

# Project settings

Guides for Merlin Project Express

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## Project settings - as of December 2018

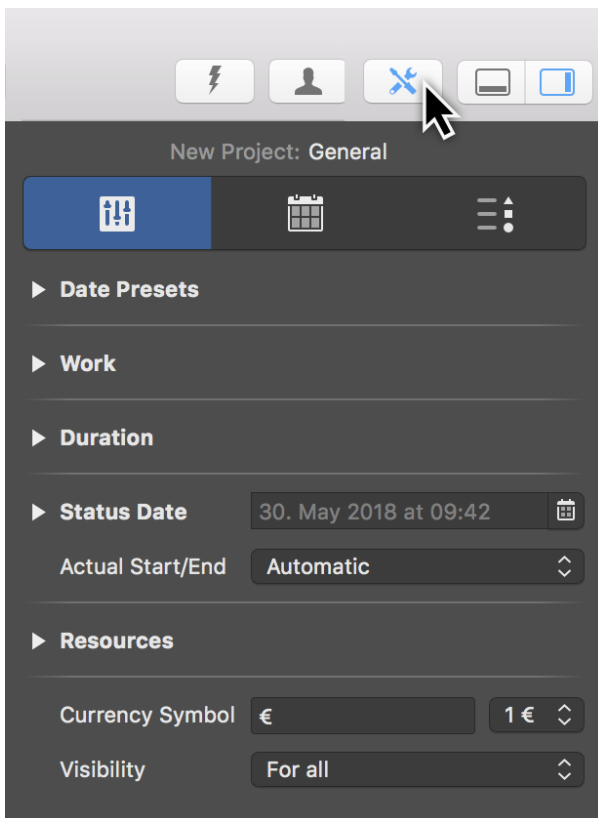
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Merlin Project Express provides a number of settings for the open project. Click the **Settings** icon or use the **File** → **Project Settings** menu to open the Inspector.

## General

The **General** tab contains the following settings for the project:

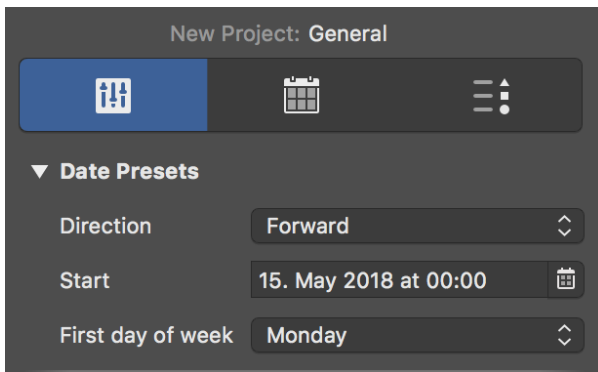
- **Date Presets**
- **Work**
- **Duration**
- **Status Date**
- **Resources**



The **visibility** of the project relates to multi-user use and Merlin Server.

Here you will also find settings for the **currency sign** used in the project and the **visibility** of the project.

## Date Presets



**Date Presets** relate to the project and are therefore important.

### Direction

The **direction** sets whether the project is *forward planned* or *backward planned*.

The **Forward** option is active by default and lets you begin a project from the start date.

The **Backward** option allows you to work backwards in the project starting from an end date.

### Start

The **Start** is the start date for the project and is required.

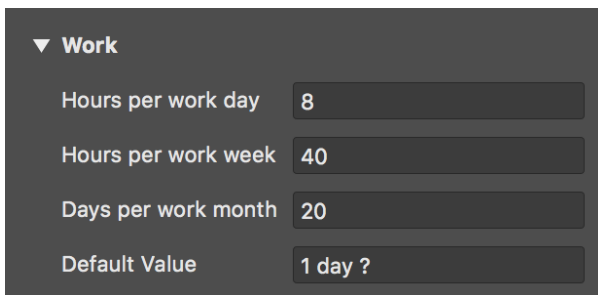


Whenever you create a new project, tomorrow's date is always set automatically as the start.

### First day of week

The **First day of the week** option specifies the day on which the week begins. This varies from country to country. By default, in Europe a week starts on **Monday**.

## Work



▼ Work	
Hours per work day	8
Hours per work week	40
Days per work month	20
Default Value	1 day ?

This is where you will find the project **work** settings.

The following values can be set:

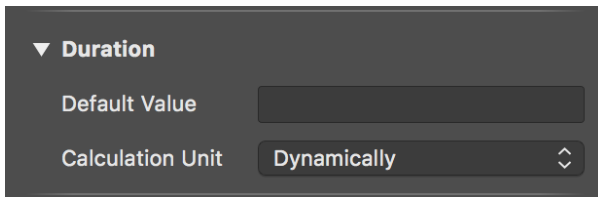
- **Hours per working day**
- **Hours per working week**
- **Days per working month**

### *Default Value*

The **Default Value** is used for newly created activities. Each new activity is assigned the **Default Value** for **Work** automatically.

The **?** is only an indication that the **Default Value** is estimated. Delete the **?** if not required.

## Duration



The image shows a dark-themed settings panel for 'Duration'. At the top, there is a dropdown arrow followed by the text 'Duration'. Below this, there are two settings: 'Default Value' with an empty text input field, and 'Calculation Unit' with a dropdown menu currently showing 'Dynamically' and a small up/down arrow icon.

This is where you will find settings for the project **duration**.

As with **work**, a **Default Value** for **Duration** can optionally be set. This means that new activities are assigned the **Default Value** automatically for the **duration**.

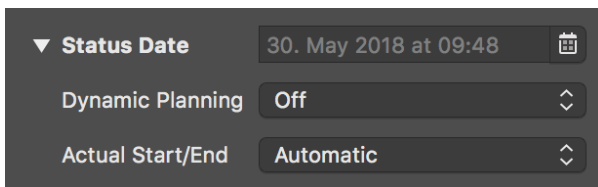
### *Calculation unit*


The **calculation unit** sets the **duration** unit.


It is set to **Dynamic** by default. This means that the units are calculated dynamically. This means that **7 days** becomes **1 week**, **4 weeks** becomes **1 month**, etc.


Units are available in the drop-down menu. Once you set a unit, it is used for the entire project.

## Status Date



▼ **Status Date** 30. May 2018 at 09:48 

Dynamic Planning Off 

Actual Start/End Automatic 

The **Status Date** allows you to view the project from a certain date.

If a **Status Date** is set, it is used as the **current date** for the entire project.

This allows you to simulate the progress of the project on the status date specified.

### Dynamic Planning

**Dynamic Planning** is enabled by default.

When activated, **Dynamic Planning** shifts the content of the project based on the **Status Date**.

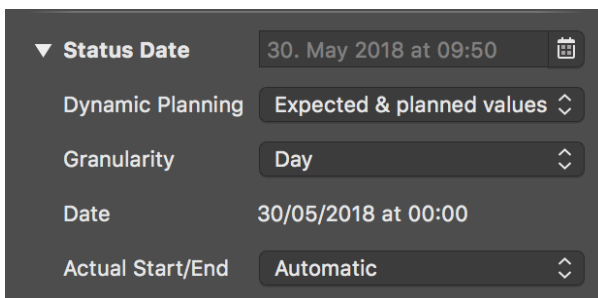
Two variants for **Dynamic Planning** are available in the drop-down menu:


- **Expected & planned values**
- **Only expected values**


If you select the first option, dynamic planning is applied to both the expected and planned values in the project.




If you activate the columns **Expected Start** and **Planned Start**, the consequences of dynamic planning are easier to see.




▼ **Status Date** 30. May 2018 at 09:50 

Dynamic Planning Expected & planned values 

Granularity Day 

Date 30/05/2018 at 00:00

Actual Start/End Automatic 

If dynamic planning is activated, further settings appear.

The **granularity** determines how detailed dynamic planning should be in relation to the status date. The time units are available in the drop-down menu.

For example, if **week** is selected as **granularity**, a different date appears calculated based on the status date and granularity. It serves as the basis for dynamic planning.

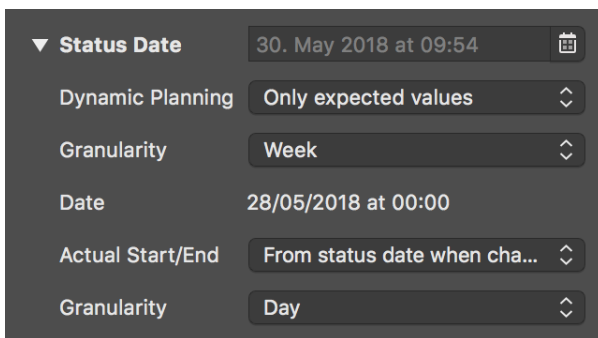
## Actual Start/End

The **Actual Start/End** option is calculated automatically by default.

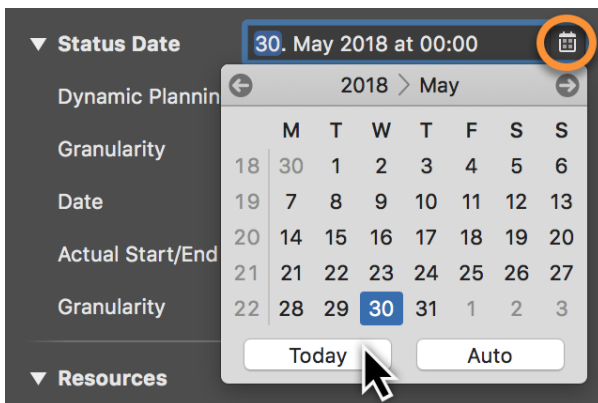
Two further options are available in the drop-down menu:

- **From expected values for change in completion**
- **From status date when changing completion**

These options take effect when changing the **completion** of activities and influence the **actual start/end** of the activities.



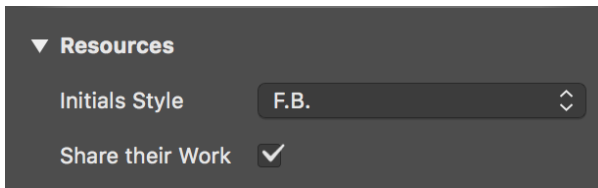
The setting for **granularity** is also displayed with the **From status date when changing completion** option.



To deactivate the status date, click the calendar icon and the **Today** button. If you want the status date to move automatically, click **Auto**.



## Resources



▼ Resources

Initials Style F.B. ⌵

Share their Work

This is where you set the **Initials Style** for project resources. The **Initials** are under the **Style options**. The **Format** must then be set to **Initials**.

### *Share their Work*

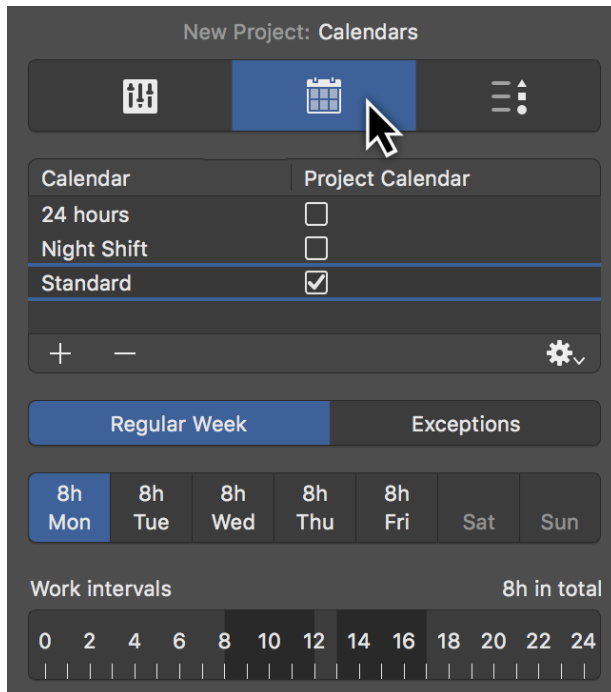
The **Share their Work** option is important when there are **multiple simultaneous assignments**. For example, if **two resources** are moved to one activity, both share the work **equally**.

Remove the checkmark to stop the automatic assignment of labor to assigned resources.

## Calendar

In the **Calendar** section you will find the list of calendars. Here you can edit and create new calendars. Tick the checkbox to select the default calendar.

New **calendars** can be created by clicking the **plus** icon. To remove existing calendars, click the **minus** icon.



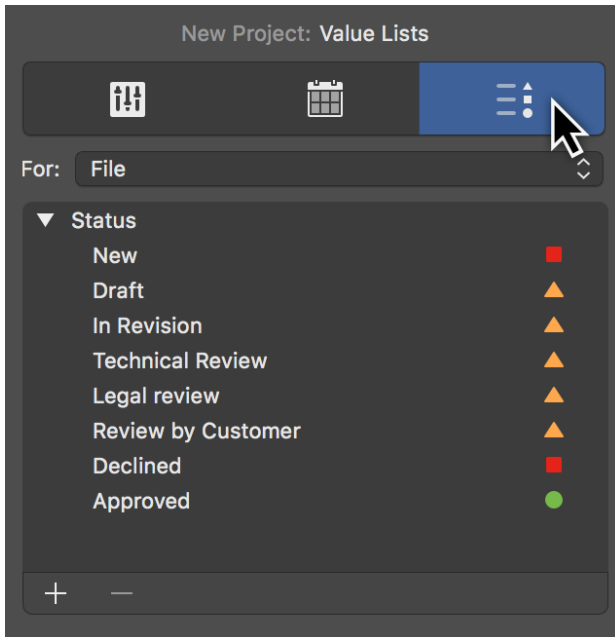
The **regular working week** for the project can be set for each calendar. This refers to the fixed working times in the project.

A separate tab is available for **Exceptions**. Here you enter the **vacation** and **special working times** for the calendar. Using the **gear** icon you can **import** or **export** calendars for use with other users. The **format** used for the calendars is **ics**.

## Value Lists

**Value Lists** are for use with attachments in Merlin Project Express.

Here you can create new or modify existing value lists for the attachments.



First select an attachment type from the **For** drop-down menu, and then click the **plus** icon to create a new entry in the value list.

Change the **name** of existing entries by double-clicking the **title** of the entry.

Click the **minus** icon to delete values from the list.