# Views

## Guides for Merlin Project

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## Views - as of December 2020

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In Merlin Project there are several **views** for your project.

Merlin Project includes views for traditional **Work Breakdown** with Gantt chart, **Net Plan**, and **Kanban board**, but also for **Resources**, **Assignments**, **Reports** and **Attachments**.

The views support the Dark Mode, available in macOS Mojave or later, and let you display and edit your content in any way you find more fitting.



For the app to remain in Light Mode even if the system is in Dark Mode, enable the *Always light* setting for the **Views Appearance** in *Preferences* > *General*.

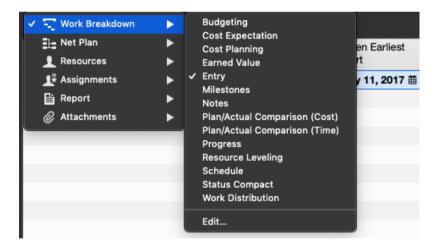


Even if using the app in Dark Mode, printing always takes place in the light appearance, while image exports take place in the currently selected appearance.

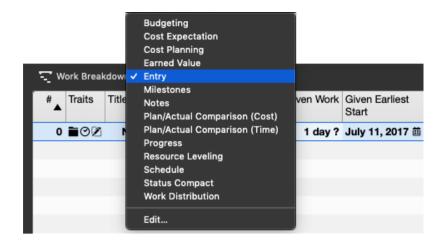
Merlin Project shows in the upper left corner the name of the current view.

• • •	
+ - >= =< @ - •	
T Work Breakdown Entry	
<b>N</b>	

Click Work Breakdown for the selection list of all views.



Click *Entry* to see all built-in **Work Breakdown** views.

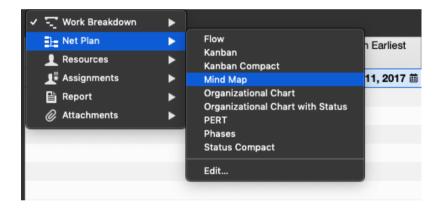


#### Additional option in the sub-views:

The *Edit* option lets you modify existing views and saves the changes as new, custom views.

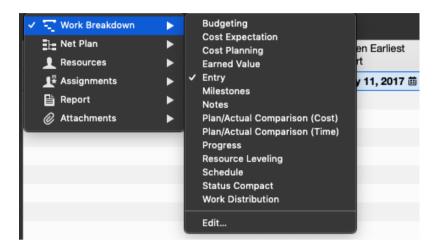
## Switching views

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.



For this purpose, you can find the following *Work Breakdown* views in Merlin Project:

- Entry
- Schedule
- Progress
- Milestones
- Notes
- Resource Leveling
- Plan/Actual Comparison (Time)
- Status Compact

If you need an evaluation of your Work Breakdown **by time phase**, you can use one of the following Work Breakdown views:

- Workdistribution
- Cost Expectation
- Cost Planning
- Budgeting
- Plan/Actual Comparison (Cost)
- Earned Value

You create further views with the *Edit* option. The **Edit** window lets you choose from the **built-in** views; you can create new views by clicking the **plus** icon.

<ul> <li>✓ Work Breakdown</li> <li>⇒ Net Plan</li> <li>▲ Resources</li> <li>▲ Assignments</li> <li>➡ Report</li> <li>Ø Attachments</li> </ul>	Earned Value art	Earliest , 2017 ⊞
	Edit	

## Net Plan

The *Net Plan* view lets you select various graphical plan views:



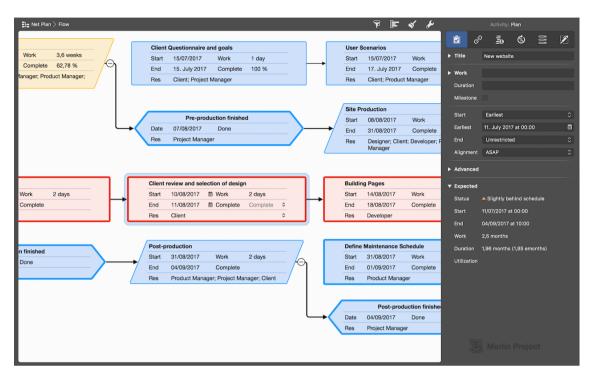
- Flow
- Kanban
- Kanban Compact
- Mind Map
- Organizational Chart
- Organizational Chart with Status
- PERT
- Phases
- Status Compact



You can create additional views by clicking the *Edit* option. The existing views are displayed in the window and you can create new views by clicking the plus icon.

## Flow

The *Flow* view contains the logical connections and the structure of the project in the form of a **Net Plan**.



You can modify how the Net Plan is displayed in the **View Options** (1) using the **Layout** drop-down menu (2). The Inspector contains additional options for displaying the Net Plan.

. Net Plan > Flow			<	7 🗐	x 🖌	V	iew Options: View Flow
			F	Project Start		For Selection	n
		Date	11/07/2017	i Done	100	Layout	✓ Multiple Values
		Res	Client; Proje Developer	ect Manager; D	Designer;	Critical Path	Top Down Mind Map
Client Questionnaire and goals				7		Hierarchy Lin	Right Mind Map
						Dependency	Li Organizational Chart Organizational Chart upwards
						Group Bound	ar Split Organizational Chart
End 15. July 2017						Crossings	Outline Split Outline
Res Client; Project Manager							Grid
User Scenarios						Conflicts	
Start 15/07/2017						Advanced	
End 17. July 2017 菌 Complete 100 % ≎							
Res Client; Product Manager \$						Objects	Sorting Field ↑↓
						Activities	
Comparative Analysis							
Start 17/07/2017   Work 1 day							
End 18. July 2017 菌 Complete 100 % ≎							
Res Product Manager ≎							
+							
Technical Specifications							
Start 18/07/2017  Work 1 day							
End 18. July 2017							
Res Developer; Product Manager \$							
¥							
Create Project Proposal							
Start 21/07/2017							
End 25. July 2017 茴 Complete 33,33 % ≎		Pre-pro	duction				
Res Project Manager  \$	// •	-	15/07/2017	i Work	3,6 weeł		
+	Θ	End	07/08/2017	Complete			
Create Timeline		Rec		t Managar: Dr		J	Merlin Project

## Kanban / Kanban Compact

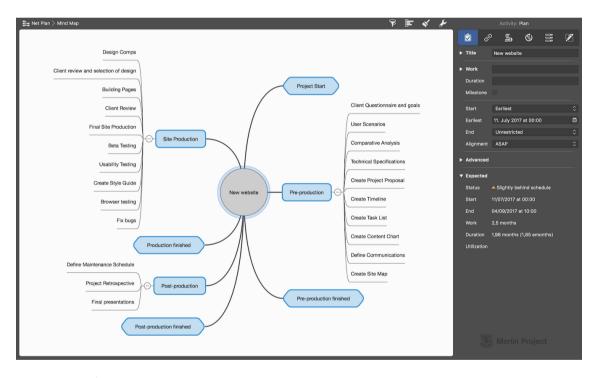
The *Kanban* view is intended for agile project management and offers a variety of possible applications.

The *Kanban Compact* view is a slimmed-down variant of the *Kanban* view.

Le Net Plan > Kanban Compact	N					🖗 🔄 Kanban Status 💰 🗲
Backlog	20	In process 3	0	Done 4		
Project Start	c; pm; d; d	Create Project Proposal	pm			Client Questionnaire and goals
Create Timeline	pm	Create Content Chart	pm			User Scenarios
Create Task List	pm	Define Communications	pm			Comparative Analysis
Create Site Map	d					Technical Specifications
Dra production finished						

#### Mind Map

The *Mind Map* view is perfect for displaying projects graphically. You can adjust the layout of the Mind Map in the »View Options« and change how it looks. Click the displayed icon.

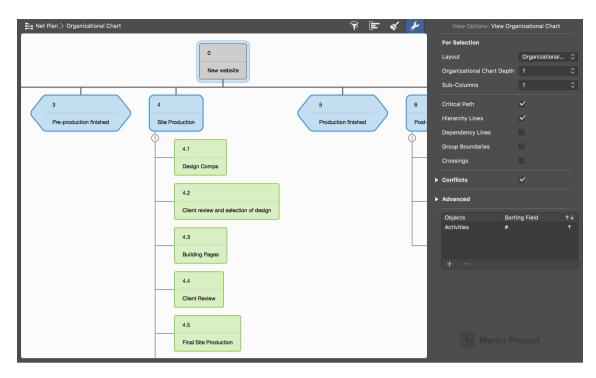


 $\mathbf{O}$ 

Further options for displaying the Mind Map can be edited using the Inspector **View Options**. To do this, click the **wrench** icon.

## Organizational Chart

The *Organizational Chart* view in the Net Plan is perfect for the hierarchical display of different projects.



You can adjust the layout of the Organizational Chart in the »View Options« and change how it looks. Click the **wrench** icon.

## 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.

上 Resource 🗸 Entry Niew Options: View Entry	
Image       Type       Material Unit       Available Units       Project       Resource pools       View Options: View Entry	
L Default Resource Person 100% New website	
Lient Person 100% New website	
L Designer Person 100% New website Highlight Changes	
L Developer Person 100% New website Details in secondary View ✓	
L Product Manager Person 100% New website Selection-dependent Styles ✓	
▲ Project Manager Person 100% New website Dimming non-editable fields	
L Employee 01 Person 100% New website	
Employee 02 Person 100% New website Objects Sorting Field	↑↓
L Employee 03 Person 100% New website Any Type #	↑
L Employee 04 Person 100% New website	
L Employee 05 Person 100% New website	
L Employee 06 Person 100% New website + -	
L Employee 07 Person 100% New website	
Employee 08 Person 100% New website	
Employee 09 Person 100% New website	
L Employee 10 Person 100% New website	
Employee 11 Person 100% New website	

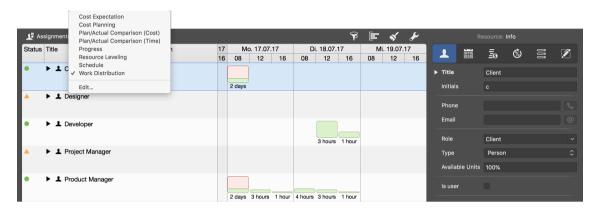
**Resources** can be viewed in the four following **views**:

- Work
- Entry
- Costs
- Earned Value

## Assignments

The *Assignments* view contains all assigned resources in the project. The chart shows each resource's **utilization values** for each day.

This gives you a quick overview of utilization levels (shown in red) of individual assignments, allowing you to spot potential cases of over-utilization and correct these.



The available views for the assignments are:

- Schedule
- Work Distribution
- Cost Expectation
- Cost Planning
- Resource Leveling
- Plan/Actual Comparison (Cost)
- Plan/Actual Comparison (Time)

📕 As	🗜 Assignments > Plan/Actual Comparison (Cost)											
Status	Title	Planned Costs	Expected Costs									
•	Client											
<b>A</b>	▼ ⊥ Designer	\$1.800,00		\$1.800,00								
✓	Project Start											
0	Design Comps	\$800,00		\$800,00								
0	Final Site Production	\$600,00		\$600,00								
0	Create Style Guide	\$400,00		\$400,00								
•	▼ <b>⊥</b> Developer	\$4.400,00	\$200,00	\$4.400,00								
✓	Project Start											
✓	<b>Technical Specifications</b>	\$200,00	\$200,00	\$200,00								

The views let you **check** the assigned project resources according to different aspects, for example according to the **Expected Costs**.

## Report

The *Report* view lets you create reports from different view modules. Here you can combine any views to report the required project information.

	atus Compact				9 E	<u>× × </u>		Module: Project View					
Jow v	website						Title						
	WCD3ILC						Туре	Net Plan					
anned (Start	t-End) 11. July 2017	21. August 2017					View	E Status Compact					
cpected (Star	art-End) 11. July 2017	4. September 2017					Filter	Generativity	0				
one	22,6 %	<ul> <li>Slightly behind schedule</li> </ul>											
bjective	This project can be use	d for creating a new website for a course, always be necessary.					Grouping	⊷None					
	client. nevisions will, o	course, always be necessary.											
	client. Revisions will, o	course, aways be necessary.					Grouping Mode	⊷None	0				
	Client, Nevisions will, o	Course, aiways be necessary.											
ngoing A		course, always be necessary.					Without content	Show message	0 0				
ngoing A # Status	Activities	Group Path	Resources	Expected Start	Complete	Remaining Work	Without content						
# Status	Activities		Resources		Complete		Without content	Show message					
# Status	Activities Title		Resources	Start	Complete 70 %	Work	Without content	Show message					
# Status	Activities Title On time	Group Path		Start 28.07.17		Work 1,7d	Without content	Show message					
# Status	Activities Title On time Create Content Chart	Group Path New website > Pre-production	pm	Start 28.07.17 28.07.17	70 %	Work <b>1,7d</b> 1,2d	Without content	Show message					
# Status	Activities Title On time Create Content Chart Define Communications	Group Path New website > Pre-production	pm	Start 28.07.17 28.07.17 04.08.17	70 %	Work 1,7d 1,2d 4h	Without content	Show message					
# Status 10 • 11 •	Activities Title On time Create Content Chart Define Communications Behind schedule	Group Path New website > Pre-production New website > Pre-production	pm pm	Start 28.07.17 28.07.17 04.08.17 21.07.17	70 % 50 %	Work 1,7d 1,2d 4h 4d	Without content	Show message					

## Attachments

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

🧷 Attachment					٦	P 🖃	st 🖌		nation: II	nfo	
Title	Checklists	•	Attached to	Status	B	Planned Base Costs		0	0	ĴĴĴ	
Background I	Files Information		Post-production > Project Retrospective	Comment	٥	\$0,00	Information	► Title	Backg	ound Informatio	n
Basic questic	Issues ▲* Risks	tive	Post-production > Project Retrospective	<ul> <li>Planned</li> </ul>		\$0,00	Checklist	Author			
Clients often	RISKS		Site Production > Client Review	🔺 Medium Risk		\$0,00	Risk	Notification date	11 Juli	2017 um 09:19	<b></b>
Define a clear	Edit		New website > Post-production finished	Comment		\$0,00	Information	Туре	Inforn		\$
O Define a clear s	start of the project		New website > Project Start	Comment		\$0,00	Information	Status		omment	٥
Each phase end	ds with a milestone		New website > Production finished	Comment		\$0,00	Information	URL		www.pinnaclepro	
Have a milestor	ne after each phase		New website > Pre-production finished	Comment		\$0,00	Information				
Link to useful w	veb design checklists		Pre-production > User Scenarios	Comment		\$0,00	Information				

Using the drop-down menu, the **attachments** can be listed by type in the view:

- Checklists
- Files
- Events
- Information
- Issues
- Risks

## **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.

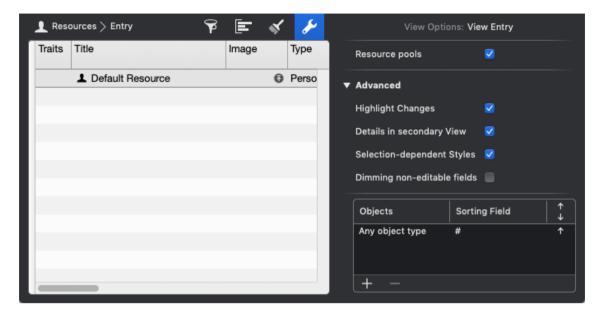
T Work	Break	down $>$ Entry	5	P		<b>\$</b>	1	ø		View O	ptions: View Entry		
#▲ Tra	aits	Title	WI 8	9	10	WK 2	28, J 12	-		Critical Path			
0 🖬	OZ	New website	-	w wet			12	10		Dependencies			
										Bar			
										Labels	<b>V</b>		
										Secondary			
										Group Boundaries			
										Time Phase			
										Labels	<b>V</b>		
										Description	Automatic		٢
										Conflicts	☑		
										Advanced			
										Advanced			
										Objects	Sorting Field	↑	
										Activities	#	Ŷ	
									J	+ -			

- Critical Path
- Dependency Lines
- Bar
- Labels
- Secondary
- Group Boundaries
- Time Phase
  - Labels
  - Description (*Automatic*, *Show* and *Hide*)
- 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«

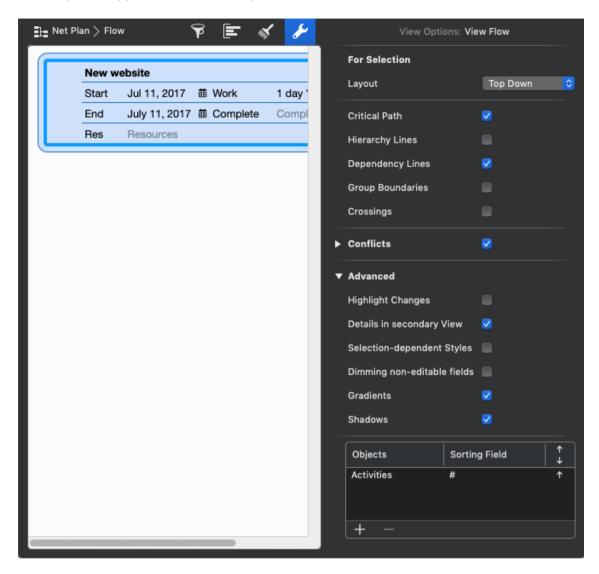
This inspector appears when the *Resources* view is enabled.



- Resource pools (important if you use a Resource Pool)
- Advanced
  - Highlight Changes
  - Details in secondary View
  - Selection-dependent Styles
  - Dimming non-editable fields
- Objects and Sorting Fields

## Inspector »View Options: Net plan«

This inspector appears when the Net plan view is enabled.



- For Selection
  - Layout
- Critical Path
- Hierarchy Lines
- Dependency Lines
- Group Boundaries
- Crossings
- Conflicts

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

## Inspector »View Options: Assignments«

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

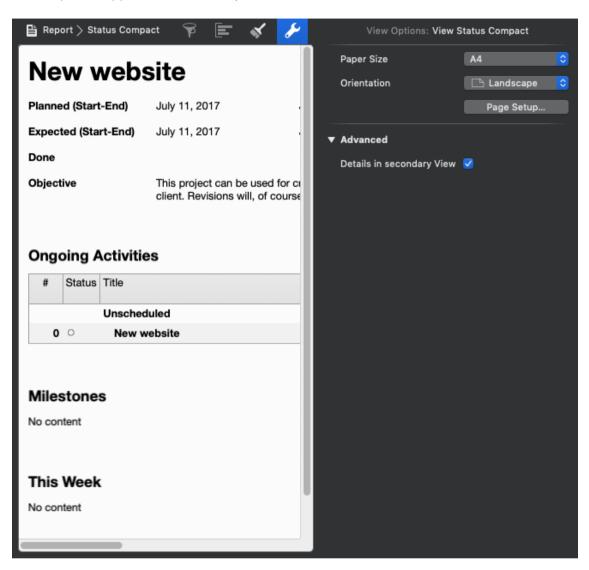
上 As	signments $>$ Work Distribu	tion S	P		*	۶		View Options: View Work	Distribution
Status	Title	WK 11	28, J 12	uly 9 13	14	15		Critical Path	
•	No resources assi							Resource Pools	
		1d?						All Pool Resources	
								Assignments From Pools	
								Bar	
_								Labels	<b>Ø</b>
								Secondary	
								Group Boundaries	
								Time Phase	
								Labels	
								Description	Automatic ᅌ
							►	Conflicts	
							•	Advanced	
								Highlight Changes	
								Details in secondary View	<b>Ø</b>
_								Selection-dependent Styles	<b>Ø</b>
								Dimming non-editable fields	
								Bundle adjacent lines	
_								Gradients	
								Shadows	
								Objects Sorting	Field ↑
_								Any object type Expecte	· •
								+ -	

- Critical Path
- Resource pools (important if you use a Resource Pool)
  - All Pool Resources
  - Assignments From Pools

- Bar
- Labels
- Secondary
- Group Boundaries
- Time Phase
  - Labels
  - Description (Automatic, Show and Hide)
- 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: Report«

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



This inspector appears when the *Report* view is enabled. It contains the following options:

- Paper Size
- Orientation
- Page Setup...
- Advanced
  - Details in secondary View

## Inspector »View Options: Attachments«

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

T Wor	k Break	down > Entry		٦	P		•	*	يکي ا		View Options: View All Attachments
#▲ T	raits	Title	-	WI 8	9	10	WK	28,	July 9	V	▼ Advanced
	00	New website	,	Ne	w we	bsite	_	<u>ן</u>			Highlight Changes 🗹
				-			_		_		Details in secondary View 🛛 🔽
_											Selection-dependent Styles 🛛 🔽
											Dimming non-editable fields
_											Attachments of descendants 🥑
_											Objects Sorting Field $\uparrow$
											Any object type Title ↑
											+ -
_											
_	_										
Ø Atta	chment	s > 🛋 All Attach	ments	٢	P		•	*	s		
Title		•	Attach	ed	to					S	
3 New E	Event		New w	eb	site						
	_										

- Advanced
  - Highlight Changes
  - Details in secondary View
  - Selection-dependent Styles
  - Dimming non-editable fields
  - Attachments of descendants

## View Options in detail

#### Resource pools

The *Resource pools* option is available in the View Options of the Resources and Assignments views.

If you have included an resource pool file in your project, enable this option to list the resources of the resource pool in this view.

#### All Pool Resources

The All Pool Resources option is available in the View Options of the Assignments views.

If you have included an resource pool file in your project, activate this option to list all resources of the resource pool in this view. If this option is disabled, **Merlin Project** will only show those resources from the resource pool that have been adopted in the project.

#### Assignments From Pools

The *Assignments From Pools* option is available in the View Options of the Assignments views.

If you have included an resource pool file in your project, enable this option to also list in this view the assignments of the resources on other project where the resource pool was linked. If this option is disabled, Merlin Project does not list all assignments for Resource Pool Resources. Assignments of resources in other projects will be hidden.

#### For Selection

The options section **For Selection** is available in Net Plan views and influences the layout of the tiles.

<u>]</u> _ Net	t Plan > Flo	w	9 E	K 🖌	View Options: View Flow
	New w	vebsite		_	For Selection
	Start	Jul 11, 2017	茴 Work	1 day ?	Layout V Top Down Mind Map
	End	July 11, 2017	d Complete	Complet	Critical Path Left Mind Map Right Mind Map
	Res	Resources			Hierarchy Line Organizational Chart Organizational Chart upwards
					Dependency L Split Organizational Chart
					Outline Group Bounda Split Outline
					Crossings Grid

The *layout* of a Net plan can be set as follows:

- Top Down
- Mind Map

- Left Mind Map
- Right Mind Map
- Organizational Chart (more options: Organizational Chart Depth, Sub-Columns)
- **Organizational Chart upwards** (more options: Organizational Chart Depth, Sub-Columns)
- **Split Organizational Chart** (more options: Organizational Chart Depth, Sub-Columns)
- **Outline** (additional option: Sub-Columns)
- Split Outline (additional option: Sub-Columns)
- Grid (more options: Row Layout, Swimlane, Sub-Columns)



The background shape of the cards of a *Net plan > Organizational Chart* view will not change to circles when you change the layout from Organizational Chart to Mind Map. To change the background shape of the cards, you must go to the *Style and Content > Cards* options.

The grid options are designed for the *Net plan > Kanban* and *Net plan > Kanban Compact* views.

#### 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.

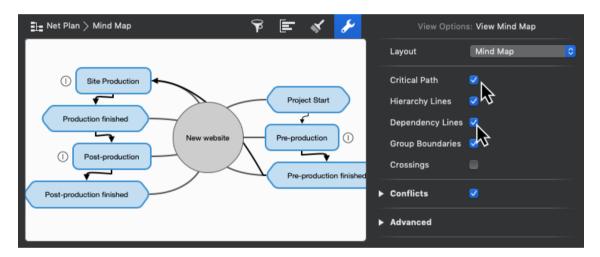
The display of the *Critical Path* can also be activated by clicking the corresponding icon on the toolbar.

+ • > = = 0 • • • •	A IL	O Ø	
	Toggles the criti	cal path visibility	

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..

R	Worl	k Brea	kdown >	Entry					¥		5	\$	s			View Optic	ons: View Entry
	28, J	uly 9		WK 2	29, Ju	ly 16					WK	30, Jı	ly 23			Critical Path	<b></b>
	14	15	16 17	18	19	20	21	22	23	24	25	26	27	28	B		
⊳	enario	os 🧧		Clien	t; Proc	duct N	lanag	er								Dependencies	<b>⊘</b> r∿
⊳	ompar	ative A	nalysis 🧲	5	Produ	uct Ma	anage	r								Bar	
⊳	echnie	cal Spe	ecifications	<b>-</b>	Deve	eloper	; Proc	duct M	anage	Hr.							
⊳	te Pro	oject P	roposal 🦲	)- P	roject	Mana	ager								Labels		
⊳			Proposal Project Manager Create Timeline Project Manager													Secondary	
⊳			Create Task List Project Manager													Group Boundaries	
⊳					С	reate	Conte	nt Cha	rt 🖕	•		ר Pi	roduct	Ma	a —		
⊳			Define Communications													Time Phase	
⊳									Creat	e Site	Мар	Ċ	)		Labels	<b>2</b>	
⊳									Pre-p	produc	ction f	inisheo	ı 🗸	$\geq$		Description	Automatic 🛟

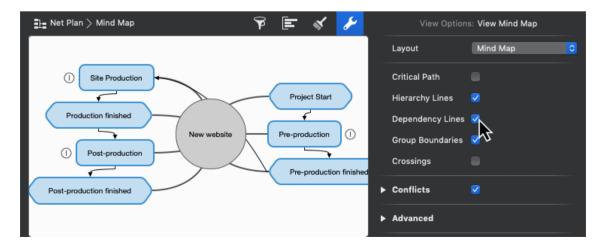
In the **Net Plan > Mind Map** view, where the dependency lines are not displayed by default, please activate the display of the link lines of the Dependency Lines in addition if you want to highlight the Critical Path.



#### Dependency Lines

i

The *Dependency Lines* option is available in the View Options of the Work Breakdown and Net Plan views.



With it you can activate or deactivate the display of the dependency lines between the Gantts bars or cards in the Net plan views.

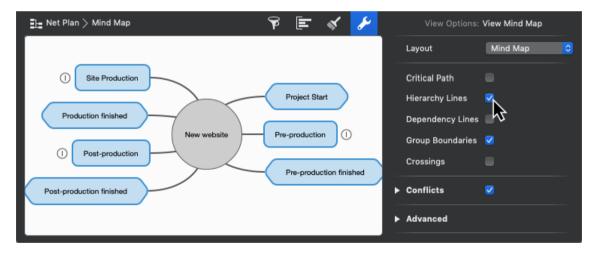
5	2	Work Br	eakdo	wn >	Sched	ule			P		-	\$	s	View Opti	ons: View Schedule
		WK 27,		WK	28, J	uly 9			WK	29, Ju	ıly 16		WK 3	Critical Path	
		6 7	10	11	12	13	14	17	18	19	20	21	24	ontioarratin	
	•	New web	site 🤇											Dependencies	K
Þ	>	Project Start 🔷 Client; Project Manag						Desigr	ner; De	velope	r			Bar	-₩
	•	Pre-production												I ab ala	_
D	>		Client Questionnaire and goa						ent; Pro	oject N	lanage	r		Labels	
Þ	>		User Scenarios						Client	; Produ	ict Mar	nager		Secondary	
D	>				Comp	arative	Analys	sis 📒		Produ	ict Man	nager		Group Boundaries	
Þ	>				Tecl	hnical \$	Specific	ations		Deve	eloper;	Produ	ct Manag		
D	>		Create Project Prop					al 🦲		P	roject	Manag	er	Time Phase	
D	>							Cre	ate Tir	neline		) Pi	oject Ma	Labels	<b>2</b>
D	>								Cre	ate Tas	sk List		Proj	Description	Automatic



This option has no effect in a Work Breakdown view, if your Gantt chart is not a **bar chart** but a **time phase** representation.

#### **Hierarchy Lines**

The Hierarchy Lines option is available in Net Plan views.



The option *Hierarchy Lines* activates/deactivates the display of lines that lead from higher structures to lower structures. These lines help understanding the hierarchy of the respective cards in the Net plan, but can be switched off if required.

<u> ∃</u> Net Plan > Mind Map	9 🗉 🛠 🥓	View Optio	ns: View Mind Map
() Site Production	Project Start	Layout Critical Path Hierarchy Lines	Mind Map 📀
Production finished New website Post-production	Pre-production 1	Dependency Lires Group Boundari Crossings	nes A
Post-production finished		<ul> <li>Conflicts</li> <li>Advanced</li> </ul>	

#### Crossings

The *Crossings* option is available in Net Plan views.

$\blacksquare$ Net Plan $>$ Organizational Chart with Status		' 🖻 🖌 🥕	View Options: View Organization	onal Chart with Status
			For Selection	
	2		Layout	Organizational ᅌ
Project Start	Pre-production		Organizational Chart Depth	1
Date Jul 11, 2017 Done 100%	Start Jul 15, 2017	Work 3.6 we	Sub-Columns	1
	End Aug 7, 2017	Complete 62.789	Critical Path	
	0		Hierarchy Lines	
	2.1		Dependency Lines	
	Client Questionr	~~~~	Group Boundaries	
	Start Jul 15, 2		Crossings	<
	End July 15,	2017 Complete	▶ Conflicts	✓

The option *Crossings* activates/deactivates the display of crossings at started and completed cards of Net plan views, which are coded according to the status. These are for example *PERT*, *Organizational Chart with Status*, *Phases*, *Kanban*, *Kanban Compact* and Flow. One line on the card indicates that an activity has be started, two lines indicate that the activity is 100% completed.

El= No	et Plan $>$ O	rganizational Chart wi	ith Status				۴		X 🦻	View Options: View Organization	onal Chart with Status
										For Selection	
	1				2					Layout	Organizational ᅌ
		Proj	ject Start		Pre-p	roduction				Organizational Chart Depth	1
	Date	Jul 11, 2017	Done	100%	Start	Jul 15, 2017	7 Worl		3.6 we	Sub-Columns	1
					 End	Aug 7, 2017			62.789	Critical Path	
					Φ				_	Hierarchy Lines	
						2.1				Dependency Lines	
						Client Quest				Group Boundaries	
							5, 2017	Worl		Crossings	ĸ
						End July	15, 2017	Com	plete	▶ Conflicts	<u> </u>

#### Bar

The **Bar** options section is available in the Work Breakdown and Assignments views and affects how bars are displayed in the Gantt chart.

													5	P		- 1	<i>(</i>	ø	View Option	s: View Entry
WΚ			WΚ	28, J	uly 9					WK 2	29, J	uly 16	5			WK :	30, Ju	ıly 23	Critical Path	
8													24	25	26	Denerdensier				
		website													Dependencies	<b>V</b>				
Proj	ect St	t Start 🔶 Client; Project Manager; Designer; Developer														Bar				
		Pre-production															Labels			
	CI	Client Questionnaire and goals Client; Project Manager																		
																Secondary				
		Client; Product Manager														Group Boundaries				
						•		ecifica	_	Ģ		/eloper	-		lanage	ør			Time Phase	
								Crea	ate Pr	oject F	ropo	sal 🗣	·					<u>}</u>	Labels	
															Crea	te Tirr	neline	Ċ		
	Create Task												k Lis	Description	Automatic					
																Crea	te Co	nten		

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

													9 🗉 🗹 🥕							View Option	s: View Entry
		28, Ju							29, Ju	-					WK 3	-	-			Critical Path	
10	11	12	13	14	15	16	17	18	19	20	21	22	23 24 25 26 27 28							Dependencies	
	-																			_	
				-	_		_					_								Bar	
																				Labels	N
					-															Secondary	75
							-7													Group Boundaries	
								╏		_										Time Phase	
									·											Time Phase	
																				Labels	
																				Description	Automatic ᅌ

Up to three labels can be defined per Gantt element in the styles.

The *Secondary* option enables/disables the display of planned values. These values are displayed as a gray bar and appear automatically if the real values differ from the planned values.

		P	<b>F</b> 🔨	۶	View Options: <b>Vi</b>	ew Entry
July 2 WK 28, July 9	WK 29, July 16		( 30, July 23	WK Critical	Path	
7 8 9 10 11 12 13 14 Project Start Client; Project Manag		23 24 25	5 26 27 28 29	9 30 Critical Depend		<ul><li>✓</li></ul>
Pre-production	Client: Project Manager		,	Bar		
User Scenarios	Client; Product Manager			Labels		
Comparative Analysis	Product Manager			Second	iary	<b>R</b>
Technical Specifications	Developer; Product Ma	inager	Project Manager		Boundaries	
Cn	Create Task List		Project Mar		hase	
	Create Content Chart Define Communications		Ċ	Labels		✓
	Create Site			Descrip	otion	Automatic ᅌ
	Pre-productio					

#### Group Boundaries

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

groups in the Gantt chart.

	🖗 🗲 💉 WK 28, July 9 WK 29, July 16 WK 30, July 23 WK 31											ىكى			View O	ptions: Vie	w Entry			
WK 28, July 9										-					July	30	Critica	al Dath		
10 11 12 13 14 15	16	17 18	8 19	20	21 22	23	24	25	26	27	28	29	30	31	1	2	Citica	in Facili		
art 🔶 Client; Project Manager; D	esigner	; Develo	per														Depen	ndencies		<ul><li>✓</li></ul>
Pre-production																				
ent Questionnaire and goals	Client	; Project	Manage	H.													Bar			
User Scenarios		Cii	ient; Pro	duct Ma	nager												Labels	\$		<b>S</b>
Comparative /	Analysis	•	Prod	uct Man	ager												Secon	darv		
Technical Sp	ecificati	ions ५	- Dev	eloper; F	Product I	Manage	r									U	000011	aary		
	Creat	te Projec	t Propos	sai 🗣					- Pr	oject I	Manag	jer					Group	Boundaries		
						Crea	te Time	line		Pr	oject	Manag	per							
							Create				ר, Pr	oject I	Manag	ger			Time I	Phase		
	Create Content Chart														Labels	2				
													D	efine	Com		Labers	•		
															≫		Descri	iption		Automatic
															≫					



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

#### Time Phase

The **Time Phase** option section is available in the Work Breakdown and [Assignment] views and affects the display of Time Phases in the Gantt chart.

				P		<b>X</b>	۶		View	Options: Vie	w Earned Value	
	W	/K 28, July	9		W	K 29, J	luly 16	Cri	itical Path			
	11	12	13	14	17	18	19					
BCWS	\$400.00	\$400.00	\$600.00	\$400.00	\$400.00	\$400.	.00	De	pendenci	ies	2	
BCWP					\$400.00	\$600.	.00	Ba	ır			
ACWP					\$1,000.00	\$600	.00	Lal	bels		•	
BCWS								-				
BCWP								Se	condary			
ACWP								Gr	oup Boun	daries		
BCWS	\$400.00	\$400.00	\$600.00	\$400.00	\$400.00	\$400.	.00	Tir	me Phase	• •		
BCWP					\$400.00	\$600	.00	Lal	bels	$\mathbf{k}$		
ACWP					\$1,000.00	\$600.	.00	De	scription		Automatic	0
BCWS	\$200.00										Hatomatic	
BCWP	_						_	► Co	onflicts		<ul><li>✓</li></ul>	

The *Labels* option enables/disables the display of labels in the respective Time Phase.

				۴		st 👌	6		View Options: View	Earned Value
	W	K 28, July	9		W	'K 29, July	/ 16		Critical Path	
	11	12	13	14	17	18	19			
BCWS									Dependencies	
BCWP									Bar	
ACWP									Labels	
BCWS										
BCWP									Secondary	
ACWP									Group Boundaries	
BCWS									Time Phase	
BCWP						)			Labels	
ACWP									Description	
BCWS									Description	Altomatic ᅌ
BCWP	_						-	►	Conflicts	<b>2</b>

The *Description* option contains settings for displaying a descriptive title for the Time Phase lines and can have one of the following values:

				Ŷ		st 🦻	·		View Options: View	Earned Value		
	WK 28, July 9 WK 29, July 16								tical Path			
	11	12	13	14	17	18	19			_		
BCWS	\$400.00	\$400.00	\$600.00	\$400.00	\$400.00	\$400.00		Dep	pendencies			
BCWP					\$400.00	\$600.00		Bar				
ACWP					\$1,000.00	\$600.00		Lab	als			
BCWS												
BCWP								Sec	condary	•		
ACWP								Gro	oup Boundaries	•		
BCWS	\$400.00	\$400.00	\$600.00	\$400.00	\$400.00	\$400.00		Tim	ne Phase			
BCWP					\$400.00	\$600.00		Lab	els			
ACWP					\$1,000.00	\$600.00		Des	scription	✓ Automatic		
BCWS	\$200.00							Des		Show		
BCWP	_							► Cor	nflicts	Hide		

- Show: Always show Time Phase Description
- Hide: Always hide Time Phase Description

				F	÷ 🜮	View Options: View Earned Value				
W	/K 28, July	9			WK 2	9, July 16		Critical Path		
11	12	13	14	17	18	19				
\$400.00	\$400.00	\$600.00	\$400.00	\$400.00	\$400.00	\$400.0		Dependencies	<b>2</b>	
				\$400.00	\$600.00			Bar		
				\$1,000.00	\$600.00			Labels		
								Secondary		
								Group Boundaries		
\$400.00	\$400.00	\$600.00	\$400.00	\$400.00	\$400.00	\$400.0		Time Phase		
				\$400.00	\$600.00			Labels		
				\$1,000.00	\$600.00			Description	Hide 📐 ᅌ	
\$200.00							-	0		
								Conflicts	<b>2</b>	

 Automatic: Show Time Phase descriptions only if multiple Time Phase lines are enabled in the current view, e.g. in the Gantt of the Work Breakdown > Earned Value view. A maximum of 3 Time Phase rows can be activated.

#### Conflicts

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

Ξw	ork Breakdown $ ightarrow$ Schedule				P		💉 🍾		View Opt	ions: View Schedule	
#▲	Title		July 16 9 20 21	WK 24 25	30, July 23 26 27	_	WK 31, July 3 31 1 2		Description	Automatic	<b>\$</b>
4	User Scenarios	rios 🔶 Client; Pro	oduct Manager					•	Conflicts	•	
5	Comparative Analysis	analysis Pro	duct Manager						Strong		
6	Technical Specifications	Specifications	eveloper; Product	Manager							
7	Create Project Proposal	Create Project Pro	oposal 🔶		Project I	Manager			Weak	<b>2</b>	
8	Create Timeline	Cr	eate Timeline 뎍	Pro	ject Manag	ər		►	Advanced		
9	Create Task List		Create Tas	k List 🦲	Project Ma	anager					
10	Create Content Chart			Create Con	tent Chart	•			Objects	Sorting Field	↑] ↓
11	Define Communications						Define Commu		Activities	#	↑ ↑
12	Create Site Map						>>				
13	Pre-production finished						Pre-				
14	Site Production						>>		+ -		

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

n in the second	ork Breakdown > Schedule		¥ E	💉 🥜	View Optio	ns: View Schedule
#	Title	July 9 WK 29, July 16	WK 30, July 23	WK 31, July	Description	Automatic 🗘
_		14 17 18 19 20 21	24 25 26 27 28	31 1 2		
4	User Scenarios	rios 🖵 Client; Product Manager			Conflicts	N
5	Comparative Analysis	Analysis Product Manager			Strong	<i>₽</i>
6	Technical Specifications	Specifications - Developer; Produc	t Manager			
7	Create Project Proposal	Create Project Proposal 🔸	Project Manager	r	Weak	
8	Create Timeline	Create Timeline	Project Manager	•	Advanced	
9	Create Task List	Create Ta	sk List Project Manager			
10	Create Content Chart		Create Content Chart		Objects	Sorting Field
11	Define Communications			Define Commu	Activities	# 1
12	Create Site Map			>>		
13	Pre-production finished			Pre-		
14	<ul> <li>Site Production</li> </ul>			>>	+ -	

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.

#### Paper Size

The **Paper Size** options section is available in the View Options of the Report views.

Select the desired paper size for the Report view from the list, or click the **Paper Size...** button to bring up the associated Page Setup dialog and use the options there.



The paper size settings for all other views (like Work Breakdown, Net plan, Resources, Assignments, Attachments) can be found in the [Print] dialog.

#### Orientation

The **Orientation** options section is available in the View Options of the Report views.

Set the desired orientation for the Report view as Landscape or Portrait, or click the **Paper Size...** button to bring up the associated Page Setup dialog and use the options there.



The orientation settings for all other views (such as Work Breakdown, Net plan, Resources, Assignments, Attachments) can be found in the [Print] dialog.

#### Page Setup...

The **Page Setup...** button is available in the View Options of the Report views.

It is a shortcut to the *File > Page Setup...* menu item. You can use this macOS dialogue to set the Page Attributes (Paper Size, Orientation, Scale) and Borders for the Report view.



The Page Setup settings for all other views (such as Work Breakdown, Net plan, Resources, Assignments, Attachments) can be found in the [Print] dialog.

#### Advanced

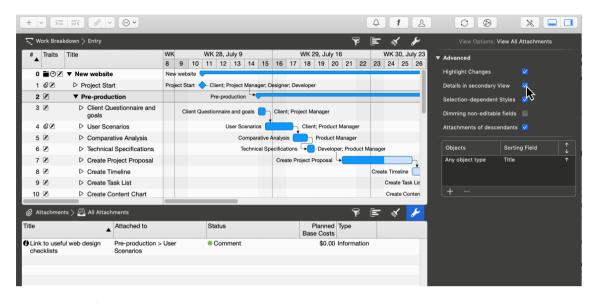
The Advanced section contains advanced View Options.

#### 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.



6

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

+ ~ 5	=< 0 ~	· · ·				A F A	0 0	* -
- Work Breakd	iown > Entry				Ŷ	E 🗸 🖌	View Options:	View All Attachments
# Traits	Title			WK 28, July 9 11 12 13 14 15	WK 29, July 16	WK 30, July 23 22 23 24 25 26	▼ Advanced	
0 10 2	New website	,	New website 🤜				Highlight Changes	
102	▷ Project Sta	rt	Project Start <	- Client; Project Manager; D	esigner; Developer		Details in secondary	View
2 🗷	▼ Pre-produ	ction		Pre-production			Selection-dependen	t Styles
3 🗷	▷ Client Qu goals	lestionnaire and	Client Qu	estionnaire and goals	Client; Project Manager		Dimming non-editab	le fields
4 @Z	User Sce	enarios		User Scenarios	Client; Product Manager	,	Attachments of desc	endants 🔽
5 🗷	Compara	ative Analysis		Comparative	Analysis Product Manager			
6 🗷	Technica	I Specifications		Technical Sp	ecifications 🕞 Developer; Produ	ct Manager	Objects	Sorting Field
7 🗷	Create P	roject Proposal			Create Project Proposal		Any object type	Title
8 🗷	Create T	imeline				Create Timeline		
9 🗷	Create Ta	ask List				Create Task Lis		
10 🗷	Create C	ontent Chart		_		Create Conten	(+ -	
Ø Attachments	s > 🗟 All Attach	nments			Ĩ	· 🖃 🖌 🥕		
Title	•	Attached to		Status	Planned Type Base Costs			
Background li	nformation	Post-production : Retrospective	> Project	Comment	\$0.00 Informa	tion		
Basic questio project retros		Post-production : Retrospective	> Project	<ul> <li>Planned</li> </ul>	\$0.00 Checkli	st		
Clients often of time	don't review in	Site Production >	Client Review	A Medium Risk	\$0.00 Risk			
Define a clear project	end to the	New website > Pe finished	ost-production	Comment	\$0.00 Informa	tion		
Define a clear project	start of the	New website > Pr	roject Start	Comment	\$0.00 Informa	tion		
Each phase e milestone	nds with a	New website > Pr finished	roduction	Comment	\$0.00 Informa	tion		
Have a milest phase	one after each	New website > Pr finished	re-production	Comment	\$0.00 Informa	tion		
Link to useful checklists	web design	Pre-production > Scenarios	User	Comment	\$0.00 Informa	tion		

#### 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.

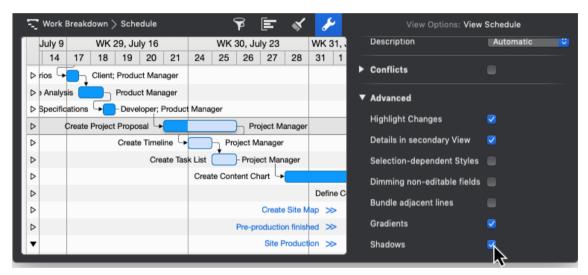
## Gradients

Σ	T Work Breakdown > Schedule								F		\$	ð	6		View Options: View	Options: View Schedule	
	July 9		WK	29, Ju	ly 16			WK	30, Jı	ly 23		WK :	31, .		Description	Automatic 오	
	14	17	18	19	20	21	24	25	26	27	28	31	1				
⊳	rios 🗣	h	Client;	Produ	ct Man	ager									Conflicts		
⊳	Analys	is 🚺		Produc	ct Mana	ager								•	Advanced		
⊳	Specific	ations	-	- Deve	loper; f	Produc	t Mana	ger									
⊳	(	Create	Project	t Propo	sal 🕨	•			- Pr	oject M	anager				Highlight Changes	<b>S</b>	
⊳				Create	e Timel	ine 🗣		ך Pn	oject N	lanager					Details in secondary View	<b>S</b>	
⊳					Cre	ate Tas	k List	Ċ	- Proje	ect Mar	nager				Selection-dependent Styles		
⊳							Crea	te Con	tent Cl	hart 🖵	•				Dimming non-editable fields		
⊳												Defir	ne C		- Burdle adlessed lless		
⊳										Create	e Site N	ap >	>		Bundle adjacent lines		
⊳									Pre-pr	roductio	on finisl	ned >	>		Gradients	<u> </u>	
▼										Site F	Product	ion >	>		Shadows	<u>1</u> 2	

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

	ς	Work	Breakd	lown )	> Sche	dule				P		<b>\$</b>	J	9		View Options: View	Schedule
ſ		July 9		WK	29, Ju	ly 16			WK	30, Jı	ıly 23		WK :	31, .		Description	Automatic 💙
	7	14	17	18	19	20	21	24	25	26	27	28	31	1			
	⊳	rios 🗣		Client;	Produc	ct Man	ager									Conflicts	
	⊳	Analys	sis 🛑		Produc	ct Man	ager								•	Advanced	
	⊳	Specific	ations	<b>-</b>	- Deve	loper; l	Produc	Manag	ger								_
	⊳	(	Create	Project	t Propo	sal 🗣	·			)_ Pr	oject M	lanager				Highlight Changes	<b>S</b>
	⊳				Create	e Timel	line 🕞		_ Pr	oject N	lanage	r				Details in secondary View	<b>2</b>
	⊳					Cre	ate Tas	k List	Ĺ	- Proje	ect Mar	nager				Selection-dependent Styles	
	⊳							Creat	e Con	tent Cl	hart 🖣					Dimming non-editable fields	
	⊳												Defi	ne C			
	⊳										Creat	e Site N	ap >	>		Bundle adjacent lines	
	⊳									Pre-pr	oductio	on finisl	ned >	>		Gradients	N
	•										Site	Product	ion >	>		Shadows	<u></u>

#### Shadows



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

- Work Breakdown > Se	chedule	P	<b>e</b> 🗸	s	-		View Options: View	Schedule
	July 16	WK 30, Ju		WK 3	1, .		Description	Automatic 😂
	9 20 21 24	25 26	27 28	31	1	•	Conflicts	
▷ rios └→ Client; Pro	oduct Manager							-
	oduct Manager					▼	Advanced	
	eveloper; Product Man				-1		Highlight Changes	<b>~</b>
Create Project Pro			oject Manage	r				
D Cr	eate Timeline	Project M	-	_			Details in secondary View	<b>S</b>
⊳	Create Task List		ct Manager				Selection-dependent Styles	•
⊳	Crea	ate Content Ch	art 🗣				Dimming non-editable fields	•
				Defin			Bundle adjacent lines	
			Create Site		- 1		Gradients	<ul> <li>Image: A start of the start of</li></ul>
⊳		Pre-pro	oduction fini				Gradients	<u> </u>
			Site Produ	tion ≫	>		Shadows	

#### Objects and Sorting Fields

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

₹ wa	ork Breakdown $ ightarrow$ Schedule	۲	= 🚿 🥜	View Options: View Schedule
#▲	Title	Expected Start	Expected End	Time Phase
4	User Scenarios	July 15, 2017	July 17, 2017	Labels 🗸
5	Comparative Analysis	July 17, 2017	July 18, 2017	
6	Technical Specifications	July 18, 2017	July 18, 2017	Description Automatic 🗘
7	Create Project Proposal	July 21, 2017	July 25, 2017	► Conflicts
8	Create Timeline	July 24, 2017	July 24, 2017	
9	Create Task List	July 25, 2017	July 25, 2017	► Advanced
10	Create Content Chart	July 28, 2017	Aug 2, 2017	
11	Define Communications	Aug 4, 2017	Aug 4, 2017	Objects Sorting Field
12	Create Site Map	Aug 7, 2017	Aug 7, 2017	Activities 🗘 # 🗸 🛧 Ascending
13	Pre-production finished	Aug 7, 2017	Aug 7, 2017	↓ Descending
14	▼ Site Production	Aug 8, 2017	Aug 31, 2017	
15	Design Comps	Aug 8, 2017	Aug 9, 2017	

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