

# Merlin Project

The Handbook for Express

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## Merlin Project Express Help

### Download, Test & Subscribe

#### Welcome!

Thank you for using **Merlin Project Express** – the little brother of [Merlin Project](#) – offering a basic key features set for project management.

This is the **Merlin Project Express** documentation for the **Mac**.

It will help you get off to a flying start, providing you with basic and further information.

### Help and support

Use the built-in help in the **Help** menu.



For further help and support, please visit the Support section on our website: [www.projectwizards.net](http://www.projectwizards.net) or email our support team [support@projectwizards.net](mailto:support@projectwizards.net).

## System requirements

**Merlin Project Express** requires an *Apple Mac with Intel processor* and *macOS 10.13* as a minimum.

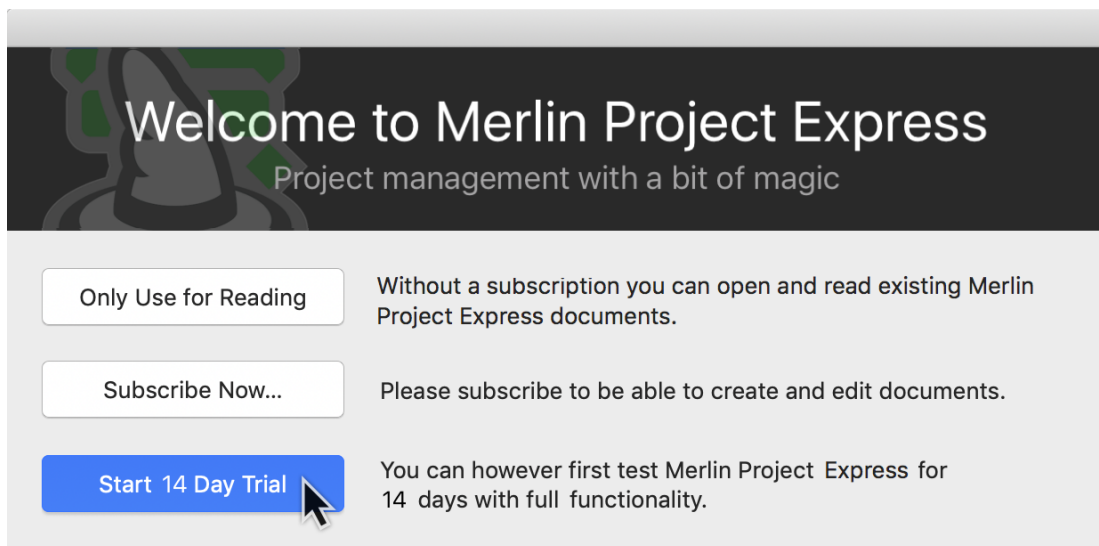
## Installation and trial period

Visit [our website](#). This is where you will find all our products and further information.

Click [Merlin Project Express](#).

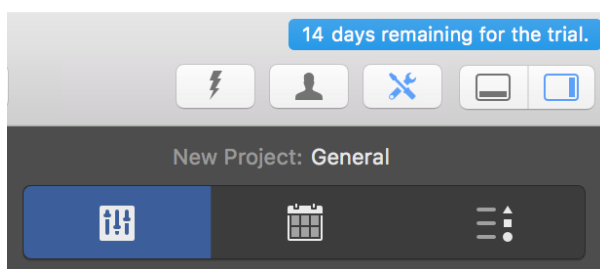
### 14-day trial

Try Merlin Project Express for free and without restriction. The first time the program is started, the following message will appear.



The trial period allows you to test Merlin Project Express in full for **14 days** starting from when you first launch the program.

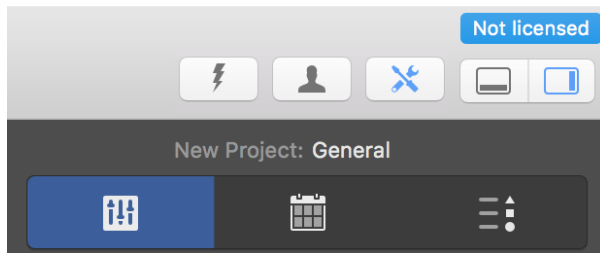
During your 14-day trial period a notification will be displayed on the top right of the program window. This tells you how many days remain of the trial period.



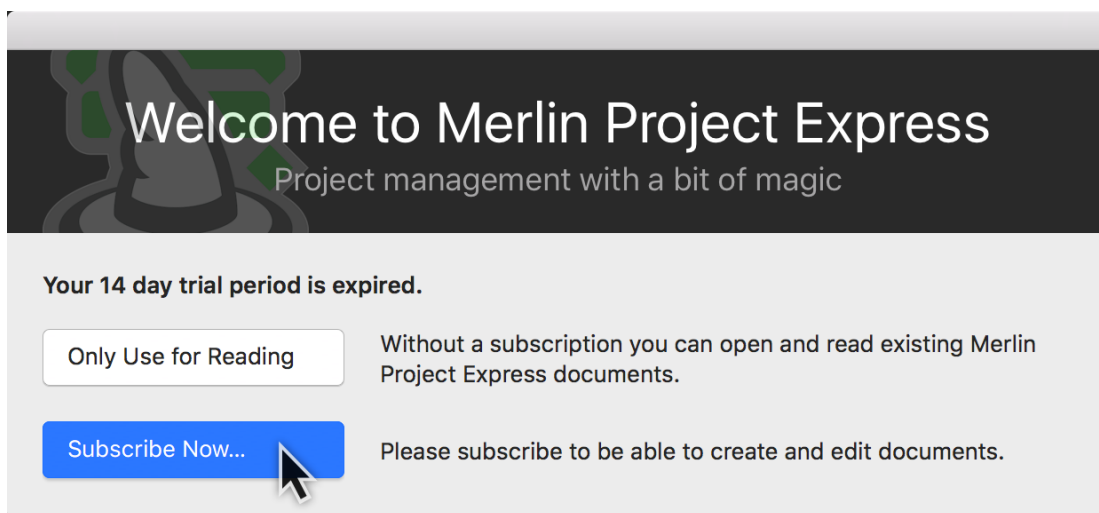
At the end of the trial period you'll still be able to open and view project files, although you won't be able to edit them. A subscription is required to edit projects again.

## Subscription

If you start Merlin Project Express after the trial period, a ***Not licensed*** message will appear in the upper right corner of the main window.



If you click ***Not licensed***, the following window will appear.



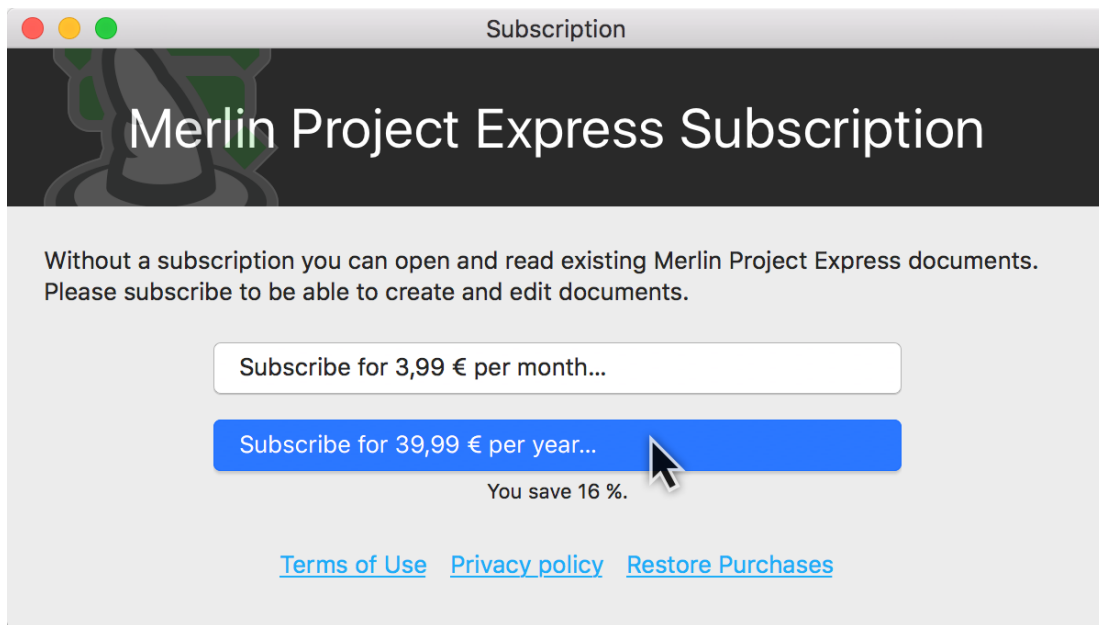
Click on ***Subscribe Now...*** to open the [Subscription](#) panel.

Click ***Only Use for Reading***, to use the application to open and read existing Merlin Project Express documents.

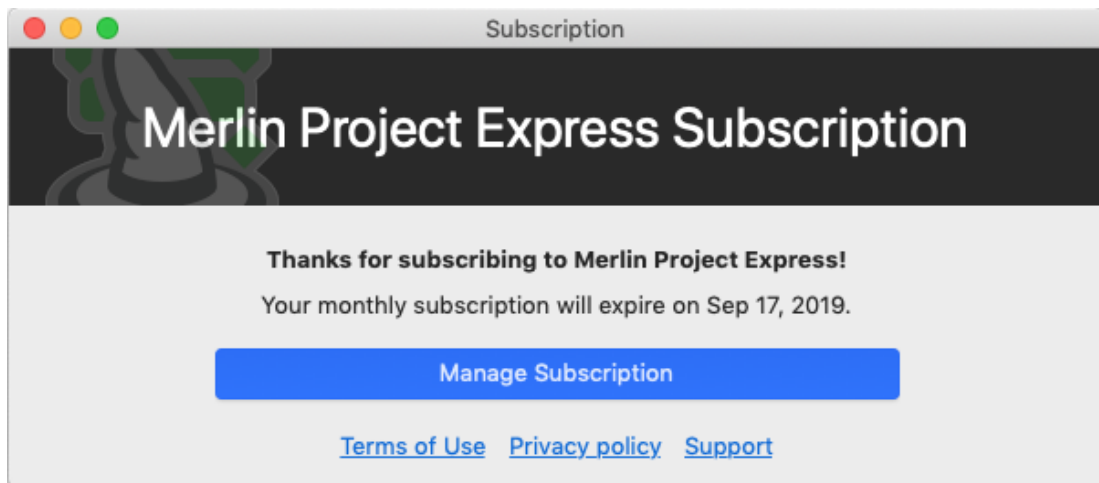


The ***Only Use for Reading*** option **does not allow opening** files of third party formats or the use of templates.

Subscribe Now...



Your subscription will be billed by the service you subscribed from, i. e. App Store or Setapp. For information on your running subscription, click on **Manage Subscription**



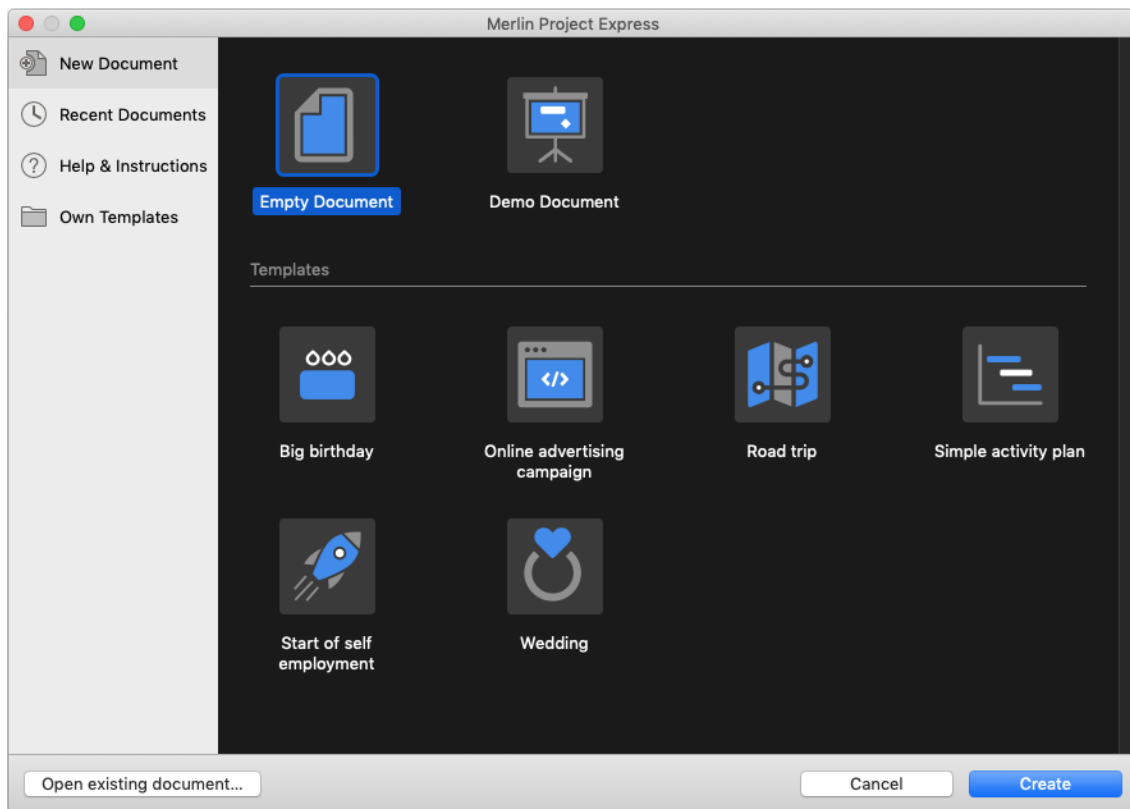
You can cancel a running subscription at any time and start a new again whenever needed.

## New projects

The following guide will help you get started with new projects.

### Opening a new project

When Merlin Project Express starts without an open project, or when you call *File > New...* following window will be displayed:

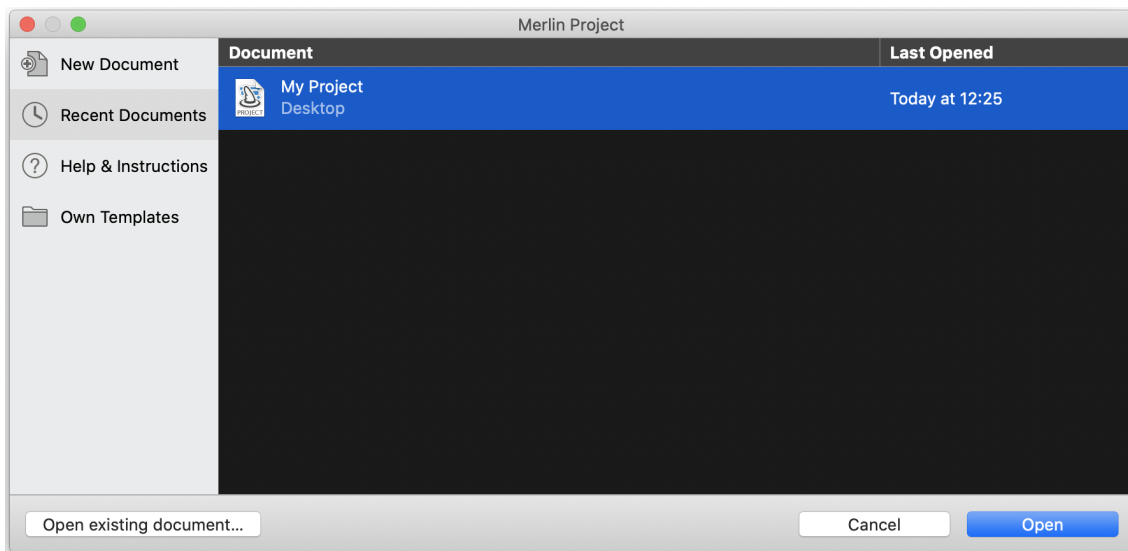


To create a new empty project, click the **Empty Document** button.

To start a project out a specific template, select the template and click the **Create** button.

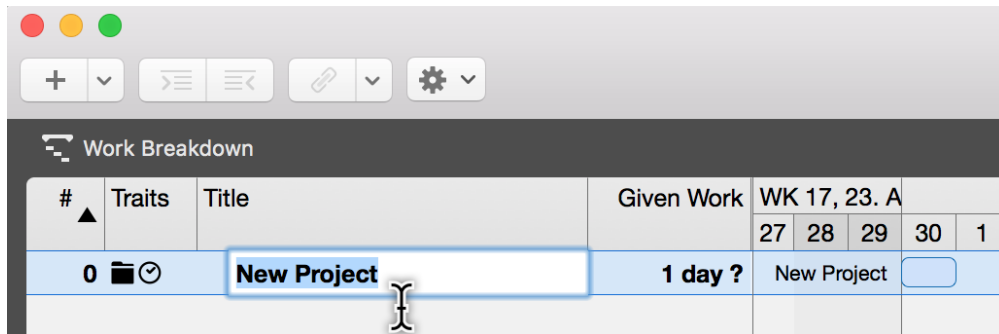
To open an existing project, click the **Open existing document** button and select the file.

Recently opened files are listed in the **Recent Documents** area.



## Naming your project

Name your project. To do this, double-click *New Project* in row #0 of the outline and give your project a new title.

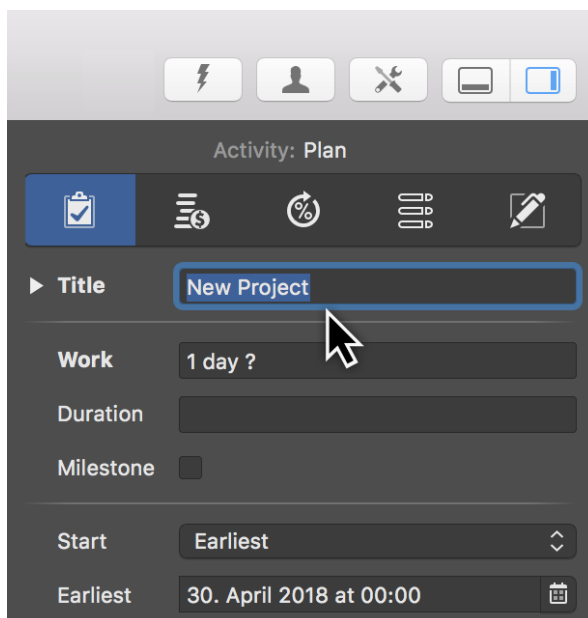


## Project Inspector

Display the Inspector by clicking *row #0* (the project). It contains a number of options for the selected project. Here you can also change the title and start date of the project.

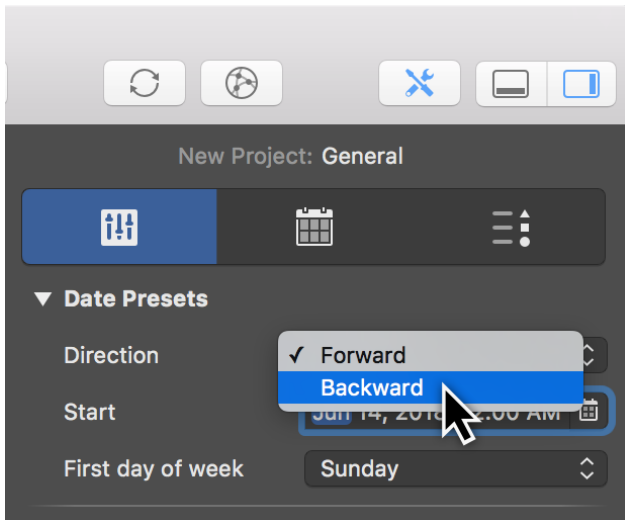


Each Inspector has multiple tabs containing further options. When you select elements, as in this case *row #0*, the corresponding Inspector always appears.



## Setting the project's direction

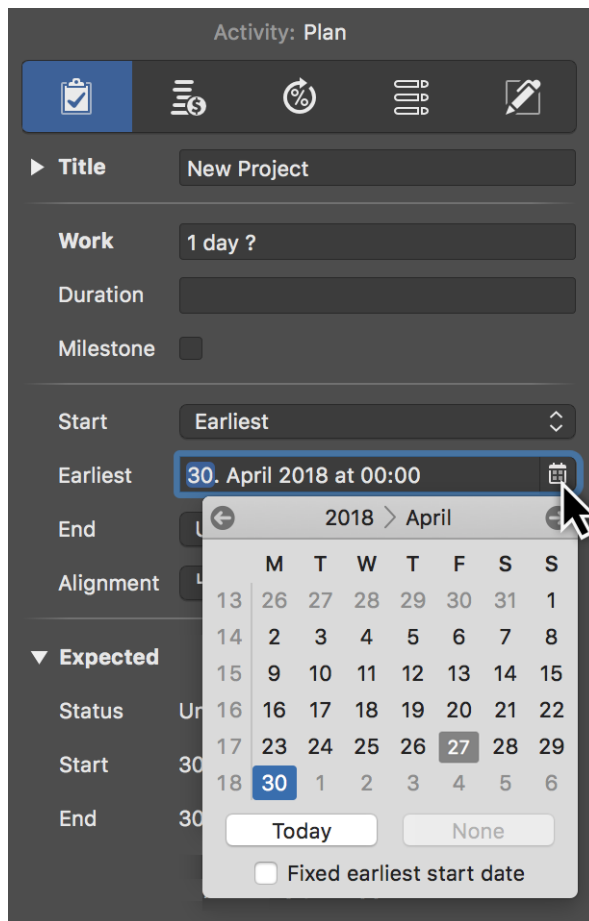
You can plan a project forwards or backwards. If you've already got a fixed end date for the overall project, you can also take a backward-looking approach. To do this, in your project click Settings and set the Direction to »Backward«.





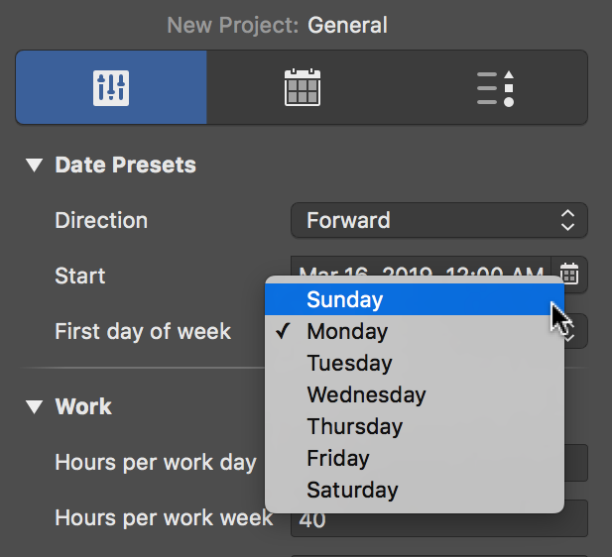
## Start Date

In the Inspector, click the **Calendar icon** in the **Start > Earliest** field. Use the calendar to set the earliest planned start for the project.



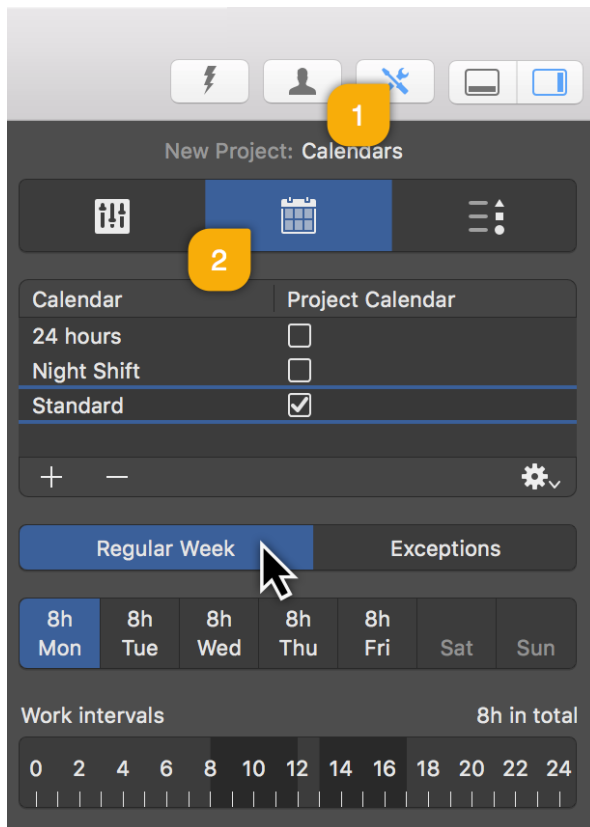
## First day of week

Per default you'll find Sunday to be the first day of week for new projects. To change it, just select another day in the **Settings > General > Date Presets**. You may need to do this for projects taking place abroad, for instance.



## Regular working times

Working times are configured in the settings for each project. Click the **Settings** icon (1) and then the **Calendar** tab (2).



The Inspector shown here contains **calendars** for the **Regular Week** and **Exceptions**, such as *vacation time* and *extra working time*.

Click the **Regular Week** tab:

The **default** calendar is active (checkbox ticked). Further calendars are available in the list and can be configured as project calendars.



By clicking the **plus** or **minus** icons you can create new calendars or delete existing ones.

Click one or more (while holding down the **cmd** key) **weekdays** and then click the **Work intervals** to change the calendar settings.



The calendar settings have a direct impact on project planning and the working time in the active project.

The exceptions work according to the same principle. Read more about this in the **Non-working Time** guide.

## Views

In Merlin Project Express there are two **views** for your project:

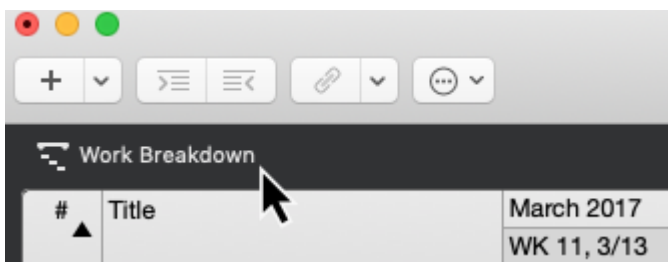
- [Work Breakdown](#)
- [Resources](#)

The views support the [Dark Mode](#), available in macOS Mojave or later.



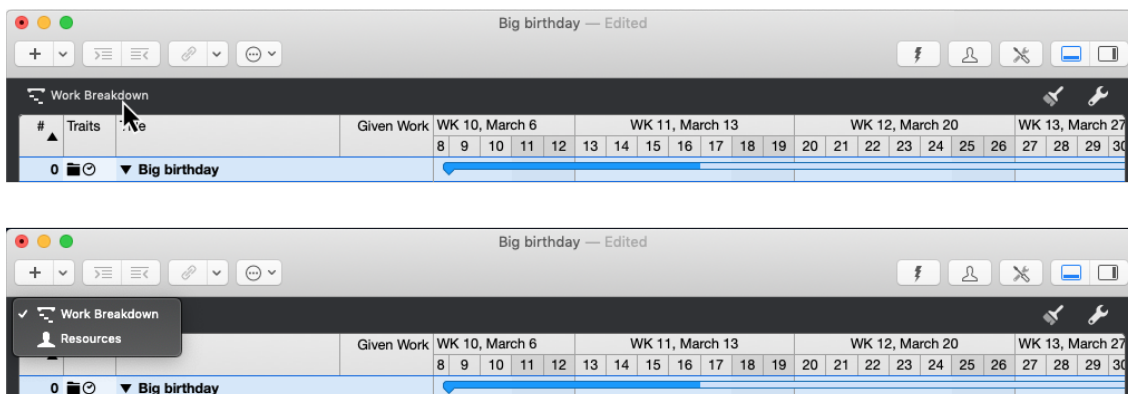
Even if using the app in Dark Mode, printing always takes place in the light appearance, while image exports take place in the currently selected appearance.

Merlin Project Express shows in the upper left corner the name of the current view.



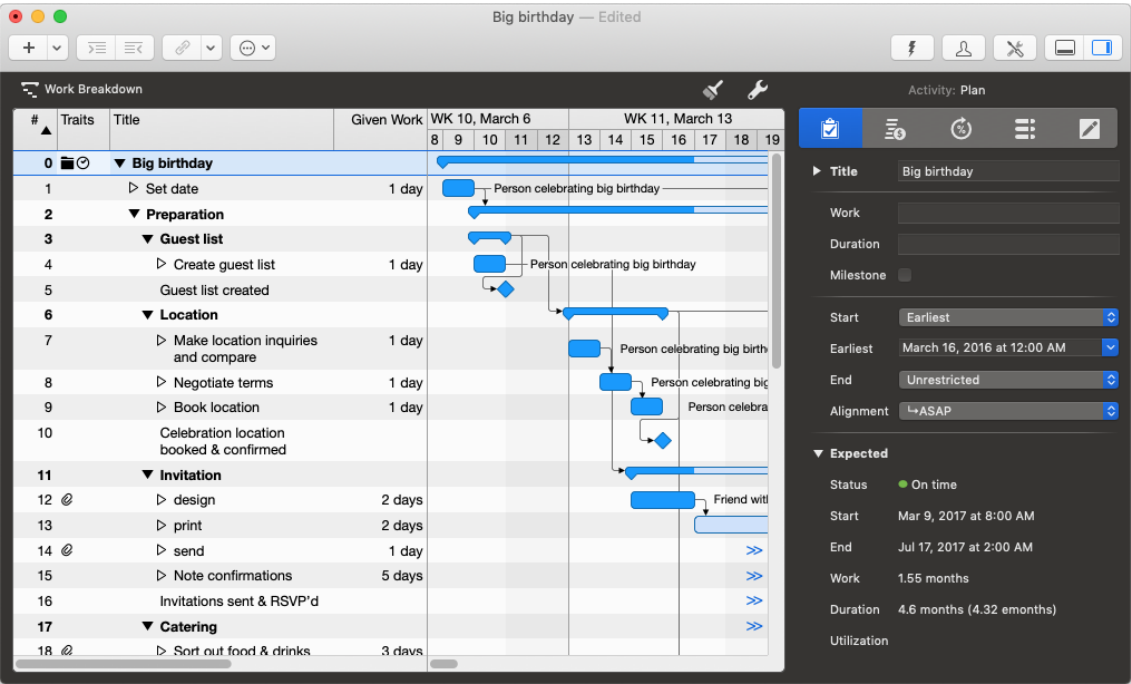
## Switching views

Switch to another view, by selecting another item from the view list.



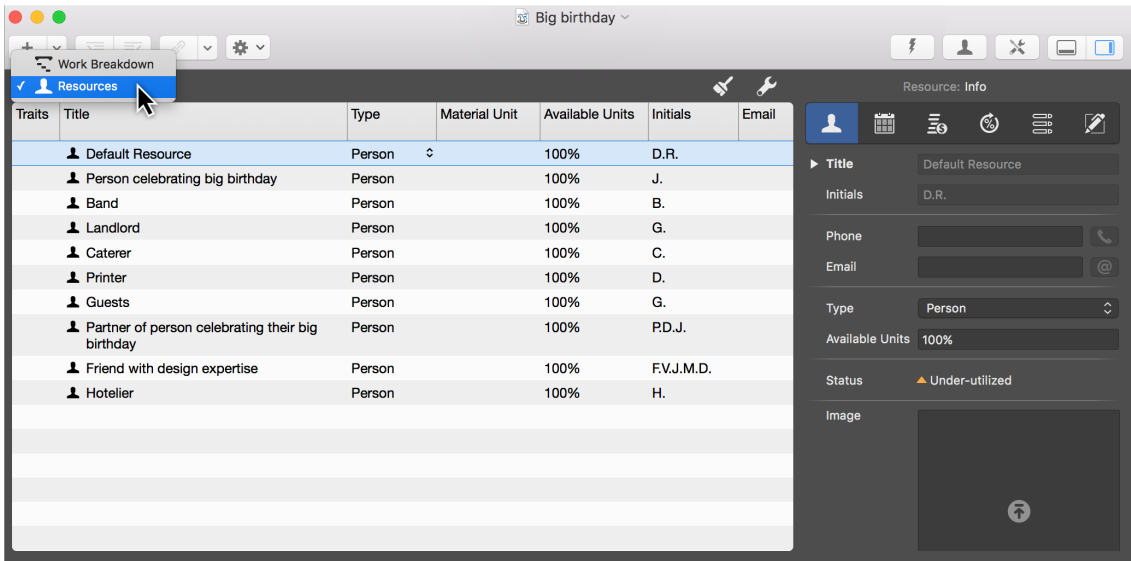
# Work Breakdown

Typically, a **Work Breakdown** representation with an **Outline** and a **Bar Gannt chart** is used in project management.



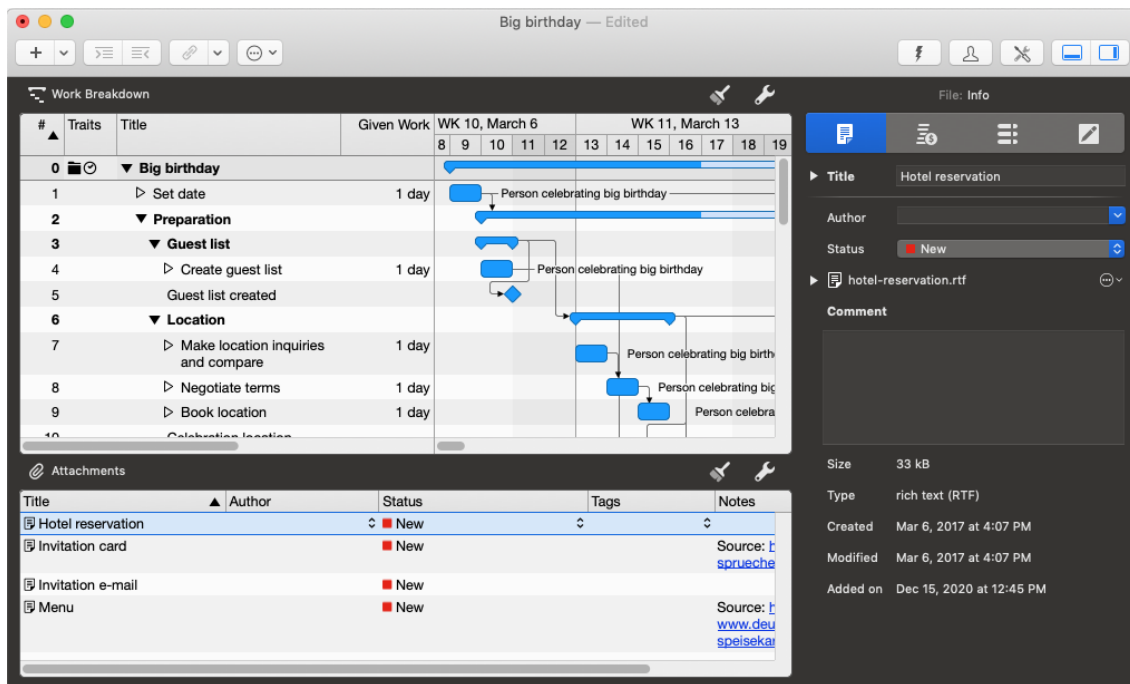
# Resources

The **Resources** view contains all resources involved and assigned in the project. This gives you an overview of the resources available in the project.



## Attachments

The **Attachments** view provides an overview of **all file attachments** in the project.

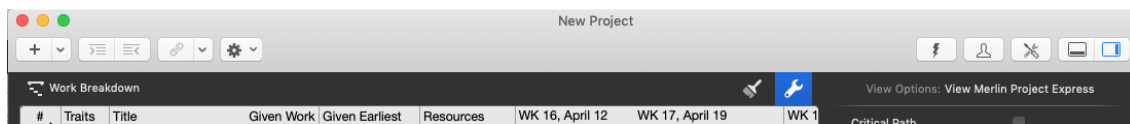


To show or hide it call the according toolbar icon.



## View Options

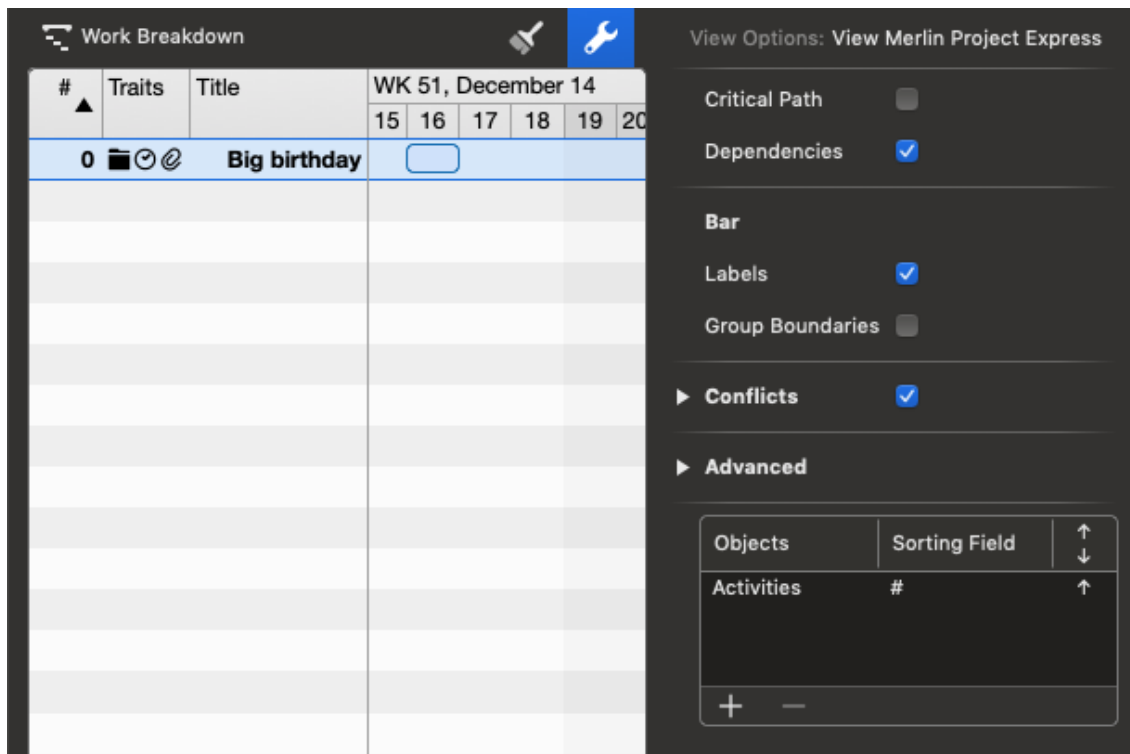
The layout of the current view can be changed and graphically adjusted in the **View Options**. To do this, click on the **wrench**.



Depending on the selected view, this inspector is context sensitive and contains different options.

## Inspector »View Options: Work Breakdown«

Following inspector appears when the *Work Breakdown* view is enabled.



It contains the following options:

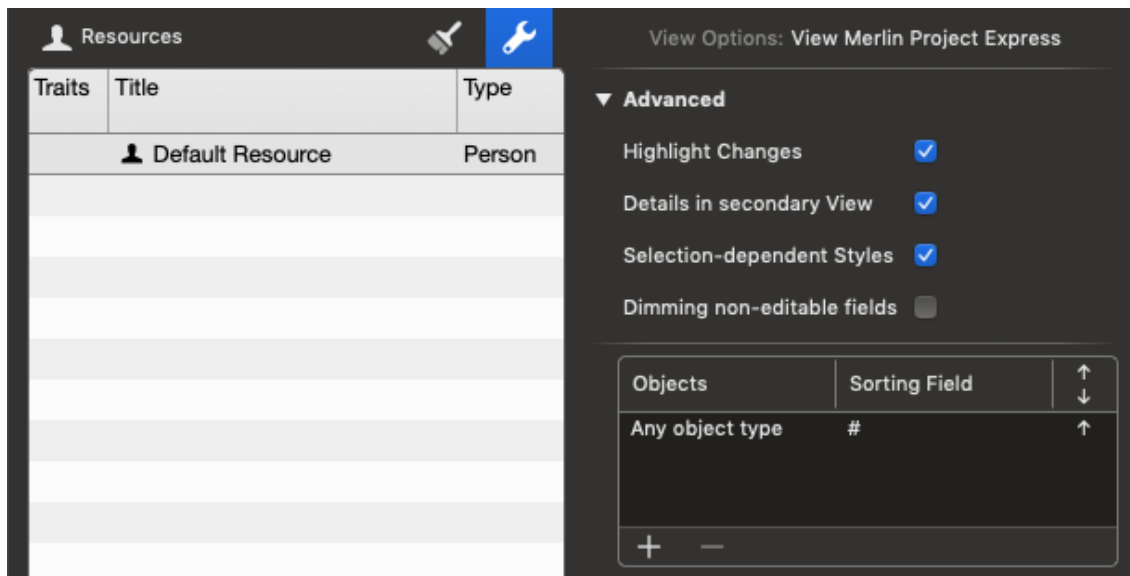
- Critical Path
- Dependency Lines
- Bar
  - Labels
  - Group Boundaries
- Conflicts
  - Strong
  - Weak
- Advanced
  - Highlight Changes
  - Details in secondary View
  - Selection-dependent Styles
  - Dimming non-editable fields
  - Bundle adjacent lines

- Gradients
- Shadows
- Objects and Sorting Fields



## Inspector »View Options: Resources«

This inspector appears when the *Resources* view is enabled.

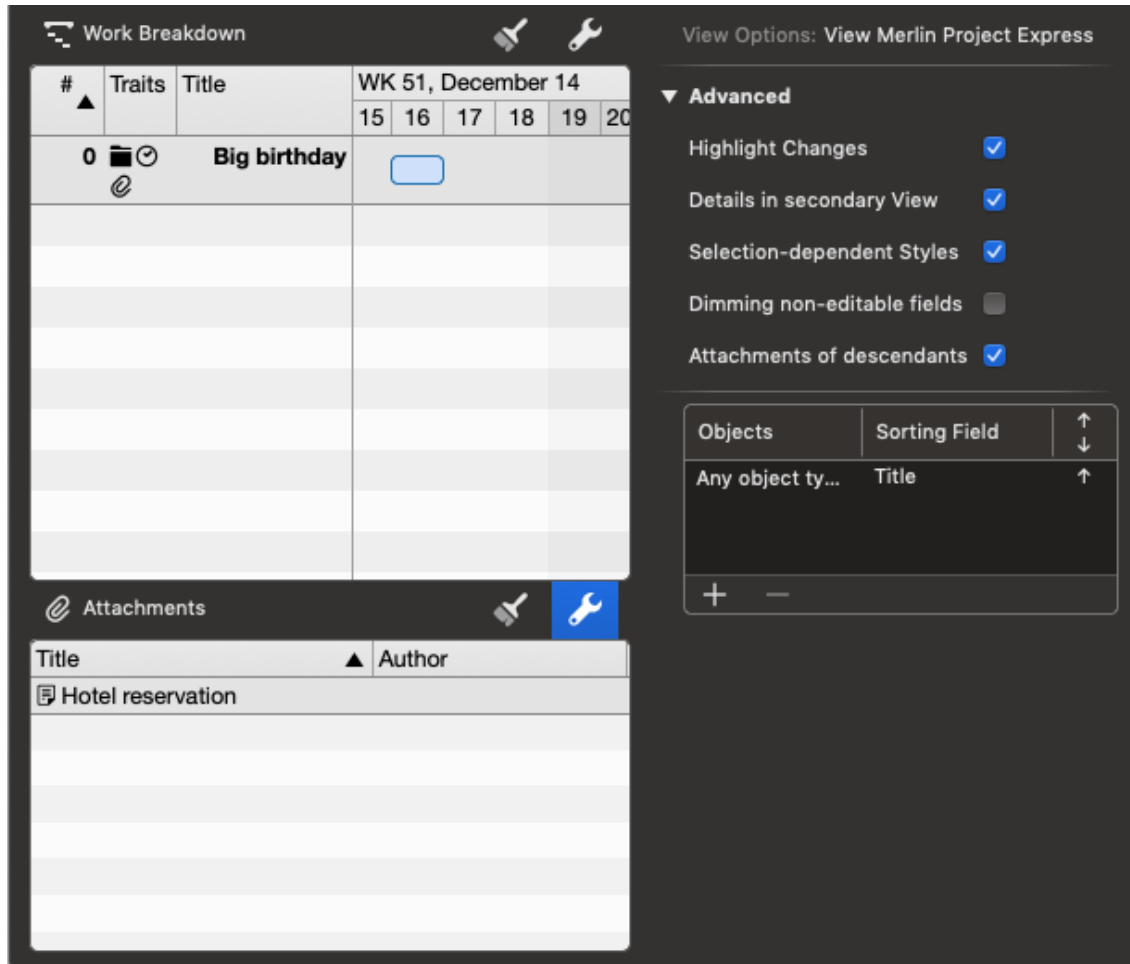


It contains the following options:

- Advanced
  - Highlight Changes
  - Details in secondary View
  - Selection-dependent Styles
  - Dimming non-editable fields
- Objects and Sorting Fields

## Inspector »View Options: Attachments«

This inspector appears when the *Attachments* view is enabled.



It contains the following options:

- [Advanced](#)
  - [Highlight Changes](#)
  - [Details in secondary View](#)
  - [Selection-dependent Styles](#)
  - [Dimming non-editable fields](#)
  - [Attachments of descendants](#)

## View Options in detail

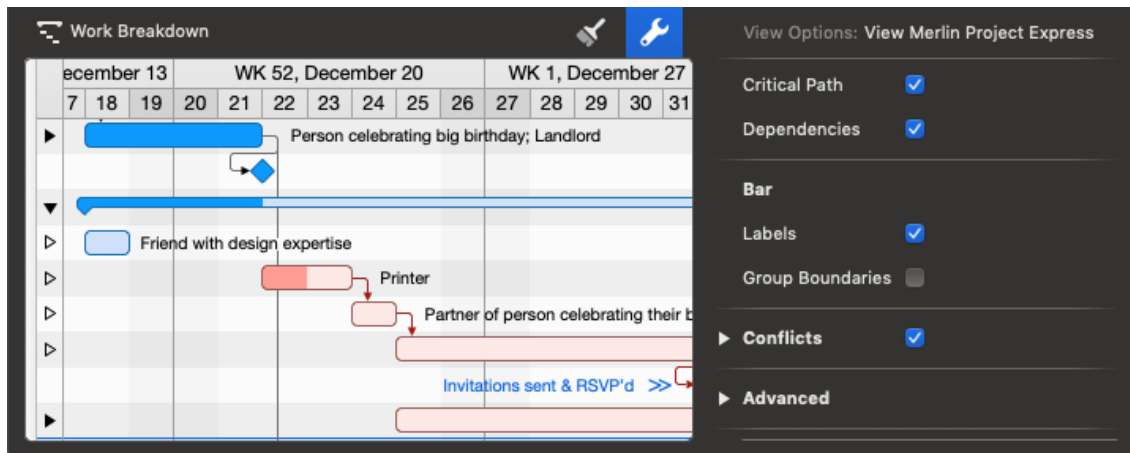
### Critical Path

The **Critical Path** option enables/disables the display of the critical path in the Gantt chart. Here, the dependency lines between the operations are highlighted graphically.

The display of the **Critical Path** can also be activated by clicking the corresponding icon on the toolbar.



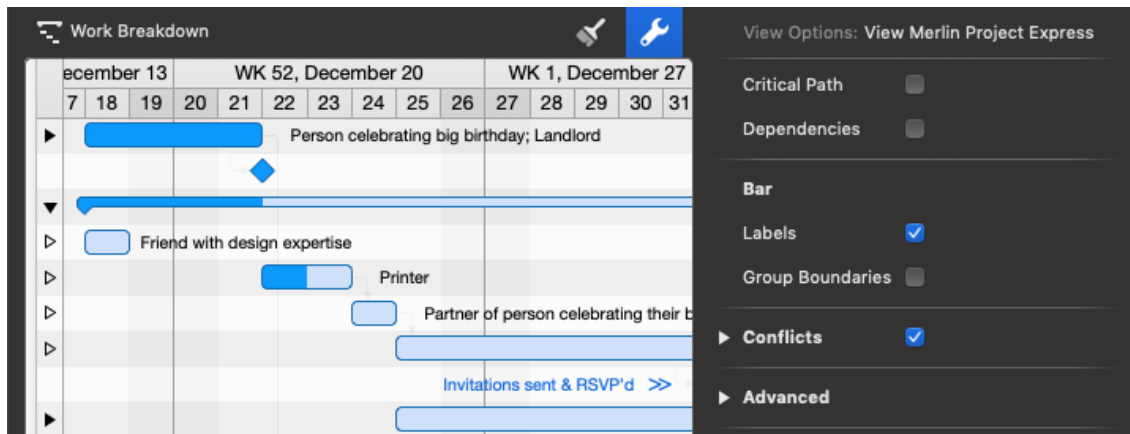
The critical path is always present when the linked tasks influence the end of the project. Any change to one of the linked tasks on the critical path automatically leads to a change in the end of the entire project. More information about the critical path can be found at [Wikipedia](#)..



### Dependency Lines

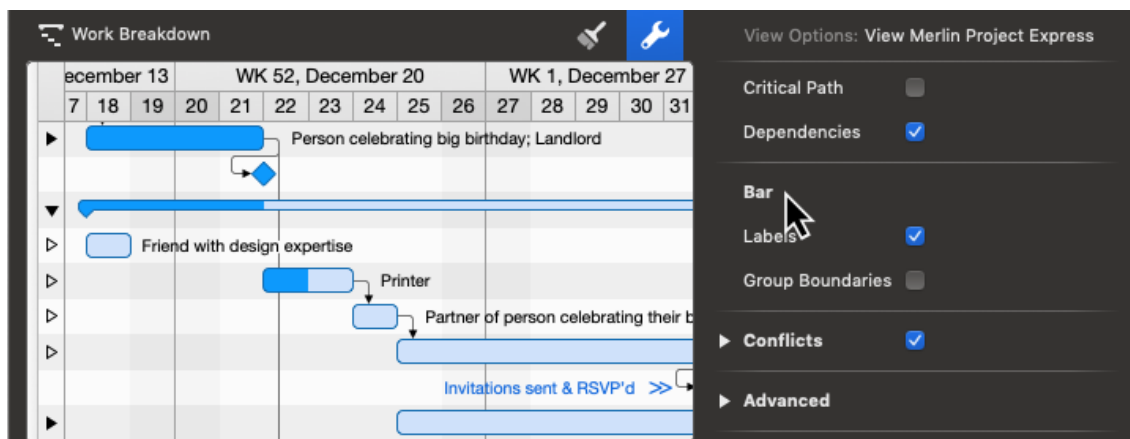
The **Dependency Lines** option is available in the [View Options](#) of the [Work Breakdown](#) view.

With it you can activate or deactivate the display of the dependency lines between the Gantt bars.

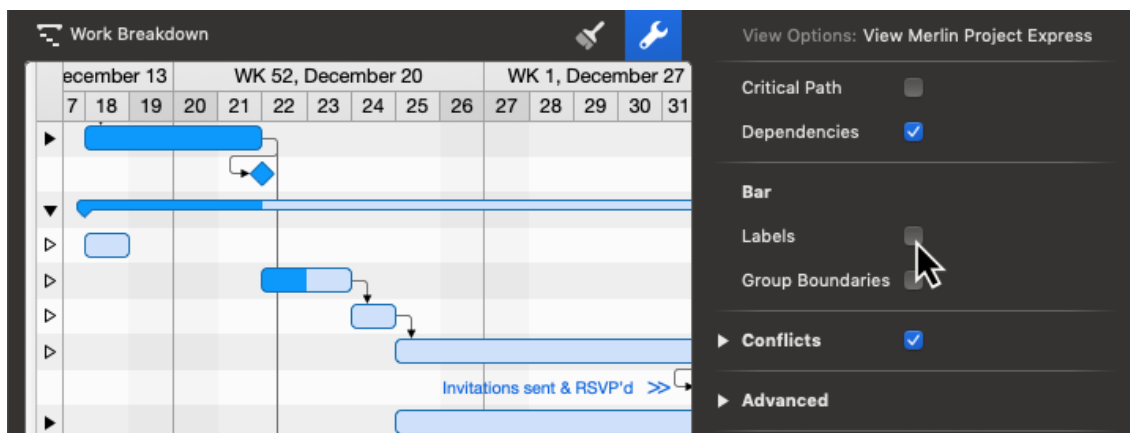


## Bar

The **Bar** options section is available in the [Work Breakdown](#) view and affects how bars are displayed in the Gantt chart.



The *Labels* option enables/disables the bar labels display.

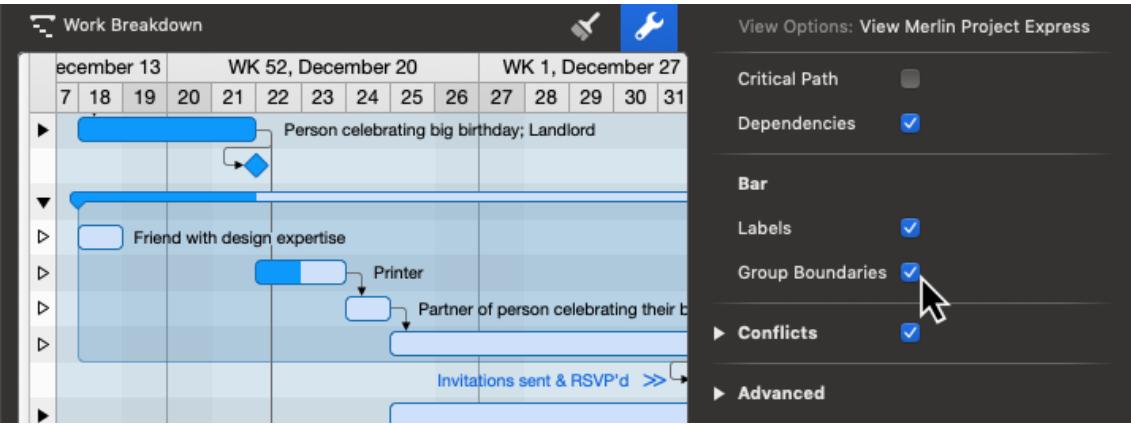


Up to three labels can be defined per Gantt element in the [styles](#).

## Group Boundaries

The *Group Boundaries* option enables/disables the display of graphical boundaries of

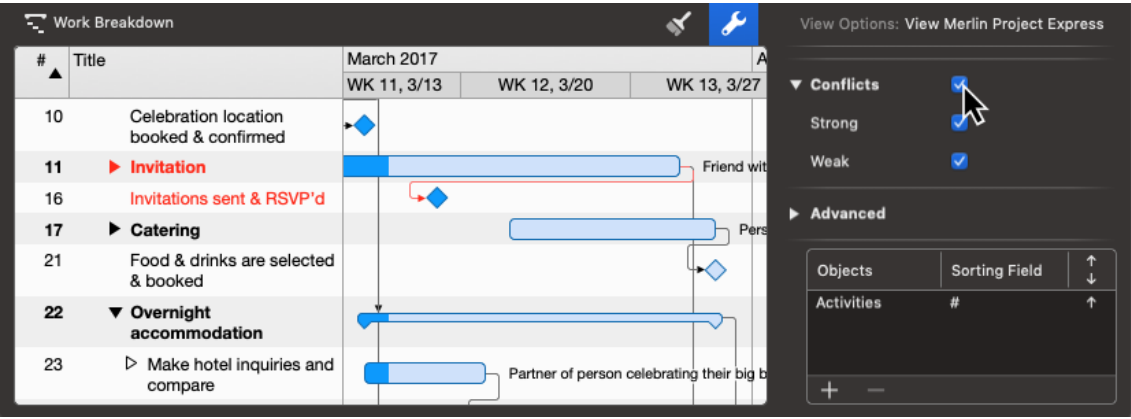
groups in the Gantt chart.



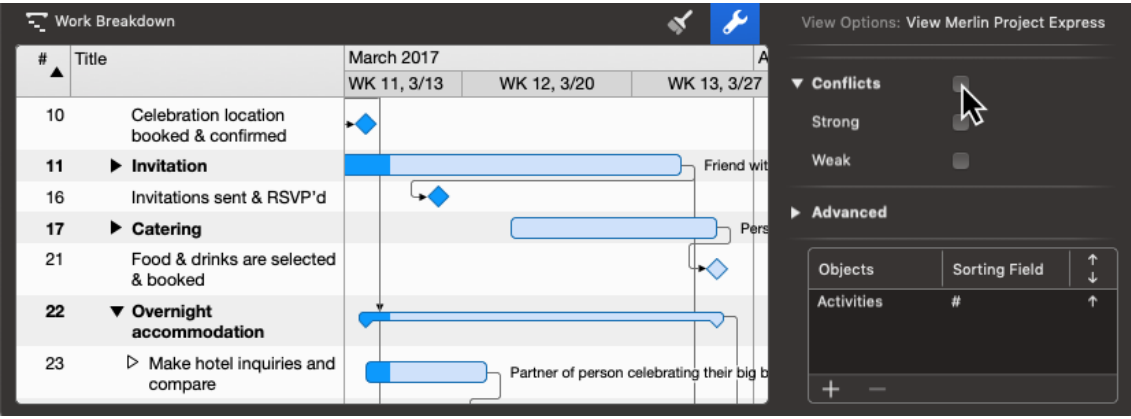
The *Group Boundaries* option increases the clarity of groups and subgroups.

Conflicts

These options allow to control the display of Conflicts in the Work Breakdown.



The *Conflicts* option enables/disables the display of all possible planning conflicts.



Expand them if you want to display Strong or Weak Conflicts differently.

The **Strong** option enables/disables the display of possible strong planning conflicts.

The **Weak** option enables/disables the display of possible weak planning conflicts

You can learn more about what Conflicts are and how to resolve them, [here](#).

## Advanced

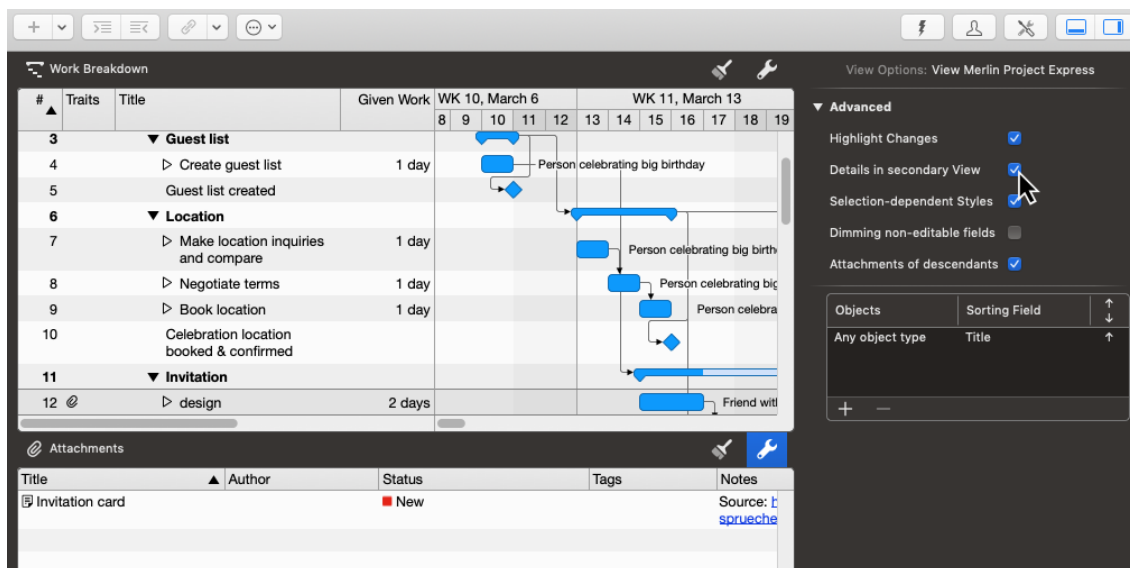
The **Advanced** section contains advanced [View Options](#).

### Highlight Changes

The option **Highlight Changes** activates/deactivates the highlighting of the last changed values. This highlighting is only effective for the display and will not be printed.

### Details in secondary View

The option **Details in secondary View** defines whether the information of the Details view refers only to the current selection of the main view or to the entire project.

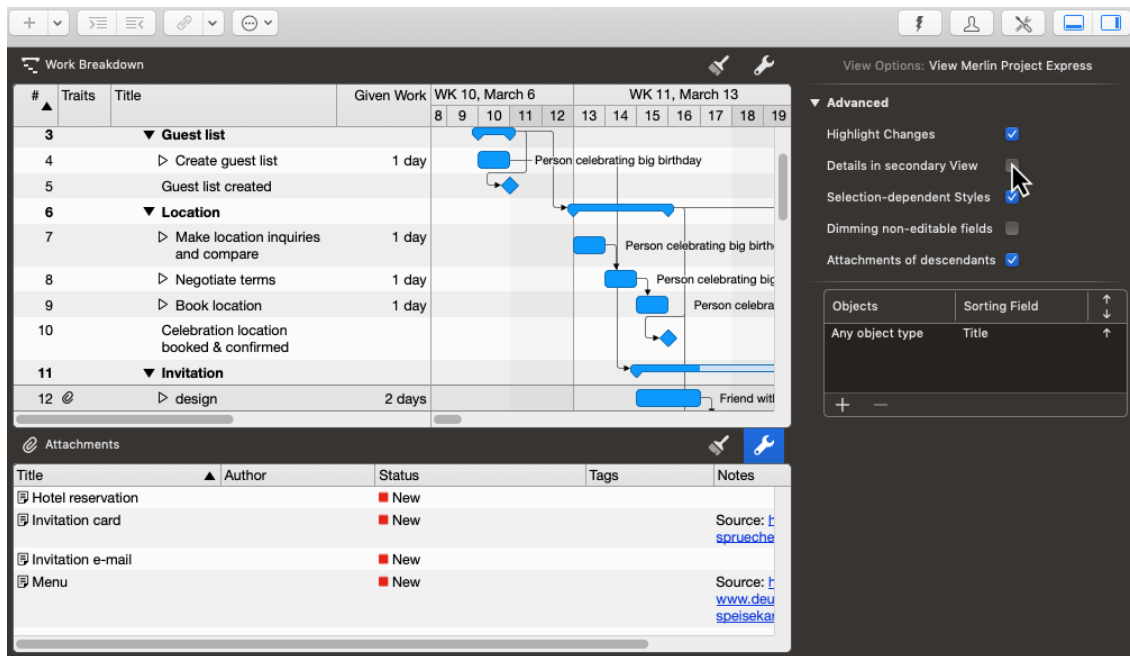


The screenshot shows the Merlin Project Express software interface. On the left, there is a 'Work Breakdown' tree with tasks like 'Guest list', 'Location', and 'Invitation'. The main area displays a Gantt chart for 'WK 10, March 6' and 'WK 11, March 13'. On the right, the 'View Options: View Merlin Project Express' panel is open, showing the 'Advanced' section. In this section, the 'Details in secondary View' option is checked and highlighted by a mouse cursor. Other options include 'Highlight Changes' (checked), 'Selection-dependent Styles' (checked), 'Dimming non-editable fields' (unchecked), and 'Attachments of descendants' (checked). Below these options is a table for 'Objects' and 'Sorting Field'.

Objects	Sorting Field	
Any object type	Title	↑



Disable this option if you want the Details view to show information for your complete project.



### Selection-dependent Styles

The *Selection-dependent Styles* option enables/disables the display of styles depending on the selection.

### Dimming non-editable fields

The *Dimming non-editable fields* option turns on/off the display of calculated fields in gray.

### Attachments of descendants

The *Attachments of descendants* option is available in the [View Options](#) of [Attachments](#) views. It controls the display of attachments in the detail view if the project window is configured as a main view with a detail view.

If this option disabled, and you select a row in the main view in which some attachments are defined, the Attachments Detail view will show these attachments.

If this option is disabled and you select a row in the main view in which no attachments are defined, the Attachments Detail view will not show any attachments.

If this option is enabled and you select a row in the main view where attachments are defined in its substructure (in sub-activities or child activities), the Attachments Detail view will show the attachments of the substructure.

If this option is enabled, and you select a row in the main view where some attachments and in its substructure (in sub-activities or child activities) more attachments are defined, the Attachments Detail view will show the attachments of the selected row and those of the substructure.

### *Bundle adjacent lines*

The ***Bundle adjacent lines*** option bundles the display of link lines in the bar chart. This makes the display of the links in the project more graphically appealing.

### *Gradients*

The ***Gradients*** option enables/disables the display of color gradients if the ***Gradients*** style is enabled for bar elements of this view.

### *Shadows*

The ***Shadows*** option enables/disables the display of shadows if the ***Shadows*** style is enabled for bar elements of this view.

### *Objects and Sorting Fields*

This table can be used to sort the current view by specific fields in descending or ascending order.

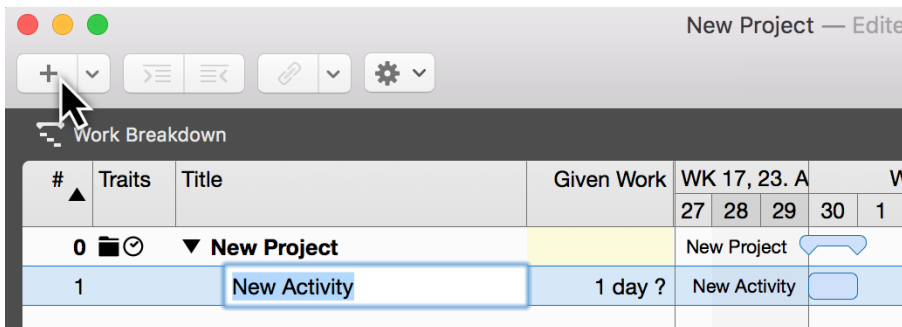
A mouse click on the **+** creates a new sorting option.



## Project content

Below you will learn how to create project content (activities, milestones and more) in Merlin Project Express.

### Plus icon



The easiest way to create new activities is to click **New** (the *plus icon* in the toolbar) or even faster with the keyboard shortcut **cmd + N**.

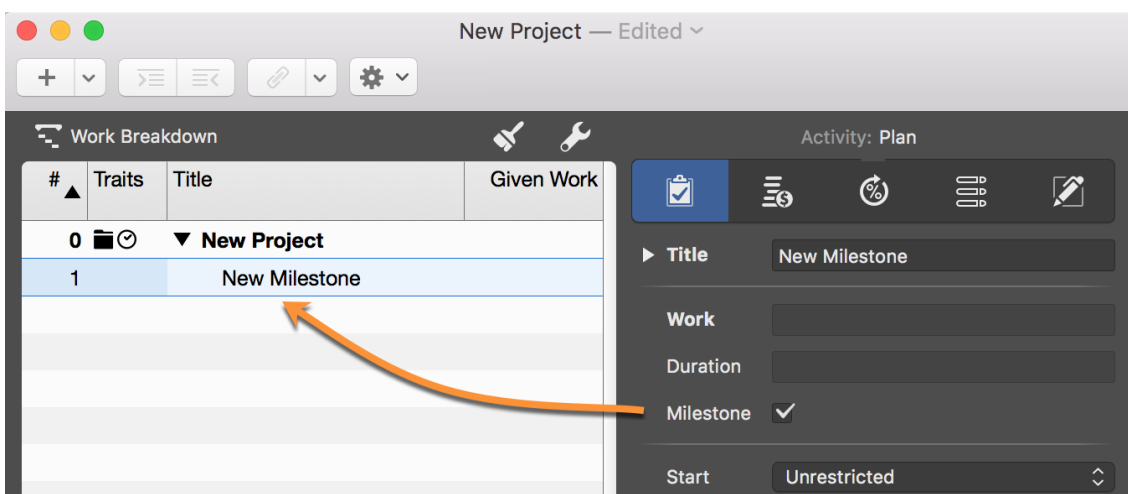


If you repeat the step several times, the activities appear in chronological order.

Newly created content is activated and ready to be named. Add a *title* to the activity.

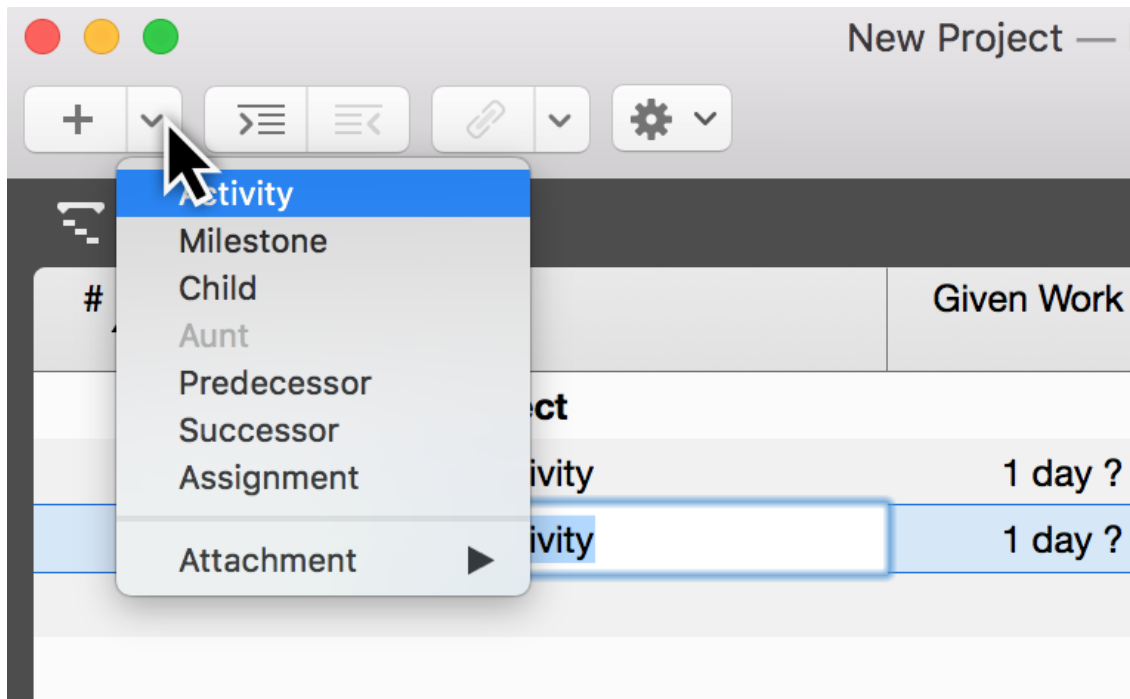


You can quickly convert an activity into a milestone. To do this, tick the checkbox next to the **Milestone** option in the Inspector. If you uncheck the box, a milestone will become an **activity** again.



### Insertion options

If you click the **arrow** to the right of the **plus** icon, a menu appears with further content for selection.



Depending on your current selection, you can create the following content:

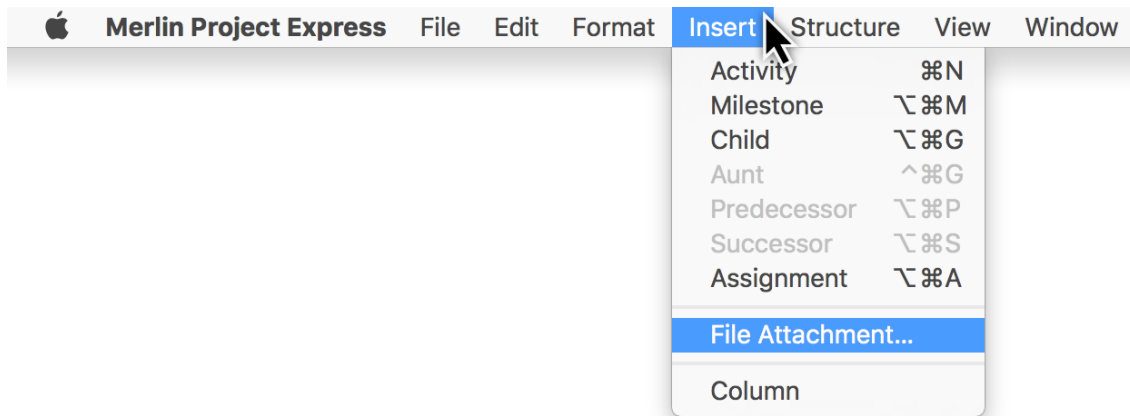
- **Activity** (creates an activity)
- **Milestone** (creates a milestone)
- **Child** (creates an indented activity)
- **Aunt** (creates an outdented activity)
- **Predecessor** (creates a link to the successor)
- **Successor** (creates a link to the predecessor)
- **Assignment** (creates an assigned resource)
- **File Attachment** (allows you to attach a file)
- **Column** (inserts a column into the outline)



The **aunt** option remains grayed out until an indented activity is selected at least one level down. Only then will an outdented activity be created using the **aunt** option.

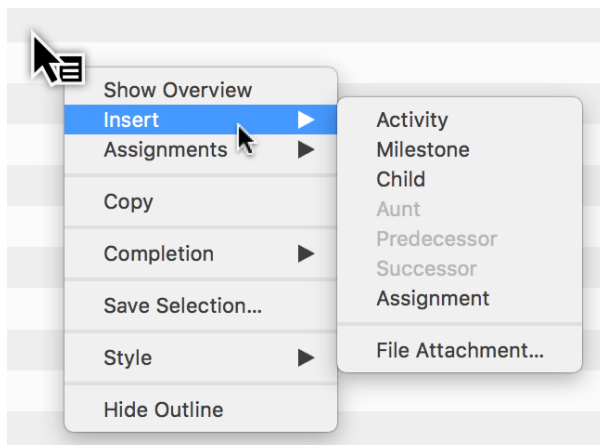
## Insert menu

You can also create the content listed above using the **Insert** menu item.



## Insert menu - context menu

In addition, the **context menu** shown can be called up in the view by performing a secondary-click. Among other things, it includes the ***Insert*** option.



New content is created beneath the *current selection*. If nothing is selected in the main area, new content is created *beneath the last row* at the end of the project.

## More content

A project needs content. This content can be [inserted manually](#), copied from a template, the library or imported from different documents.



The **Library** is a feature existing only in Merlin Project, not in Merlin Project Express.

## Import

Merlin Project Express can open various file formats:

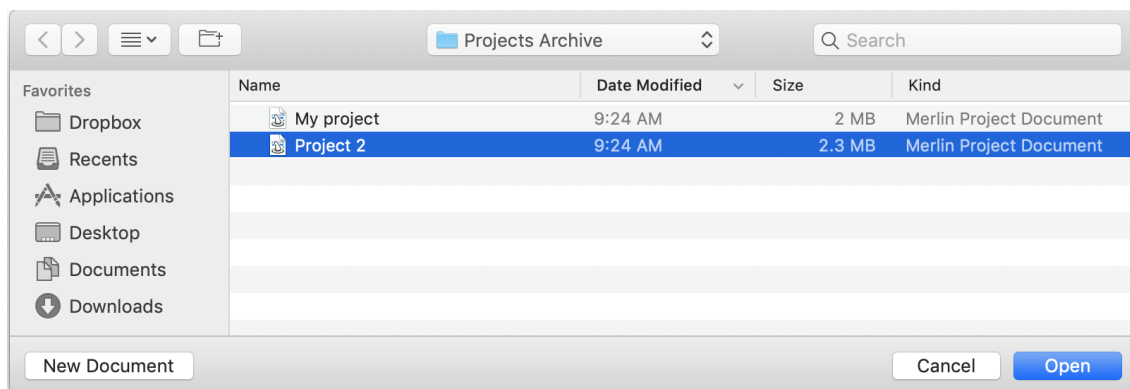
- CSV text (recommended for import of EXCEL sheets)
- ics (iCalendar files)
- Merlin 2
- Microsoft Project (.mpp files from MS Project 2003, 2007, 2010, 2013 and 2016 as well as XML and MPX)
- MindManager / FreeMind / NovaMind 4 & NovaMind 5
- Omniplan 2
- OPML
- Merlin Project XML

There are two ways to import new content:

- [File > Open](#)
- [Drag & drop using the mouse](#)

### File > Open

Call the **File** → **Open...** menu item. It opens existing documents. If the format of the selected document is supported, Merlin Project Express imports the content and opens it in a new document.



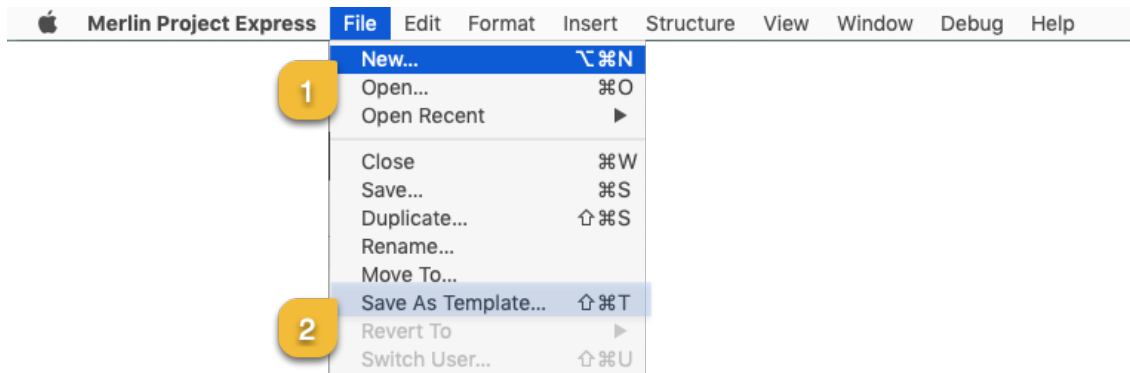
## Drag & drop using the mouse

You can drag & drop a document directly onto the Merlin Project Express application icon or onto an existing project. Latter, imports the document into the existing project.

## Content from templates

**Project templates** make working with recurring content easier. They are perfect for starting new projects quickly.

A large number of templates can be found in the **File** → **New...** (1) menu item.



You can save existing projects for later use as templates. To create a template of your own from a project, call the **File** → **Save As Template...** (2) menu item.

## Work and duration

In Merlin Project Express you can schedule activities by work, duration, start and end date constraints.

Simply select an activity, use the **Plan** inspector and define your activity as required. Alternatively you can use related columns in the outline.



For flexible planning and easier adjustment throughout the life of your project, we recommend that you define as few start and finish dates as possible and as many as needed.

### Work

If you want to schedule your activity by the **effort** it will need to be completed, use the **Plan** inspector or enter the effort in the **Given work** outline column.

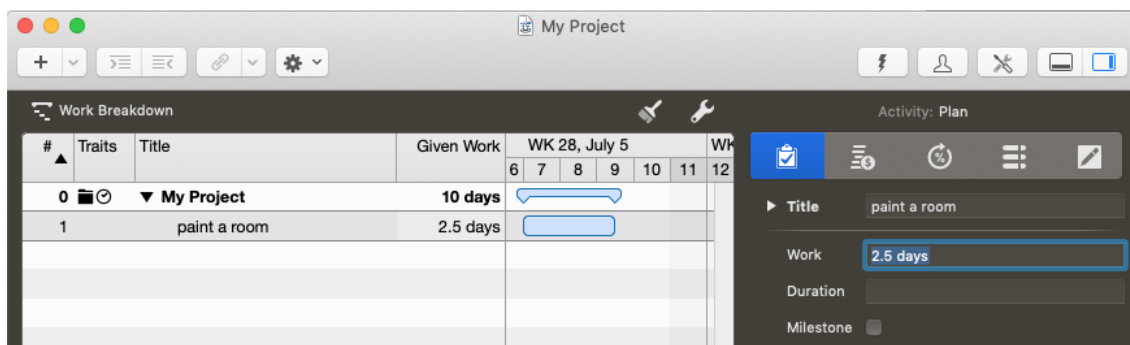
#### Example

You want to schedule the painting of a room. You estimate the required **effort** for the activity as **2.5 working days**. You expect that when assigning this activity to let's say two resources, each resource's effort will be half as much.

- So you create a new activity.
- Select it.
- Check in **Plan** inspector.
- Change the **Work** value to **2.5 days**.
- Leave the value in the **Duration** field empty.



You can adjust the *Default Value* '1 day ?' for work in **Settings > General > Work** The ? indicates that the value is estimated. Remove it when you are sure about the value or don't need so much detail in your planning.



Alternatively: You can edit the **Given Work** value in the outline column.

## Duration

If you want to schedule your activity by the **duration** it will need to be completed, use the **Plan** inspector or enter the effort in the **Given duration** outline column.

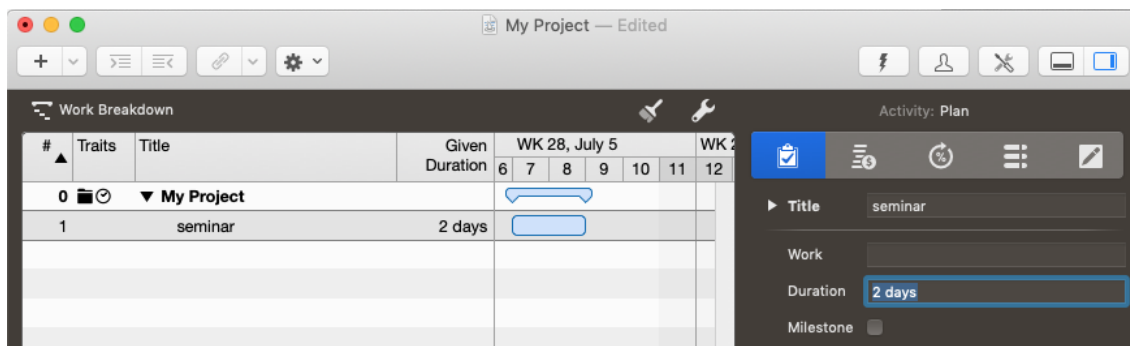
### Example

You want to schedule a seminar. The **duration** for this seminar is *2 working days*. You expect that when assigning it to your trainer personnel, all assigned trainers will work throughout the complete duration of this seminar.

- So you create a new activity.
- Select it.
- Check in **Plan** inspector.
- Blank the **Work** value.
- Enter **2 days** in the **Duration** field.



You can adjust the *Default Value* for duration in *Settings > General > Duration*



Alternatively: You can edit the **Given Duration** value in the outline column.

### Example team meeting

You schedule a team meeting on a remote location. You want to plan with *1.5 working days*. But also need to block 3 working days of your team for the overall duration. Within those 3 days, your team transfers to the remote location, works for those 1.5 working days and transfers back to its base.

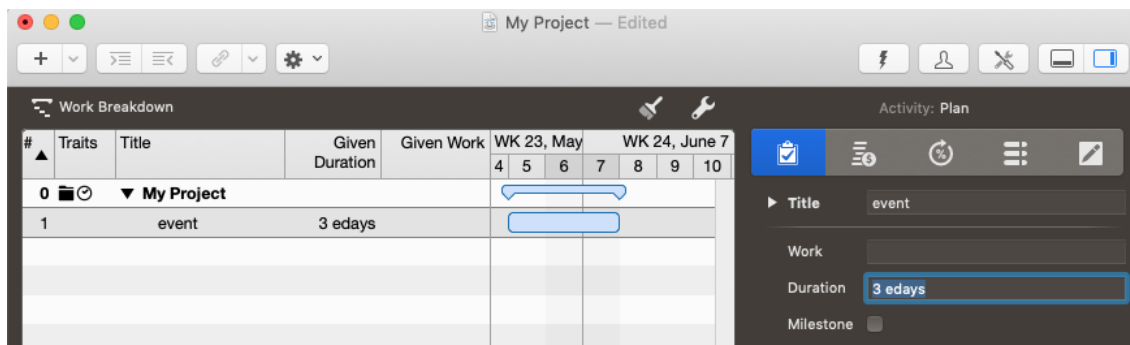
- So you create a new activity.
- Select it.
- Check in **Plan** inspector.
- Change the **Work** value to **1.5 days**.
- Enter **3 days** in the **Duration** field.

### Example 72hours event



You want to schedule an event for which you know it will be 3 calendar days long. It starts on Friday and the weekend (which is usually non working time) should be included in the overall duration.

- So you create a new activity.
- Select it.
- Check in **Plan** inspector.
- Blank the **Work** value.
- Enter **3 edays** in the **Duration** field.



Alternatively: You can edit the **Given Duration** value in the outline column.



Such an event starting first thing on Friday and ending on first thing on Monday, includes only working times on Friday. If you want to adjust the included effort, modify the **Work** value accordingly.

### Example placing a concrete slab

You want to schedule the placing of a concrete slab. You estimate the required **effort** for the activity as *1.5 working days*. You know concrete starts drying directly as you pour it and requires at least *1 calendar week* of overall drying time.

- So you create a new activity.
- Select it.
- Check in **Plan** inspector.
- Change the **Work** value to **1.5 days**.
- Enter **1 ework** in the **Duration** field.

Alternatively: You can edit the **Given Work** and **Given Duration** values in the outline columns.

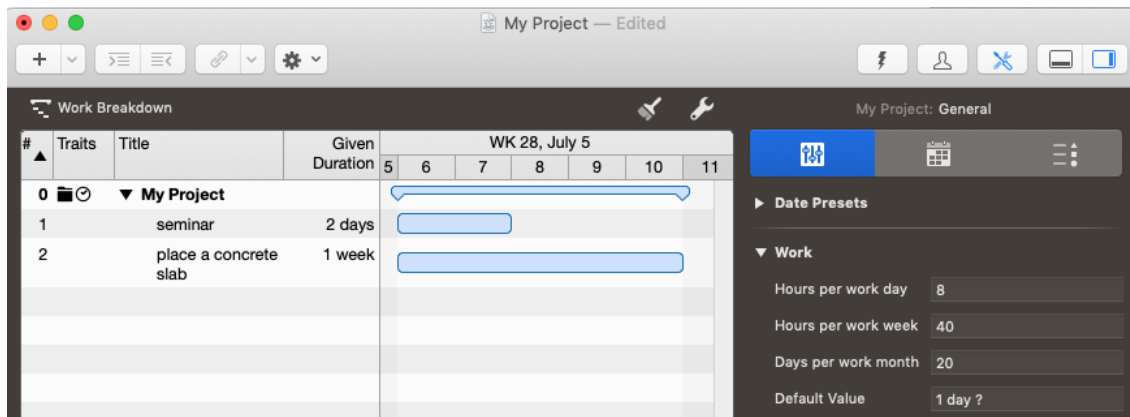
### Working times

In the above examples we used the terms *working days*, *working week*.

For simplicity reasons, we enter them in Merlin Project Express as '2 days' or '1 week'.

## How does this calculate in other units?

Let's check the defaults in *Settings > General > Work*



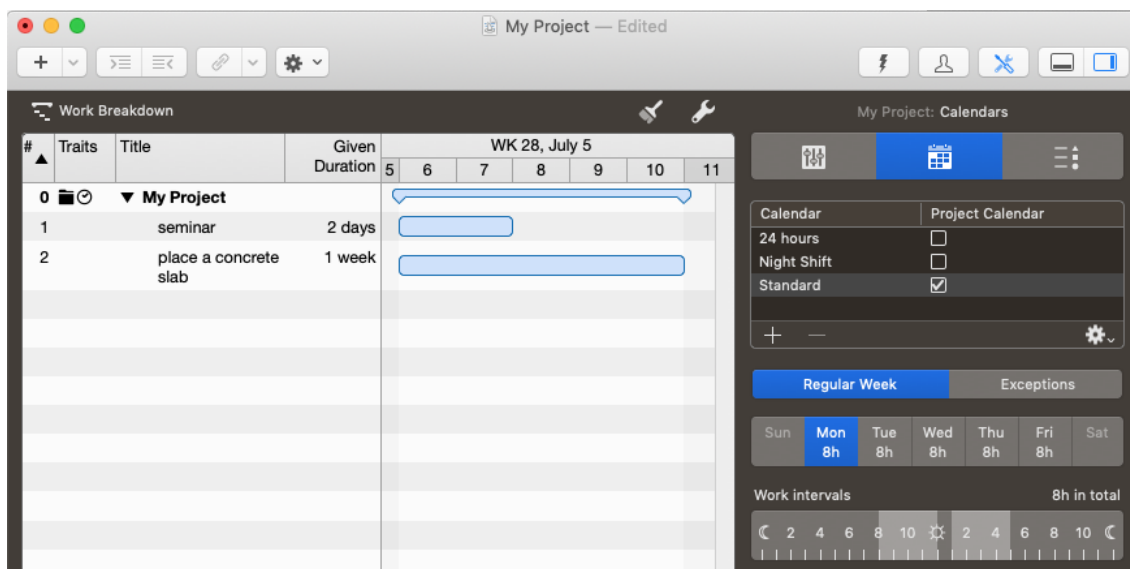
Per default, 1 working day are 8 working hours, 40 working hours make a week and 20 days a month.

So '2 days' are those '2 working days' of '8 working hours' each. '1 week' means '40 working hours' which calculates as '5 working days' or '8 working hours' each.

## When do working times start or end?

Let's check the defaults *Settings > Calendars*

- Select the calendar on which the checkbox **Project Calendar** is enabled
- Check the **Regular Week** tab



Per default, there are 5 work days: Monday to Friday. Each work day includes work intervals from 8am to 12pm and 1pm to 5pm.

So the working time on Monday starts at 8am and ends at 5pm.



Should you choose to adjust your regular week or work intervals in **Settings > Calendars** make sure you also adjust your defaults in **Settings > General > Work** to match the new values.

### How long are working times really?

Let's select an activity of '2.5 days' work and open the **Plan** inspector.

We see in the *Expected*

#	Traits	Title	Given Work	WK 27, June 28	WK 28, July
0	▼	My Project		30	1 2 3 4 5 6
1		paint a room	2.5 days		

Activity: Plan

Title: paint a room

Work: 2.5 days

Duration:

Milestone:

Start: Unrestricted

End: Unrestricted

Alignment: ASAP

Expected

Status: Unscheduled

Start: Jul 1, 2020 at 8:00 AM

End: Jul 3, 2020 at 12:00 PM

Work: 2.5 days

Duration: 2.5 days (2.17 edays)

- Work: 2.5 days
- Duration: 2.5 days (2.17 edays)

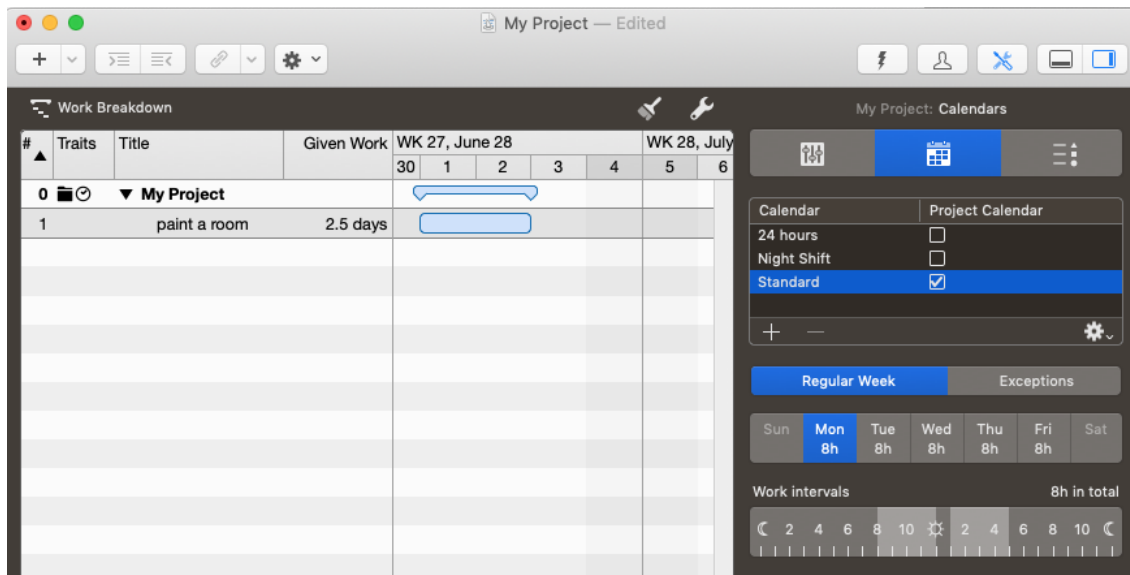
We know that 2.5 days are 2.5 working days, 20 working hours. This activity has the same amount of effort and duration.

2.17 edays is the elapsed calendar time and time period to expect the activity to be completed. The prefix "e" denotes "elapsed".

### How do elapsed e-durations calculate?

The elapsed duration is the duration plus the free time contained.

By default and according to the settings (**Settings > Calendars**) a regular work day starts at 8am, contains a lunch break between 12pm and 1pm and ends at 5pm.



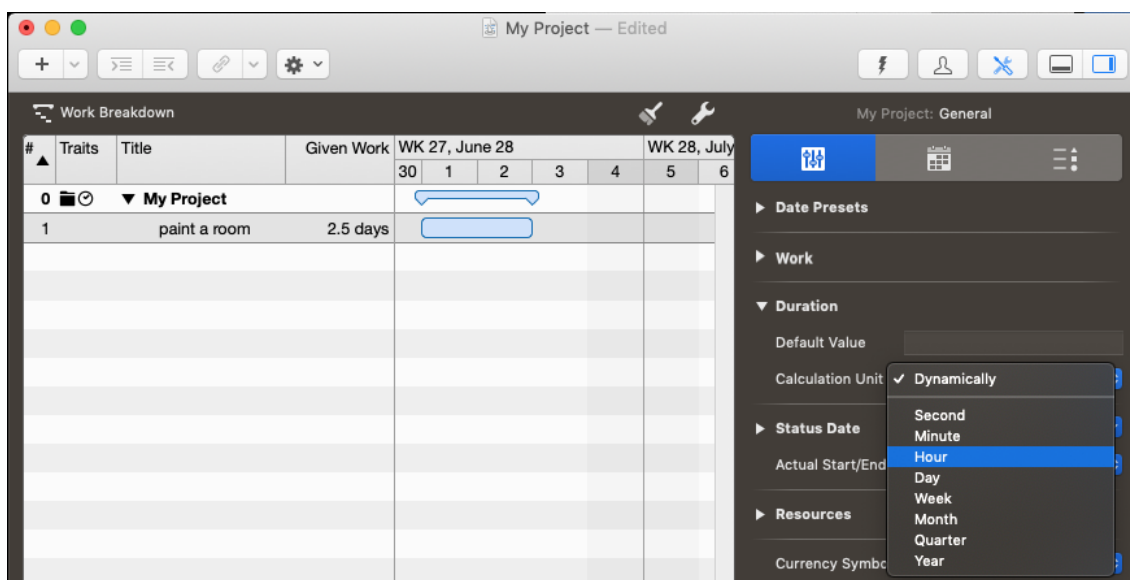
An activity with the planned **2.5 days** of work, which starts at 8am requires for the first 8 hours (four in the morning, four in the afternoon) 9 consecutive hours (**ehours**) on the first day.

The works stop at 5pm and start next day at 8am. So there are 15 hours of **free time**. From 8am until 5pm on the second day there are further 8 hours (9 ehours), until once again at 5pm 15 hours of free time start again.

The remaining 4 hours can be scheduled on the third day to start at 8am and finish at 12pm. So to the 20 hours of work, you add 32 hours of free time which calculates as 52 ehours.

52 ehours divided by 24 ehours equals 2.16666 edays, or 2.17 edays.

Should you change the **Calculation Unit** to **Hour** in **Settings > General > Duration ...**



And select again your activity, you'll see expected values in hours thus:

- Work: 20 hours
- Duration: 20 hours (52 ehours)

The screenshot displays a project management application window titled "My Project — Edited". The interface is divided into a main workspace and a right-hand sidebar.

**Main Workspace:**

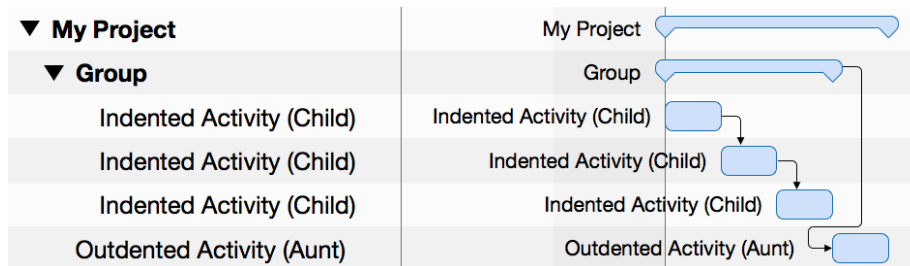
- Work Breakdown:** A hierarchical tree view on the left shows a project node "0 ▼ My Project" and a task node "1 paint a room" with a duration of "2.5 days".
- Gantt Chart:** A timeline view at the top shows the task "1 paint a room" as a blue bar spanning from Wednesday, June 30, to Friday, July 2, 2020. The timeline is divided into days: 30, 1, 2, 3, 4, 5, 6.

**Right Sidebar (Activity: Plan):**

- Title:** paint a room
- Work:** 2.5 days
- Duration:** (empty field)
- Milestone:** ☐
- Start:** Unrestricted
- End:** Unrestricted
- Alignment:** ASAP
- Expected:**
  - Status:** Unscheduled
  - Start:** Jul 1, 2020 at 8:00 AM
  - End:** Jul 3, 2020 at 12:00 PM
  - Work:** 20 hours
  - Duration:** 20 hours (52 ehours)
  - Utilization:** 100%

## Project structure

It's a good idea to group activities together to structure your project. This gives a clearer picture of the individual project phases.

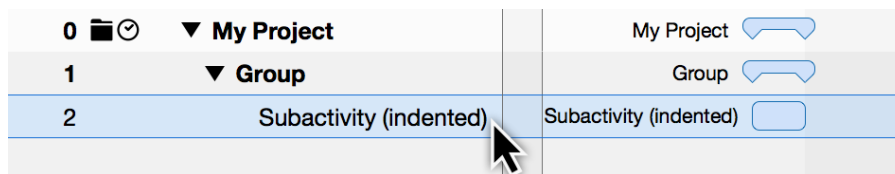


## Indent

The **indentation** of activities in the outline creates **groups** and, if required, further indented **child activities** (*children*) and **child groups** automatically.



Indenting to another level creates a **child activity** and a resulting **group** automatically.



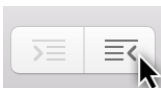
The activity above the indented content becomes a **group** automatically, which is identifiable graphically by the **group bar**.



A project is always a group and, like all groups, can be expanded and collapsed using the small **triangle**.

## Outdent

The **outdent** icon moves activities out of a group and its child groups.



Select one or more activities and then click the **outdent** icon.

Outdenting is only active if the selected activities or milestones are already in a group. An outdented activity is called an **aunt**.



You can indent multiple selected **activities/milestones**. Additionally, you can use your mouse to nest activities in other activities or ***indent or outdent*** activities in the levels using the **Structure → Indent** or **Structure → Outdent** menu item or the corresponding keyboard shortcuts **cmd + →** or **cmd + ←**.

# Link and connect

This guide shows you how to create dependencies in Merlin Project Express.

## Why link

The aim of linking content in a project is to define the sequence in which the activities are worked through logically.

# ▲	Traits	Title	Successors	Predecessors	Week 1			
					14	15	16	17
0	📁🕒	▼ My Project			My Project			
1		Activity A	2		Activity A			
2		Activity B		1	Activity B			

**Example:** Only when **Activity A** is completed can **Activity B** begin. Activity A is the predecessor of Activity B, which is its successor.

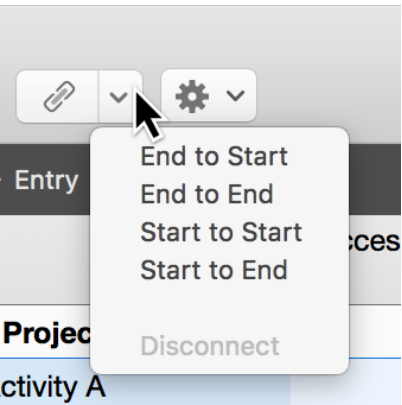
## Creating links

You can link project activities. When linking, dependencies are created that define a logical sequence.

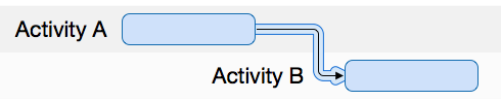
Select at least two activities that you want to link together.



On the toolbar you will find the **Link** button. If you click the **arrow** to the right of the **Link** icon, the available link types and the option to **separate** existing links appear.



Click the **Link** icon or use the keyboard shortcut **ctrl + cmd + L** for the **End to Start** dependency type. The two activities are now linked with an **arrow**.



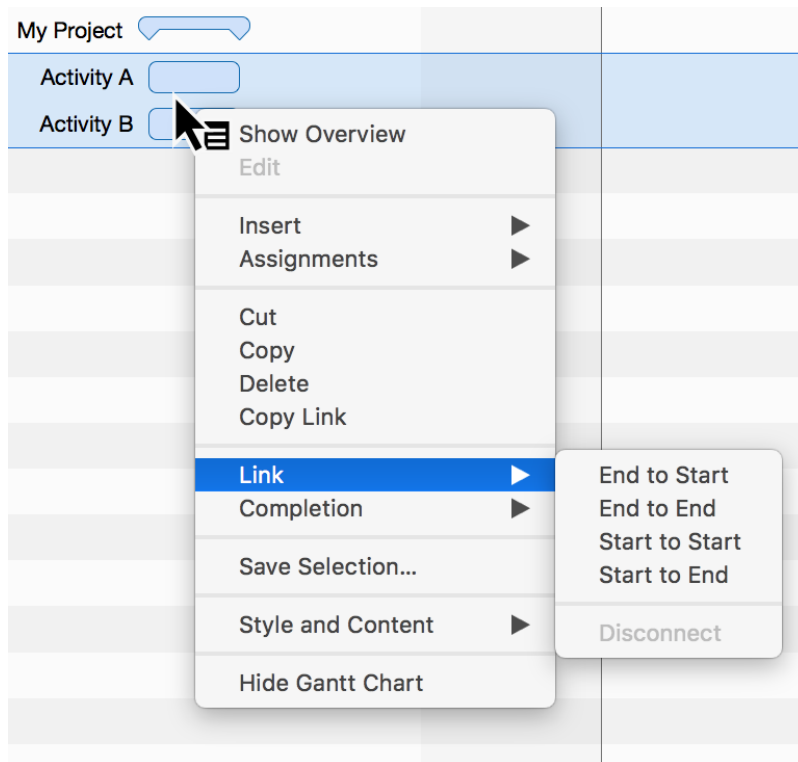


## Alternatives

All roads lead to Rome, including the various possibilities for creating links.

### Menu and context menu

In the **Structure** → **Link** menu item you will find the same options.



Secondary-clicking selected content will display the **context menu**. This contains the **dependency** option with the four **dependency types**.

### Linking using the mouse

You can also link activities in the Gantt chart using your mouse. Press and hold the **alt** button while hovering the mouse pointer over an activity bar or milestone.



A small **black dot** appears on the activity. While holding down the **alt** key, move the mouse to another activity (successor).

The dependency will be created as soon as you release the mouse button.

Linking with columns

In the **Predecessor** or **Successor** columns, you can see the predecessor or successor activity numbers (#).

# ▲	Traits	Title	Predecessors	Successors
0	📅🕒	▼ New Project		
1		New Activity		
2		New Activity		
3		New Activity		

Enter an activity number in the **Predecessor** or **Successor** columns, to create a dependency of the current activity row to that number.



The **Successor** column is not activated by default.

Disconnecting links

To disconnect links, click a link line and press the **delete** key.



If you need to delete several links, select all activities and use the **Disconnect** option in one of the **Link** menus.

## Dependency Inspector

If you select a link, the **Dependency** inspector appears.

The options contained in the Dependency inspector are responsible for the *dependency* of linked activities, groups, and milestones.

The screenshot shows the 'Dependency' panel with the following fields:

- Predecessor**: A dropdown arrow icon.
- Activity #**: A text input field containing '1'.
- Title**: A text input field containing 'Activity A'.
- Successor**: A dropdown arrow icon.
- Activity #**: A text input field containing '2'.
- Title**: A text input field containing 'Activity B'.
- Type**: A dropdown menu showing 'End to Start' with a double arrow icon.
- Lead/Lag**: A text input field.
- Expected Critical**: A checkbox labeled 'yes'.
- Planned Critical**: A checkbox labeled 'yes'.

Here you can modify the predecessors and successors, and find them quickly in the project by clicking the **arrow**.

In the **Type** drop-down menu, you can select the *dependency types*. This lets you change the current dependency:

- *End to Start*
- *End to End*
- *Start to Start*
- *Start to End*

### Lead/Lag in links

Click a **link line** to access the **Dependency** inspector.



Enter a time unit in the **Lead/Lag** field to lengthen the dependency between the linked activities.

If you enter a **negative** value, the dependency and the linked activity will move back along the timeline according to the entered lag value. For example, enter **-2 days** in the **Lead/Lag** field.



**Lead/Lag** can be entered manually in the **Predecessor** or **Successor** columns.

#	Traits	Title	Predecessors	Successors
0	📁🕒	▼ My Project		
1		Activity A		5ES+2 days
2		Activity B		
3	🕒	Activity C		
4	🕒	Activity D		
5	🕒	Activity E	1ES+2 days	

**Example:** If you enter the value **5ES+2 days** in the **Successor** column for an activity, an **End to Start** dependency will be created with the **Activity #5** and a lead/lag of **2 days**.  
At the same time, the **Activity #5** will be also linked to **Activity #1** by a lead/lag of **2 days**. Its **Predecessor** column will show then: **1ES+2 days**

## Resources

This guide shows you how to create resources and assignments in Merlin Project Express.

### What are resources

Resource is a term for people, materials and equipment used in the project.

Merlin Project Express offers the following **resource types**:

- **Person** (involved in the project actively or inactively)
- **Material**
- **Company**
- **Equipment**



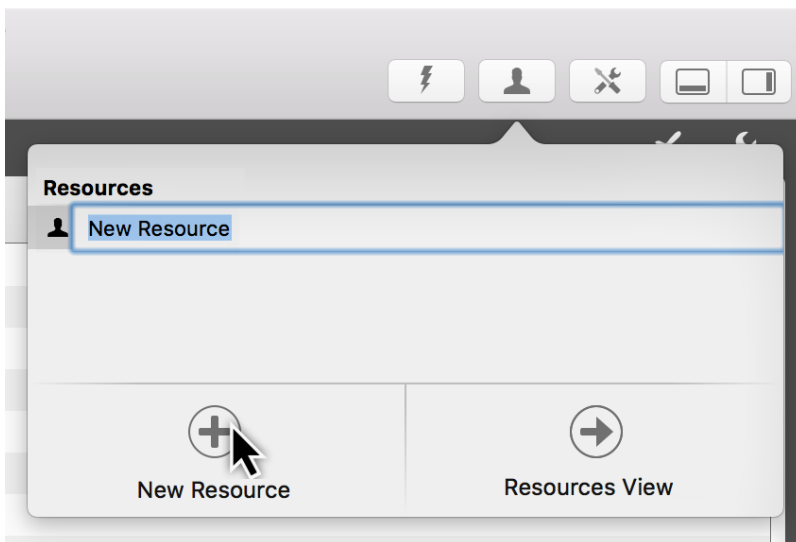
The default **resource type** is **Person**.

## Creating resources

The **Resources** toolbar icon opens a *pop-up* window listing all resources in your project.



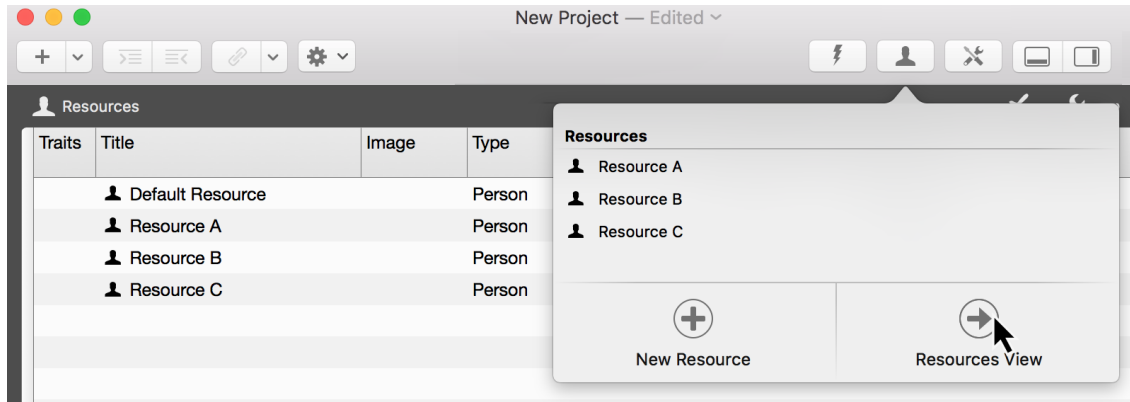
You can quickly create new resources in Merlin Project Express by clicking **New Resource** in the *pop-up* window.



## Using resources *pop-up*

The resources *pop-up* is perfect for gaining a quick overview of project resources.

For more information on your resources and for a more detailed edit of the values of your resources, click on **Resources View**. Merlin Project Express will switch quickly to [that view](#).



Switch to the **Resources View** to insert an image for your resource, [thus...](#)

The resources *pop-up* can be used as a separate window. Move the window down with the mouse pointer.





You can quickly show or hide the resources *pop-up* as a separate window using the **F4** key or via the **Window** menu item.

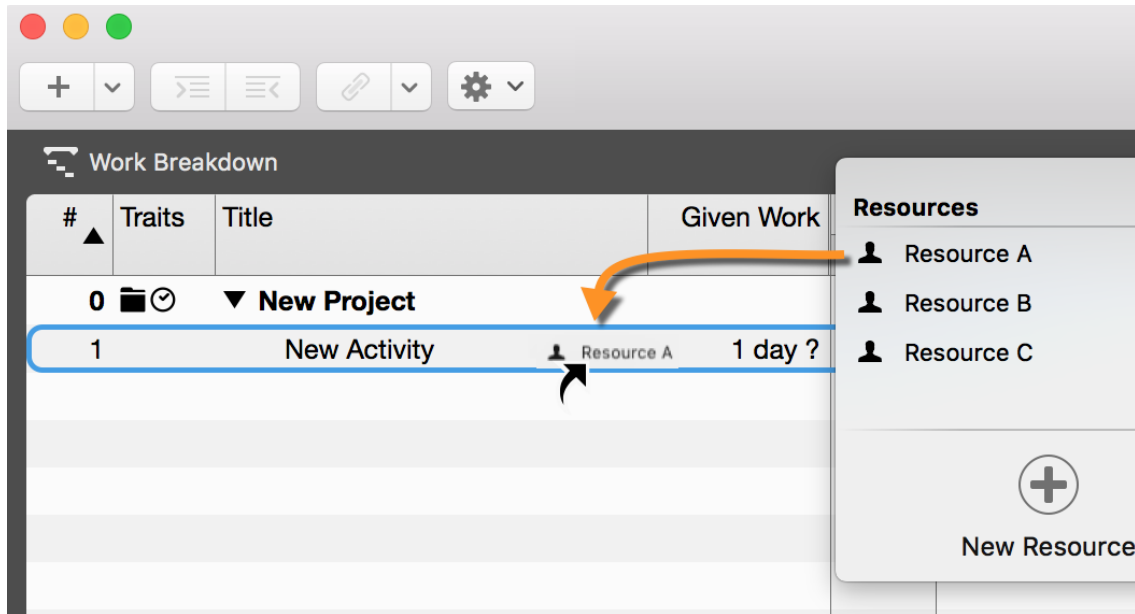


## Creating assignments

Move a **resource** from the resources *pop-up* to an activity, group, or milestone. An **assignment** is created automatically.



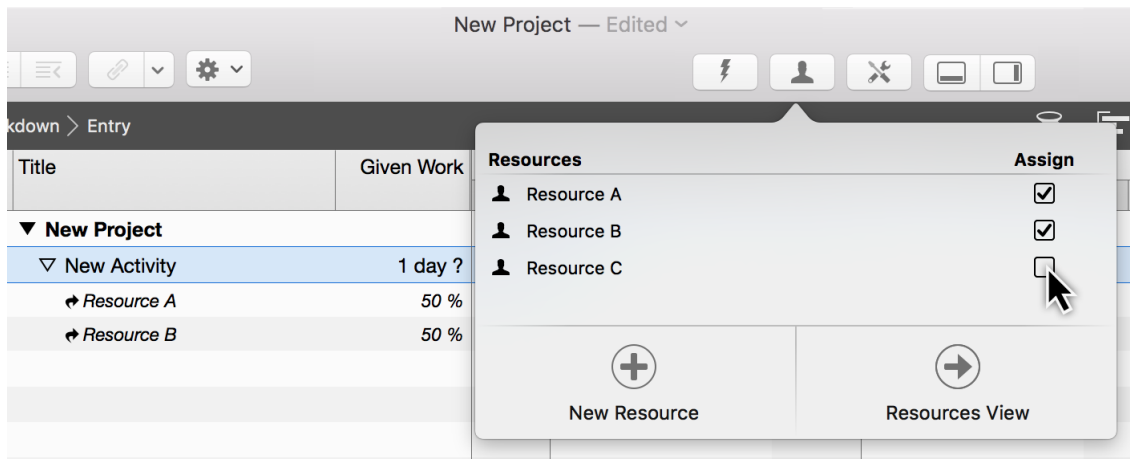
A **resource** assigned to an activity is called an **assignment**. This resource works on the activity assigned to it in the project.



The assignments are identifiable by the **white triangle**. Multiple assignments can be created for an activity and these share the work automatically.

#	Traits	Title	Given Work
0	📁🕒	▼ New Project	
1	▼	New Activity	1 day ?
		↙ Resource A	50 %
		↘ Resource B	50 %

For selected activities in a view, the **Assign** option appears in the resources *pop-up*. This allows you to add additional resources as assignments to the activity quickly by marking the check box.



If the checkmark is removed, the **assigned resource** is also removed from the activity.



You can create new assignments for the selected activities automatically using the **Insert → Assignment** menu item or the corresponding shortcut ***option* + *cmd* + A**.

## Time scale

### What is the time scale

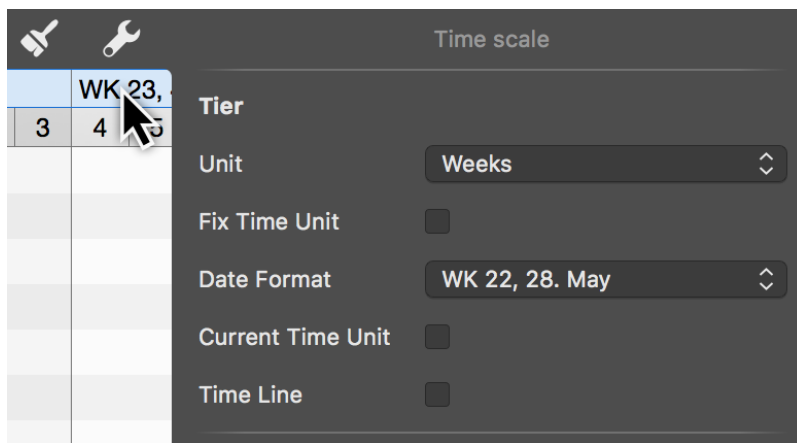
The **time scale** is the display of time in the Gantt chart. The default time scale contains two **tiers**, the upper and the lower one.

In the time scale Inspector, you can make a range of adjustments to the time units and other options.

### Time scale Inspector

Click a row in the **time scale** to open the corresponding Inspector.

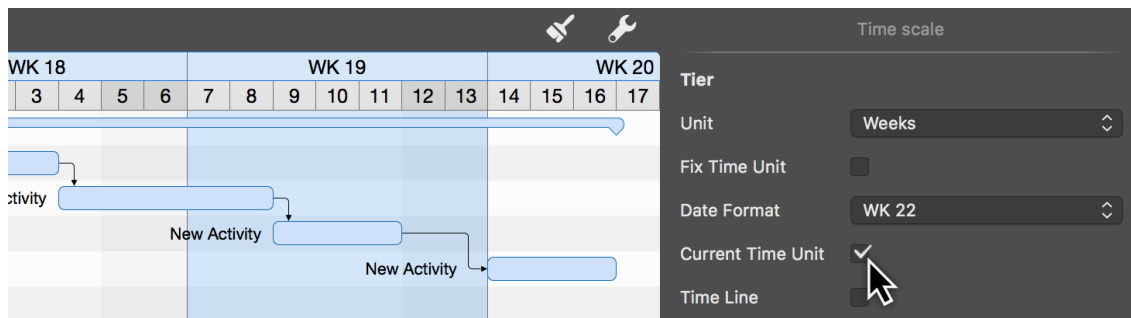
There you will find a range of options for adjusting the clicked time scale and settings for **Non-working Time**.



The selected time scale is shaded blue. The options only apply to this selected tier of the time scale.

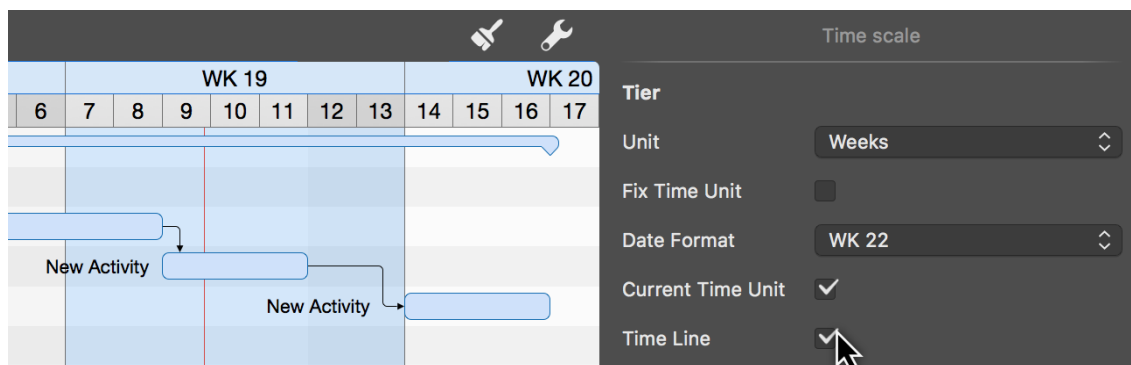
- **Unit** (Minutes / Hours / Days / Weeks / Months / Quarters / Years)
- **Fix Time Unit** (fixes the selected Gantt unit and preserves it even when zooming the view)
- **Date Format** (absolute and relative formats for displaying the units, e.g. from project start or end)

## Current Time Unit



If you enable the **Current Time Unit** option the time unit in the Gantt chart which contains the [status date](#), will be shaded **blue**. This gives you an additional highlight on the Gantt of the project, to quickly visually identify the tasks that are due during this period.

## Time line



Similar to the **Current Time Unit** option, the **Time Line** option allows you to add a vertical marker to the Gantt chart.

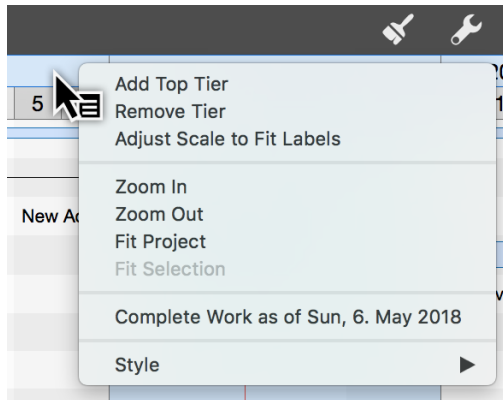
If you check the **Time Line** option, the [status date](#) will appear as a **thin red line** on the project Gantt.



The [status date](#) updates automatically by default and shows the macOS date and time, but can also be set in the [project settings](#) if required.

## Time scale context menu

Secondary-click the **time scale** to display the context menu.



### Add Top Tier

The **Add Top Tier** option lets you insert one more tier to the time scale.



The time scale can show up to four tiers.

### Remove Tier

The **Remove Tier** option lets you remove the selected tier from the time scale.



The time scale requires at least one tier.

### Adjust Scale to Fit Labels

The **Adjust Scale to Fit Labels** option adjusts the width of all active time scale columns automatically.

The available space on the time scale is set automatically to the best width.

### Zoom In / Out

The time scale is enlarged or reduced according to the selection.

The content of the time scale grows or shrinks with it. The time units are adjusted automatically as required.

### Fit Project

The **Fit Project** option adapts the time scale to the project.

The entire project is zoomed into until it fits into the visible area. The time scale grows automatically with it.

### *Fit Selection*

The **Fit Selection** option adapts the time scale to the activities selected in the project.

The selection is zoomed into until it fits into the visible area. The time scale grows or shrinks automatically with it.



At least one activity, group, or milestone must be selected in the project for this option to be active.

### *Complete Work as of*

The **Complete Work as of** sets all activities contained in the project to the status **Completed** up to the date clicked in the time scale.

This makes it easy to determine the progress of the project just by clicking.

### *Style*

The **Style** option changes the graphical appearance of the time scale.



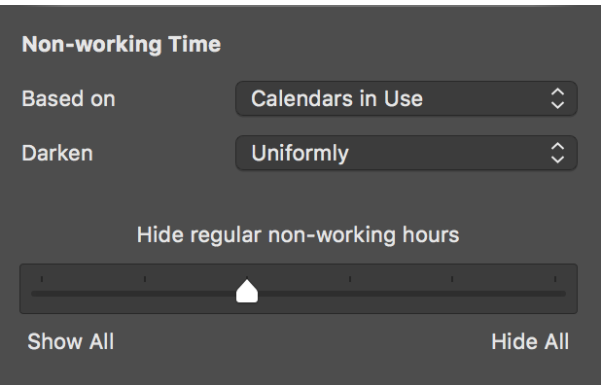
For more information on style options, see the **Styles and contents** guide.

## Non-working time

**Non-working time** is grayed out in Merlin Project Express. For example, the **weekends** in the project calendar are **darkened** by default.

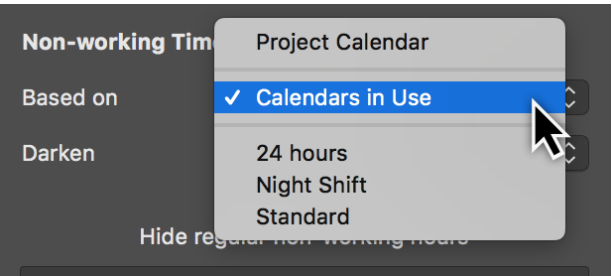
WK 31										
Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon

Click the **time scale**. In the Inspector you will find three options for adjusting the non-working time.

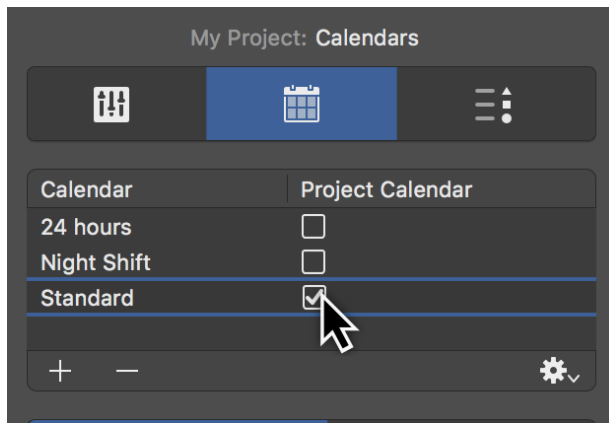


### Based on

The **Based on** option lets you display the calendar based on its non-working time in the project.



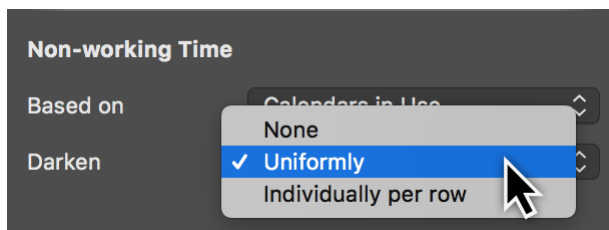
By default, the **project calendar** is preset as the base calendar for non-working time. There are further calendars to choose from in the drop-down menu. The **calendar** settings are located in the **project settings** and can be edited there.



## Darken

The ***Darken*** option has three configurations to control the **display** of non-working time in the project:

- **None**
- **Uniformly**
- **Individually per row**



The ***Never*** option stops darkening the display of non-working time in the project.

The ***Uniformly*** option is set by default. The non-working times for the **regular week** in the project are displayed.

Activate the ***Individually per row*** option so that you can see the non-working times of resources and their vacation periods in the project in the respective row.

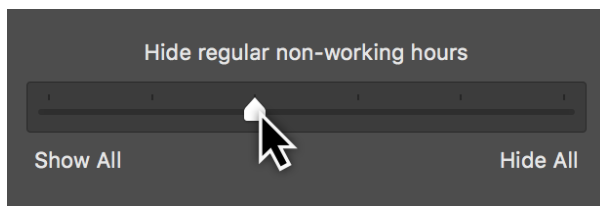


## Regular non-working time

Using the **slider**, set whether you want the regular **non-working times** to be displayed or hidden.

Choose from the following options to display the working times:

- **Show All**
- **Hide all regular non-working minutes**
- **Hide regular non-working hours**
- **Hide all regular non-working days**
- **Hide all non-working days**
- **Hide all non-working times**



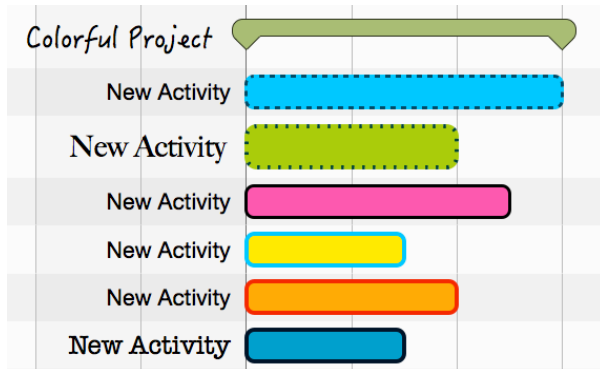
The effect of the slider setting depends on the selected **zoom level** in the active view.

## Styles and contents

This guide contains information on using and modifying styles and contents in Merlin Project Express.

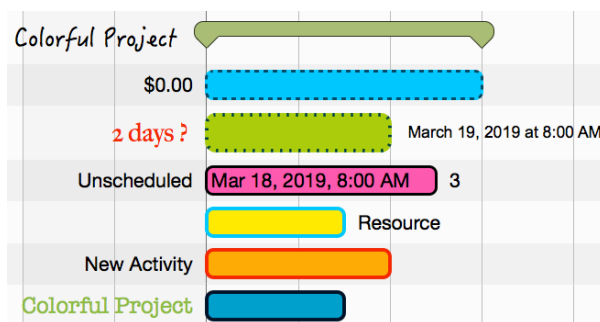
### What are styles?

Styles let you change how elements (bars, groups, milestones, columns, timescales, etc.) are displayed in the views to suit your preferences. You can do this using the style options for view elements, such as to change the format of **colors**, **borders**, **shadows**, or **fonts**.



### What are contents?

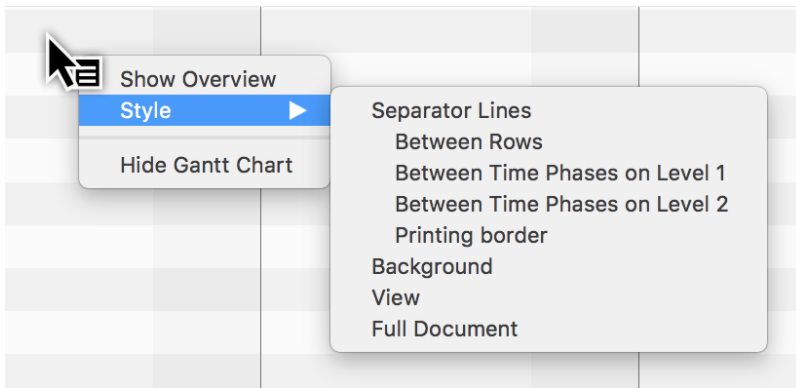
Contents let you store a range of project information in the view, for example in the **labels** (to the left and right of the bars and on the bars themselves) or in the **Cards** of the Net Plan or Kanban view.



## Style and Content Inspector

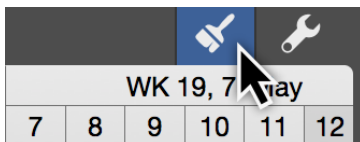
The **Style and Content Inspector** gives you control over styles and contents in a couple of mouse clicks.

You can access the **Style and Content Inspector** quickly by right-clicking an element in the active view and going to the associated **context menu**.



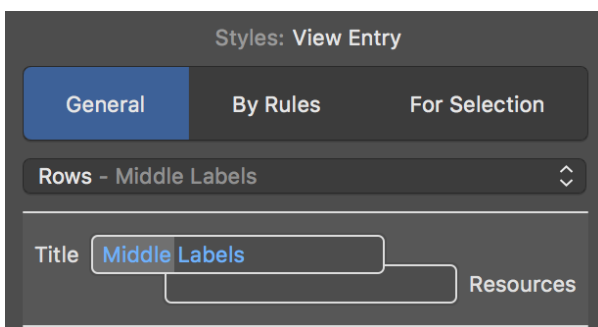
Depending on the element you right-clicked, either the **Style** option on its own or the **Style and Content** option will appear in the context menu. The selection options they include open the associated options in the **Style and Content Inspector**.

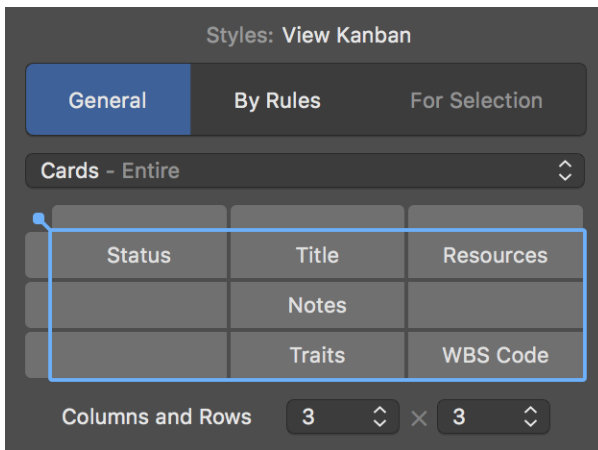
There is also a new way to access the **Style and Content Inspector** by clicking the **paintbrush icon**.



Elements are displayed graphically in the **Style and Content Inspector**.

Depending on the active view, you can see schematic displays for **bars/groups** or **cards** there.





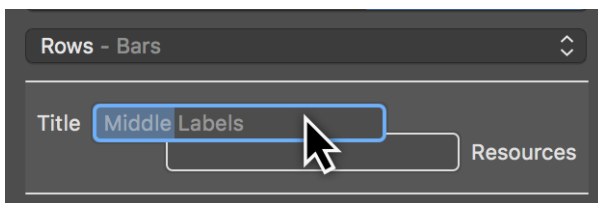
## Using the Inspector

Click an element to access the **style** or **content** options. In the above drop-down menu, you can see the selection you made and the selected element will be highlighted in blue.

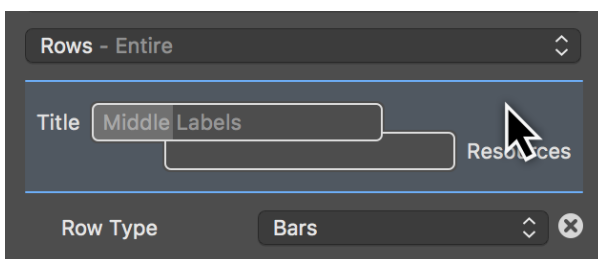
## Style

In the following, the **Bars** (1), the entire **Row** (bar row type) (2) and the **Reference Bars** (3) are activated.

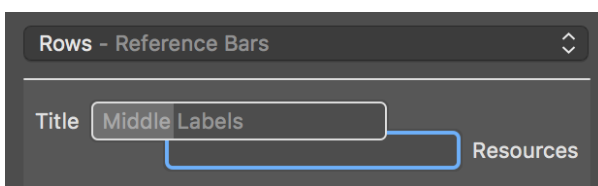
1



2

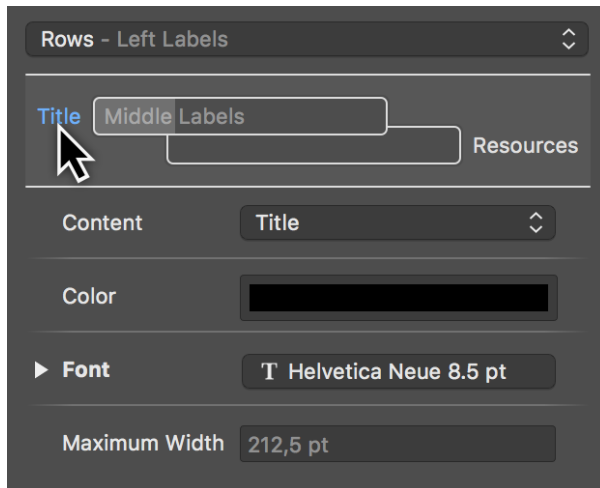


3



## Content

Activate the *left label* by clicking **Title** and changing the **content** of the left label using the option in the drop-down menu with the same name. You'll also find style options here for modifying the **Color** and **Font** of the content.

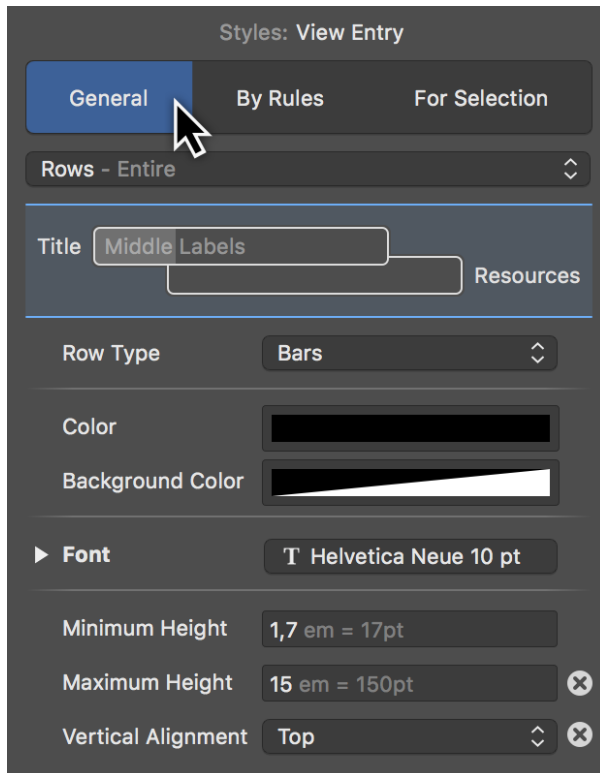


From the **Content** drop-down menu, select the ***Expected Start*** instead of the default ***Title*** selection. This will display the expected start of the activity as a date in the left-hand label.

## General

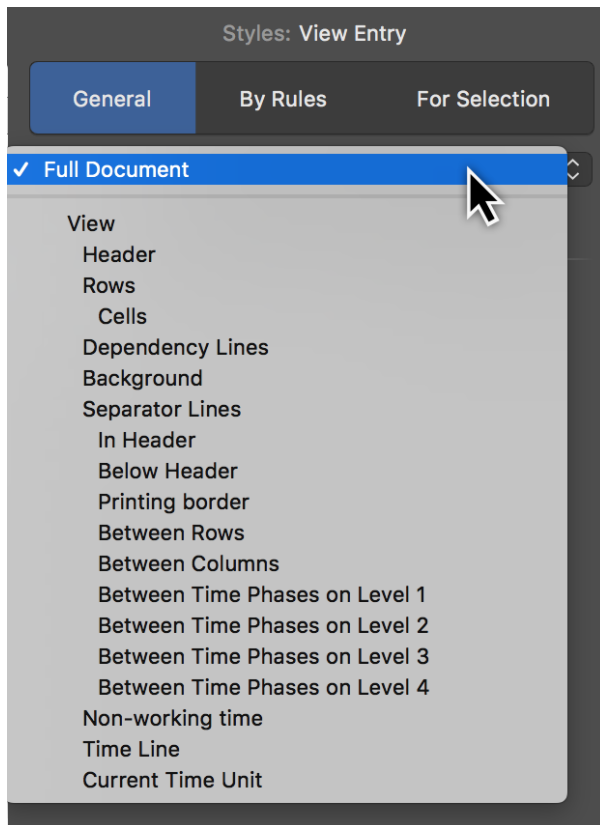
The **General** tab controls the styles for the display of many general elements in the active view.

If no selection is active in the view and you click the *magnifying glass icon*, the **Style Inspector** will open with the **General** tab.



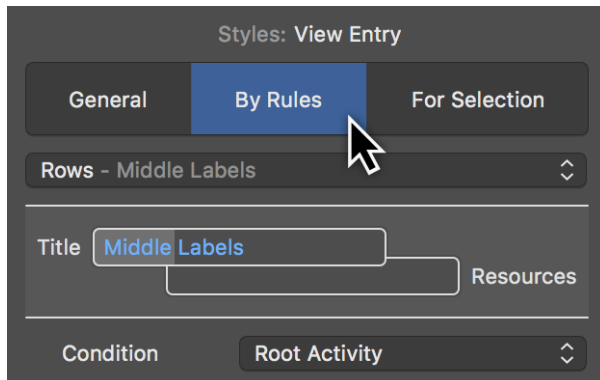
The general settings for **Style and Content** apply in principle to all style options across the project.

The elements for the particular view, which you can configure to suit using the options available in the Inspector, can be found in the **drop-down menu**.



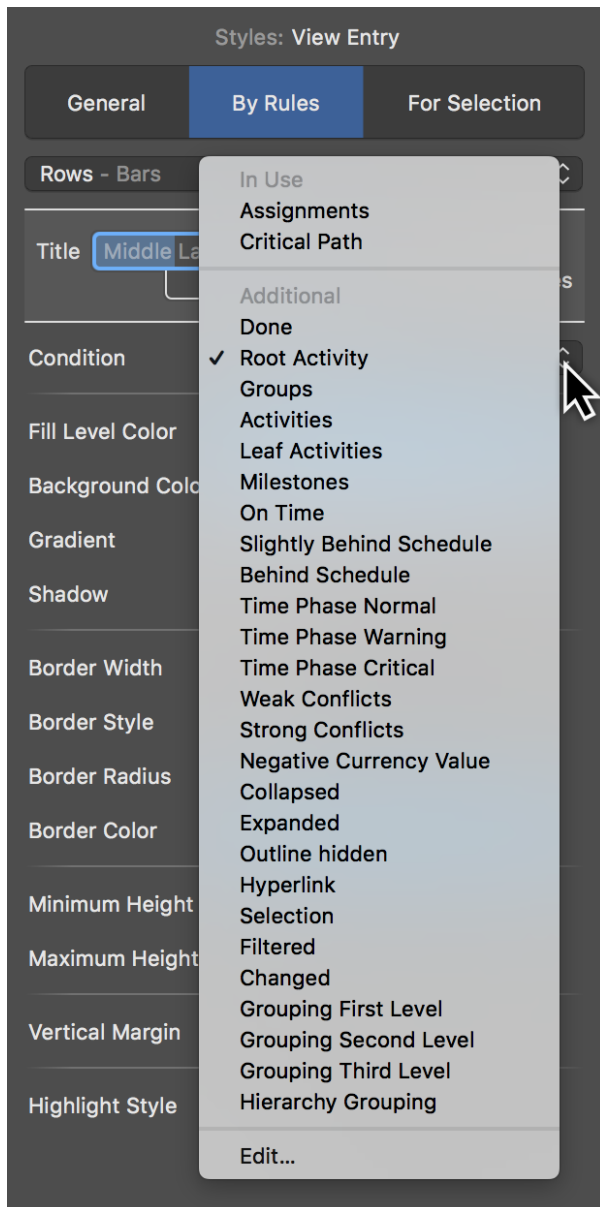
## By Rules

The **By Rules** tab lets you control **style and content options** automatically depending on specific **conditions**.



For example: You want all activities to which a specific resource has been assigned to appear in a specific color or alternate font automatically.



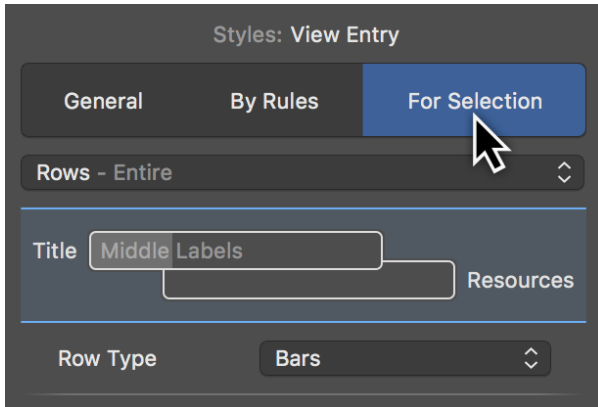


In "Merlin Project" you can define your own conditions. "Merlin Project Express" does not support this option.

## For Selection

The **For Selection** tab controls the styles and contents for the selection. This lets you adjust elements individually.

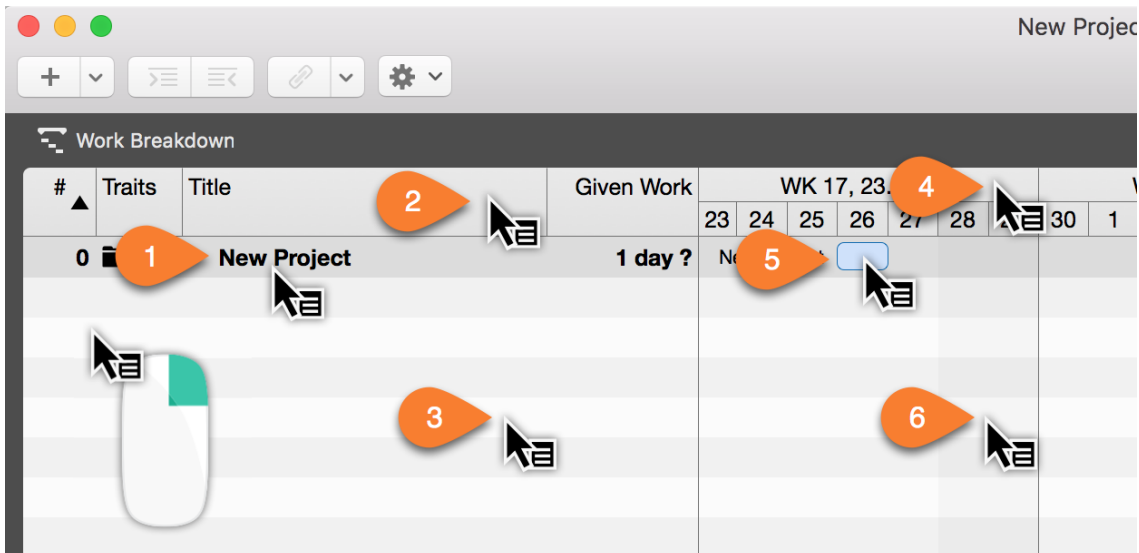
In a view, select an element and click the **paintbrush icon**. The **Style Inspector** will open with the **Selection** tab.



In principle, you can control styles and content by right-clicking and selecting the option **Style** or **Style and Content** from the context menu.

## Work Breakdown selection

Right-click a bar in the Work Breakdown view, a column row, or the Outline to access and edit the associated **style** and/or **content options**.



- (1) Outline text style and content options
- (2) Column row style options
- (3) Outline style options

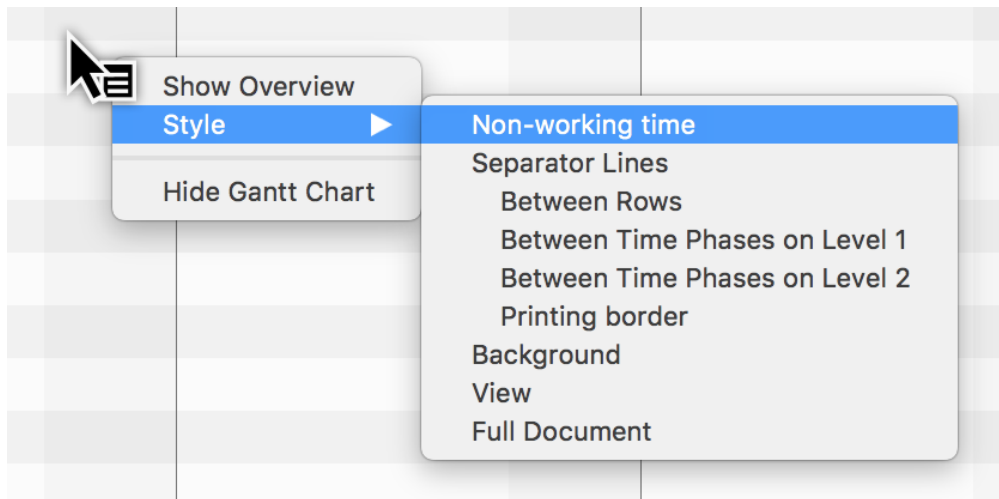
- **(4) Timescale style options**
- **(5) Bar, milestone, and group style and content options**
- **(6) Gantt chart style options**

## Style and content examples

Here is a small selection of practical examples.

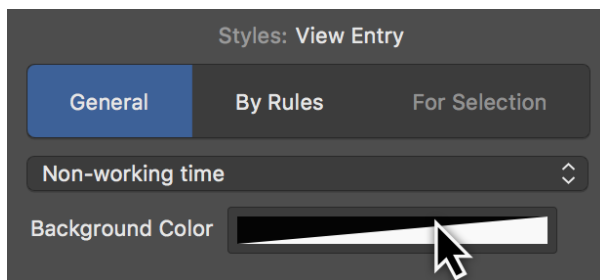
### Example 1: Modifying the color of non-working time

Right-click *Non-working Time* (6) in the **Gantt** chart and in the drop-down menu click the option **Style > Non-working Time**.

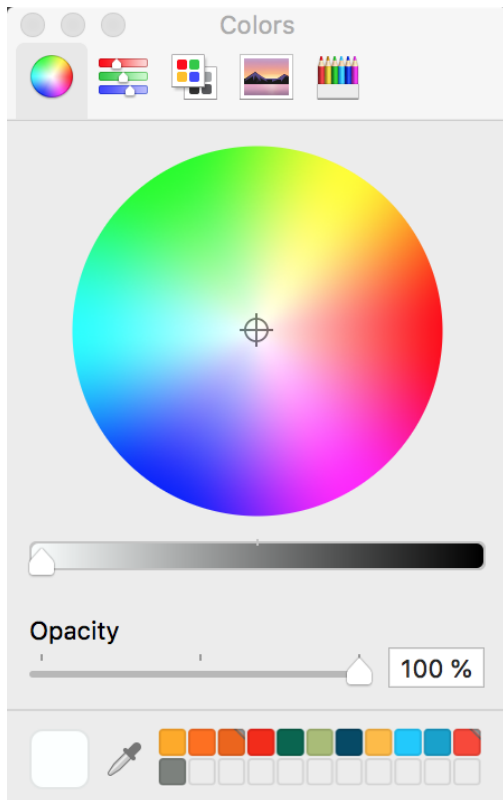


Alternatively, you can also click the **paintbrush icon** and then in the **General** tab select **Non-working Time** from the drop-down menu.

The **General** tab will open in the Inspector with the style option for *Non-working Time*.



Click the **Background Color** color well to change the display color of the *Non-working Time* in the **Gantt** chart.

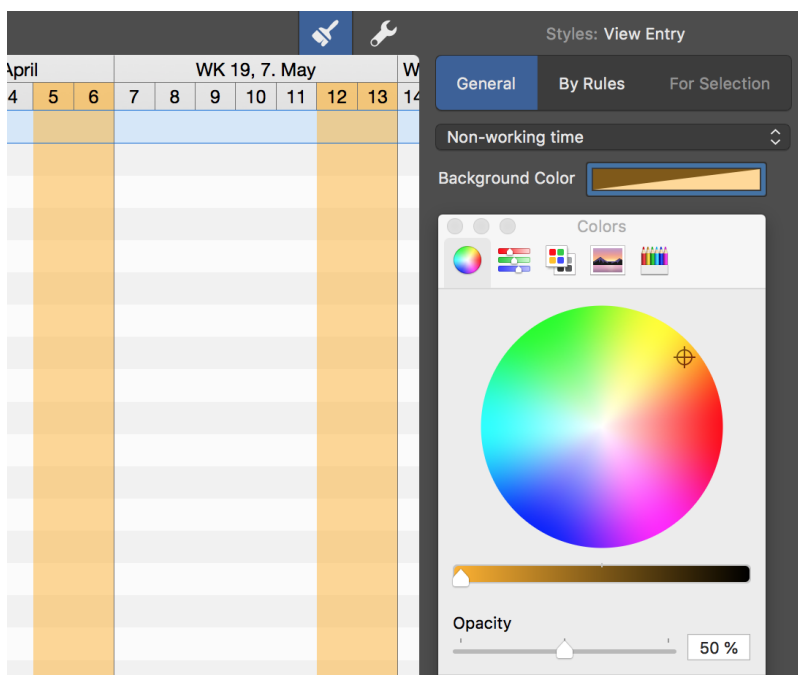


The *macOS Colors* window will then appear. This includes a range of options for setting **colors** and the **opacity**.



Learn more about macOS's *Colors* window at [Apple online](#).

Changing the **background color**. Following that, **Non-working Time** will be displayed in the selected color in the Work Breakdown.

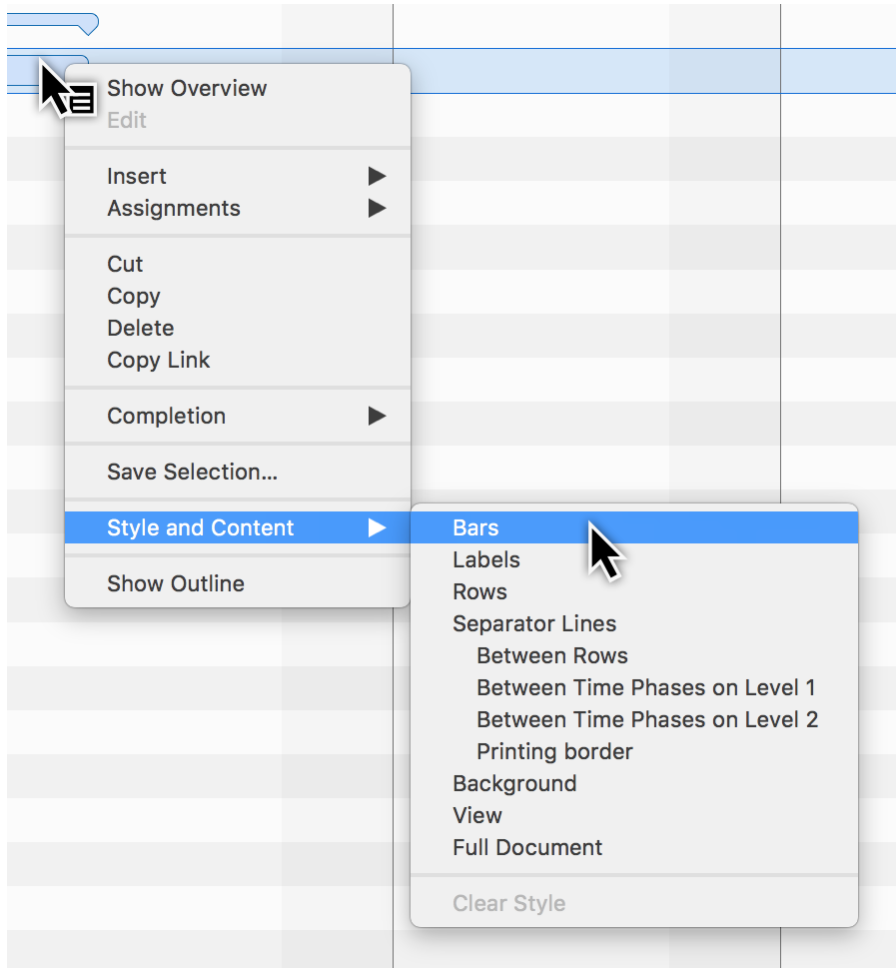


## Example 2: Custom bar colors

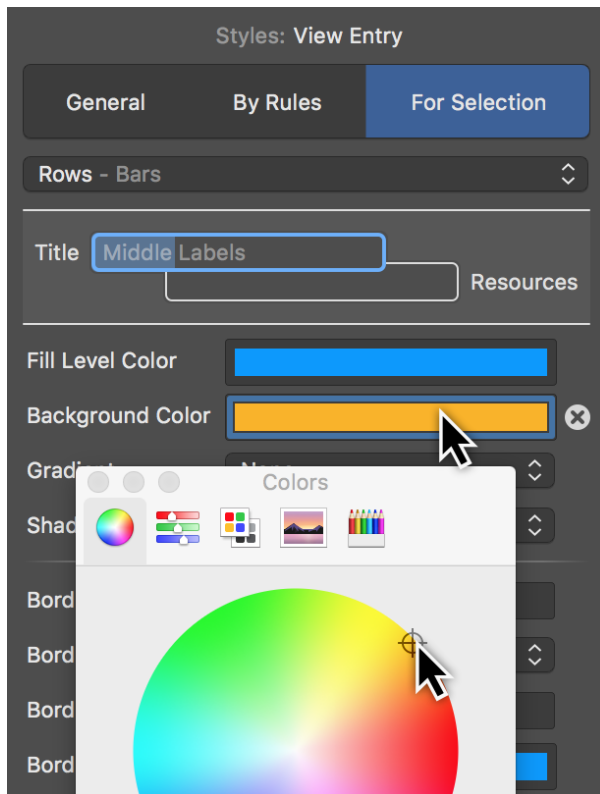
Open a new or existing project in Merlin Project Express.

To change the color of a bar, milestone or group, first right-click a bar, group or milestone.

From the **context menu**, select the option **Style and Content > Bars**.



The **For Selection** tab will open in the Inspector. There you will find options to modify the styles for the selected bars.



Click **Background Color**. In the **Color** window, choose the desired color. This will be adopted immediately for the selected bars. Repeat the process for the **Fill Level Color**.



The fill level color is displayed only once the activity has *progressed* in the rows.

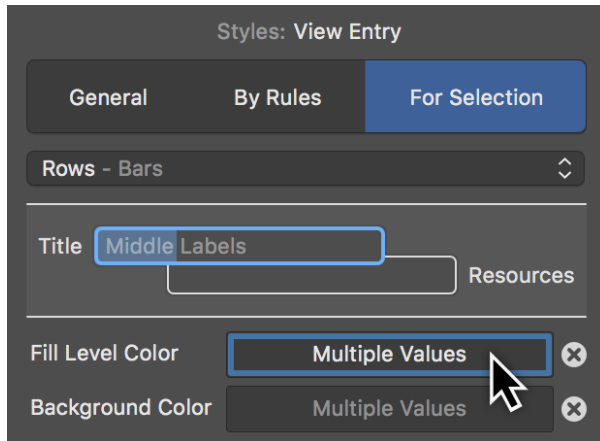




the parent level or condition for the option will be used instead.



The above steps also work with multiple selections. You can select several bars using the **Caps Lock key** or **cmd key** and use the Inspector.

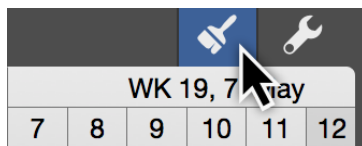


When making a multiple selection, if the bars have different values then **Multiple Values** will appear in the Info field. Click the field and adjust the color so that all selected bars are assigned the new color. This overwrites the old values.

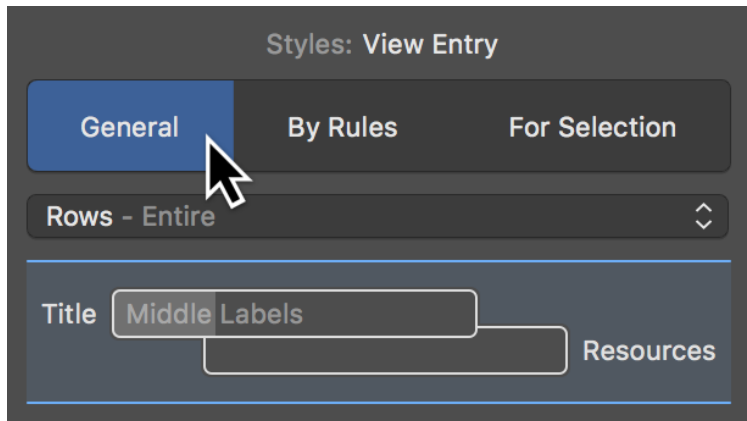
Otherwise, click the **cross icon** to revert from multiple values to the default values.

### Example 3: Activate labels in Gantt bars

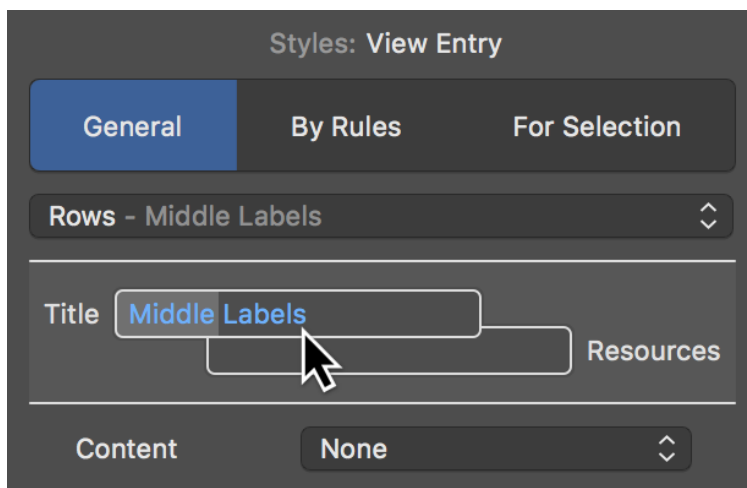
Click the **brush icon**. In the Inspector, select the appropriate tab.



Select the **General** tab so that the change applies to all content in the view.



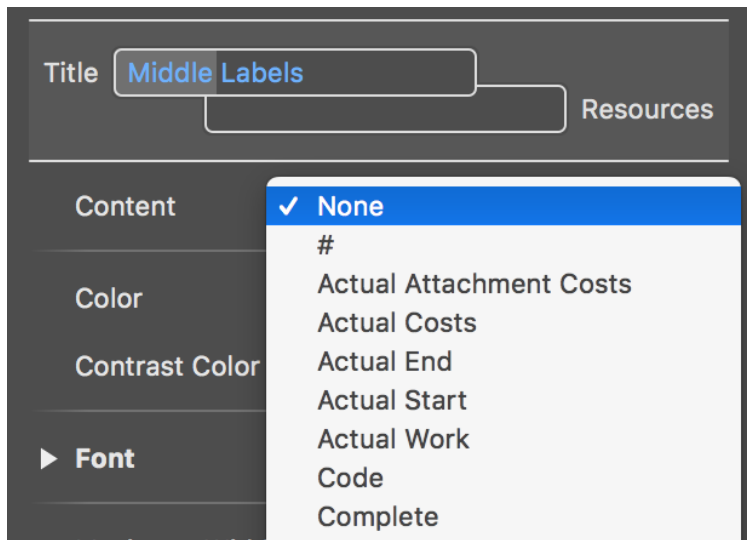
Click the desired label in the preview.



There are three labels to choose from:

- **Left Labels** (*title*)
- **Middle Labels** (*middle labels*)
- **Right Labels** (*resources*)

Click the **Content** drop-down menu and select the desired content for the active label.



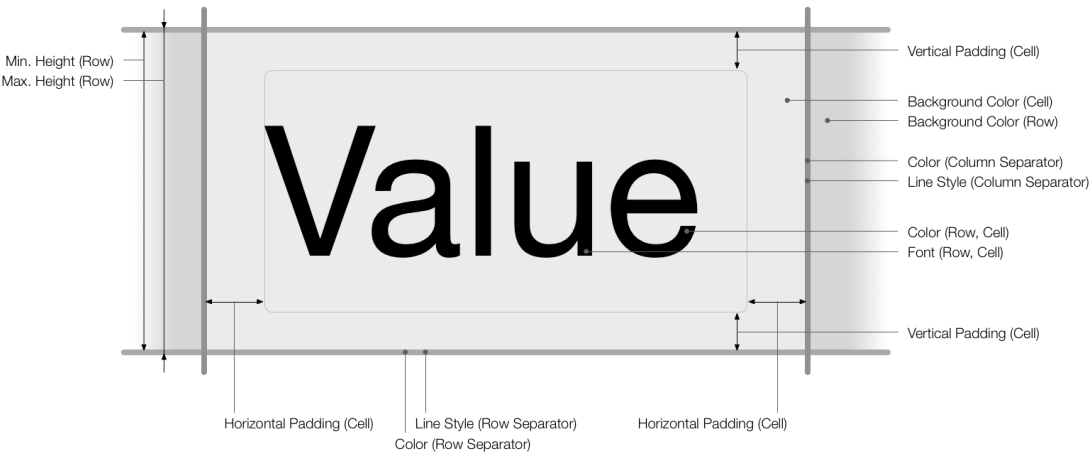
The ***Content*** drop-down menu contains all the information that can be used in labels.

# Style properties

## Outline style properties

All elements in the Outline include various options to change styles. These are summarized graphically in the following image.

**Style Properties in Outline Rows, Cells and Separators**

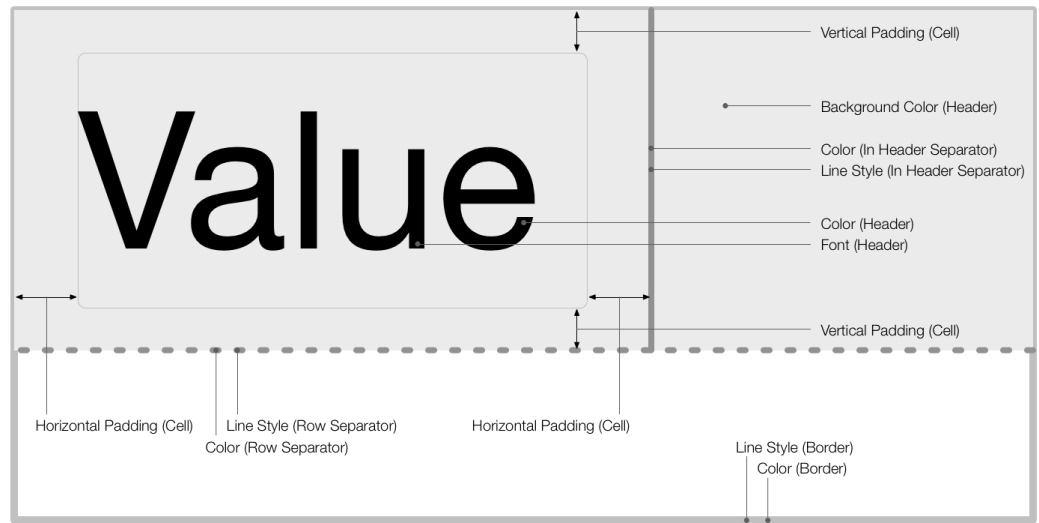


Right-click a title in the Outline. From the context menu, click the style options for *Rows*, *Cells*, and *Separator Lines* in the Outline.

Outline column style properties

Outline columns include various options to change column styles. These are summarized graphically in the following image.

Style Properties for Outline Header and Separators

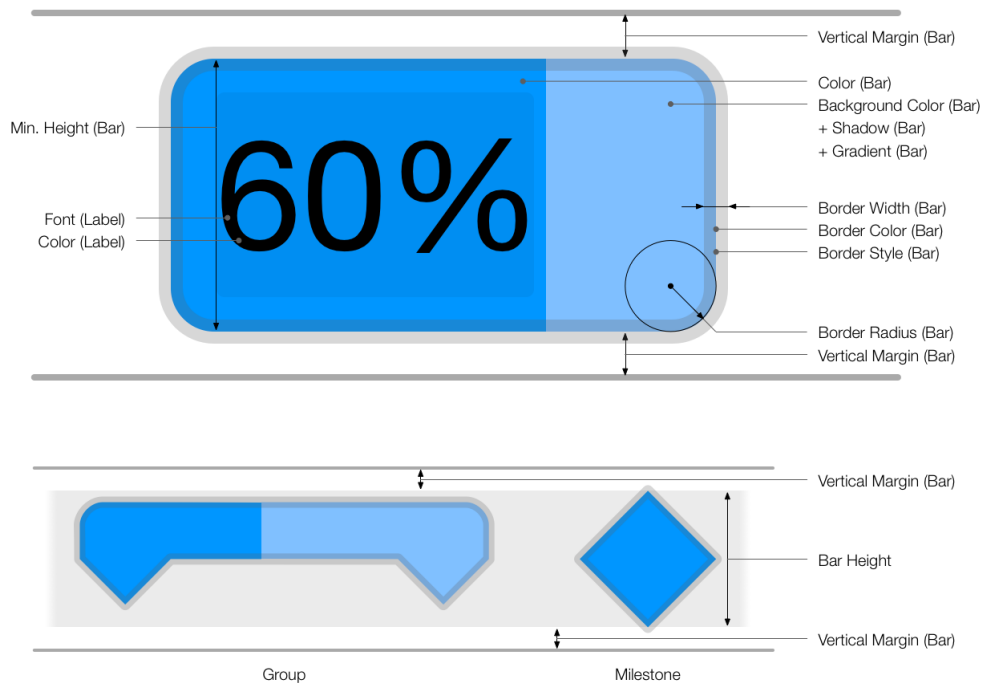


Right-click a column title above the Outline. From the context menu, click the style options for *Rows*, *Cells*, and *Separator Lines* in the Outline.

## Gantt chart bar style properties

Gantt chart bars include various options to change the bar styles. These are summarized graphically in the following image.

### *Style Properties in Gantt Row, Bars and Labels*

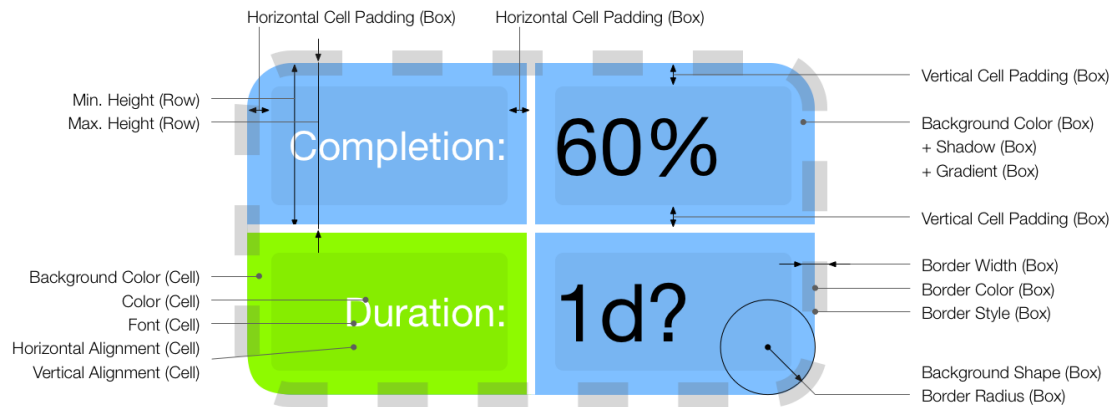


Right-click a bar, milestone or group. From the context menu click the style options for **Bars** in the Gantt chart.

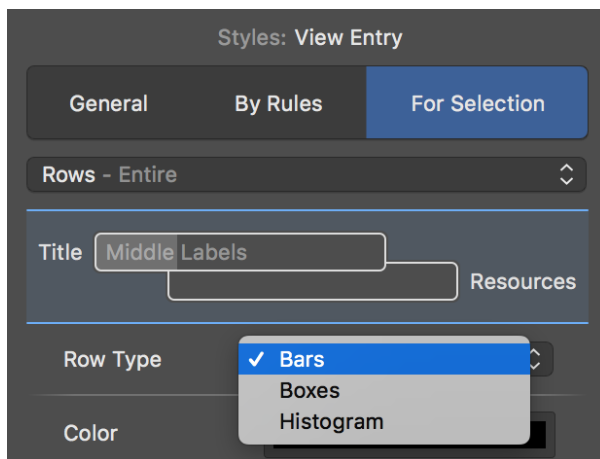
## Net Plan box and histogram style properties

Net Plan boxes and histograms include various options to change the bar styles. These are summarized graphically in the following image.

### Style Properties in Net Plan Box and Cells



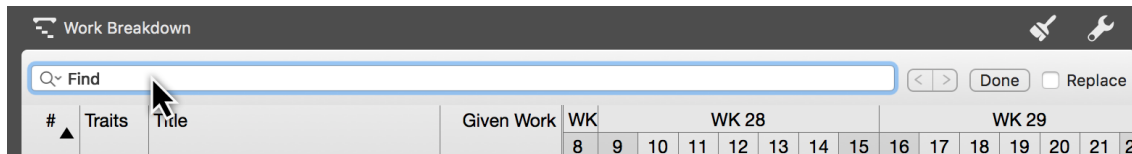
Right-click a **bar**, **milestone**, or **group**. Select **Style and Content > Bars** in the context menu. In the Inspector, in the **Row Type** drop-down menu select either **Boxes** or **Histogram** instead of **Rows**.



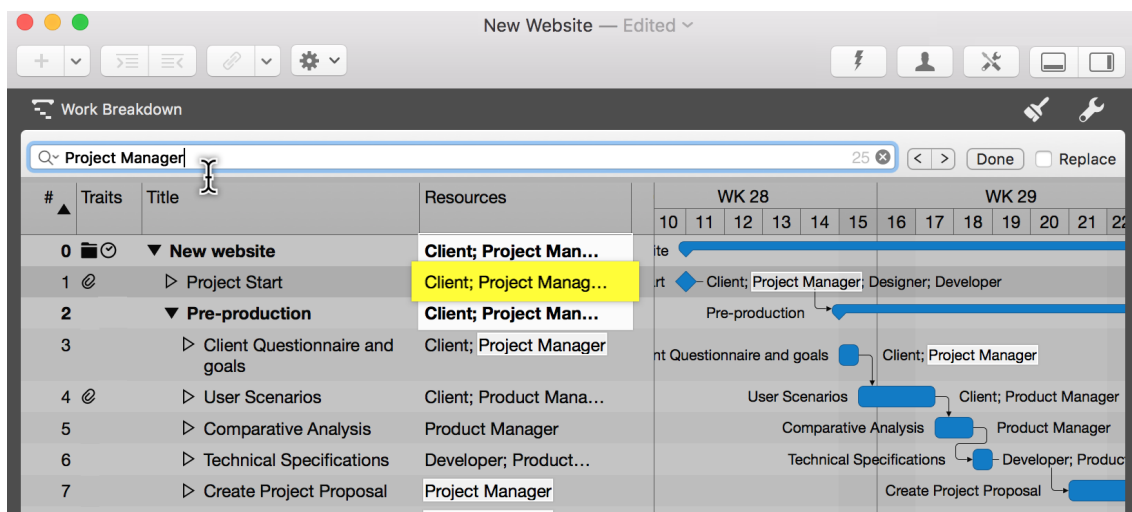
## Search and replace

Merlin Project Express offers you a built-in **Find** function to search for **content** within projects.

Use the keyboard shortcut **cmd + F** to open the **search box** at the top of the **active view**.



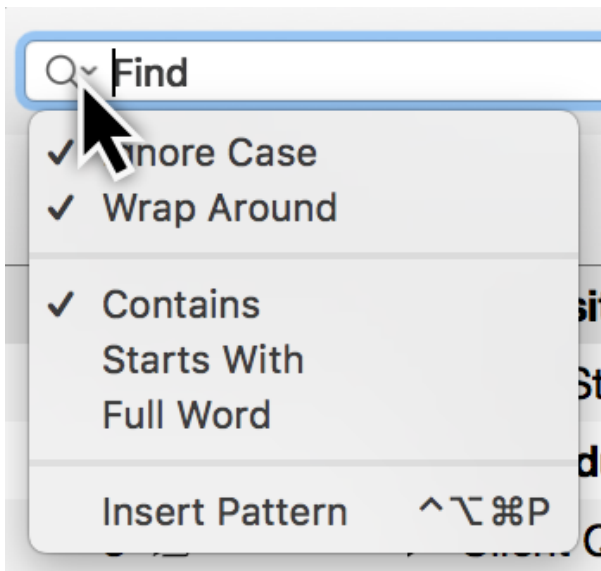
You will find all the **search options** together with the relevant **keyboard shortcuts** under the menu item **Edit → Find**.



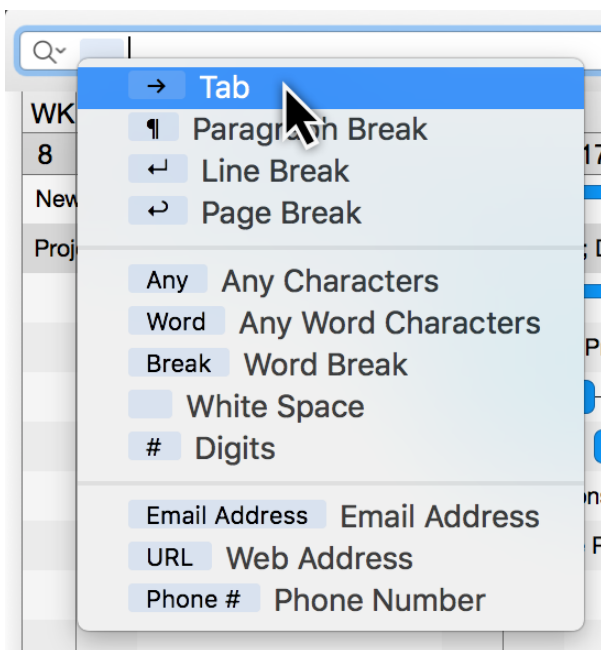
If you enter a **term** in the **search box**, all **hits** will be **highlighted** automatically in the view, making them easy to spot.

You will find the **magnifying glass icon** on the left in the **search box**. Click it and a **menu** will appear with the options shown.

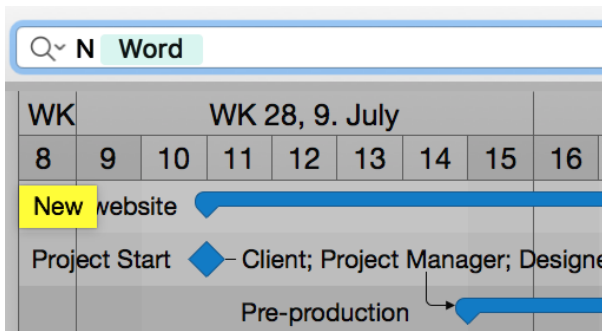




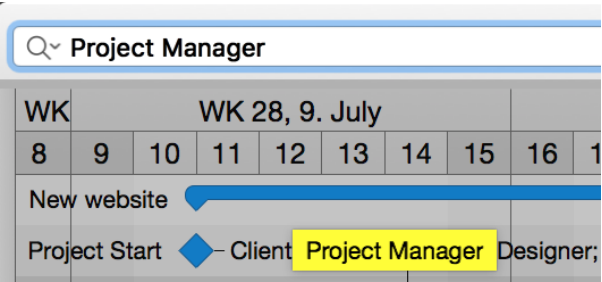
Click **Insert Pattern** and a further menu will open. There you will find a selection of **pre-defined patterns**. These **patterns** make it easier to **search**.



For example, if you select the option **Word**, individual **characters of a word** are marked automatically as **hits**.



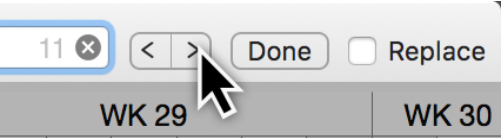
If you enter a **letter** before the **word**, e.g. an **N**, **all words** starting with **N** will be found in the project.



The right-hand corner of the search box **displays** the **number of search hits** and includes an **x** to delete the current **search**.

To the right of the **search box** are **buttons** for **navigating** the **search results**.

If there is more than one **search hit**, use the **arrows** to the left and right. This takes you to the **next** (→) or **previous** (←) search hit.

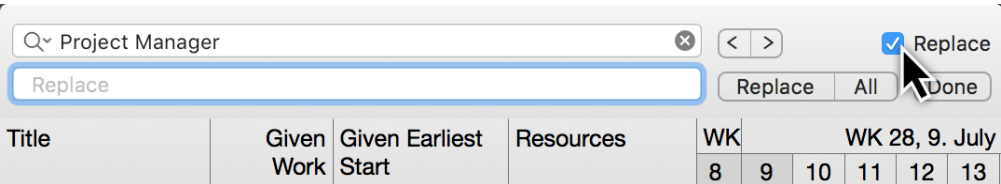


Click the **Done** button to exit the search and hide the **search box** again.

If you tick the checkbox next to the option **Replace**, another box appears. Now you can **find** and **replace** terms in the project.

## Replace

The **Replace** function is very easy to use. Enter the word(s) to **replace** in the **upper search box**. In the lower box, enter the word you want to replace the **hits** with.

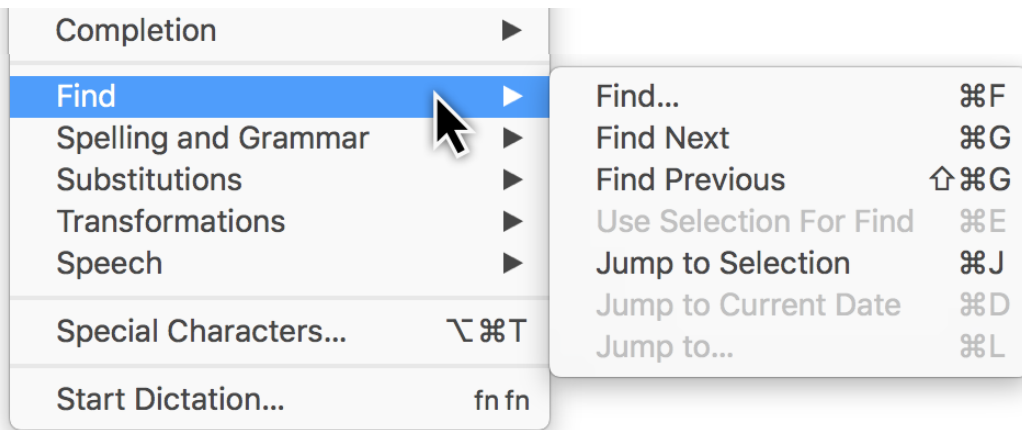


On the right next to the **Replace box** you will find three buttons:

- **Replace** (\_replaces search terms step by step)
- **All** (*replaces all search terms at once*)
- **Done** (*finishes replacing*)

## Find menu

In the menu item **Edit** → **Find** you will find all the search options described above as well as the following ones.



### Using a selection for searching

**Use Selection For Find** lets you additionally search through hits.

Use the **keyboard shortcut** **cmd + E** for the option.

### Jump to Selection

**Jump to Selection** lets you jump to a previously made selection, such as a selected activity or several items of selected content in the project.

Use the **keyboard shortcut** **cmd + J** for the option.

### Jump to Current Date

**Jump to Current Date** lets you find the current day in the project quickly.

Use the keyboard shortcut **cmd + D** keys for the option.

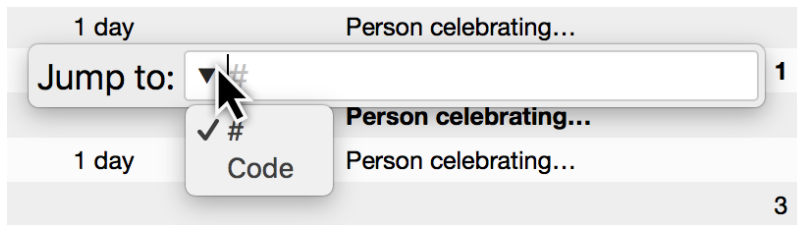
### Jump to...

**Jump to...** lets you jump quickly to individual project rows.



This feature is particularly useful for very large projects.

Use the keyboard shortcut **cmd + L** keys for the option.



The **Jump to** box will appear in the active **view**. Enter the desired **row number** into the box.

By clicking the **triangle** you set your preferred **numbering**:

- #
- Code
- WBS Code



If you also use custom **Code** or **WBS Code** in addition to the default **#** numbering, you should display the corresponding columns.

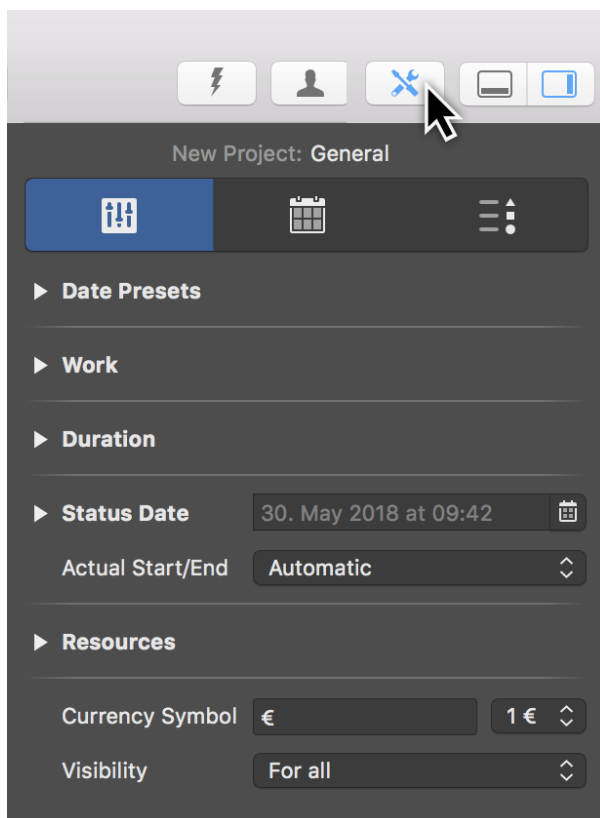
## Project settings

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:

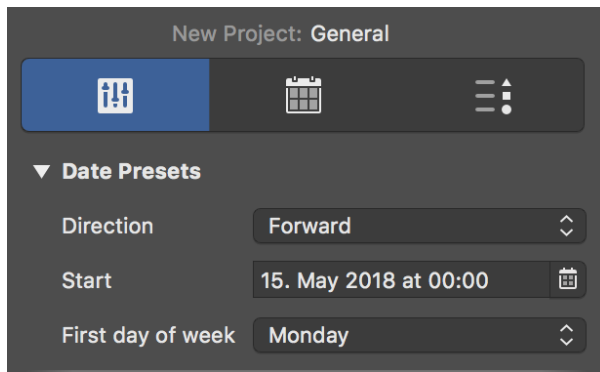
- **Date Presets**
- **Work**
- **Duration**
- **Status Date**
- **Resources**



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



New Project: General

▼ Date Presets

Direction Forward

Start 15. May 2018 at 00:00

First day of week Monday

**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:

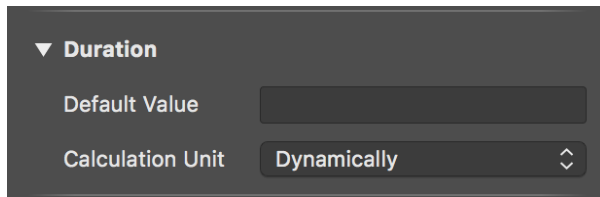
- **Hours per working day**
- **Hours per working week**
- **Days per working month**

## 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



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**.

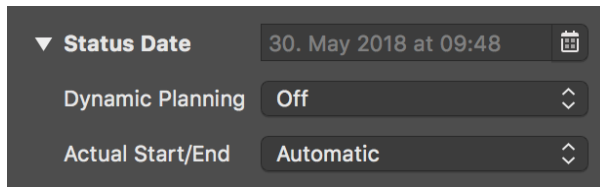
## Calculation unit


The **calculation unit** determines the unit for calculated fields. Per default it is set to **Dynamically**. This means that the units are calculated dynamically according to the [Work](#) project settings: **8 work hours** become **1 work day**, **40 work hours** become **1 work week**, **20 work days** become **1 work month**.


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




## Status Date



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

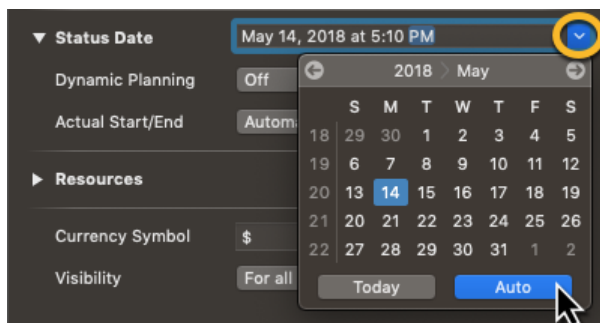
Dynamic Planning Off 


Actual Start/End Automatic 


The current progress in the project is compared against this date. The **status date** updates automatically by default and shows the macOS date and time.


If a **status date** is set, the progress of the project can be viewed relative to this specific date. This can be handy if you need to create a status report retrospectively, for example at the end of the month.

If you have set the status date and want it to update automatically by default, click the icon next to the date and then the **Auto** button.



▼ **Status Date** May 14, 2018 at 5:10 PM 

Dynamic Planning Off 

Actual Start/End Autom. 

► **Resources**

Currency Symbol \$

Visibility For all

2018 May

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

Today Auto

## Dynamic Planning

**Dynamic Planning** is disabled 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

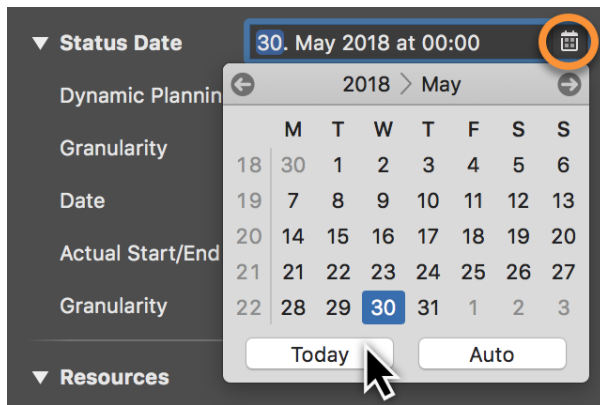
Granularity Week

Date 28/05/2018 at 00:00

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

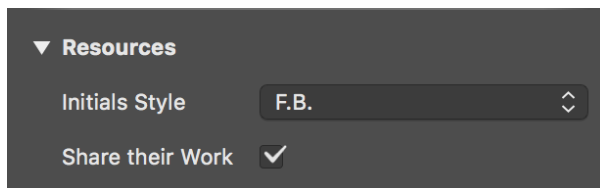
Granularity Day

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



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.

### Calendars

In the **Calendars** section you can manage the various calendars in your project. Here you can edit, create new, rename, delete calendars and define which calendar should be the default **Project Calendar**.

New Merlin Project Express documents come with following pre-defined calendars:

- **Standard** - 5 days by 8 hours spread out over the day time (8am-12pm and 1pm-5pm).
- **Night Shift** - 5 days by 8 hours, but spread out over the night hours (11pm-3am and 4am-8am).
- **24 hour** - 7 days by 24 hours



The **Project Calendar** with the enabled tick, is the calendar which Merlin Project Express will use when scheduling new activities. Resource calendars applying for new resources are automatically based on the **Project Calendar**.

New **Calendars** can be created by clicking the **+** icon.

To remove existing calendars, select the calendar you want to delete and click the **-** icon.

## Regular Week

In the **Regular Week** section you can manage the regular work intervals per week day. Just select the Calendar you want to manage, select the various week days and edit its regular **Work intervals** as desired.

New Project: Calendars

Calendar

Project Calendar

24 hours

☐

Night Shift

☐

Standard

☒

+

—

Regular Week

Exceptions

8h

Mon

8h

Tue

8h

Wed

8h

Thu

8h

Fri

Sat

Sun

Work intervals

8h in total

0

2

4

6

8

10

12

14

16

18

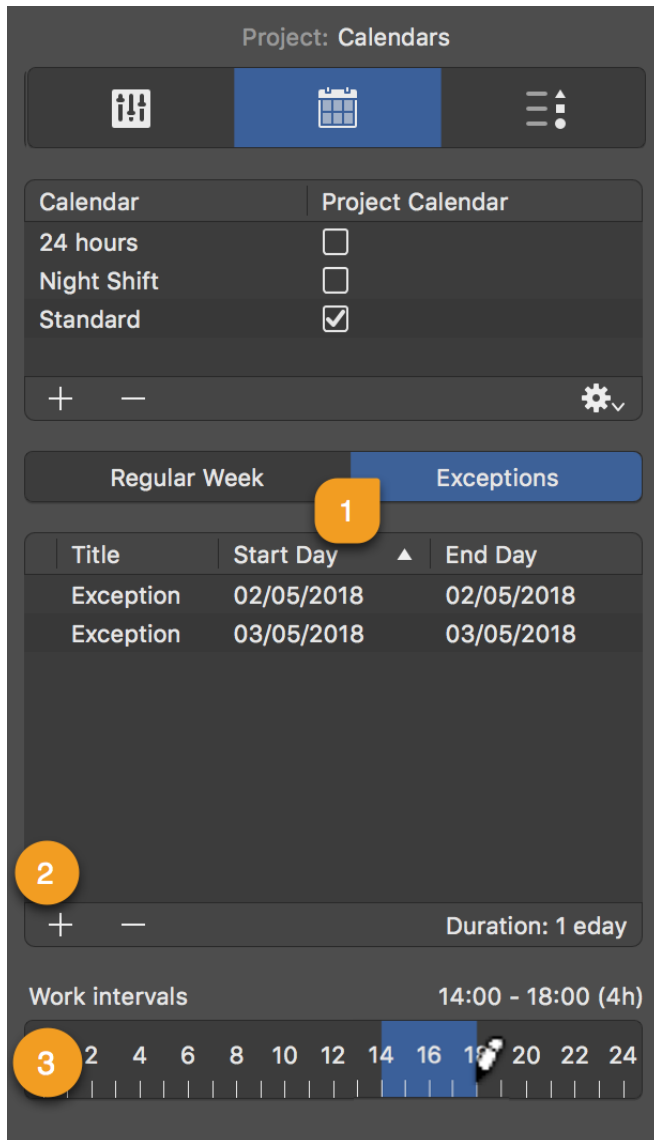
20

22

24

## Exceptions

By clicking **Exceptions** (1) you can set single days or time phases as exceptions for **free time** and **extra working time** in the active calendar.



New exceptions are created by clicking the **plus** (2) icon. Each exception can be customized with the following information:

- *Title*
- *Start Day*
- *End Day*

By default, new exceptions are defined as **non-working hours**.

These times are only active as **additional working times** (*outside regular working time*) when times are added in the **Work intervals** bar (3).

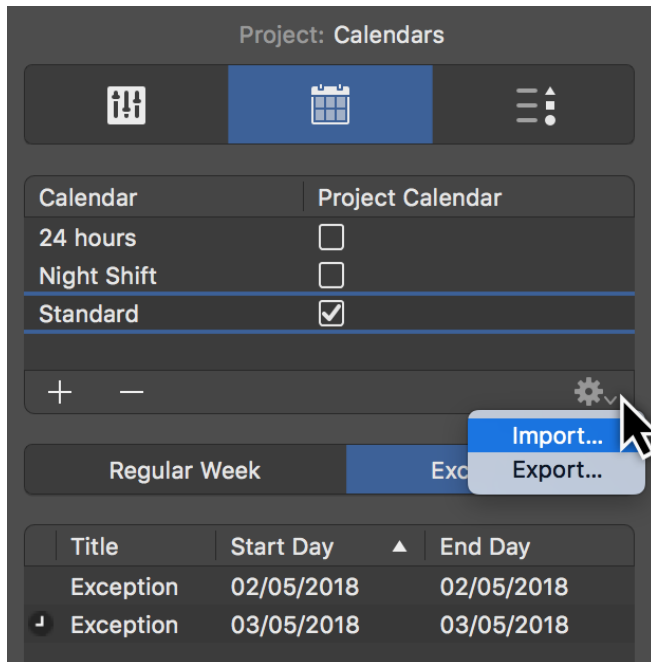


Exceptions with **Work intervals** show a **clock icon** in the list.

## Import / Export Calendars

Use **Export** option, to export a configured calendar from a project to be able to import in another Merlin Project Express document. The exported file will include the Calendar's **name**, [Regular Week](#) and [Exceptions](#).

Use **Import** option, to import a Merlin Project Express calendar you've previously exported, or to insert [Exceptions](#) in your existing project out of an **ics** calendar file.

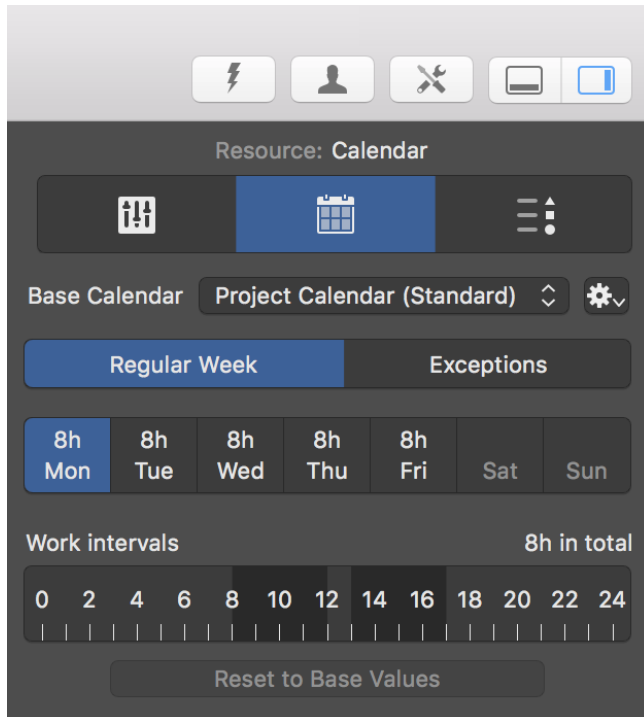


Importing an **ics** calendar file, imports all day events as [Exceptions](#) into the project.

## Working times for resources

You can configure the [Regular Week](#) and [Exceptions](#) of the working times for your [Resources](#) in the same way as for the project [Calendars](#).

Just select a Resource row in the [Resources](#) view, and click the **Calendar** tab in the Inspector.



Resource calendars are per default based on the project calendar.

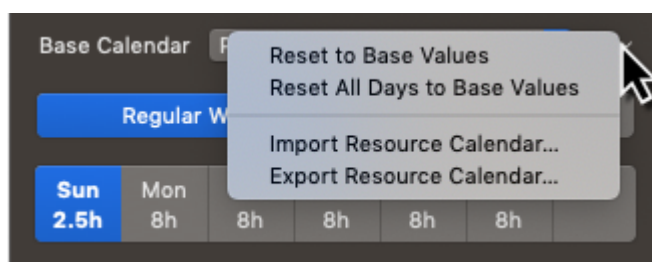
Use the **Base Calendar** drop-down menu to select another project calendar for the active resource if needed.

If you make changes to the resource calendar, these settings will take priority over the selected **Base Calendar**.

You can **Reset to Base Values** and remove changes from the resource calendar for the individual days.

## Additional options

The **Calendar** tab in the Resource Inspector offers some more options:

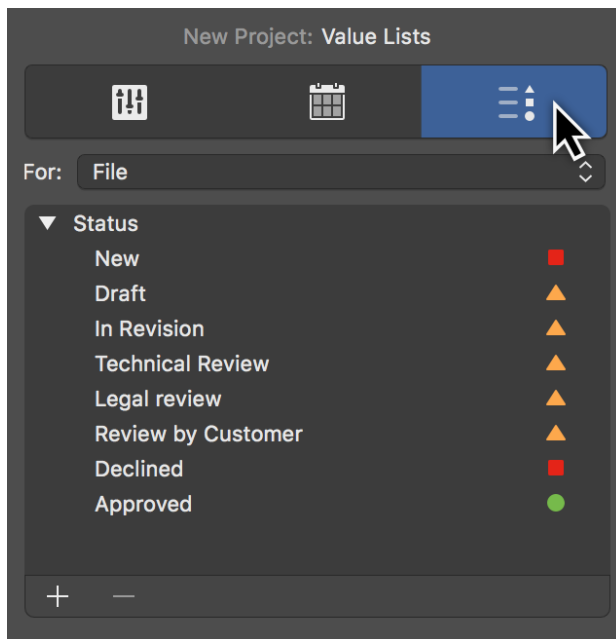




- **Reset to Base Values** - resets changes for individual days
- **Reset All Days to Base Values** - resets all changes for all days
- **Import Resource Calendar...** - imports Merlin Project Express calendars or **ics** calendar files as Exceptions.
- **Export Resource Calendar...** - exports Merlin Project Express calendars

## Value Lists

Here you can edit entries of **Value Lists** used in [attachments](#) or for [cost](#).



Lists are available for:

- **Cost** (Type, Status)
- **File** (Status)

To insert new items in a Value List:

- Select the relevant list from the **For** drop-down menu
- Click the section of the list where you would like to insert a new entry
- Click the **+** symbol to create a new entry.
- Edit the entry as desired.



You may drag the new entry upwards or downwards to change its order.

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

Click the **-** symbol, to delete values from the list.

Some value lists allow you to set an attention symbol. Simply select the desired symbols as needed.

For: Cost

► Type

▼ Status

Requested	○
Approved	
Invoice received	●
Invoice released	✓ ▲
Invoice paid	■

## Save

### File > Save...

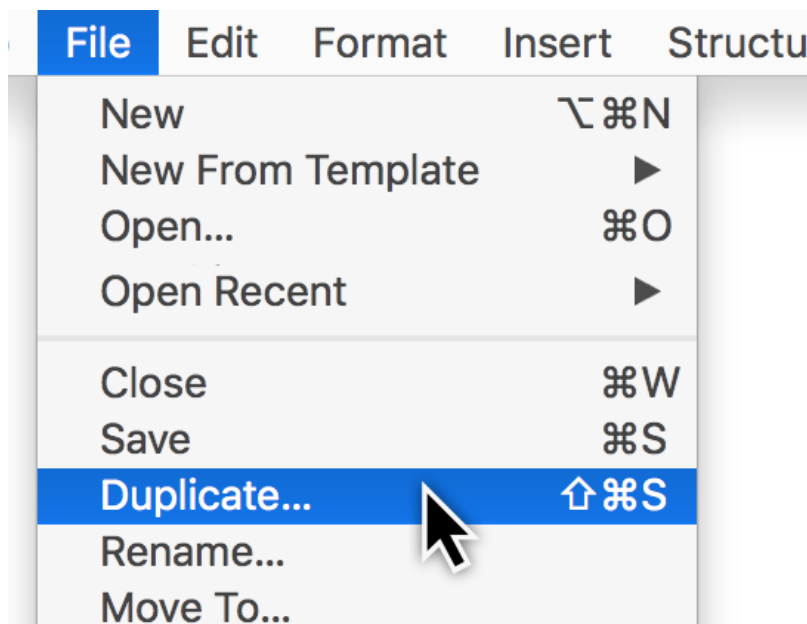
The first time you save a document, you name it and choose where to save it—on your desktop or in a folder, for example.

Thereafter, **Merlin Project Express** automatically saves your document as you work.

- Click anywhere in the document window to make it active
- Choose 'File > Save'
- Enter a name in the Save As field
- Choose where to save the document
- Click 'Save'

### File > Duplicate...

You can duplicate an opened document. The copy is saved to the same location as the original.

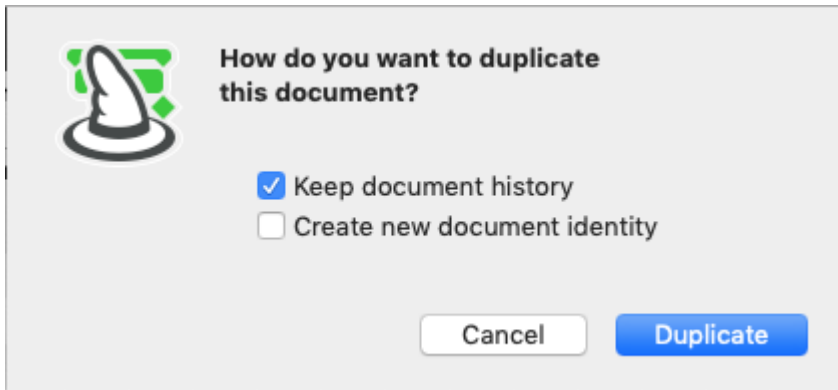


In Merlin Project Express you have two additional options:

- [Keep document history](#)
- [Create new document identity](#)

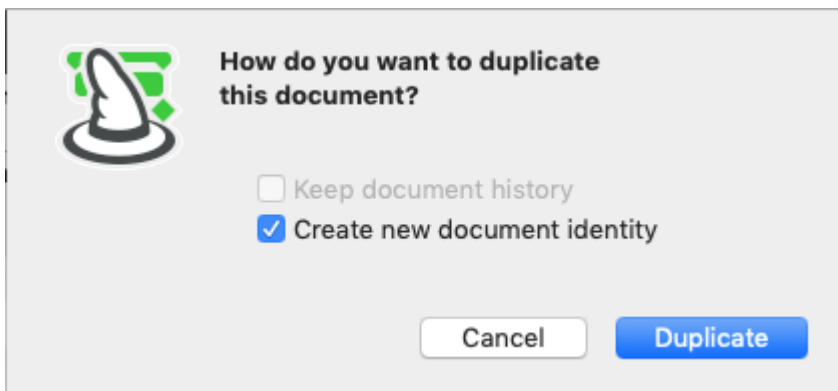
### Keep document history

Choose this option to create a duplicate with the same document history and be able to undo all your previous actions starting by document creation.



### [Create new document identity](#)

Choose this option to remove document history in the duplicate and work in this document by a new identity. This would allow you to combine for example the old file with the new duplicate within master projects.

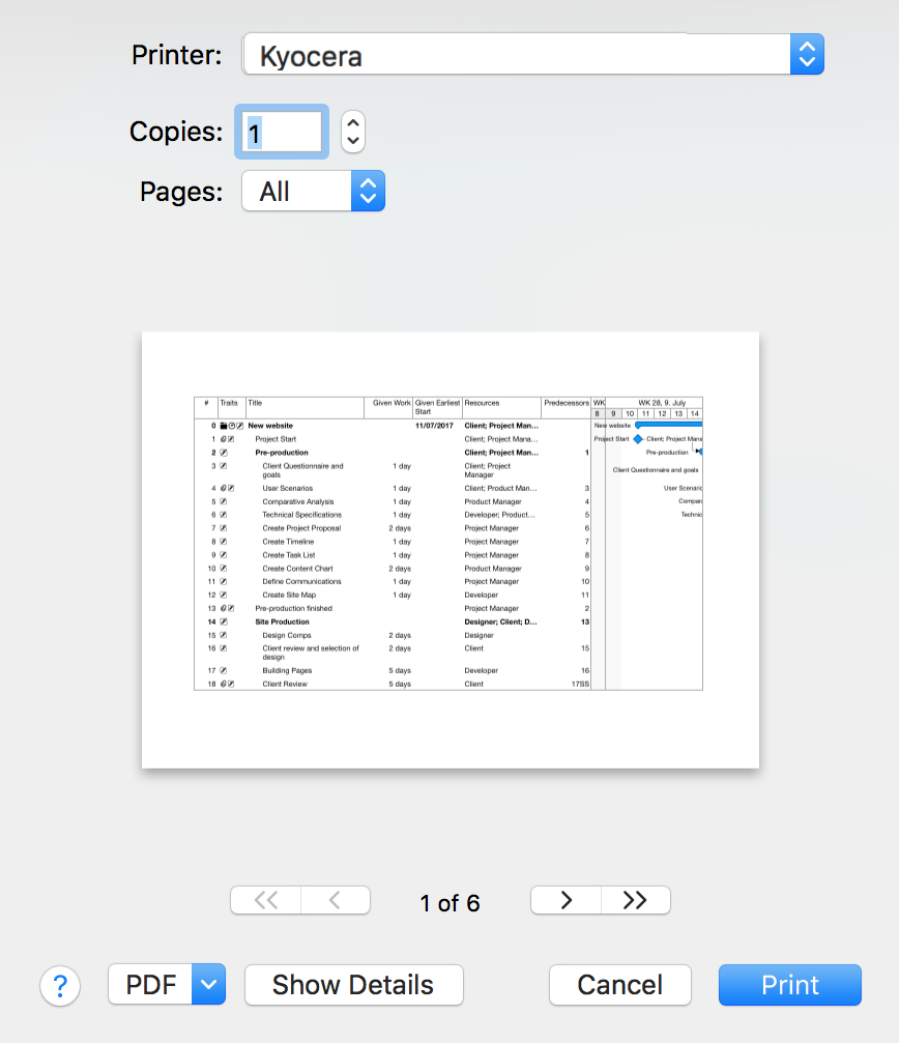


## Print

You can print from Merlin Project Express via the **File** → **Print** menu item. This uses the standard **print dialog** integrated into **macOS**. The **Page Setup** settings can be found there.

## Print project content

The **macOS** print window has two views: One with fewer details and one with **more details**.



Printer: **Kyocera**

Copies: **1**

Pages: **All**

#	Tasks	Title	Given Work	Given Earliest	Resources	Predecessors	WK	WK 28, 9. July					
			Start				8	9	10	11	12	13	14
0	■	New website		11/07/2017	Client, Project Man...								
1	■	Project Start			Client, Project Man...								
2	■	Pre-production			Client, Project Man...								
3	■	Client Questionnaire and goals	1 day		Client, Project Manager								
4	■	User Scenarios	1 day		Client, Product Man...								
5	■	Comparative Analysis	1 day		Product Manager								
6	■	Technical Specifications	1 day		Developer, Product...								
7	■	Create Project Proposal	2 days		Project Manager								
8	■	Create Timeline	1 day		Project Manager								
9	■	Create Task List	1 day		Project Manager								
10	■	Create Content Chart	2 days		Product Manager								
11	■	Define Communications	1 day		Project Manager								
12	■	Create Site Map	1 day		Developer								
13	■	Pre-production finished			Project Manager								
14	■	Site Production			Designer, Client, D...								
15	■	Design Comps	2 days		Designer								
16	■	Client review and selection of design	2 days		Client								
17	■	Building Pages	5 days		Developer								
18	■	Client Review	5 days		Client								

1 of 6

PDF Show Details Cancel Print

This **basic view** only offers a few options. Click the **Show Details** button. This opens the **advanced print view**. Here you will find the options described in the following.

#	Title	Client Work	Client Content	Resources	Predecessors	MS	MS	MS	MS
1	Project Start			Client Project Man...					
2	Preproduction			Client Project Man...					
3	Client Questionnaire and goals	1 day		Client Project Manager					
4	Client Scenarios	1 day		Client Project Man...					
5	Comparative Analysis	1 day		Product Manager					
6	Technical Specifications	1 day		Developer Product...					
7	Create Project Proposal	2 days		Project Manager					
8	Create Timeline	1 day		Project Manager					
9	Create Task List	1 day		Project Manager					
10	Create Content Chart	2 days		Product Manager					
11	Define Communications	1 day		Project Manager					
12	Create Site Map	1 day		Developer					
13	Preproduction Workshop			Project Manager					
14	Site Production			Designer Client D...					
15	Design Content	2 days		Designer					
16	Client review and selection of design	2 days		Client					
17	Building Pages	9 days		Developer					
18	Client Review	5 days		Client					

1 of 6

Printer: Kyocera

Presets: Default Settings

Copies: 1

Pages: All

Paper Size: A4 210 by 297 mm

Orientation:

Contents

Print area: As in project view

☐ Print background

☒ Print gradients

☐ Print shadows

☐ Repeat header columns on every page

☒ Smart column page break

☒ Smart row page break

? PDF Hide Details

Cancel Print



The **page setup** and **orientation** settings depend on the printer used.



## Content

The **Content** drop-down menu offers options for configuring the content to be printed.

For example, you can configure the **print area**:

- **As in project view**
- **Outline and Gantt chart**
- **Outline only**
- **Gantt chart only**

Paper Size: A4 210 by 297 mm

Orientation:  

**Content**

Print area: As in project view

☐ Print background

☒ Print gradients

☐ Print shadows

☐ Repeat header columns on every page

☒ Smart column page break

☒ Smart row page break

Cancel Print

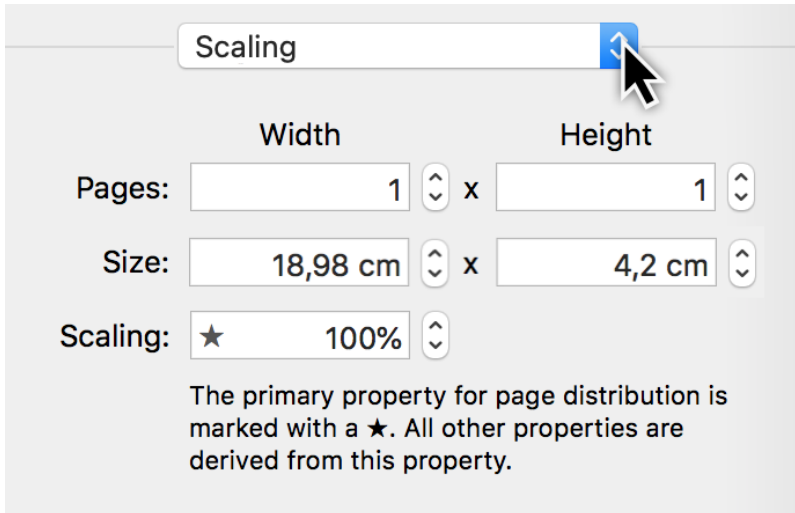
The other options control how the project is **printed graphically**:

- **Print background**
- **Print gradients**
- **Print shadow**
- **Repeat header columns on every page** (*useful for printing over several pages*)
- **Smart column page break** (*useful for printing over several pages*)
- **Smart row page break** (*useful for a printout over several pages*)



## Scaling

Under **Scaling** you set the **scaling** of the project to the configured **paper format**. If you want to output a **large** project on **A4** paper, it may come out looking very **small**.

A screenshot of a software dialog box titled "Scaling". The dialog has a light gray background. At the top, there's a tab labeled "Scaling" with a blue arrow icon pointing to it. Below the tab, there are two columns: "Width" and "Height". Under "Width", there are three rows: "Pages:" with a value of "1", "Size:" with a value of "18,98 cm", and "Scaling:" with a star icon and a value of "100%". Under "Height", there are three rows: "Pages:" with a value of "1", "Size:" with a value of "4,2 cm", and "Scaling:" with a star icon and a value of "100%". Each input field has a small up/down arrow icon. A mouse cursor is pointing at the "Scaling:" field under "Width". Below the input fields, there is a text block: "The primary property for page distribution is marked with a ★. All other properties are derived from this property."

Scaling

	Width		Height
Pages:	1	x	1
Size:	18,98 cm	x	4,2 cm
Scaling:	★ 100%		

The primary property for page distribution is marked with a ★. All other properties are derived from this property.

The **number** of pages, based on the **width** or **height** of the selected paper format, determines the size of the output.



If you set the width to one **page**, the project will be scaled to fit the width of the sheet. See the following section.

## Printing the project on a single sheet

Click the paper **orientation** option to select whether you want your project content printed in **portrait** or **landscape** format.

Then select **Scaling** from the drop-down menu. If, for instance, you have selected **landscape**, set the **width** to one page.

This resizes the **entire project** to fit the full **width** of **one sheet**.

Printer: Kyocera

Presets: Default Settings

Copies: 1

Pages: ☒ All  
☐ From: 1 to: 1

Paper Size: A4 210 by 297 mm

Orientation:

Scaling

Width: Pages: ★ 1 x Height: 1

Size: 24,04 cm x 7,62 cm

Scaling: 35%

The primary property for page distribution is marked with a ★. All other properties are derived from this property.

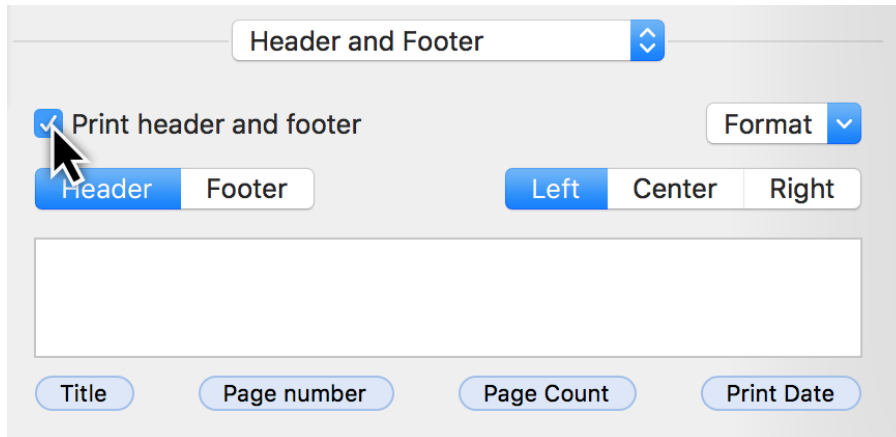
? PDF Hide Details Cancel Print



This setting is marked with a **star**. All other values are derived from this setting.

## Header and Footer

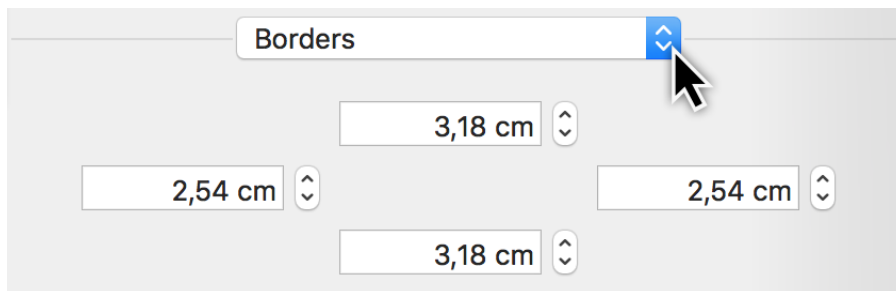
The options for the **header and footer** offer a variety of settings. You will find **pre-defined entries** arranged at the bottom. The **Format** drop-down menu contains **text formatting** options.



Select the information you want to appear in the **header and footer**, and select the **alignment** in the row (*left, center, or right*). Following that, you can drag & drop the **entries** in the field to move them around. You can also enter your own text to expand on the entries.

## Borders

The **Borders** option can be used for **headers and footers** as well as a **watermark**.



Enlarge the **borders** if the **header and footer** as well as the **watermark** are covered when printing out project content.

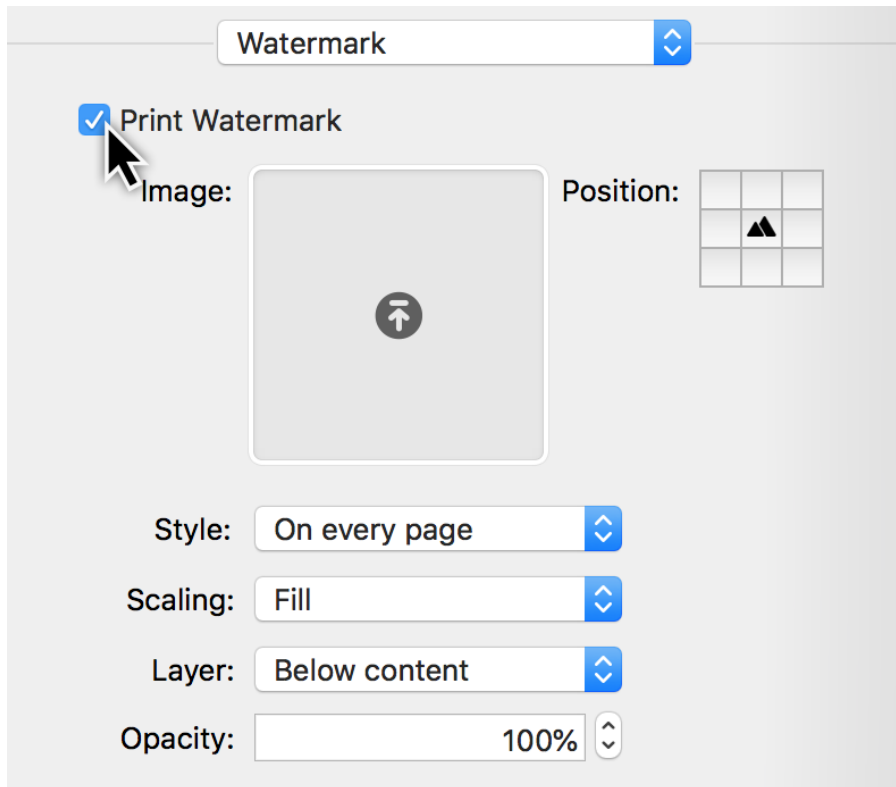


The **distance** from the **paper margin** varies depending on the printer model.

## Watermark

The **Watermark** option lets you include a graphic in the printout. This allows you to include custom **company logos** in the printout.

The various options control the **position**, **size**, and **opacity** of the image in the printout.

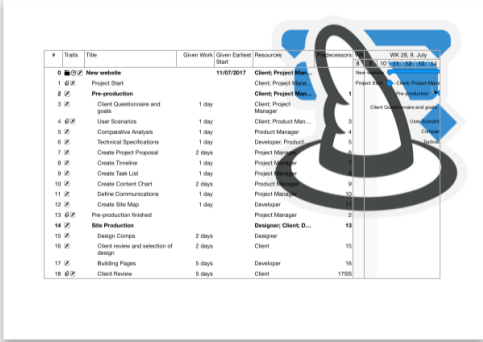


The screenshot shows a 'Watermark' settings window. At the top is a title bar with the word 'Watermark' and a close button. Below the title bar is a checkbox labeled 'Print Watermark' which is checked. To the right of the checkbox is a mouse cursor icon. Below the checkbox is a large square area labeled 'Image:' containing a circular icon with an upward arrow. To the right of the 'Image:' area is a 'Position:' section with a 3x3 grid. The center cell of the grid contains a small black triangle pointing upwards. Below the 'Image:' and 'Position:' sections are four settings: 'Style:' with a dropdown menu set to 'On every page', 'Scaling:' with a dropdown menu set to 'Fill', 'Layer:' with a dropdown menu set to 'Below content', and 'Opacity:' with a slider set to 100%.

First tick the checkbox next to **print watermark**.

Then move a **graphic file**, which you want to use as a **logo** for the **watermark**, into the **image** field.

Next, set the **position**, **style**, **scaling**, **layer**, and **opacity** of the **watermark**.





**Presets:** Default Settings

**Copies:** 1



**Pages:** All  
☐ From: 1 to: 1

**Paper Size:** A4 210 by 297 mm

**Orientation:**  

**Watermark**

☒ **Print Watermark**

**Image:**  **Position:** 

**Style:** On every page

**Scaling:** Manual 75%

**Layer:** Below content

**Opacity:** 70%

<< < 1 of 6 > >>

Set the **scaling** to **manual**, so that the **size** of the image can be changed in percentage terms.

In the **mini preview** you can see the result of the changes in real time.



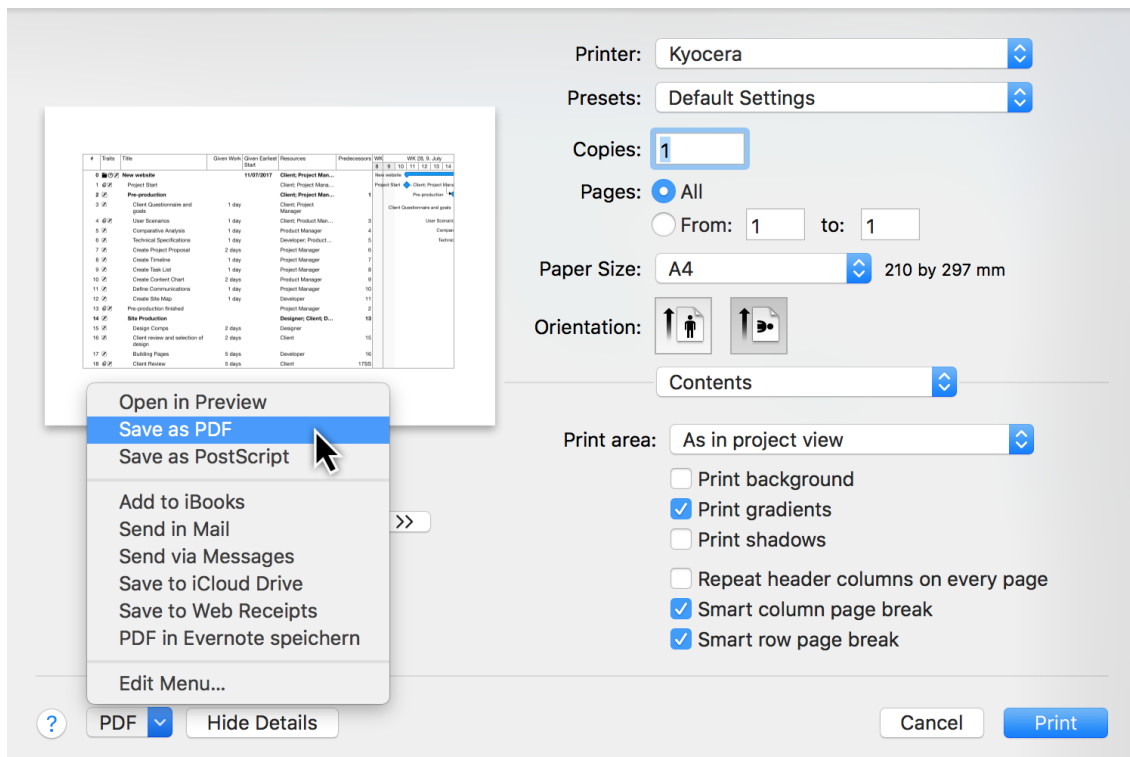
Any **graphic format** supported by **macOS** and **Preview** can be used for the **watermark** (**JPEG**, **GIF**, **TIFF**, **PNG** and others).

## PDF

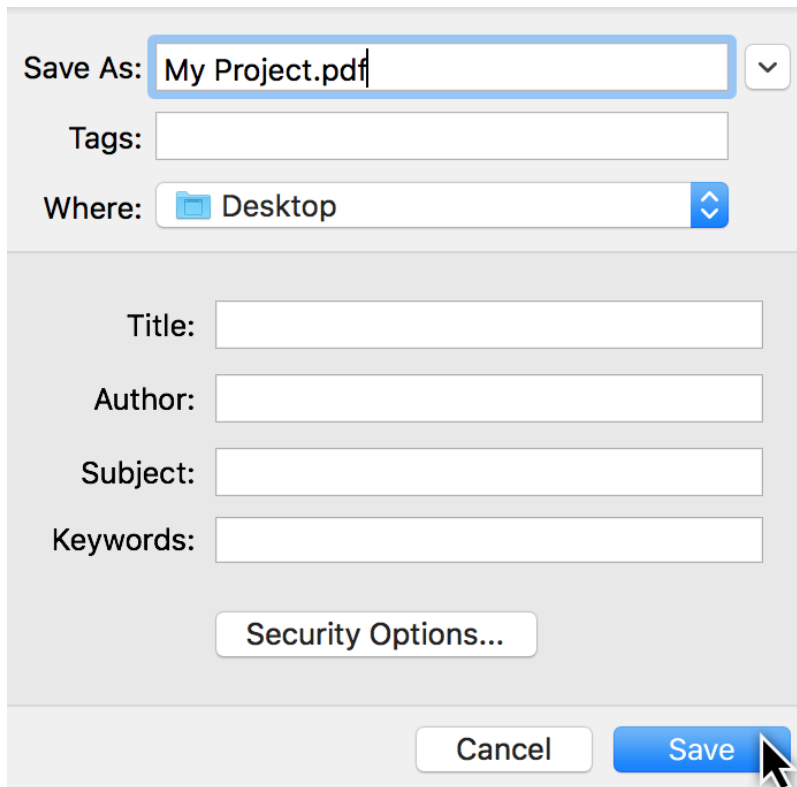
### Printing PDFs

You can create **PDF files** quickly and easily via the **print window**.

Click the **Show Details** button. This opens the **advanced print view**. Configure the **print options** as necessary. Following that, click the **PDF** button on the bottom left.



Click **Save as PDF**. The **macOS Save dialog** will open. Name the **PDF** file.



In addition, **further options** for creating the **PDF** file can be found here:

- **Tags** (*tags used in macOS Finder*)
- **Title** (*document title*)
- **Author** (*author and copyright holder of the document*)
- **Subject**
- **Keywords**



These are **optional settings** that can be used if **required**.

### PDF security options

The **Security Options...** button gives you the option to **password protect** the **PDF file** and its **contents**.

PDF Security Options

☒ Require password to open document

Password:

Verify:

☐ Require password to copy text, images and other content

☐ Require password to print document

Password:

Verify:

Cancel OK



## Export

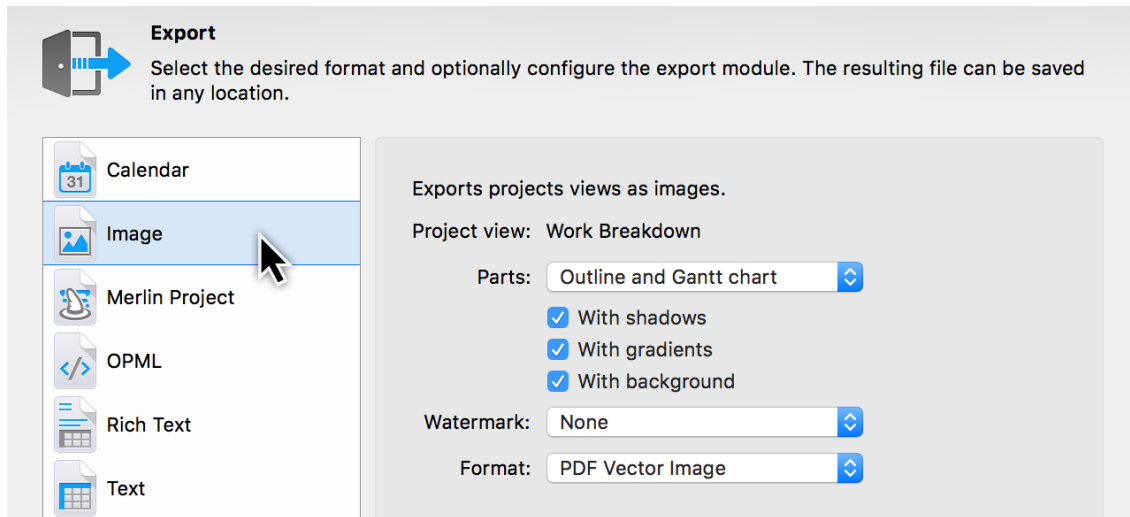
Merlin Project Express can export in various file formats:

- Text (recommended for exchange with EXCEL sheets)
- Calendar (ics files)
- Image ([PDF](#), PNG, JPG, JPEG 2000, TIFF, BMP, GIF, all with watermarks and other settings)
- OPML
- Merlin Project XML

To export, just select the menu item **File** → **Export** and the desired **Format**.

## PDF

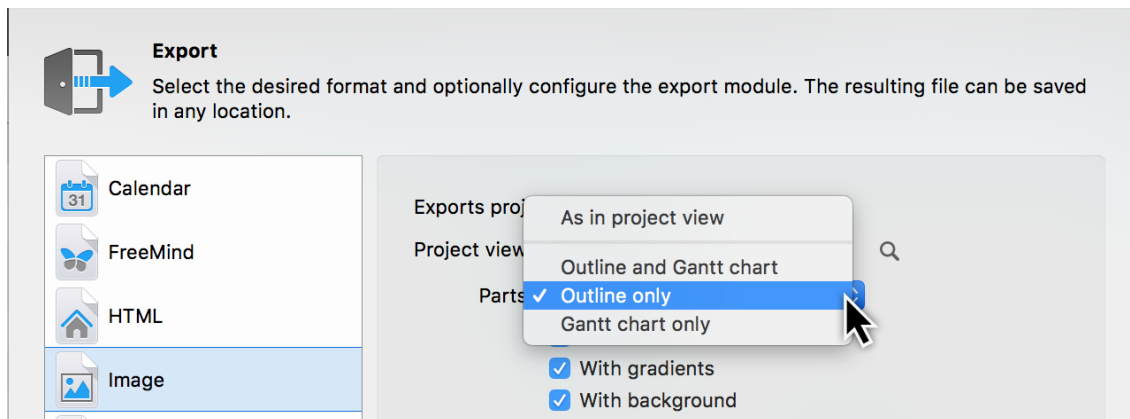
To **export** a **single-sided PDF**, select the menu item **File** → **Export** and click the **Image** format.



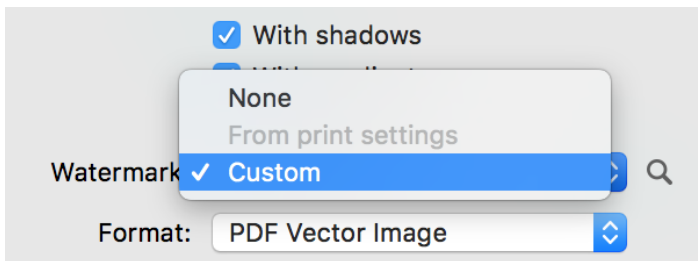
On the right-hand side you will see the **settings for exporting** the image.

- **Parts** (*outline and Gantt chart or only one of the two ranges*)
- **Watermark**
- **Format** (*image format in our case **PDF vector graphic***)

Specify which **parts** you want to export as a **single-sided PDF**.



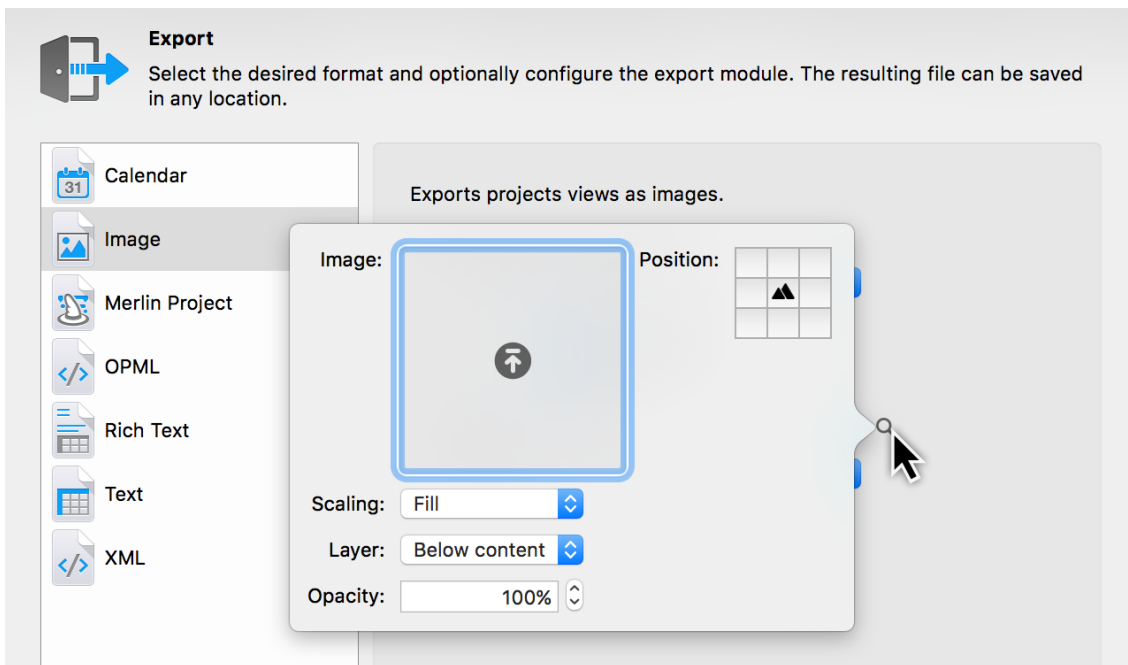
Further **settings** for **modifying** the **PDF output** can be found here.



For instance, select the **Watermark** option to add a **custom image** to the PDF.



If a **watermark** is already used in the **print settings** of the project, it can be used directly.

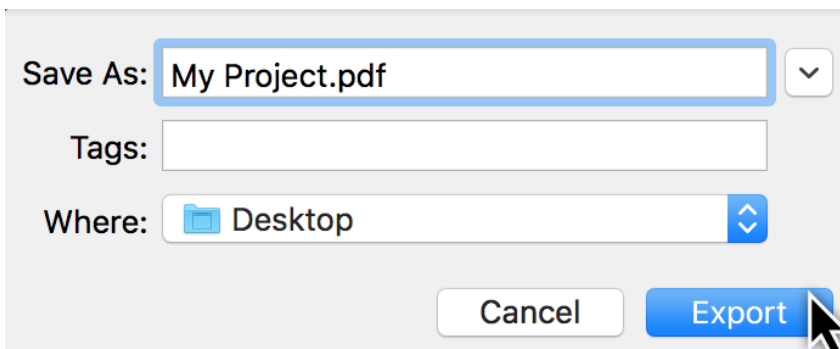


Click the **magnifying glass** and the settings for the **watermark** will appear.



Read more about [Watermark](#) in the [Print](#) area.

Then click **Next**. In the dialog box, enter a **filename** for the **PDF** and select the desired storage **location**. Finally, click **Export**.



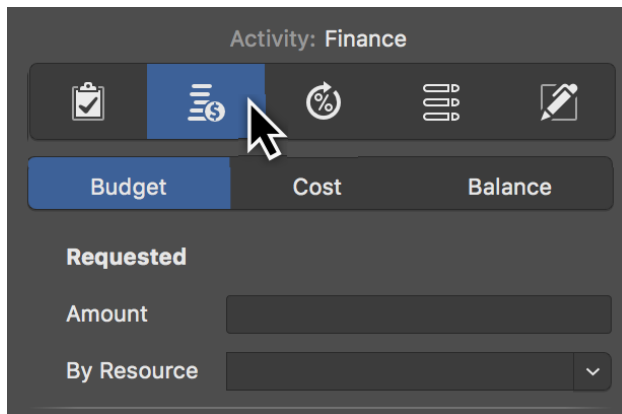


A single-sided PDF is suitable for forwarding the project to users with a large format printer.

## Finance

**Merlin Project Express** offers you **finance** options for your project. Every **activity**, **milestone**, **activity group** or **assignment** can be assigned a **budget** and **base costs**.

The easiest way to do this is to use the **Finance** tab in the Inspector.



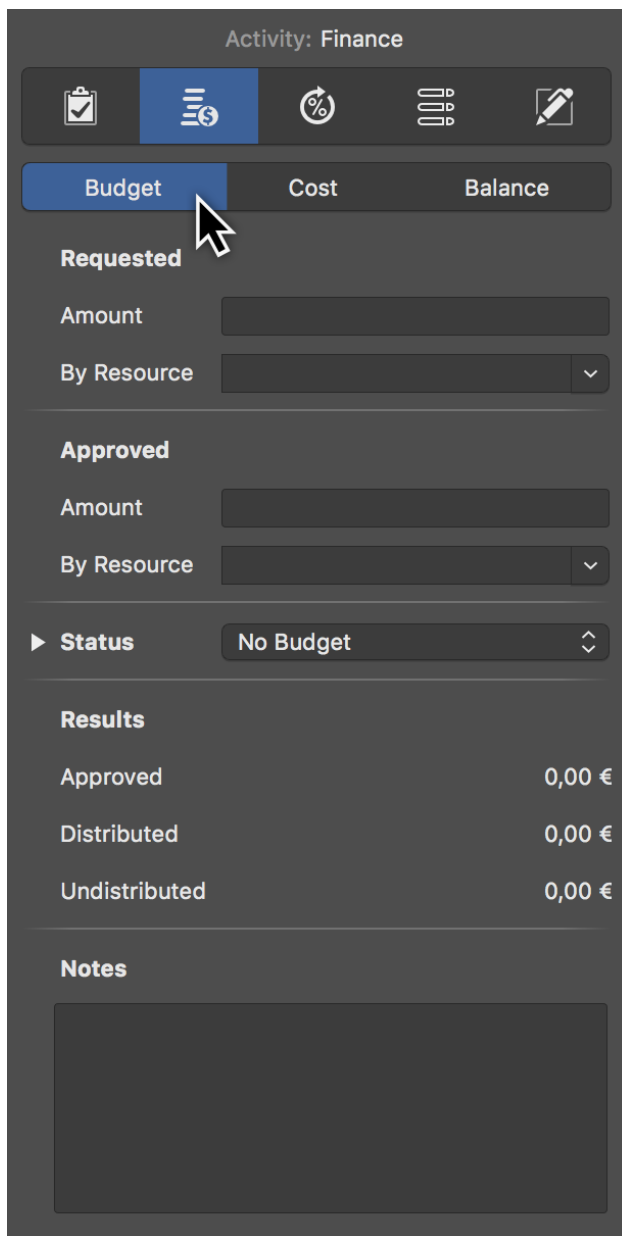
There you will find three more tabs:

- Budget
- Cost
- Balance

## Budget

**Budget** means *money that is available* for the project.

Select an **activity**, **milestone**, or **assignment** and then click the **Finance** → **Budget** tab in the inspector. Here you can enter all budget information in the fields provided.



The screenshot shows the 'Activity: Finance' inspector with the 'Budget' tab selected. The interface includes a top bar with icons for various functions. Below the top bar are three tabs: 'Budget', 'Cost', and 'Balance'. The 'Budget' tab is active, showing fields for 'Requested' and 'Approved' amounts and resources. A mouse cursor is pointing at the 'Requested' section. Below these fields is a 'Status' dropdown menu set to 'No Budget'. At the bottom, there is a 'Results' section with three rows: 'Approved', 'Distributed', and 'Undistributed', each showing a value of '0,00 €'. A 'Notes' section is at the very bottom, containing a large text area.

Requested	
Amount	
By Resource	

Approved	
Amount	
By Resource	

► Status: No Budget

Results	
Approved	0,00 €
Distributed	0,00 €
Undistributed	0,00 €

Notes



If you do not have a budget and would like to record base **costs** in your project, use the tab **Finance** → **Cost**.

## Cost

In the tab **Finance > Cost** you can enter base costs for the selection.



**Base Costs** are **fixed costs** that arise during **planning** and **execution** of the project and add up to existing [work costs](#) or [attachment cost](#).

If you have several **cost items**, first click the triangle next to Base Costs and create new entries one after the other by clicking the **+** icon. Merlin Project Express will then add up the individual cost items automatically. The **Base Costs** field lists the **total** of all cost items.

You can select one of the possible accruals:

- [Accrue immediately](#)
- [Accrue at start](#)
- [Accrue prorated](#)
- [Accrue at end](#)

### [Accrue immediately](#)

Basic costs with **Accrue immediately** appear immediately and in total in the Actual Base

Costs.

#### *Accrue at start*

Basic costs with **Accrue at start** appear in total in the Actual Base Costs but only from the moment on when there is actual progress.

#### *Accrue prorated*

Base costs with **Accrue prorated** appear pro rata to the actual progress in the Actual Base Costs.

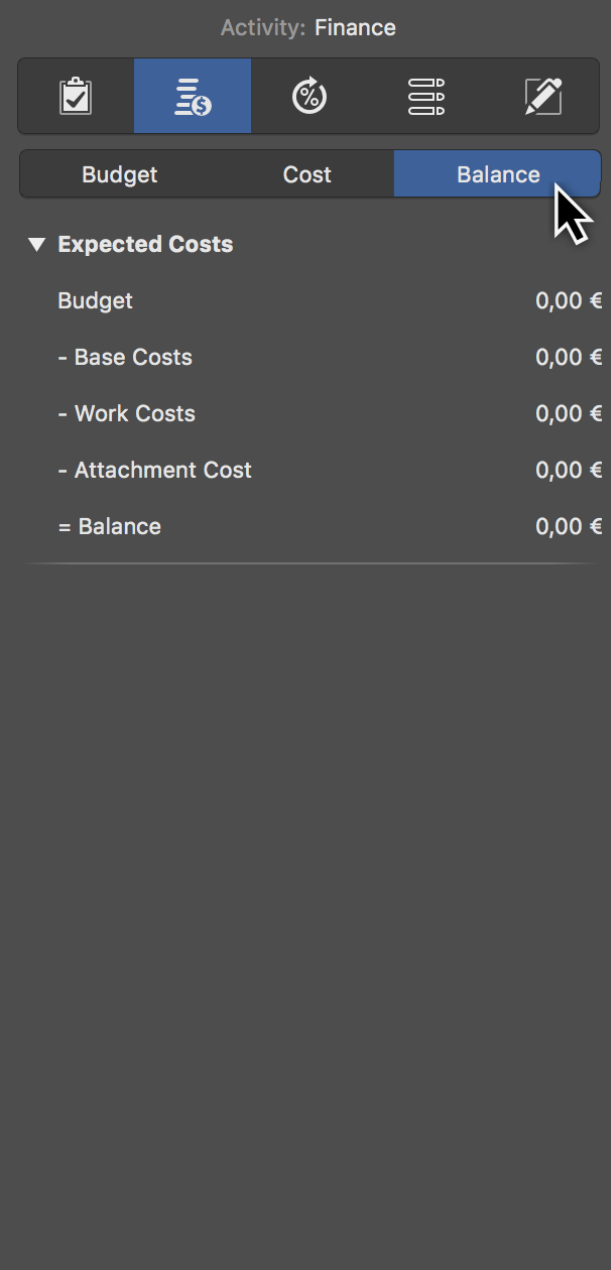
#### *Accrue at end*

Base costs with **Accrue at end** appear in total in the Actual Base Costs but only from the moment there is a 100% completion.



## Balance

Under the **Finance** → **Balance** tab you will find an **overview** of **expected costs** listed by **Base Costs**, **Work Costs**, and **Attachment Costs**.



Activity: Finance

Budget Cost **Balance**

▼ Expected Costs

Budget	0,00 €
- Base Costs	0,00 €
- Work Costs	0,00 €
- Attachment Cost	0,00 €
= Balance	0,00 €



Select the project in row #0 and go to **Finance** → **Balance** in the Inspector. You will see the total Expected Costs of your project.

## Work costs

**Work costs** are costs generated by work from resources allocated to the activity.

A resource can have following cost information:

- Standard Rate
- Overtime Rate
- Base Costs



Enter cost information for your resources in a Resources or Assignments view in the **Cost** inspector.

## Attachment cost

**Attachment cost** are costs due to base costs on attachments.

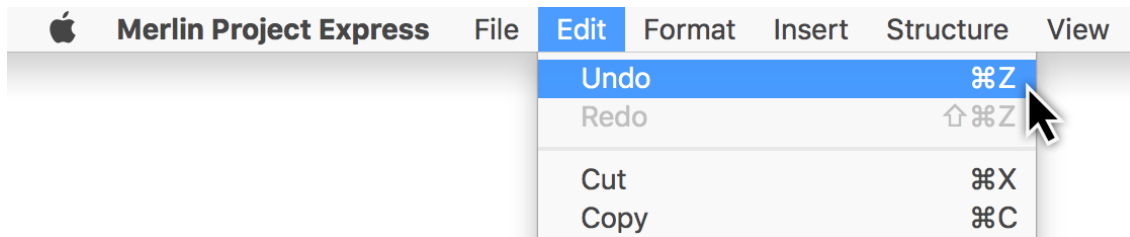


Enter the basic costs of your attachments in an Attachments view in the **Cost** inspector.

## Mouse and keyboard

Both the mouse and keyboard are useful when using Merlin Project Express.

Many commands can be accessed directly and quickly with **keyboard shortcuts**; other tasks are accomplished easily using the **mouse**.



The **keyboard shortcuts** are displayed next to the commands in the menus.

## Mouse

The **mouse** is a device used to control the **mouse pointer**. For laptops, this can be the **trackpad**.

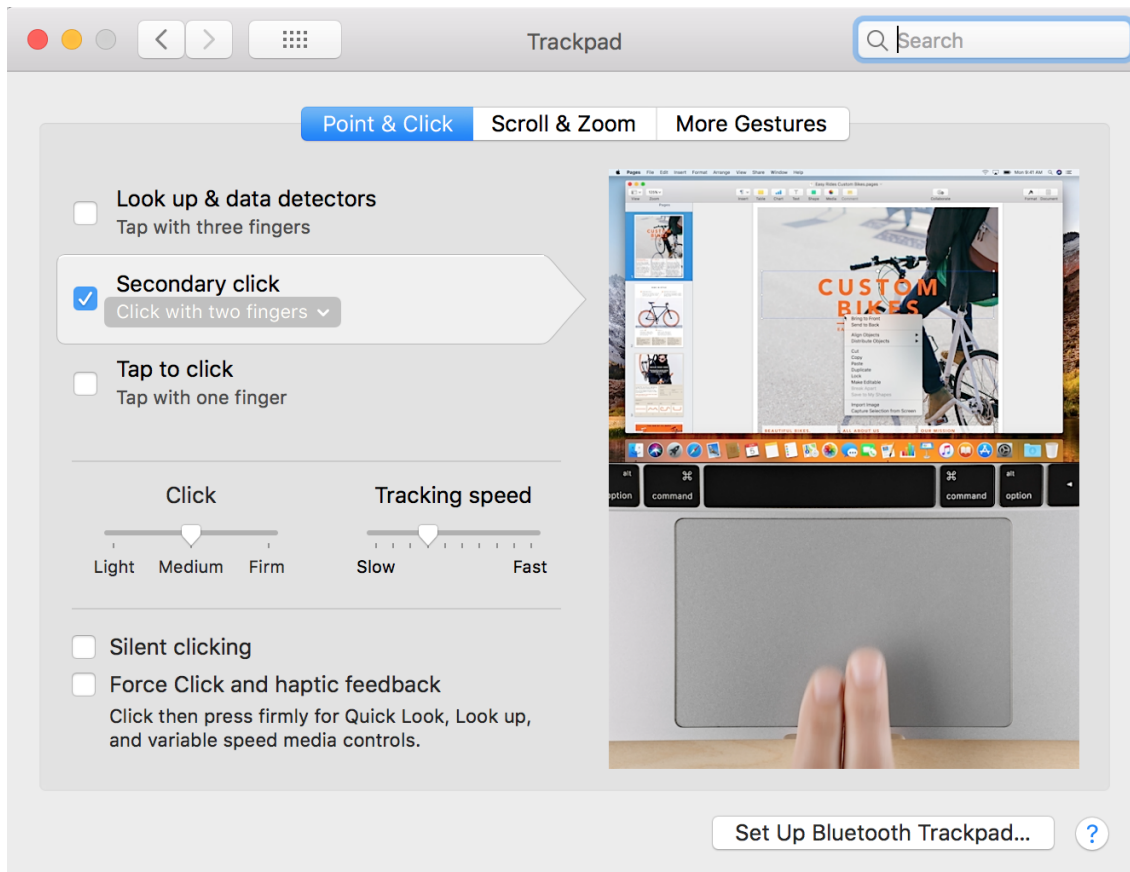


The latest Macs support a wide variety of **input devices** (*mouse, trackpad, pen tablet, etc.*).

For videos explaining the different **gestures** you can use with **mice** and **trackpads**, go to **System Preferences** in **macOS**.



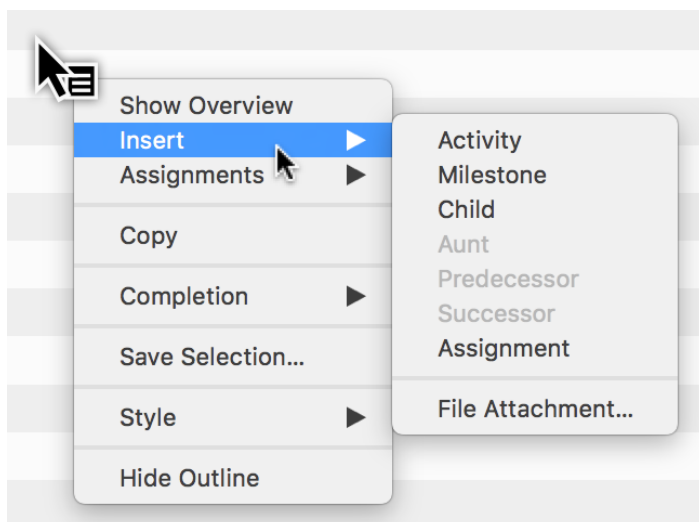
There you will also find options such as the **secondary click** (also known as the **right-click** in Windows).



In **System Preferences** → **Trackpad** under the **Point & Click** tab you will find options for controlling the input gestures for your trackpad.

## Context menus

Perform a secondary-click to open **context menus** in Merlin Project Express. This provides you with additional options for the clicked content.



## Move (Drag & Drop)

You can **drag & drop** content using your input device. This lets you move content with ease.



This function lets you create new **groups**, arrange the **sequence** of project **content** in the Outline, assign **resources** to activities, and create **attachments**.

The procedure is always the same:

1. **Select object(s)**
2. **Move the selection while keeping the mouse button held depressed**
3. **Drop the selection over an object by releasing the mouse button**

### Creating a group using »drag & drop«

New groups are created using this technique in Merlin Project Express. You can drag several activities and drop them on another activity.

The activity the content is to be dropped on will be highlighted in blue. Once you release the mouse button it will turn into a **group** (*bold*) automatically and the activities will become its **child activities** (*indented*).

1. **Click a selection and keep the mouse button held depressed**

# ▲	Traits	Title	Given Work
0	📁🕒	▼ My Project	
1		Activity A	1 day ?
2		Activity B	1 day ?
3		Activity C	1 day ?
4		Activity D	1 day ?
5		Activity E	1 day ?

2. **With the mouse button held depressed, drag the mouse pointer to an object**  
- in this example an activity (don't release the mouse button yet)

# ▲	Traits	Title	Given Work
0	📁🕒	▼ My Project	
1		Activity A	1 day ?
2		Activity B	1 day ?
3		Activity C	1 day ?
4		Activity D	1 day ?
5		Activity E	1 day ?

### 3. Release the mouse button to drop the selection

# ▲	Traits	Title	Given Work
0	📁🕒	▼ My Project	
1		▼ Activity A	
2		Activity B	1 day ?
3		Activity C	1 day ?
4		Activity D	1 day ?
5		Activity E	1 day ?

## Changing the project structure sequence

In Merlin Project Express, you can re-sort the sequence of activities, groups, and milestones. To do so, drag several activities and drop them between other activities.

When doing this, blue line with a circle appears to mark the position between the content.

### 1. Click a selection and keep the mouse button held depressed

# ▲	Traits	Title	Given Work
0	📁🕒	▼ My Project	
1		Activity A	1 day ?
2		Activity B	1 day ?
3		Activity C	1 day ?
4		Activity D	1 day ?

### 2. Move the mouse pointer between two objects, in this example between "Activity A" and "Activity B", with the mouse button held depressed (do not release the mouse button yet)

# ▲	Traits	Title	Given Work
0	📁🕒	▼ My Project	
1		Activity A	1 day ?
2		Activity B	1 day ?
3		Activity C	1 day ?
4		Activity D	1 day ?

3. Release the mouse button to drop the selection

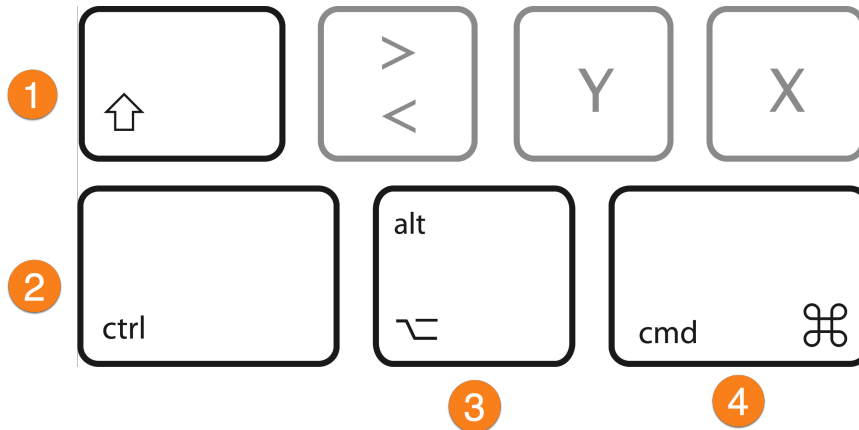
# ▲	Traits	Title	Given Work
0	📁🕒	▼ My Project	
1		Activity A	1 day ?
2		Activity C	1 day ?
3		Activity B	1 day ?
4		Activity D	1 day ?

**Activity C** now appears between **Activity A** and **Activity B**.

## Keyboard

The following keys are the important ones on a Mac for using keyboard shortcuts.

### Important keys



### Keys and their descriptions:

1. **Shift key** (*shift*) → upper-case key
2. **Control key** (*control*) → corresponds to Ctrl.
3. **Option key** (*option*) → corresponds to Alt/Alt Gr
4. **Command** (*command*) → corresponds to Windows

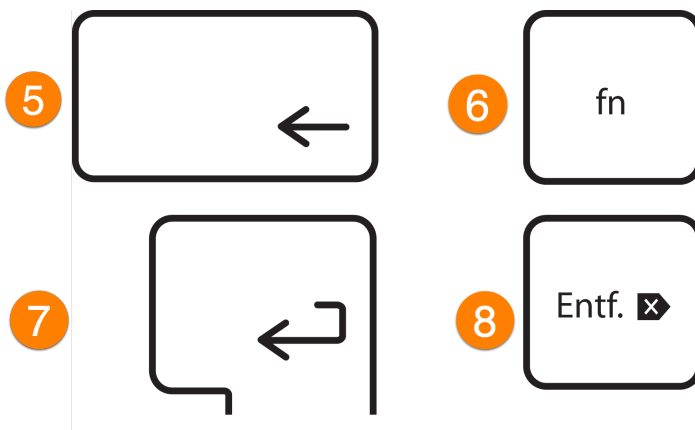


In the menus, the **ctrl** key is represented by the ^ icon.

The **command** key is abbreviated to **cmd**.

For instance, the **Enter/Exit Full Screen** option under the menu item **Window** is controlled using the keyboard shortcut **ctrl + cmd + F**.

To edit content, the following keys are especially useful.



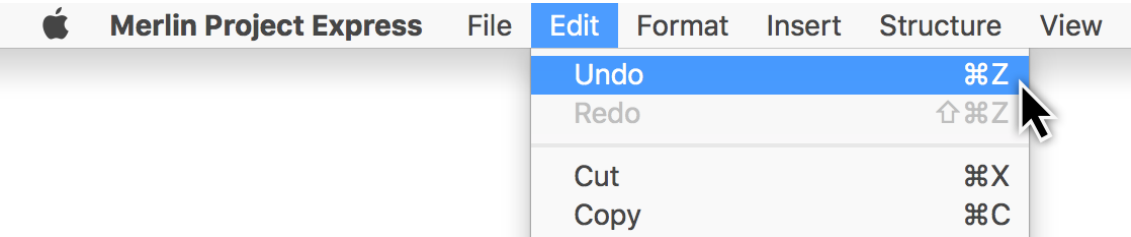


1. **Delete key** (*backspace*) → backspace key 2. **Function key** → (*Function*) → no corresponding key with Windows 3. **Enter** (*Return*) → Enter 4. **Delete** (*Delete*) → DEL

Keyboard shortcuts

Merlin Project Express uses a host of **keyboard shortcuts**.

**Keyboard shortcuts** consist of several keys pressed simultaneously, for example, saving projects is performed with **cmd + S**. **F** keys (**F1**, **F2**, etc.) are available on all newer Apple keyboards using the **fn** function key.



Most **menu entries** are provided with the corresponding **keyboard shortcuts**. They are located directly next to the individual menu entries. This lets you access these menu entries quickly and easily using the keyboard.

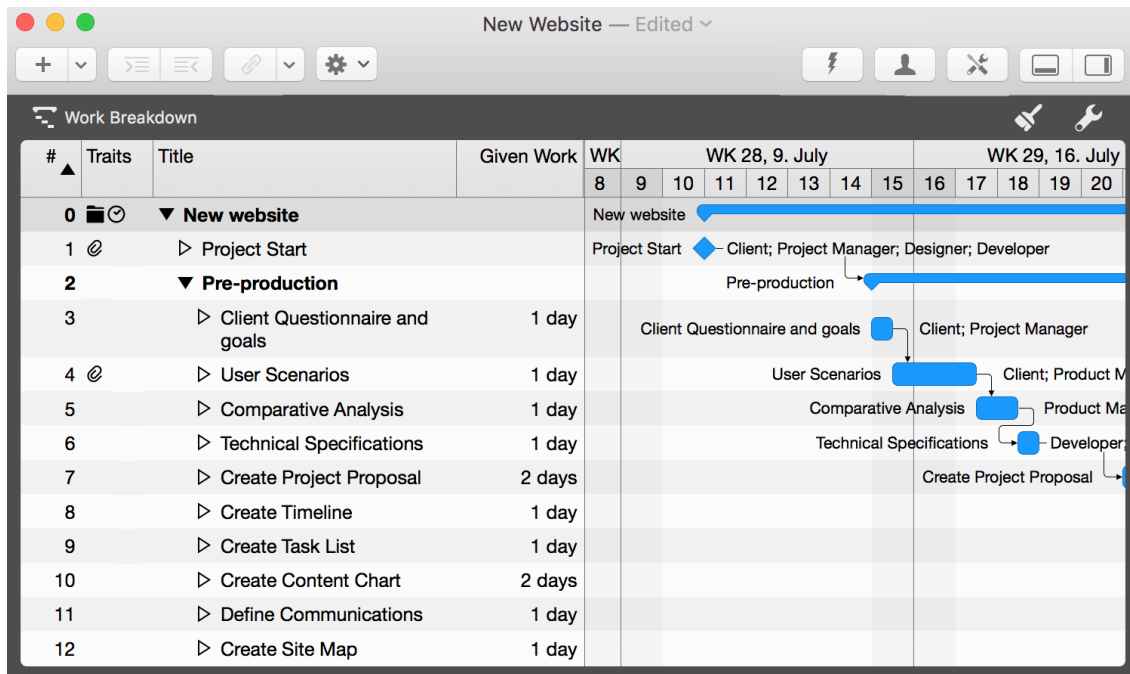
## Scroll bars

**Scroll bars** are used to move the visible area in the program window.

## System settings



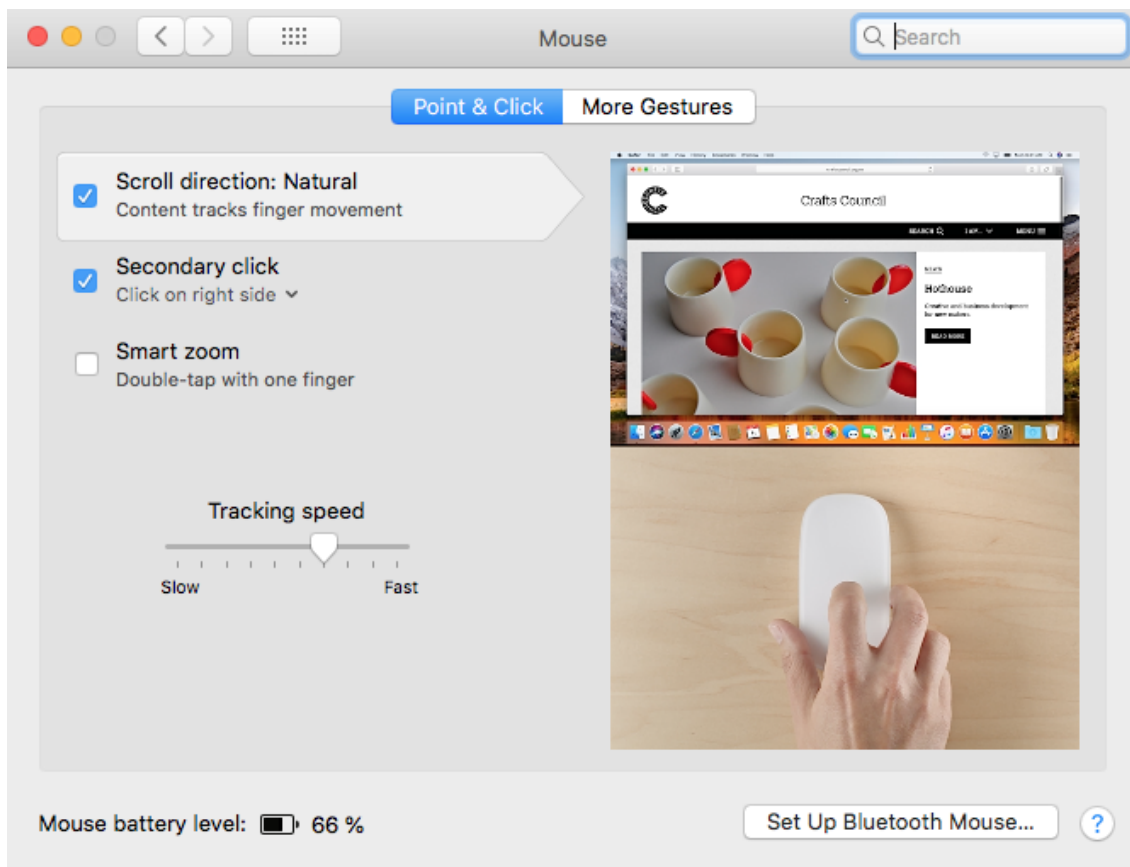
The **scroll bars** and their **behavior** are controlled by the **operating system**. By default, scroll bars are only displayed in **macOS** when **scrolling**.



The content in the different views of Merlin Project Express can be moved around the visible section using **input devices** such as a **mouse** or a **touchpad**. The **scroll bars** only appear when scrolling.

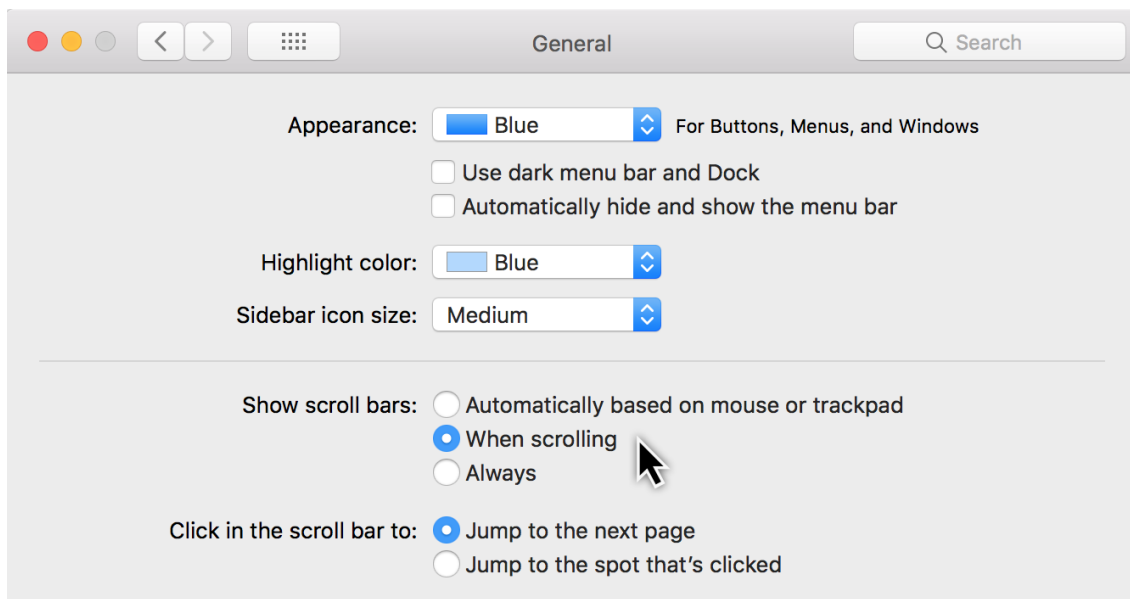


With the **Apple Magic Mouse** and the **Apple Trackpad**, you can watch short animated guides to using gestures to move content under **System Preferences** → **Mouse** and **System Preferences** → **Trackpad**.



## Displaying the scroll bars

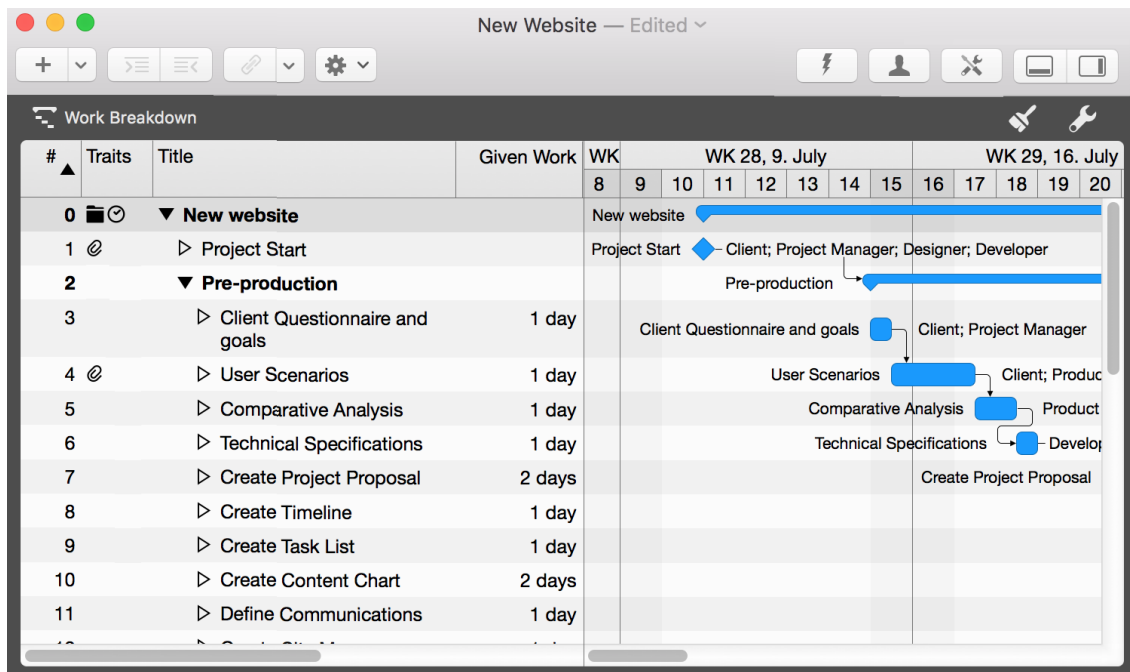
Open the **System Preferences** in **macOS** and click the **General** icon. There you will find the options for displaying scroll bars when scrolling.



The **three options** for **scrolling** using the scroll bars are **system-wide** and apply to all **programs** used.

- Automatically based on mouse or trackpad
- When scrolling
- Always

If you select **Always**, the **scroll bars** will then always appear in Merlin Project Express and in **all other programs**.



Appendix...






# Traits column







## Trait column icons

The **Traits** column contains various icons.

# ▲	Traits	Title
0	!!! 📁 ⌚ ➡   🔗 📎	▼ New Project
1	!!! ⌚ ➡   📅	New Activity
2	!!! ⌚ ➡	New Activity

These icons result from different entries already made by the user in the project.

Icon	Name	Meaning	Note
	<b>Project</b>	Row #0 is the project row and is always marked with this icon.	When projects are collapsed, the sub-projects are marked using this icon.
	<b>Attachment</b>	This icon indicates that an activity includes one or more attachments.	Groups, milestones, and assignments also support attachments.
	<b>Alignment »ASAP«</b>	An activity, group, or milestone is aligned with an early start.	This icon is only displayed with backward-planned projects. In a forward-planned project, all activities, groups, and milestones are assigned ASAP starts automatically.
	<b>Alignment »ALAP«</b>	If an activity, group or milestone in a forward-planned project is aligned with a late start, this icon appears.	
	<b>Ellipsis</b>	This icon indicates that further information is available in the Traits column, but not all of it is visible.	Change the column width to display all the icons.

Icon	Name	Meaning	Note
	<b>Calendar</b>	This icon indicates that the activity has a specified calendar.	The selected calendar is shown in the »Advanced« options of the »Plan« tab in the inspector.
	<b>Date</b>	This icon indicates that the activity has a fixed date.	Use the »Plan« tab in the inspector to see any activity start or end dates entered.
	<b>Note</b>	This icon indicates this item has a note.	Click on the icon, it opens the »Notes« tab in the inspector.
	<b>Resource Pool</b>	This icon means that the resource comes from a resource pool.	
	<b>Comments</b>	This icon indicates that this item includes one or more comments.	NOTE: Comments are accessible only in <b>Merlin Project</b> .
	<b>Unread Comments</b>	This icon indicates that this item includes one or more unread comments.	NOTE: Comments are accessible only in <b>Merlin Project</b> .

## Planning conflicts

If logical problems occur during planning, planning conflict symbols appear in the **Traits** column.

Icon	Name	Meaning	Note
!	<b>Planning conflict</b> ( <i>weak</i> )	This icon indicates that the activity has at least one weak planning conflict.	Click the icon. A »Notifications« window will open with a list of all planning conflicts in the project together with further information.
!!!	<b>Planning conflict</b> ( <i>strong</i> )	This icon indicates that the activity has at least one strong planning conflict.	In contrast to a weak conflict, a strong planning conflict prevents planning. This could be because the activity commences before the project starts. This issue will need to be resolved.

## Title column

The **title column** includes the titles of the activities, groups, milestones, and assignments. Two icons are used in the title column: one black and one light triangle.

The triangles indicate groups (black) and assignments (light).

### Group



This icon indicates a **group**. Click the triangle to expand or collapse the group.

This allows you to show or hide all group content.

### Assignment



This icon indicates that an activity, group or milestone has one or more assignments. Click the triangle to see the assigned resource.



The menu items **Structure** → **Expand** and **Structure** → **Collapse** let you expand or collapse several groups and assignments simultaneously.



# Given values

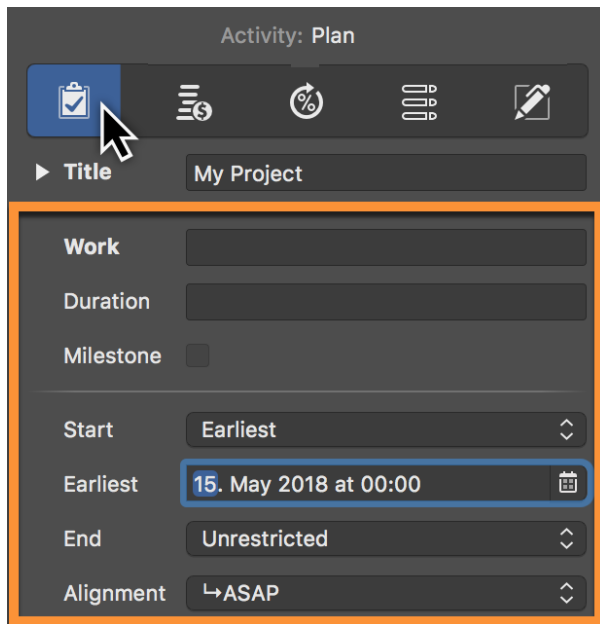
**Given values** are presets required for planning. As a project manager, you choose the presets based on your experience and other requirements for the planned course of the project.

**Given values** can be used to define work, duration, start and end dates, calendar and alignment settings for the respective activities in the project.

Insert a new column and type *Given*. Merlin Project Express will list all columns with **Given values** that are available for the project and its individual elements.

Given Work	Given	Given Earliest Start	Resol
	Given Alignment		
	Given Calendar		
2,5 days ?	Given Calendar Mode		
1,5 days ?	Given Duration		
	Given Duration Absolute		
	Given Earliest End		
3 days ?	Given Earliest Start		
	Given End		
	Given Latest End		
	Given Latest Start		
	Given Start		
	Given Work		
	Given Work Absolute		
	Given Work Overtime		
	Given Work Overtime Absolute		
	» Less		

The Given presets for **work**, **duration**, **start**, and **end** are most frequently required for planning. They can be visible in the outline or hidden if not required. Most of the **Given values** are editable in the outline and the *Plan* inspector.



For *dynamic planning*, simply configure a preset for the [work or duration](#) and link the activities, groups, and milestones using dependencies. Merlin Project Express will then calculate the **Expected** values from the presets.

## Given Work

Per default new activities are created by a *Given Work* of '1 day ?'.

You can choose to show the value of *Given Work* in the outline and edit it there. The value of *Given Work* is also shown in the *Work* field of the *Plan* inspector, where you can also edit it.

## Given Work Absolute

*Given Work Absolute* is a calculated value and cannot be edited.

You can choose to show the value of *Given Work Absolute* in the outline.

It calculates based on the value of *Given Work*. If you enter the *Given Work* as time duration, *Given Work Absolute* calculates the same value.

If you enter the *Given Work* as a fraction of the work, *Given Work Absolute* calculates the amount based on the *Given Work* defined in a higher level activity group.

## Example

Activity group is defined by **effort** of 10 days, thus *Given Work 10 days*. Child activity within is defined by 25% of the **effort**, thus *Given Work 25%*. The *Given Work Absolute* of

the child activity will calculate as **2.5 days**.

### Given Duration

Per default new activities are created by blank duration. That means, that the *Given Duration* column is empty and that *Given Work* value defines the duration of the activity as well.

To change the *Given Duration* of existing activities, select the activity row and use the *Plan* inspector to enter the desired value in the *Duration* field.

You can choose to show the value of *Given duration* in the outline and edit it there.

### Given Start / End

Per default new activities are created by blank start or end dates. That means, that *Given...* date columns are empty and that dependencies or the date constraints and durations of higher level activity groups define the start or end of the new activities.

To set a *Given Start* for an existing activity, select the activity row and use the *Plan* inspector to select a Precise Start or End date.



For flexible planning and easier adjusting through-out your project's life time, we recommend you define as less start and end dates as possible, and as many as absolutely binding to your deliverables.

### Given Earliest Start / Earliest End

Per default new activities are created by blank start or end dates. That means, that all *Given...* date columns are empty and that dependencies or the date constraints and durations of higher level activity groups define the start or end of the new activities.

To set a *Given Earliest Start* or *Given Earliest End* for an existing activity, select the activity row and use the *Plan* inspector to select a Earliest Start or Earliest End date.



For flexible planning and easier adjusting throughout your project's life time, we recommend you define as less start and end dates as possible, and as many as absolutely binding to your deliverables.

### Given Latest Start / Latest End

Per default new activities are created by blank start or end dates. That means, that all *Given...* date columns are empty and that dependencies or the date constraints and durations of higher level activity groups define the start or end of the new activities.

To set a *Given Latest Start* or *Given Latest End* for an existing activity, select the activity row and use the *Plan* inspector to select a Latest Start or Latest End date.



For flexible planning and easier adjusting throughout your project's life time, we recommend you define as less start and end dates as possible, and as many as absolutely binding to your deliverables.



If you have to define for an activity all four date values (Given Earliest Start, Given Latest Start, Given Earliest End, Given Latest End) select the activity row and use the *Plan* inspector to select Between for Start and End dates.

## Actual values

**Actual values** are the values you enter to record actual progress of your planning. You update this information as often as new information from your resources arises regarding the actual work or the completion level of the various assignments.

Insert a new column and type *Actual*. Merlin Project Express will list all columns with **Actual values** that are available for the project and its individual elements.

You can choose to show or hide them from the outline. **Actual values** are editable in the outline and the **Actual Values** inspector.

### Example – activity just started

An activity is defined by **2 days** *Given work*. You want to update the activity to reflect 50% completion level.

- You select the activity
- Use the **Actual Values** inspector
- You select the correct date for **Actual Start**
- You select **50%** from the **Complete** list

This means:

- **Actual Work** calculates as half of *Given Work*, thus **1 day**
- **Actual Start** is the date you just entered
- **Actual End** is blank (the task isn't completely done yet)
- **Actually Completed Through** calculates the date until current completion.

### Example – completing a started activity

An activity is defined by **2 days** *Given work*, which was recorded as 50% completed is now completed.

- You select the activity
- Use the **Actual Values** inspector
- Click on **100%**

This means:

- **Actual Work** is now as much as the original *Given Work*, thus **2 day**
- **Actual Start** is the date set
- **Actual End** is the date the remaining 1 day work would need to complete
- **Actually Completed Through** calculates the date until current completion, thus the same as **Actual End**.

#### Example - updating progress on a started activity

An activity is defined by **2 days** *Given work*, which was recorded as 50% completed, is now 75% Completed but needs some 1 more day work as originally estimated.

- You select the activity
- Use the **Actual Values** inspector
- Enter 75% in the **Complete** field
- Check the value in the **Remaining Work** field
- Adjust it from **4 hours** to **12 hours**

The overall activity will be adjusted and the new completion percentage will be calculated. It is now  $100\% * \text{Actual Work} / (\text{Actual Work} + \text{Remaining Work}) = 50\%$

This means:

- **Actual Work** was originally 75% of the original *Given Work*, thus **1.5 days**
- **Actual Start** is the date set
- **Actual End** is blank (the task isn't completely done yet)
- **Actually Completed Through** calculates the date until 75% completion was achieved.

## Expected values

**Expected values** reflect both [Given](#) and [Actual values](#).

Expected values are read-only and you'll find them in the **Plan** and **Actual Values** Inspector.

When an activity is not yet started, expected values reflect the [Given values](#).

When an activity is started and actual values are entered, expected values reflect the [Actual values](#).

### Example

An activity requires **2 days** *Given work*. It is not yet started.

This means:

- **Expected Work** calculates as *Given Work*, thus **2 days**
- **Expected Duration** calculates as *Given Duration*. If *Given Duration* is empty the duration it needs according to the *Given Work* and defined assignments.
- **Expected Start** calculates as *Given Start*. If *Given Start* is empty, the date it can be scheduled due to dependencies to predecessors or higher level groups.
- **Expected End** calculates as *Given End*. If *Given End* is empty, the date it can be scheduled to end due to dependencies to predecessors or higher level groups and its defined duration.

### Example - activity started

An activity is defined by **2 days** *Given work* and by 50% completed.

This means:

- **Expected Work** calculates as *Actual Work* plus *Remaining Work*, thus **2 days**
- **Expected Duration** calculates as the duration until 100% completion.
- **Expected Start** calculates as *Actual Start*
- **Expected End** calculates the date until 100% completion

### Example - updating progress on a started activity

An activity is defined by **2 days** *Given work* and as **50%** completed, remaining work was updated to **12 hours**. This recalculates a complete of **40%**.

This means:

- **Expected Work** calculates as *Actual Work* plus *Remaining Work*, thus **2.5 days**
- **Expected Duration** calculates the duration until 100% completion
- **Expected Start** calculates as *Actual Start*

- **Expected End** calculates the date until 100% completion of the new *Expected Work*

#### Example - completing a started activity

An activity is defined by **2 days** *Given work* and as 40% completed, *Actual work* was **1 day**, *Remaining work* **12 hours**. The activity was completed by a click to '100%'. This recalculates *Remaining work* to blank value, its amount will be added to the *Actual Work*.

This means:

- **Expected Work** calculates as *Actual Work* plus *Remaining Work*. *Remaining Work* is now 0, *Actual Work* is **2.5 days**. That means **Expected Work** is **2.5 days**
- **Expected Duration** calculates the duration until 100% completion
- **Expected Start** calculates as *Actual Start*
- **Expected End** calculates as *Actual End*

If you have defined cost rates on your resources, base or attachment costs on your activities, the **Expected Costs** will show up in the Finance inspector in the Balance tab.



## Epilog

This documentation was compiled by ProjectWizards GmbH in February 2021. Do you have any questions or comments? We look forward to hearing from you.

Please email us at [support@projectwizards.net](mailto:support@projectwizards.net)