do?



Pen Mode commands
Pen Mode gestures

See also:

Create a map in Pen mode

Edit a map in Pen Mode

Use Windows touch gestures

Pen Mode commands

The MindManager Pen Mode provides special commands for working with a pen.

- Insert Sketch, Ink Color, Ink Highlight, Ink Width, Ink Eraser, and Ink Selection commands in the Tablet tab.
- Ink to Text and Pen Mode Help commands on the Tablet tab.
- Pen Mode and Mouse Mode commands on the Status Bar at lower left.

Limitations

In Pen Mode some modes and actions are disabled:

- Outline View
- Linked Maps View
- Walk Through view
- Brainstorming
- Resizing topics

Toggle between Pen Mode and Mouse Mode

• On the **Status Bar** at lower left, click **Pen Mode** or tap **Mouse Mode** .



You can configure MindManager to automatically start in pen mode by enabling the MindManager Tablet PC option - **Use pen mode on startup**.

Get Help using MindManager in Pen mode

Tap the **Pen Mode Help** command on the **Tablet** tab, to see the Tablet Help pane with a quick reference for gestures, and links to tablet-specific help.

Tablet-specific options

There are a variety of options that control the behavior of MindManager in Pen Mode. To see these options click the **File** tab, click **Options**, and then click **Tablet PC**.

Pen Mode gestures

You can execute commands to <u>create</u> or <u>edit</u> topics and sketches on your map by drawing the following gestures.



You should first select the objects (if any) that you want the gesture to act on.

Gestures can be drawn anywhere on the map.

Gestures must start in white space (not touching an object) but can be drawn over objects.

Draw them at least one inch big to ensure proper recognition.

The MindManager Pen mode interface is "gesture ready". You do not need to push the pen button to signal that you are drawing a gesture.

Many of these are standard gestures defined by Microsoft and used by other tablet applications, while a few are specific to MindManager.

Δ	Insert sketch	Draw the triangle in a single stroke, without lifting the pen. Make sure that the top of the triangle points upward.
=	Delete/Erase	Make the strokes as horizontal as possible, and draw at least three strokes. If the height of the gesture increases, the number of back and forth strokes also needs to increase.

< >	Focus on topic (left) Focus on topic (right)	Draw both sides of the chevron with equal length. Make sure the angle is sharp and that the point is not rounded to a curve. Make the chevron big, approx. 3/4 inch. Right-handed people can use the chevron-right and vice versa.
0	Center map	Draw the circle in a single stroke, without lifting the pen. Start from the topmost point and end at the same spot
9	Cut	Draw the curlicue at an angle, from lower left to upper right.
	Cut	Draw this gesture in a single stroke starting with the left stroke. Draw the two strokes as close as possible, almost as one line.
کی	Сору	Draw the double-curlicue at an angle, from the lower left to the upper right.
	Сору	Draw this gesture in a single stroke starting with the right stroke. Draw the two strokes as close as possible, almost as one line.
٨	Paste	Draw both sides of the caret with equal length. Make sure the angle is sharp and that the point is not rounded to a curve.
0	Paste	Draw the circles in a single stroke, without lifting the pen. Start drawing the circle from the topmost point
─ →	Insert topic (right) Insert topic (left)	This gesture is a single, fast flick to the right. This gesture is a single, fast flick to the left.
	Insert subtopic (right) Insert subtopic (left)	Draw this gesture as a single stroke, starting downward and then right. Draw this gesture as a single stroke, starting downward and then left.
	Undo	Make sure to draw the semicircle from the right to the left. The two ends of the arc should be on the same horizontal line.

	Redo	Make sure to draw the semicircle from the left to the right. The two ends of the arc should be on the same horizontal line.
 ↑	Zoom in	This gesture is a single, fast flick upward.
	Zoom out	This gesture is a single, fast flick downward.

READ HINT

If you have a Tablet PC or touchscreen computer running under Windows 7 or later, you can use additional touch gestures when working with MindManager maps.

Create a map in Pen mode

What do you want to do?

In Pen Mode, you can create a map by entering topics and topic notes as text or ink, and sketches that are free-floating or included in topics.



Get started with Pen Mode

Edit a map in Pen Mode

Use Windows touch gestures

Enter topics

When you begin a new map in pen mode the central topic is blank. You can tap on it to enter the topic text. If MindManager can recognize the text it will be used as the default name for the map when you save it, otherwise you will be prompted for a map name.

You enter other topics using gestures, or you can tap the commands on the ribbon to <u>add topics</u>, <u>relationships</u>, and <u>boundaries</u> in the conventional way.

Insert a new main topic	Select the Central topic and draw the left or right Insert Topic gesture - or
Insert a sibling topic (topic at the same level)	Select a topic and draw the left or right Insert Topic gesture — or — in a space nearby.
Insert a subtopic (topic at the next level)	Select a topic and draw the left or right Insert Subtopic gesture or in a space nearby.
Insert a floating topic	With nothing selected, draw the left or right Insert Topic gesture — or —.
Insert a callout topic	Select a topic and on the Home tab, in the Add Topics group, tap Callout .

Enter ink topics

When you insert a topic or a subtopic the Ink entry box appears so you can use the pen tool to draw your text.

The commands in the **Tablet** tab let you select **Ink Width** and **Ink Color**. You can change these as you write, so the ink thickness and color can vary within the topic.

If you make a mistake while drawing the text, in the **Tablet** tab, tap the **Ink Eraser** tool to erase the ink. Then tap **Ink Width** to add more ink to the topic.

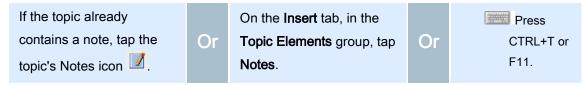
If you want to move or resize some text while entering, tap the Lasso selection button and draw a boundary around it. The selected text is displayed in outline characters, with a box around it. Drag the text to a new location or use the handles to resize it. Tap **Ink Width** to add more ink to the topic.

Insert and edit topic notes

The Ink Notes feature is designed to allow you to quickly add ink comments to a topic. The topic may or may not already contain some Text Notes.

Open the Topic Notes window

- 1. Select the topic.
- 2. Do one of the following:



The lnk and Text Notes are displayed separately in the Topic notes window, and by using the buttons on the top status bar you can switch between showing Text only , lnk only , or both Text and lnk at the same time.

Enter Ink

The lnk Notes window behaves the same as the ink sketch panel, but has its own set of controls. The lnk Notes window size is automatically adjusted to the content and can be extended at the bottom to grow.

Draw the ink using the Ink Tool or Highlighter Tool.



Turn off the Text Notes window to maximize the space available for ink notes.

- If you enter lnk close to the bottom of the window (about an inch), the page is automatically extended at the bottom, or you can use the **Extend Page** button in the lnk toolbar to extend the page.
- If you make a mistake use the Eraser to remove ink.
- To modify ink, use the **Selection Tool** to select ink. You can then resize it or drag it to a new location within the note.



The background of the ink notes window can be set in the Modify Theme mode, using the **Notes**Format command. (You must switch to Mouse Mode to use the Modify Theme command.)

Include Ink Notes in Text Notes

You can add items from the Ink Notes to the Text Note as text (the ink is converted to text by handwriting recognition) or as an image.

Convert ink in notes to text

If ink objects are dragged into the Text window, they are automatically converted to text and inserted at the drop position.

- 1. Select ink objects in the Ink Notes window (using the Selection Tool not the Ink Notes toolbar).
- 2. Drag and drop them into the Text view (both views must be shown).

The lnk is then automatically converted into regular text (using handwriting recognition) and inserted at the drop position.

Alternatively, you can select the ink and tap **Append to Text Notes as Converted Text** on the Ink Notes toolbar. The Ink is automatically converted into regular text (using handwriting recognition) and inserted at the end of the text note.



You can convert all the ink topics on your map to text topics using the Ink to Text converter.

Add an ink note to a text note as an image

You can include an Ink Note inside a Text Note as an image.

Select the ink and tap **Append to Text Notes as Image** on the Ink Notes toolbar. This command converts the selected ink object to a PNG image that is appended at the end of the Text Note. An additional space character is added after the image. You can then move the image to a different position inside the note.

Ink Notes export

Exports that include Notes will show the Ink Notes content as an image below the regular Text Notes. If you export your map to web pages or to a Word file, you have the option to exclude or include the notes in the export. For Word, this option appears in the Word Export Settings **General** tab.

Remove all ink objects from the Notes

Tap the Clear button on the Ink Notes toolbar.

Insert sketches

1. Do **one** of the following:



- 2. The sketch pad appears. On the **Tablet** tab, in the **Ink Format** group you can choose to draw with the pen or the chisel-tip highlighter. The current ink color displays under the pen.
 - Tap the pen or highlighter to select a drawing tool.
 - Tap the Ink Color arrow to choose a new color for the current pen or highlighter.
 - On the Format tab, in the Object Format group, tap the Fill Color arrow to choose a
 different background color for the sketch. (The default color is set in the MindManager
 Tablet PC options).



You have the option to use a pressure-sensitive pen in your sketch.

If you make a mistake while you are drawing the sketch, you can tap the **Ink Eraser** tool on the **Tablet** tab to switch to the eraser. Tap **Ink Thickness** to resume drawing.

If you want to move or resize some sketch elements tap the Lasso selection button on the **Tablet** tab, in the **Ink Format** group, and draw a boundary around them. The selected element is displayed in outline, with a box around it. Drag the element to a new location or use the handles to resize it. Tap **Ink Width** to resume drawing.



You can drag and drop a sketch on a topic to attach the sketch inside the topic. A green topic cue will show the position of the sketch inside the topic.

Edit a map in Pen Mode

What do you want to do?

Most pen gestures work on the currently selected object or objects. You'll also need to select topics and objects to format them or use other editing commands on them.

Pen Mode offers special editing commands for ink topics and sketches. These commands appear in a mini-toolbar on the topic or object and on the ribbon. You can drag any object to a new location, and use gestures to cut, copy, paste and delete topics.

Select topics
and objects

Edit topic text
or ink

Edit a sketch

Move, cut &
paste, or delete
topics and
objects

Convert ink

topics to text

Select topics and objects

To select a single topic or object:

· Tap the object.

To select multiple topics or objects:

- On the Advanced tab, in the Edit Topics group, tap the Select arrow, and then tap Multiselection Mode.
- 2. Tap and drag a rectangle that touches all the objects you want to select. To select or de-select additional objects, tap on the object.
- 3. To end Multiselection Mode, on the **Advanced** tab, in the **Edit Topics** group, tap the **Select** arrow, and then tap **Multiselection Mode**.

To deselect all objects:

Tap on an empty place on the map

You can also use the Power Select command to select a set of topics based on their properties.

Edit topic text or ink

In Pen Mode you can edit both ink topics and regular text topics.

Edit ink topics

- Double-tap to begin editing. If you selected an ink topic, the lnk entry box will appear so you can add or edit ink.
- 2. Use the commands in the Tablet tab, Ink group or in the mini-toolbar to edit the ink.

- Select it using the Ink Selector then choose a new line thickness or color, resize or move it.
- Use the **Eraser** to remove ink.



You can use the Find command to find ink text, but the Replace command is not available for ink.

Edit text topics, relationships and boundaries

You can also <u>edit</u> regular text topics, <u>relationships</u>, and <u>boundaries</u> in the normal way. Tap to select an object, (for example to re-shape a relationship) or double-tap to begin editing a text topic, or see the formatting options for other objects.

Edit a sketch

1. Double-tap on the sketch to begin editing.



You can edit a sketch in Mouse Mode, as well. Double-click on the sketch to edit it.

- 2. Add more ink, or modify the exiting sketch: Select ink using the **Ink Selector** then choose a new line thickness or color, move it, or resize it.
- 3. Use the **Ink Eraser** to remove ink.
- 4. To resize the entire sketch, select it and drag its corner handles.
- Tap the Format tab, Object Format group, Fill Color arrow to choose a different background color for the sketch. (The default color is set in the Tablet PC options).



Move, cut & paste, or delete topics and objects

The basic procedure for moving an object on a map is to select it (tap) and drag it to its new location. See Reorganize topics for information on moving topics.

You can also use the cut \mathcal{Y} , copy \mathcal{Y} and paste \wedge gestures to rearrange or duplicate topics.

To delete an object, select the object(s) then draw the delete gesture nearby -

Convert ink topics to text

You may want to convert the handwritten topics that you added in Pen Mode into text. One good reason to convert is that ink topics take more file space than text topics. Converting the handwriting to text will make your map smaller.

You can use the **Ink to Text** Converter in either **Pen Mode** or **Mouse Mode** to convert ink topics to text using handwriting recognition.



The **Ink to Text** converter does not act on topic Notes. You can <u>convert</u> these individually from ink note to text note.

Do one of the following:

- Right-click or tap and hold on a topic to see the context menu, then click or tap **Convert Ink to Text**, then **Ink to Text Converter**.
- On the Tablet tab, click Ink to Text.

The converter steps through each ink topic on the map. For each topic you have the following choices:

Replace with	The menu shows up to five possible text choices. You can select one of these or enter your own text. This text replaces the ink when you select Accept .
Accept all	Accepts the first suggestion for all ink topics on the map and replaces the handwriting with the new text.
Accept	Converts the ink to the current suggestion and moves on to the next ink topic.
Next	Moves to the next ink topic without converting the current topic.
Close	Stops the conversion process.



If converting ink to text does not work on your Tablet PC, be sure that you have the default input language set to **English** in your operating system Control Panel.

Use Windows touch gestures

If you have a Tablet PC or touchscreen computer running under Windows 7 or later, you can use gestures when working with MindManager maps.



Consult the Microsoft Windows Help for more information about which gestures are supported on your system.

You can choose which gestures you want MindManager to recognize for specific functions by setting these MindManager Options.

These standard gestures ▼ should be familiar to you if you normally use gestures on your computer.

Mouse	Gesture	Action
Click	Тар	tap with one finger
Double-click	Double-tap	double-tap with one finger
Right-click	Press and tap	press on target and tap using second finger
	Press and hold	press until blue ring fully appears, then release
Drag selection	Drag	drag object with one finger
Scroll	Pan with inertia	drag with one or two fingers
Zoom (CTRL+Scroll wheel)	Pinch Spread	move 2 fingers together move 2 fingers apart
Pan	Flick	make a quick drag gesture in the direction you want to pan
	Rotate	pivot with 2 separated fingers

Use gestures in MindManager

You can use gestures for these specific functions in MindManager:

Function	Gesture
Select topic or object Tap, press and hold, and flick gestures are available on all touchscreens and Tablet PC's.	Tap the topic or object
Select multiple topics	On the map background, drag a rectangle that touches the topics
See shortcut menu Tap, press and hold, and flick gestures are available on all touchscreens and Tablet PC's.	Press and tap or press and hold
Scroll map	Drag on the map background
Move topic	Tap the topic to select it, or drag it to a new location, or just release
Expand / collapse topic	Tap to select the topic Rotate right / left
Resize image This function is disabled by default. You can enable it using the MindManager Options.	Tap to select the image Pinch or spread
Zoom in / out	On the map background, pinch / spread to zoom out
Zoom or Fit Map You can choose which function applies to this gesture using the MindManager Options.	On the map background, tap with 2 fingers
Switch to next / previous open map Tap, press and hold, and flick gestures are available on all touchscreens and Tablet PC's.	Flick right / left

Keyboard shortcuts

To see a list of keyboard shortcuts at any time, on the ribbon's **Help** tab, in the Help group, click **MindManager Help** and select **Keyboard Shortcuts** from the drop down menu.

Map Documents

Navigating

Viewing

Map Window

Map Levels and Filtering

<u>Interface</u>

Walkthrough and slides

Adding objects

Topics

Elements

Editing

Selecting

Cut, Copy, Paste and Delete

Topic Text

Move Topics

Formatting

Using Help

General Windows Commands

Popular commands are highlighted in the chart below.

Map Documents

Create a new map	Ctrl+N
Open a map	Ctrl+O
Search for a map	Alt+Ctrl+Shift+F
Save the current map	Ctrl+S

Save as	F12
Close current man	Ctrl+W
Close current map	Ctrl+Shift+F4
Print Preview	Ctrl+F2
Print the current map	Ctrl+P
Move through open maps in the order they	Alt+Left arrow
were viewed (forward, backward)	Alt+Right arrow

Navigating

Select topic above, below, left or right (maps)	Arrow keys
Nudge selected topic in direction of arrow—higher, lower, to left or to right (flowcharts)	Arrow keys
Micro-nudge selected topic in direction of arrow—higher, lower, to left or to right (flowcharts)	Ctrl+Shift+Arrow keys
Select next topic / previous topic	Tab/ Shift+Tab
Move to top sibling topic	Home
Move to bottom sibling topic	End
Move forward / backward through topic selection history	Backspace / Shift+Backspace

Viewing

Map Window

Zoom in	Ctrl+=	
Zoom out	Ctrl+- (minus)	
Fit map to screen	Ctrl+F5	
100% Zoom	Ctrl+0 (zero)	
Scroll the map by small steps	Ctrl+Arrow keys	
Scroll map by large steps		
Up or down	Page Up or Page Down,	

Right or left	Ctrl+Page Up or Ctrl+Page Down
Center map and collapse all topics	Ctrl+F3
Center object	Alt+F3
Center Object	
View next map	Ctrl+F6
·	Ctrl+Tab
View previous map	Ctrl+Shift+F6 or Ctrl+Shift+Tab
Map Levels and Filtering	
Focus on topic	F3
Show next level of topics	Ctrl+D
Show 1 level	Alt+Shift+1
Show 2 levels	Alt+Shift+2
Show levels 3 through 9	Alt+Shift+3etc (up to level 9)
Show all levels	Alt+Shift+>
Collapse selected topic	Alt+Shift+0
Collapse entire branch	Alt+Shift+<
Collapse map	Ctrl+F3
Remove filter	Alt+Ctrl+Shift+A
Show branch alone	F4
Show others	
Interface	
Show the Topic Notes window	F11
Show or hide the Topic Notes window	Ctrl+T
View next topic note*	Ctrl L Chiff L Dago Days
View previous topic note*	Ctrl+Shift+Page Down
* from within Notes window	Ctrl+Shift+Page Up
Show or hide the task panes	Ctrl+Shift+F1
Expand or collapse ribbon	Ctrl+F1

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Show Alt keys	F10 or Alt
Show context menu	Shift+F10
Walkthrough and slides	
Start walkthrough from beginning	F8
Start walkthrough from selected topic	Shift+F8
Start slides from beginning	F9
Start slides from selected topic	Shift+F9

Adding objects

Topics

Add subtopic (maps)	Insert or Ctrl+Enter
Add decision topic (flowchart)	Insert or Ctrl+Enter
Add sibling topic (maps)	Enter
Add topic to the right (flowcharts)	Enter
Add sibling topic (as previous sibling)	Shift+Enter
Add topic to the left (flowcharts)	Shift+Enter
Insert parent topic	Ctrl+Shift+Insert
Add callout topic	Ctrl+Shift+Enter

Elements

Add attachment *	Ctrl+Shift+H
Manage Attachments *	Ctrl+Shift+T
Add link	Ctrl+K
Add comments	Ctrl+F11
Add notes	Ctrl+T
Add boundary	Ctrl+Shift+B
Insert relationship	Ctrl+Shift+R

Add Task Info (Start Date, Due Date)	Ctrl+Shift+I
Add icon	Ctrl+1, Ctrl+2 etc. Note: These shortcut keys are defined in the Library pane
Remove all icons	Alt+Ctrl+0
Add priority icon (Priority 1,2,etc.)	Ctrl+Shift+1; Ctrl+Shift+2; etc.
Remove all priorities	Ctrl+Shift+0
Add and cycle through progress icons forward / backward	Alt+Ctrl+P / Alt+Ctrl+Shift+P
Add Map Part	Ctrl+Shift+N
Refresh Map Part	F5
Refresh all Map Parts	Shift+F5
Insert current date and time	Ctrl+Shift+D
Insert selected date and time	Alt+Ctrl+D

^{*} These shortcuts are not available if your system administrator has disabled attachments.

Editing

Undo the last action	Ctrl+Z or Alt+Backspace
Redo the last action	Ctrl+Y
Selecting	
Select all topics and elements	
Select all topic notes text (Notes window)	Ctrl+A
Select all ink (Notes window)	
Select additional topics	Shift+arrow keys
Select all siblings	Ctrl+Shift+A
Below only	Shift+End
Above only	Shift+Home

Select all siblings and parent	Ctrl+Shift+Left arrow or Right arrow
Select parent	Ctrl+Backspace
Select topic, descendants, boundaries and relationships	Shift+F3
Select next level of subtopics	Ctrl+Shift+Right arrow or Left arrow
Move forward / backward through topic selection history	Backspace / Shift+Backspace
Cut, Copy, Paste and Delete	
Copy to the Clipboard	Ctrl+C or Ctrl+Insert
Copy as link	Alt+Ctrl+C
Cut to the Clipboard	Ctrl+X or Shift+Delete
Paste contents of the Clipboard	Ctrl+V or Shift+Insert
Paste inside	Alt+Ctrl+Shift+V
Paste as next topic (sibling topic)	Alt+Ctrl+V
Paste as callout	Ctrl+Shift+V
Delete topic or object	Delete
Remove selected topic (but keep subtopics)	Ctrl+Shift+Delete
opic Text	
Begin edit mode	F2, then click inside topic
Begin edit mode with cursor at the beginning of the text	Shift+Spacebar
Begin edit mode with cursor at the end of the text	Spacebar
Commands in topic text edit mode:	
Enter line break in topic	Shift+Enter
Move to beginning of line	Home
Move to beginning of topic text	Ctrl+Home
Move to end of topic text	Ctrl+End

Split topic at cursor location to create new sibling	Alt+Shift+Down arrow
Split topic at cursor location to create new subtopic	Alt+Shift+Right arrow
Cancel editing	Esc
Split topic as multiple topics (based on spaces in topic text)	Alt+Ctrl+Enter
Split topic as multiple subtopics (based on spaces in topic text)	Alt+Ctrl+Insert
Find	Ctrl+F
Commands in Find mode:	
Find Next	Enter
Find Previous	Shift+Enter
Enter Find text	Ctrl+G
Replace	Ctrl+H
Spelling	F7
Move Topics	
Up one place	Alt+Ctrl+Up arrow
Down one place	Alt+Ctrl+Down arrow
To top	Alt+Ctrl+Home
To bottom	Alt+Ctrl+End
Reset all main topic positions	Alt+Ctrl+Spacebar
Balance map	Alt+Ctrl+B
Formatting	
Toggle to bold and back	Ctrl+B
Toggle to italics and back	Ctrl+I

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Toggle to underline and back	Ctrl+U
Increase font size	Ctrl+Shift+>
Decrease font size	Ctrl+Shift+<
Strikethrough text	Ctrl+Shift+S
Fill color	Ctrl+Shift+C
Font / ink color	Ctrl+Shift+F
Using Help	
Show Help	F1
General Windows Commands	
Close a menu or dialog box	Esc
Cancel an operation	Esc
Close MindManager	Alt+F4
Display Windows Task List	Ctrl+Shift+Esc

Accelerator keys

You can use accelerator keys to quickly add and create resources and tags.

Add tags with an accelerator key

You can add existing tags to a topic and create new ones in the General Tags group on the fly.

- 1. Select a topic.
- 2. Do one of the following:

Type # and choose the tag in the popup menu by clicking it or scrolling to it with the arrow keys and pressing **Enter**.

Or tag name, and press **Enter**.



To use # as a character rather than an accelerator key, click in the topic, type # then press Esc or Spacebar.

Add resources with an accelerator key

You can add existing resources to a topic and create new ones on the fly.

- 1. Select a topic.
- 2. Do one of the following:

Type @ and choose the resource in the popup menu by clicking it or scrolling to it with the arrow keys and pressing **Enter**.

Or a resource name, and press **Enter**.



To use **@** as a character rather than an accelerator key, click in the topic, type **@** then press **Esc** or **Spacebar**.

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