# Groupings - as of June 2018

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Note for Merlin Project Express users

The following functions are only available in Merlin Project.

Groupings

This guide contains information on creating and using groupings in Merlin Project.

What are groupings?

Groupings let you group project content by different requirements. This allows information to be sorted as required in the particular view.

Merlin Project comes with a range of pre-defined groupings. Plus, it’s quick and easy to create your own groupings.

The Kanban view groups by status field. For further information, see the Kanban guide.

Advantages in project planning

Groupings are highlighted graphically and displayed with corresponding information in the current view.
Among other things, this lets you make different levels of progress in the project visible quickly, classify activities rapidly, and evaluate and visualize information easily.

Using groupings

Click the *Grouping icon* and the Inspector will open with a list of built-in groupings.
Mark the checkbox to the left of an entry to activate a grouping. The content in the current view will be sorted and displayed automatically based on the grouping.

An active grouping will be displayed next to the **Groupings icon** at the top with its name in blue and remains active until you unmark the checkbox in the list.
Creating groupings

Create and add your own groupings to the list of built-in groupings. Click the **plus icon** on the left below the list.

The category »Custom« will be created. This is to differentiate between the groupings you create yourself and those that are built-in. Give the **grouping** you created a distinctive name so it’s easy to tell what it is for future use.

To remove your own groupings from the list, click a grouping and then press the delete key.

**Modifying groupings**

Click the **magnifying glass icon** and use the grouping options.
Use the «Group» drop-down menu to group. Depending on the active view, you can choose between the following grouping options in the drop-down menu:

- Activities
- Resources
- Assignments

Set options according to which they are to be grouped. Use the drop-down menu to do this.

Click the plus icon to add further condition rows or remove options by clicking the minus icon.

The hierarchical display of the grouping can also be changed using the view options at the bottom.
- Without activity hierarchy
- Flatten activity hierarchy
- Include activity hierarchy

Further grouping options

The *gear icon* includes additional grouping options.

If you select a grouping in the list, you can choose from the following options under the gear menu:

- **Activate/Deactivate Grouping** (mark/unmark the checkbox)
- **Group by Status Field** (required for Kanban. Opens the Kanban wizard for the Kanban status)
- **Duplicate** (creates a copy of an existing grouping)
- **Share with other local projects** (allows use in other local projects)
- **Publish Changes** (publishes changes in a shared grouping to all local projects)
- **Save Changes...** (for shared groupings, creates a copy)

Duplicating groupings

This option can be handy to use an existing grouping as a template for a further grouping. A copy of the grouping is created.

Select a grouping and click the *gear icon* followed by **Duplicate**.

A copy of the grouping will be created and assigned a number. Name the grouping.

Following that, click the *magnifying glass icon* to modify and expand the grouping options.
Sharing groupings locally

The **Share with other local projects** option lets you share individual groupings with all other projects stored locally on your Mac.

The shared groupings are arranged in the list under the category **Shared**.

![Groupings](image)

Publishing changes

If you want to publish changes in a shared grouping to local projects, click the **gear icon** and then the **Publish Changes** option.

Reverting changes

The **arrow icon** is handy to undo changes in shared groupings.

![Reset](image)

It undoes changes made in shared groupings.

If you click the icon, a dialog will appear with options to undo changes.

Select an undo option and then click the **Reset** button.
Stop sharing groupings

If you no longer want a grouping to be shared locally, click the desired grouping and then click the gear icon.

In the list, click *Share with other local projects*. A marked checkbox in front of the option indicates that the grouping is already being shared.

Manual ranking

If you sort manually in different views and activate a grouping, this produces a *manual ranking*.

This option is indicated by a *star icon* in the # column.
Click the column followed by *Reset Manual Ranking* to deactivate the option.