

Project settings

Guides for Merlin Project Express

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Project settings - as of September 2020

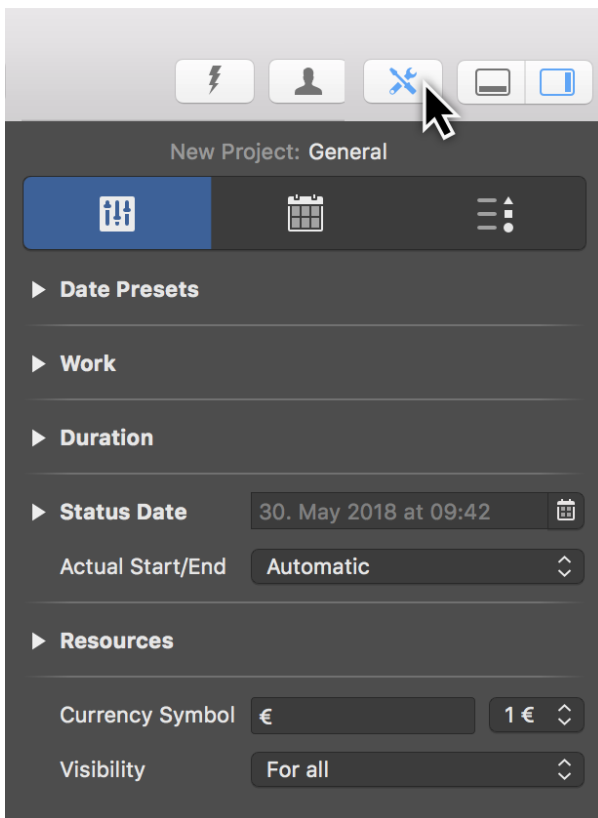
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Merlin Project Express provides a number of settings for the open project. Click the **Settings** icon or use the **File** → **Project Settings** menu to open the Inspector.

General

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

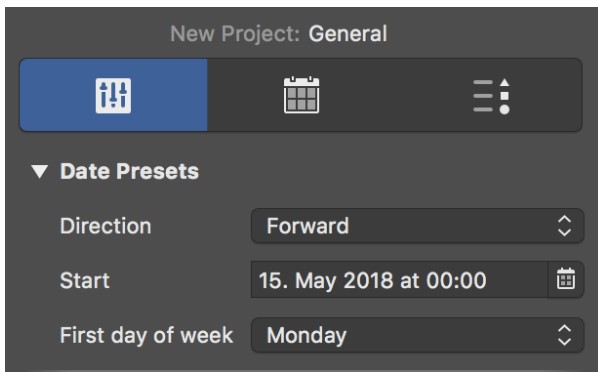
- **Date Presets**
- **Work**
- **Duration**
- **Status Date**
- **Resources**



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.

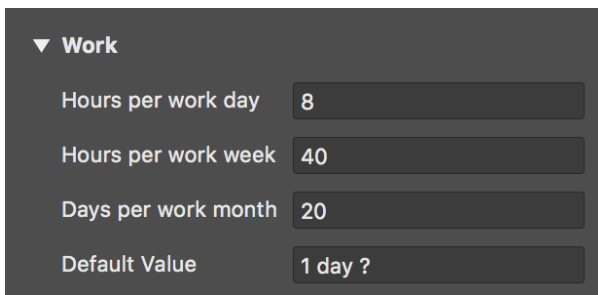


Whenever you create a new project, tomorrow's date is always set automatically as the start.

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:

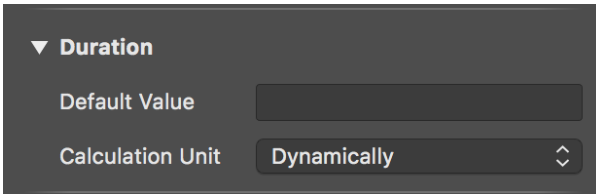
- **Hours per working day**
- **Hours per working week**
- **Days per working month**

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



▼ Duration

Default Value

Calculation Unit Dynamically ▾

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**.

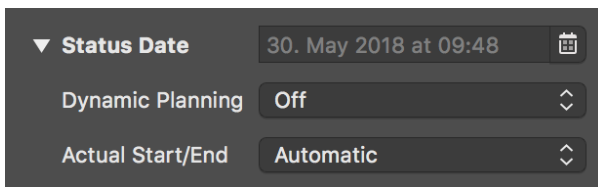
Calculation unit

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**.

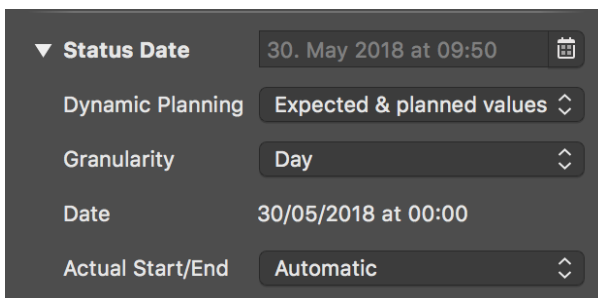
Two variants for **Dynamic Planning** are available in the drop-down menu:

- **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.

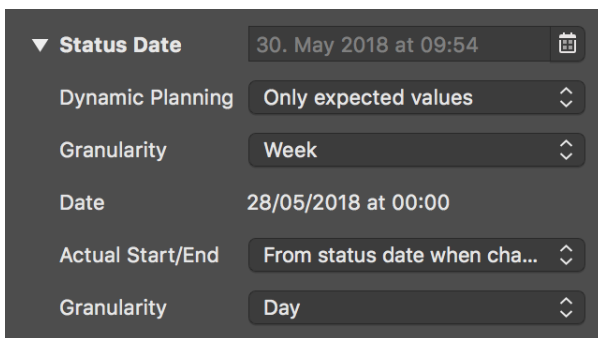
Actual Start/End


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.





▼ Status Date 30. May 2018 at 09:54 

Dynamic Planning Only expected values 

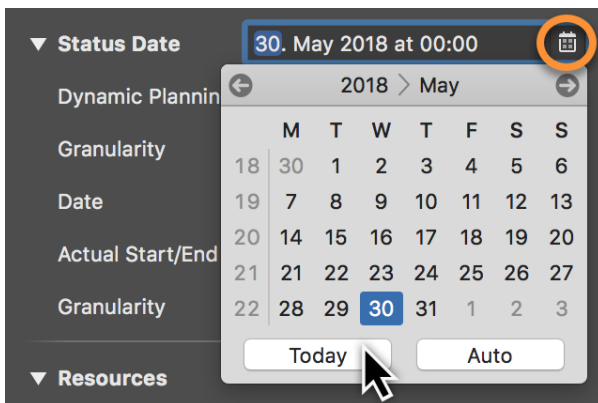
Granularity Week 


Date 28/05/2018 at 00:00

Actual Start/End From status date when cha... 

Granularity Day 

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



▼ Status Date 30. May 2018 at 00:00 

Dynamic Planning

Granularity

Date


Actual Start/End

Granularity

▼ Resources

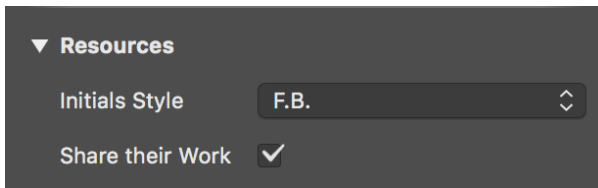
2018 > May

	M	T	W	T	F	S	S
18	30	1	2	3	4	5	6
19	7	8	9	10	11	12	13
20	14	15	16	17	18	19	20
21	21	22	23	24	25	26	27
22	28	29	30	31	1	2	3

Today  Auto

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

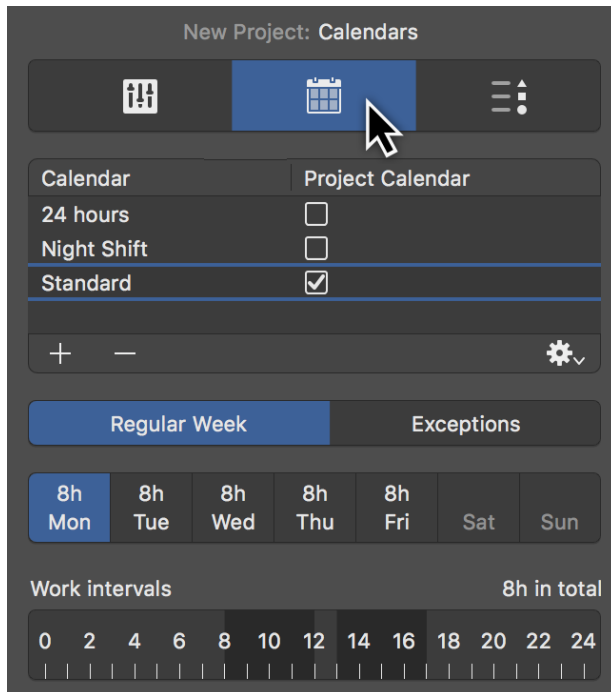
The **Share their Work** option is important when there are **multiple simultaneous assignments**. For example, if **two resources** are moved to one activity, both share the work **equally**.

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.



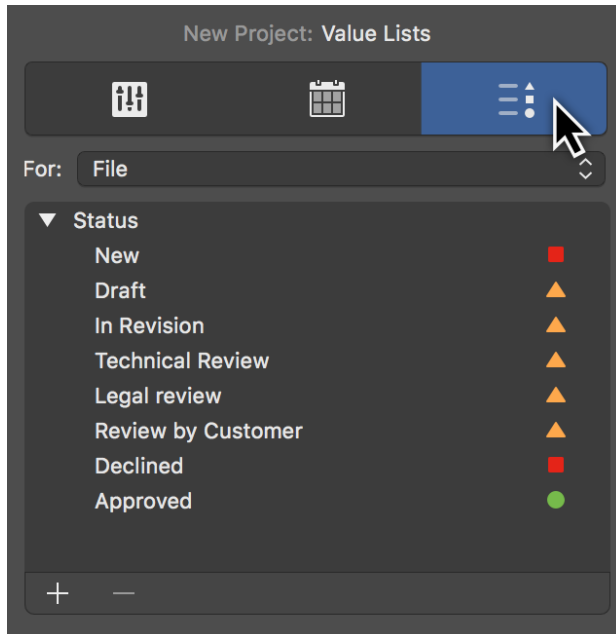
The **regular working week** for the project can be set for each calendar. This refers to the fixed working times in the project.

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.