# Groupings

Guides for Merlin Project

# Groupings - as of November 2020

**Note for Merlin Project Express users**

The following functions are only available in Merlin Project.

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.

| # ▲ | Traits | Title | Given Work |
|---|---|---|---|
| | | ▼ **Complete: 100 %** | **4 days** |
| 3 | | Client Questionnaire and goals | 1 day |
| 4 | | User Scenarios | 1 day |
| 5 | | Comparative Analysis | 1 day |
| 6 | | Technical Specifications | 1 day |
| | | ▼ **Complete: 0 % – <100 %** | **5 days** |
| 7 | | Create Project Proposal | 2 days |
| 10 | | Create Content Chart | 2 days |
| 11 | | Define Communications | 1 day |
| | | ▼ **Complete: Without** | **35 days** |
| 1 | | Project Start | |
| 8 | | Create Timeline | 1 day |
| 9 | | Create Task List | 1 day |
| 12 | | Create Site Map | 1 day |

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.
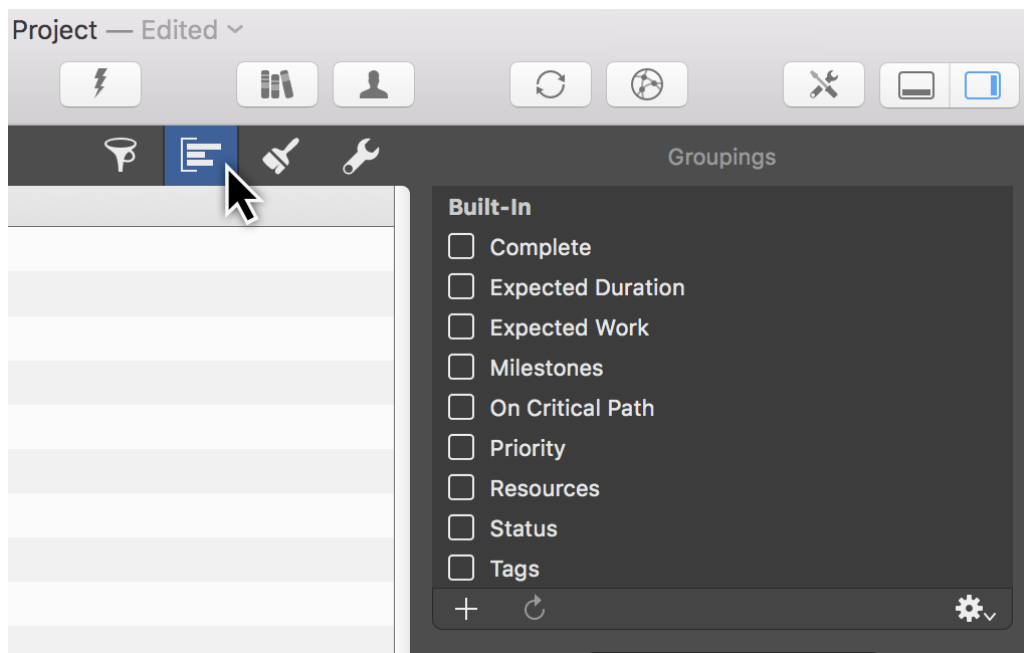


Mark the checkbox to the left of an entry to activate a grouping. The content in the current view will be sorted and displayed automatically based on the grouping.
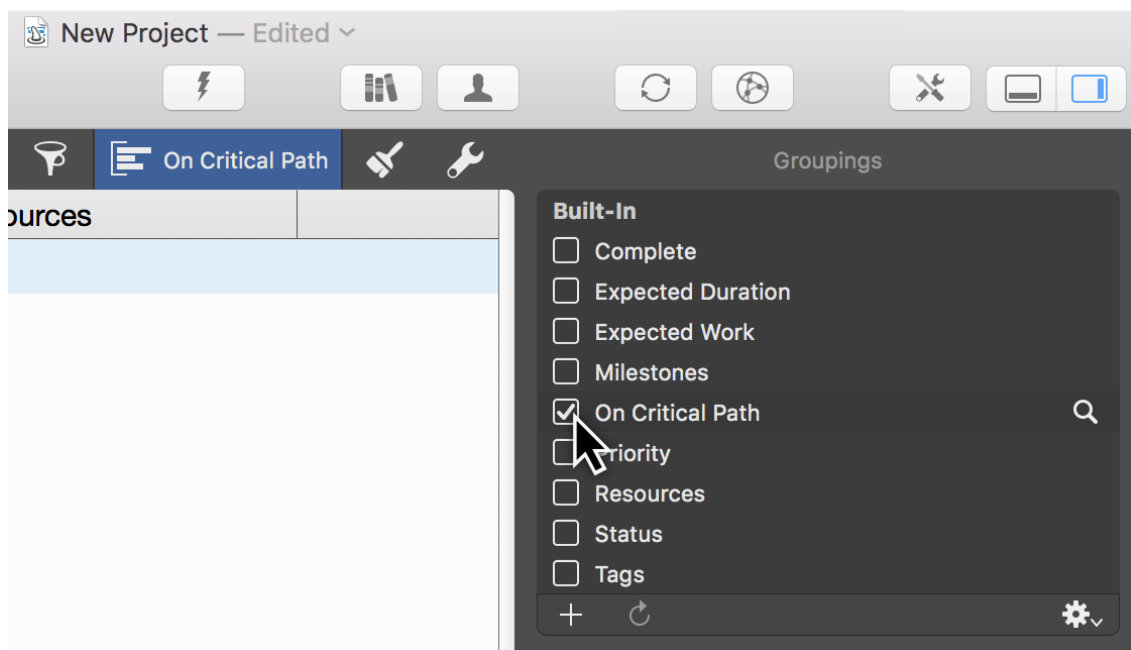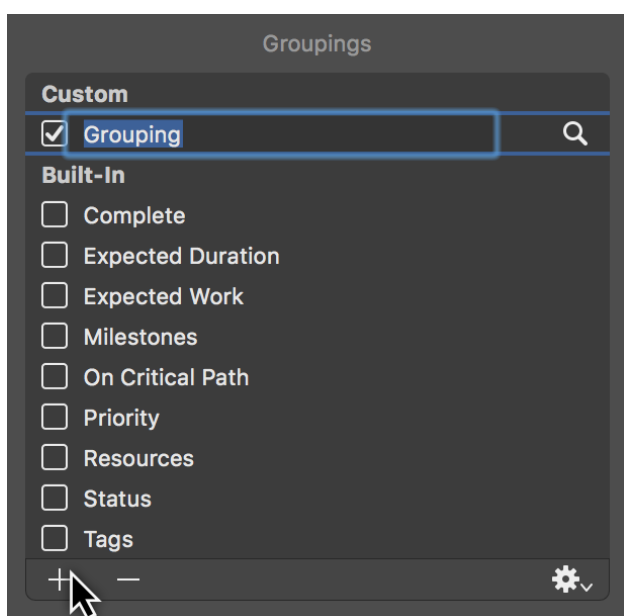
An active grouping will be displayed next to the ***Groupings icon*** at the top with its name in blue and remains active until you unmark the checkbox in the list.
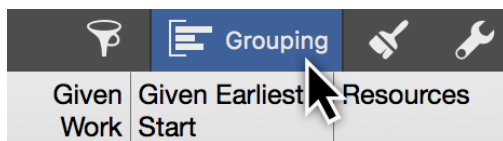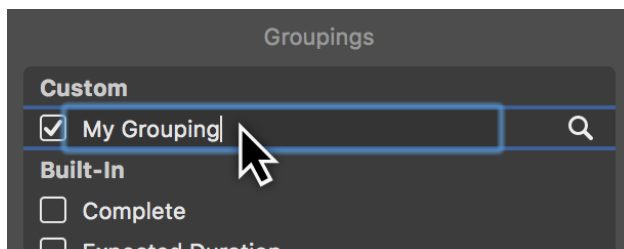


## Creating groupings

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.
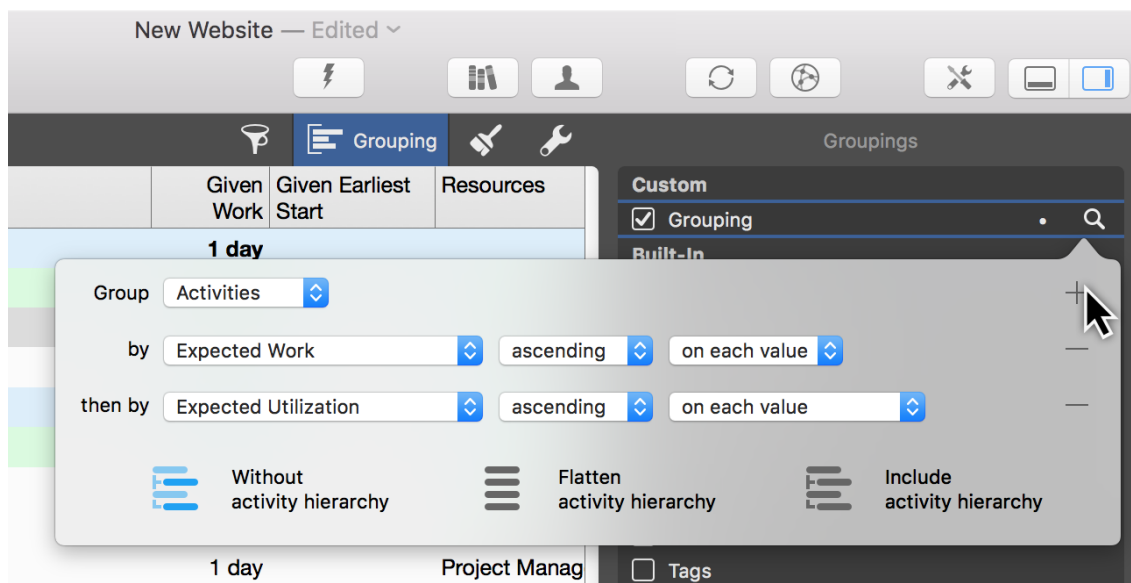
## Modifying groupings

Click the **magnifying glass icon** and use the grouping options.
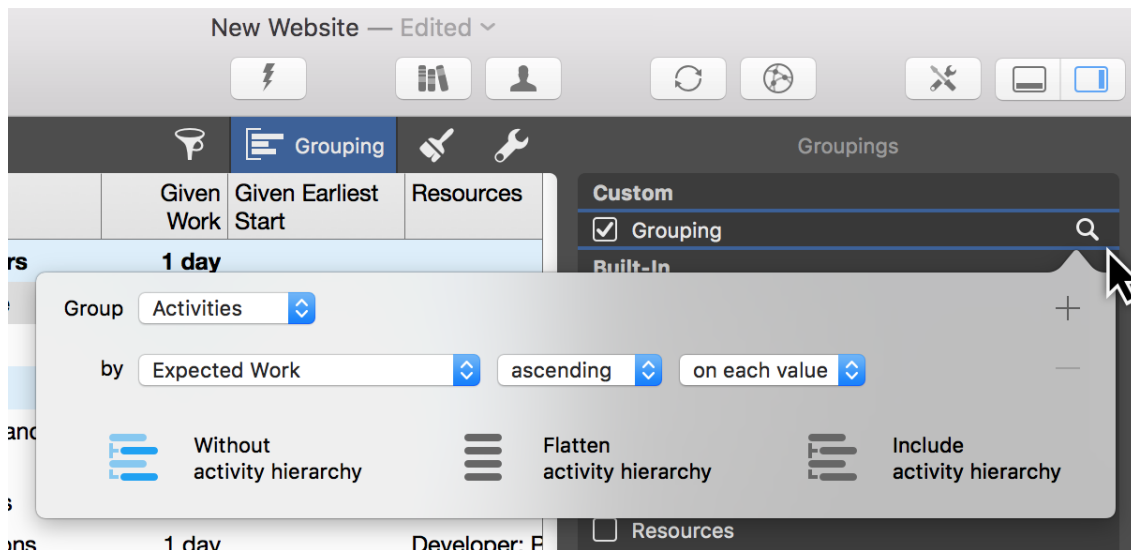


Use the **»Group«** drop-down menu to group. Depending on the active view, you can choose between the following grouping options in the drop-down menu:

- Activities
- Resources
- Assignments

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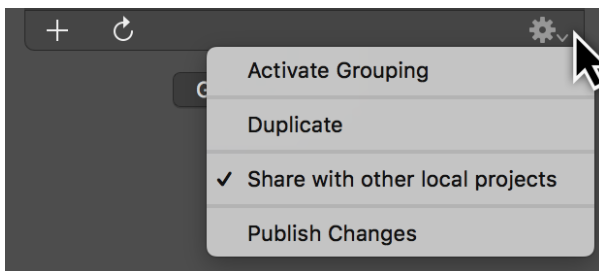


Click the **plus icon** to add further condition rows or remove options by clicking the **minus icon**.

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)
- **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)

## 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_**.
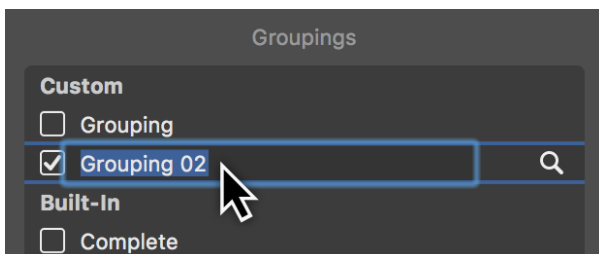


A copy of the grouping will be created and assigned a number. Name the grouping.

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.

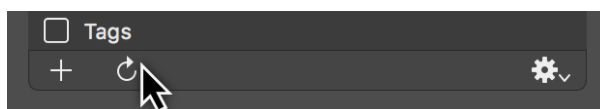The shared groupings are arranged in the list under the category **Shared**.
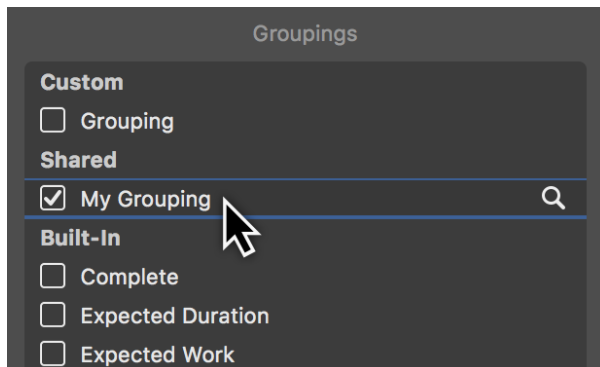


## Publishing changes

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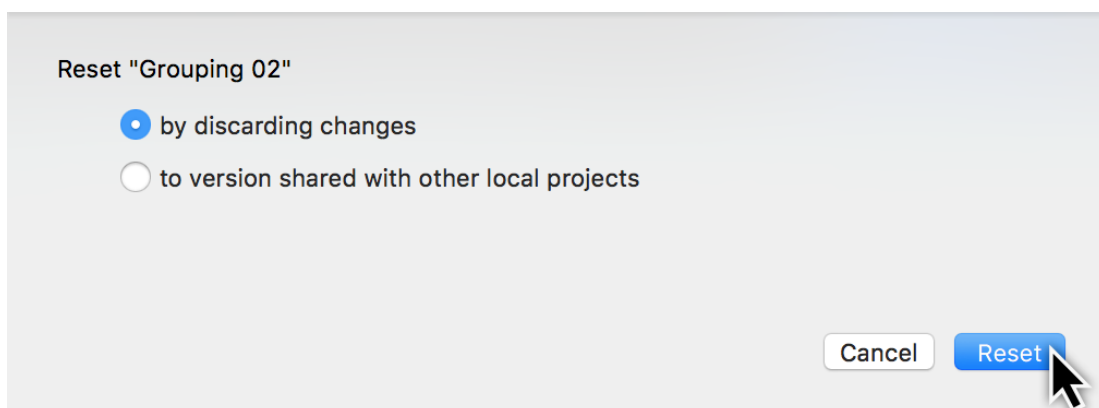
## Reverting changes

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



It undoes changes made in shared groupings.

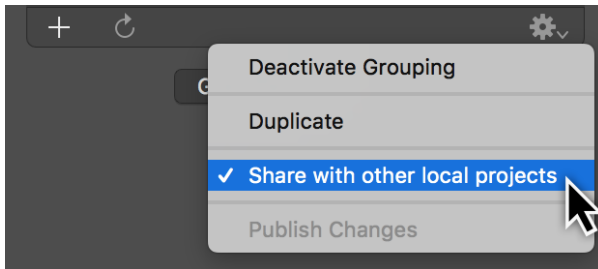If you click the icon, a dialog will appear with options to undo changes.



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**.
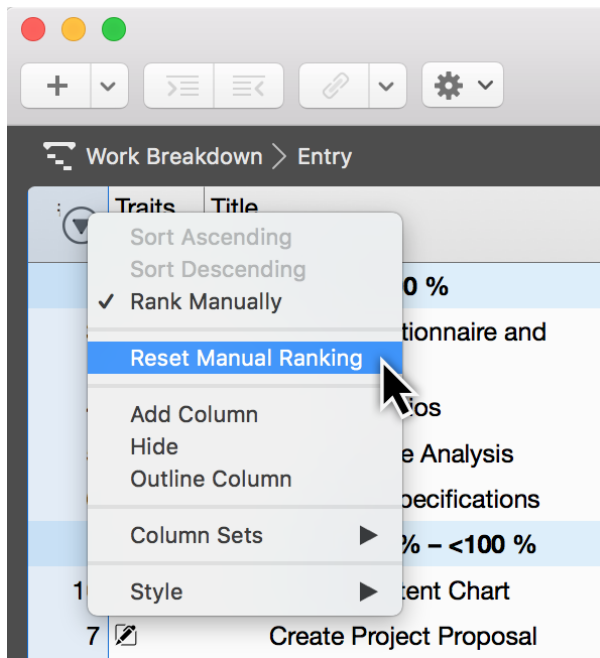


In the list, click **Share with other local projects**. A marked checkbox in front of the option indicates that the grouping is already being shared.

## Manual ranking

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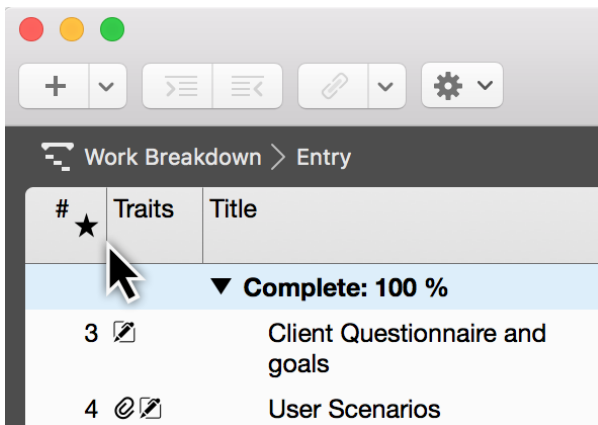


This option is indicated by a **star icon** in the **# column**.

Click the column followed by *Reset Manual Ranking* to deactivate the option.