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

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

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

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.

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

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.

![Calendar interface with options for setting working weeks and exceptions.](image)

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.