



# 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.

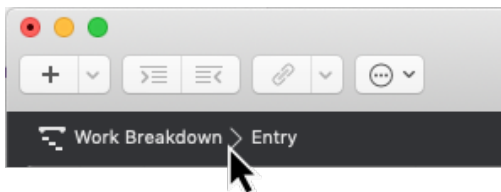


For the app to remain in Light Mode even if the system is in Dark Mode, enable the ***Always light*** setting for the **Views Appearance** in ***Preferences > General***.

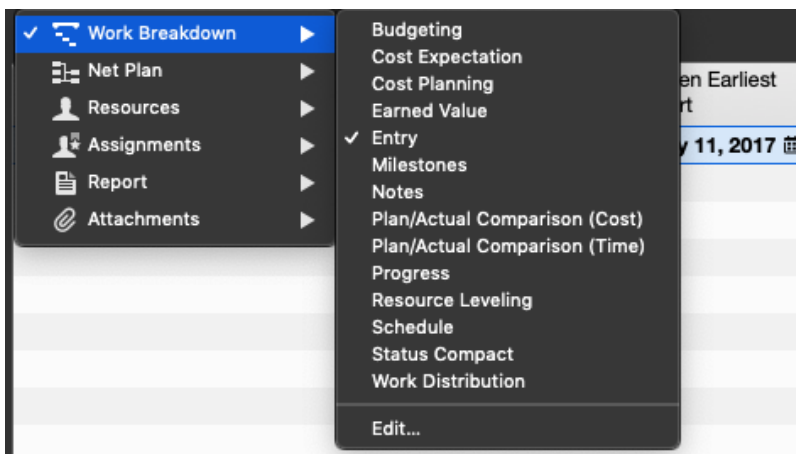


Even if using the app in Dark Mode, printing always takes place in the light appearance, while image exports take place in the currently selected appearance.

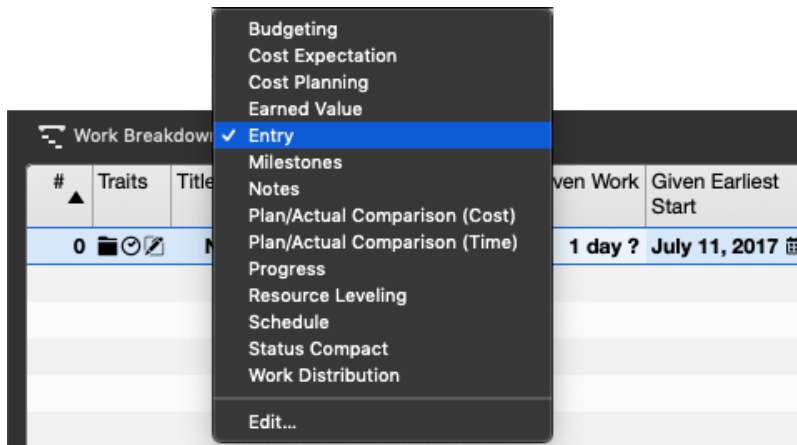
Merlin Project shows in the upper left corner the name of the current view.



Click **Work Breakdown** for the selection list of all views.



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

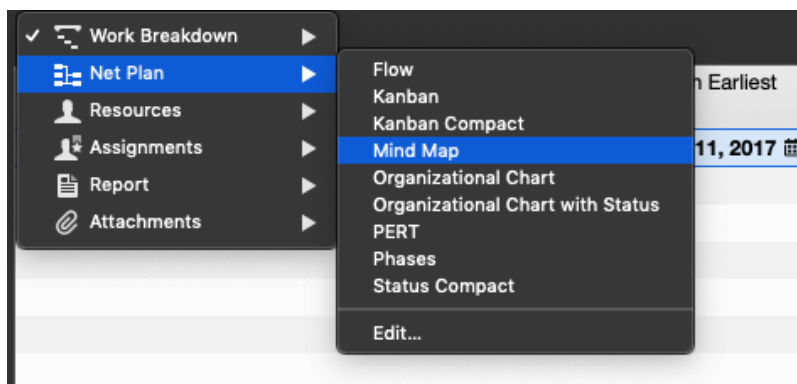


Additional option in the sub-views:

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

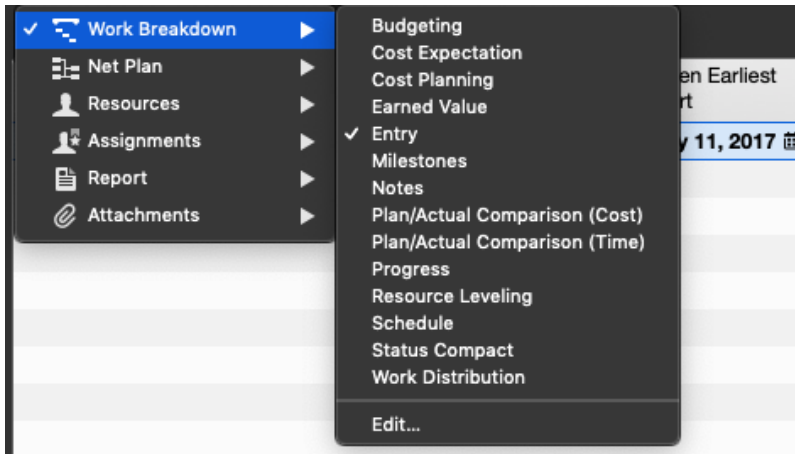
## Switching views

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 Gantt chart** is used in project management.



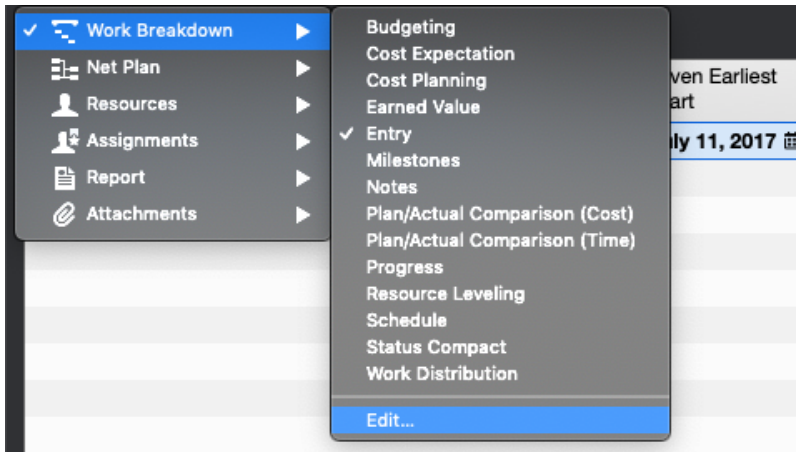
For this purpose, you can find the following **Work Breakdown** views in **Merlin Project**:

- **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:

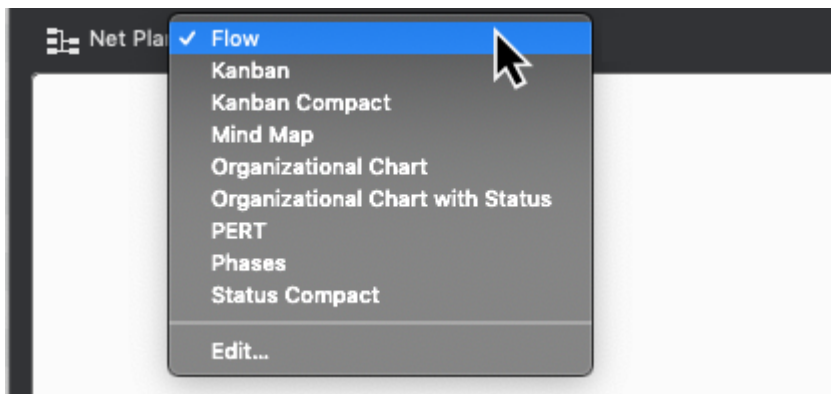
- **Workdistribution**
- **Cost Expectation**
- **Cost Planning**
- **Budgeting**
- **Plan/Actual Comparison (Cost)**
- **Earned Value**

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.



## Net Plan

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



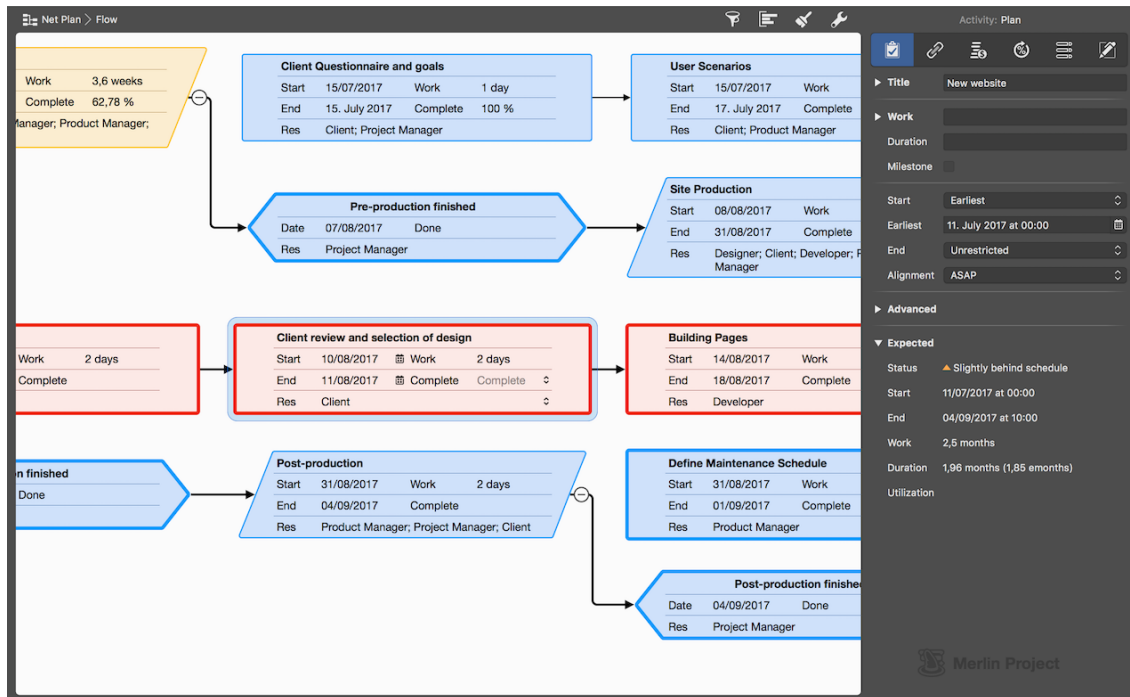
- Flow
- Kanban
- Kanban Compact
- Mind Map
- Organizational Chart
- Organizational Chart with Status
- PERT
- Phases
- Status Compact



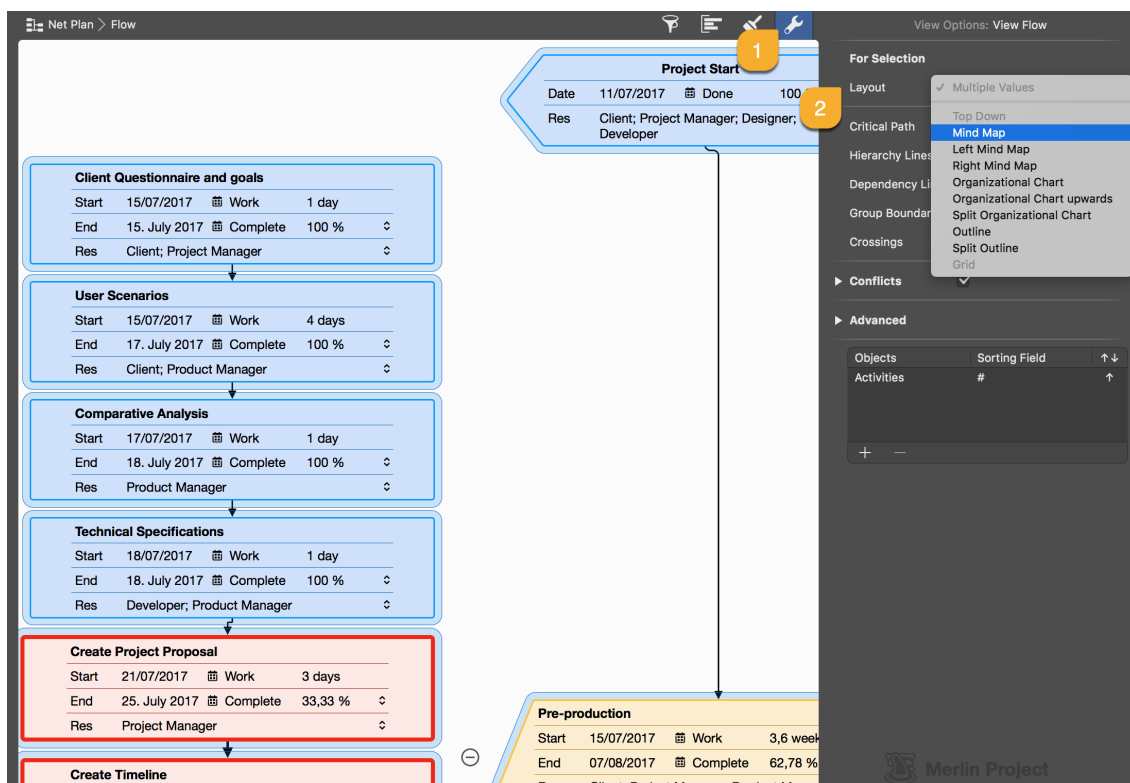
You can create additional views by clicking the **Edit** option. The existing views are displayed in the window and you can create new views by clicking the plus icon.

## 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.

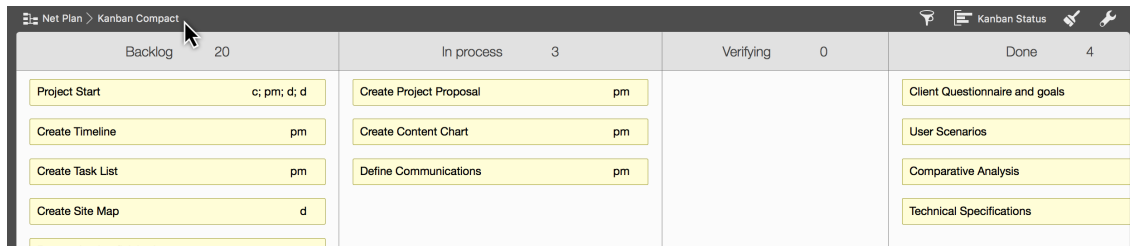




## Kanban / Kanban Compact

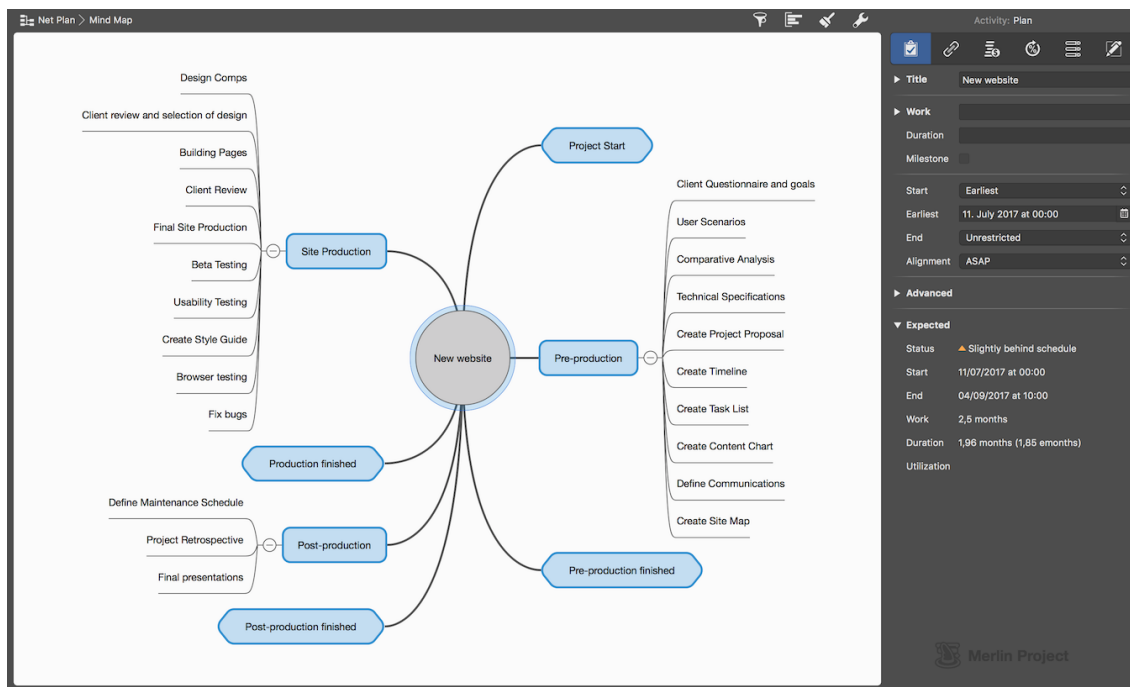
The **Kanban** view is intended for agile project management and offers a variety of possible applications.

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



## Mind Map

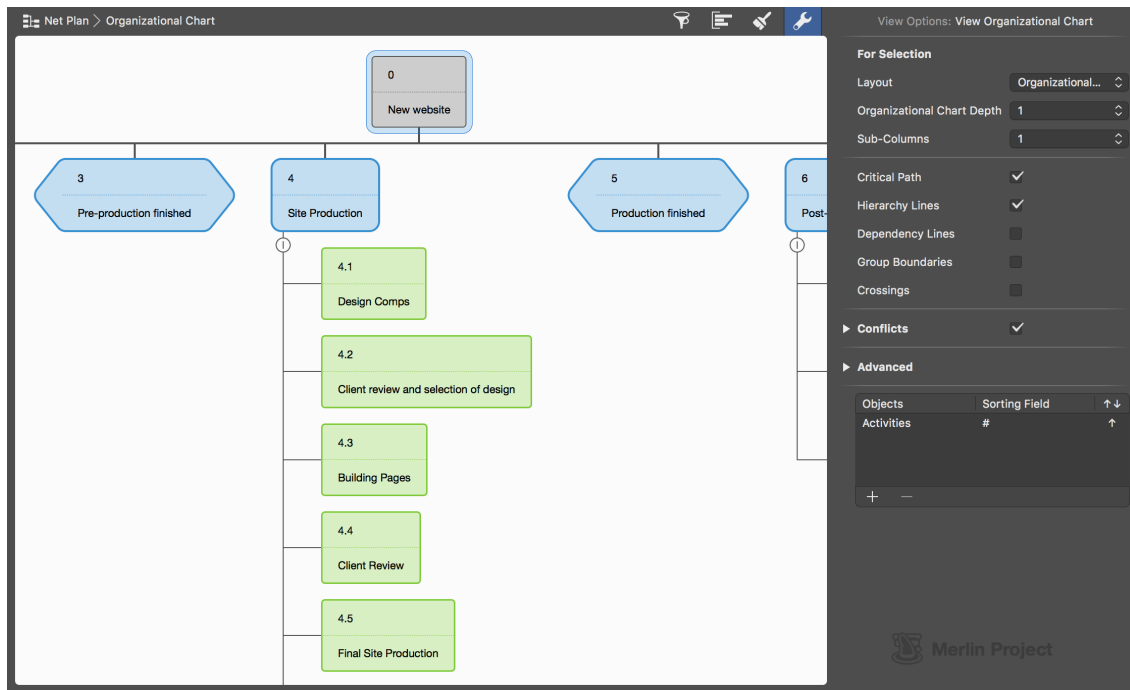
The **Mind Map** view is perfect for displaying projects graphically. You can adjust the layout of the Mind Map in the »[View Options](#)« and change how it looks. Click the displayed icon.



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.

Cost

Earned Value

Entry

Work

Edit...

Traits	Title	Image	Type	Material Unit	Available Units	Project
	Default Resource		Person		100%	New website
	Client		Person		100%	New website
	Designer		Person		100%	New website
	Developer		Person		100%	New website
	Product Manager		Person		100%	New website
	Project Manager		Person		100%	New website
	Employee 01		Person		100%	New website
	Employee 02		Person		100%	New website
	Employee 03		Person		100%	New website
	Employee 04		Person		100%	New website
	Employee 05		Person		100%	New website
	Employee 06		Person		100%	New website
	Employee 07		Person		100%	New website
	Employee 08		Person		100%	New website
	Employee 09		Person		100%	New website
	Employee 10		Person		100%	New website
	Employee 11		Person		100%	New website

View Options: View Entry

Resource pools

☒

Advanced

Highlight Changes

☐

Details in secondary View

☒

Selection-dependent Styles

☒

Dimming non-editable fields

☐

Objects

Sorting Field

Any Type

#

+

-

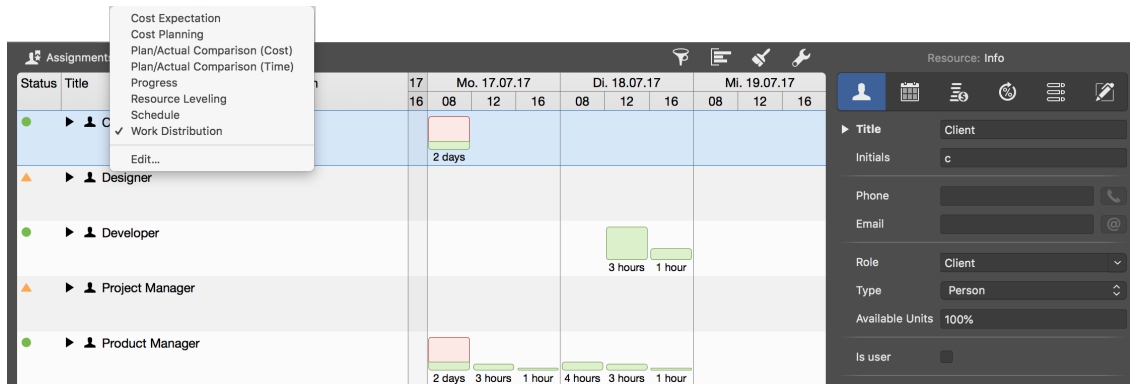
**Resources** can be viewed in the four following **views**:

- 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)**

Assignments > Plan/Actual Comparison (Cost)				
Status	Title	Planned Costs	Actual Costs	Expected Costs
●	▶ Client			
▲	▼ Designer	\$1.800,00		\$1.800,00
✓	Project Start			
○	Design Comps	\$800,00		\$800,00
○	Final Site Production	\$600,00		\$600,00
○	Create Style Guide	\$400,00		\$400,00
●	▼ Developer	\$4.400,00	\$200,00	\$4.400,00
✓	Project Start			
✓	Technical Specifications	\$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.

Report > Status Compact

New website

Planned (Start-End)

11. July 2017

21. August 2017

Expected (Start-End)

11. July 2017

4. September 2017

Done

22,6 %

▲

Slightly behind schedule

Objective

This project can be used for creating a new website for a client. Revisions will, of course, always be necessary.

Ongoing Activities

#	Status	Title	Group Path	Resources	Expected Start	Complete	Remaining Work
On time					28.07.17		1,7d
10	●	Create Content Chart	New website > Pre-production	pm	28.07.17	70 %	1,2d
11	●	Define Communications	New website > Pre-production	pm	04.08.17	50 %	4h
Behind schedule					21.07.17		4d
7	■	Create Project Proposal	New website > Pre-production	pm	21.07.17	33 %	2d
8	■	Create Timeline	New website > Pre-production	pm	26.07.17		1d
9	■	Create Task List	New website > Pre-production	pm	27.07.17		1d

Milestones

#	Status	Title	Group Path	Resources	Expected Start	Complete	Remaining Work
---	--------	-------	------------	-----------	----------------	----------	----------------

Report Module: Project View

Title

Type

Net Plan

View

Status Compact

Filter

Root Activity

Filter Mode

Show non-matching hier...

Grouping

None

Grouping Mode

None

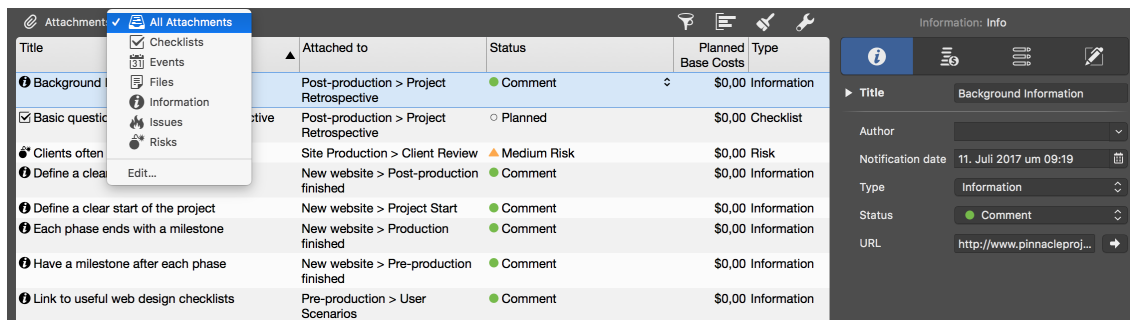
Without content

Show message

On New Page

## Attachments

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



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

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

## View Options

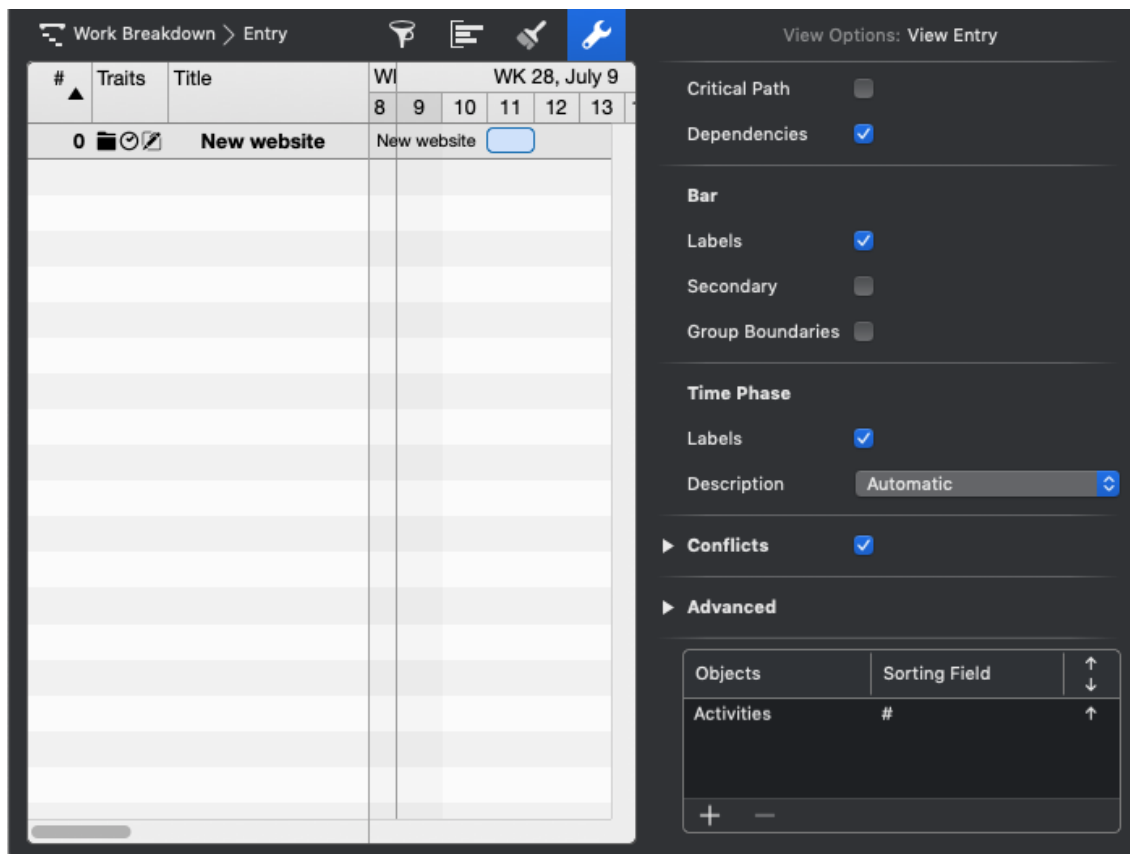
The layout of the current view can be changed and graphically adjusted in the **View Options**. To do this, click on the **wrench**.



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.



It contains the following options:

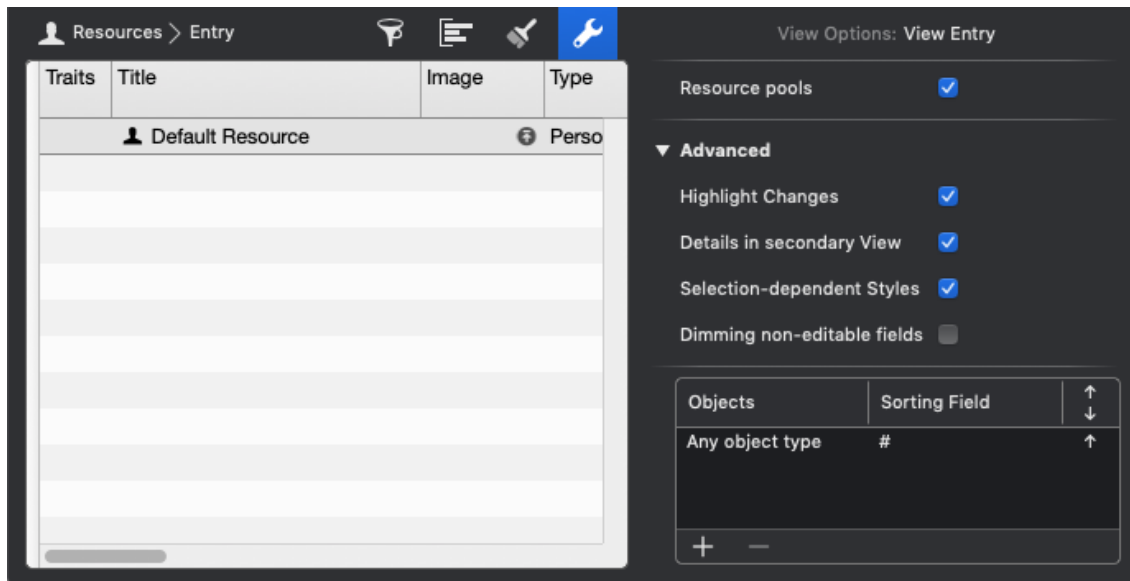
- [Critical Path](#)
- [Dependency Lines](#)
- [Bar](#)
  - Labels
  - Secondary
  - Group Boundaries
- [Time Phase](#)
  - Labels
  - Description (*Automatic, Show and Hide*)
- [Conflicts](#)
  - Strong
  - Weak

- 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.

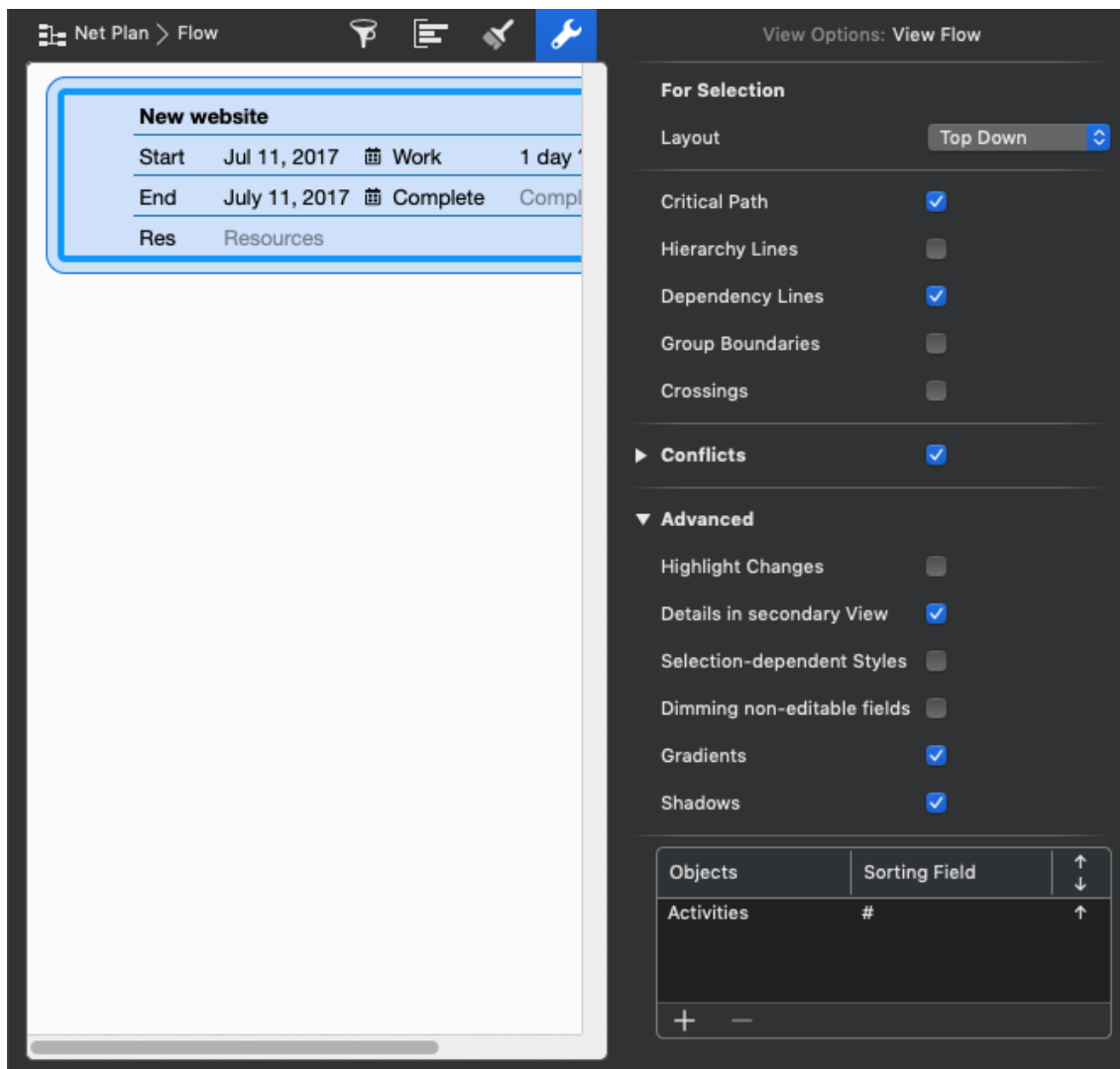


It contains the following options:

- [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.



It contains the following options:

- 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.

The screenshot shows the 'View Options: View Work Distribution' inspector panel. The left pane displays a table with columns for 'Status', 'Title', and 'WK 28, July 9' (with sub-columns 11, 12, 13, 14, 15). The first row shows a green dot, a person icon, and the text 'No resources assigned', with a green box containing '1d?' in the date column. The right pane contains the following settings:

- Critical Path**: ☐
- Resource Pools**:
  - All Pool Resources: ☐
  - Assignments From Pools: ☒
- Bar**:
  - Labels: ☒
  - Secondary: ☐
  - Group Boundaries: ☐
- Time Phase**:
  - Labels: ☒
  - Description:
- Conflicts**: ☒
- Advanced**:
  - Highlight Changes: ☒
  - Details in secondary View: ☒
  - Selection-dependent Styles: ☒
  - Dimming non-editable fields: ☐
  - Bundle adjacent lines: ☐
  - Gradients: ☒
  - Shadows: ☒

At the bottom of the right pane is a table for sorting:

Objects	Sorting Field	
Any object type	Expected Start	↑

Below this table are '+' and '-' buttons.

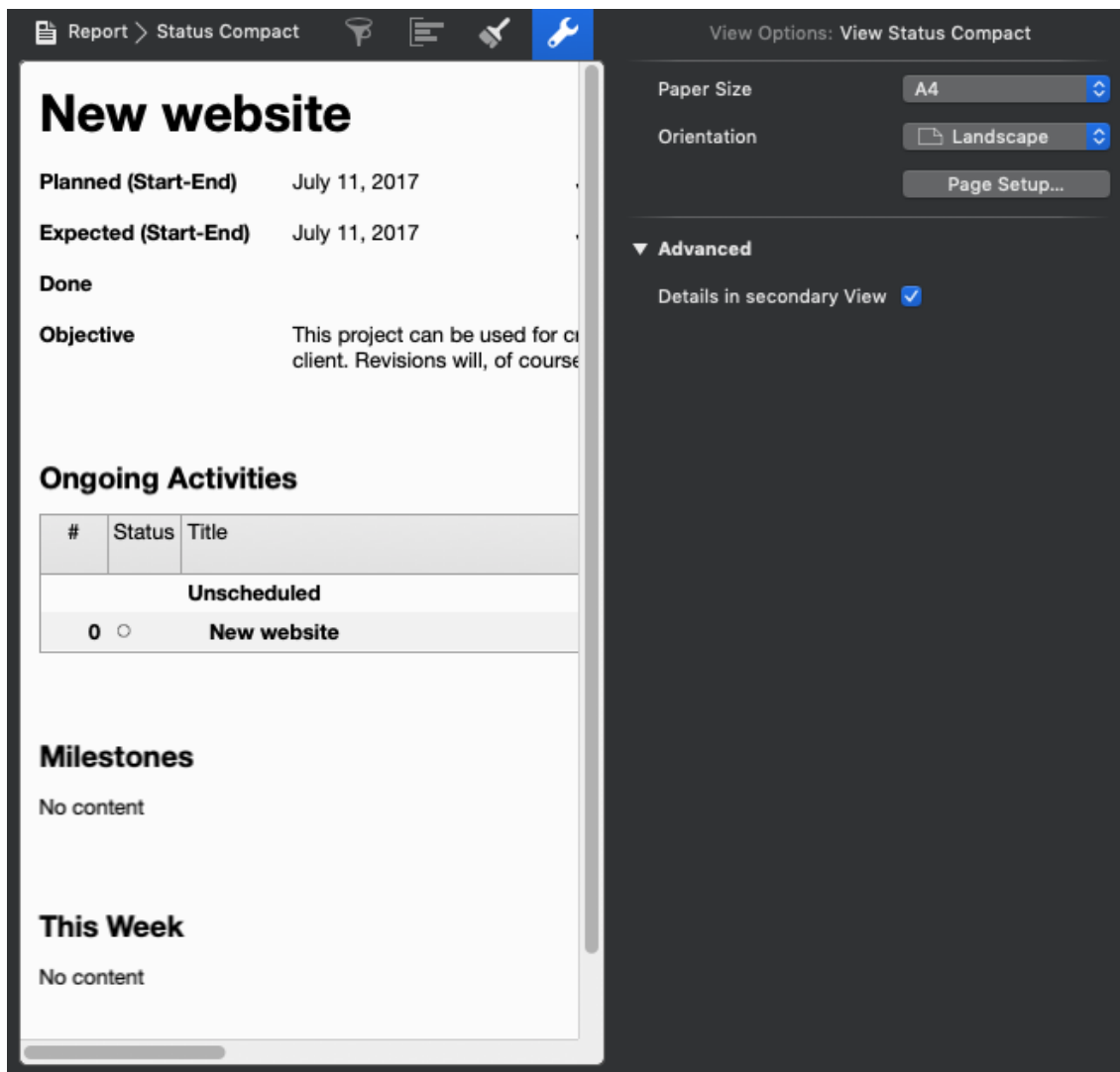
It contains the following options:

- [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.

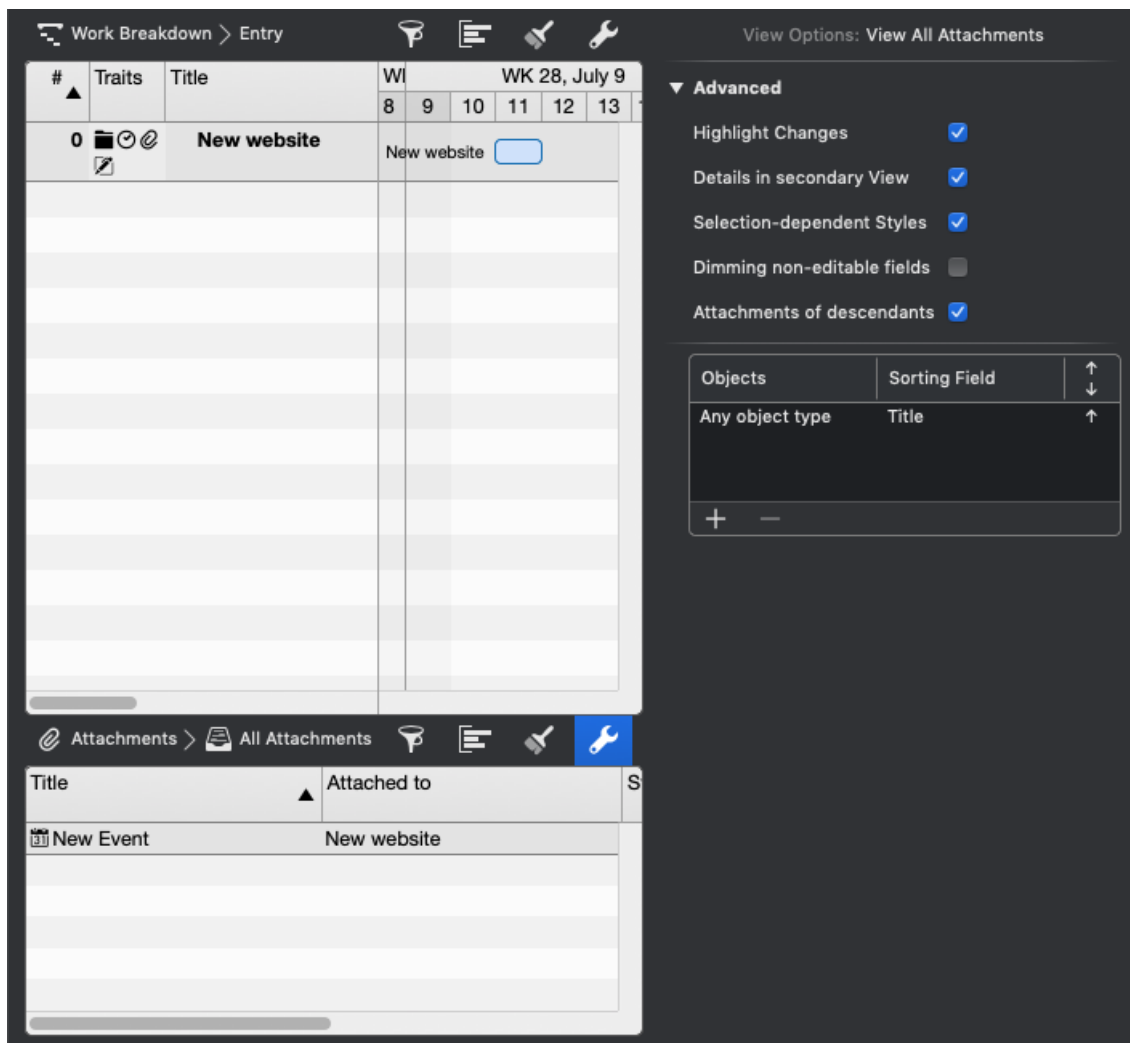


This inspector appears when the *Report* view is enabled. It contains the following options:

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

## Inspector »View Options: Attachments«

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



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

### 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.

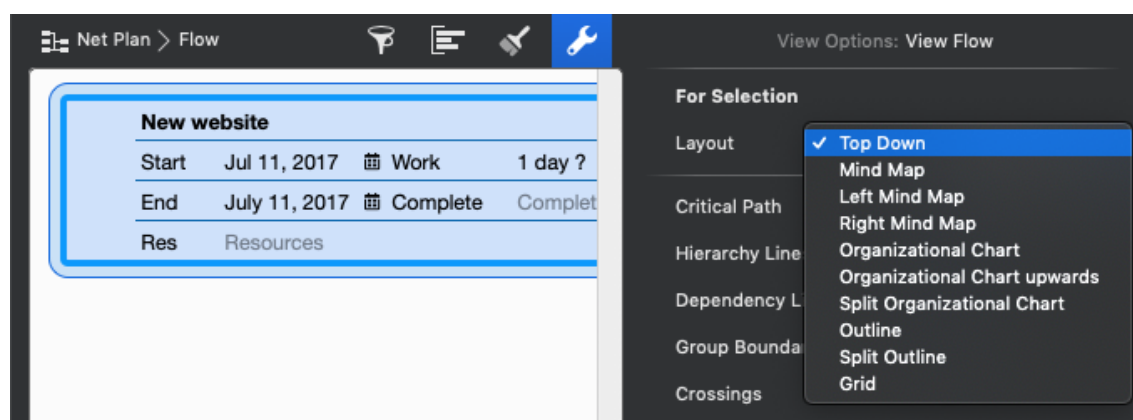
### Assignments From Pools

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.



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.

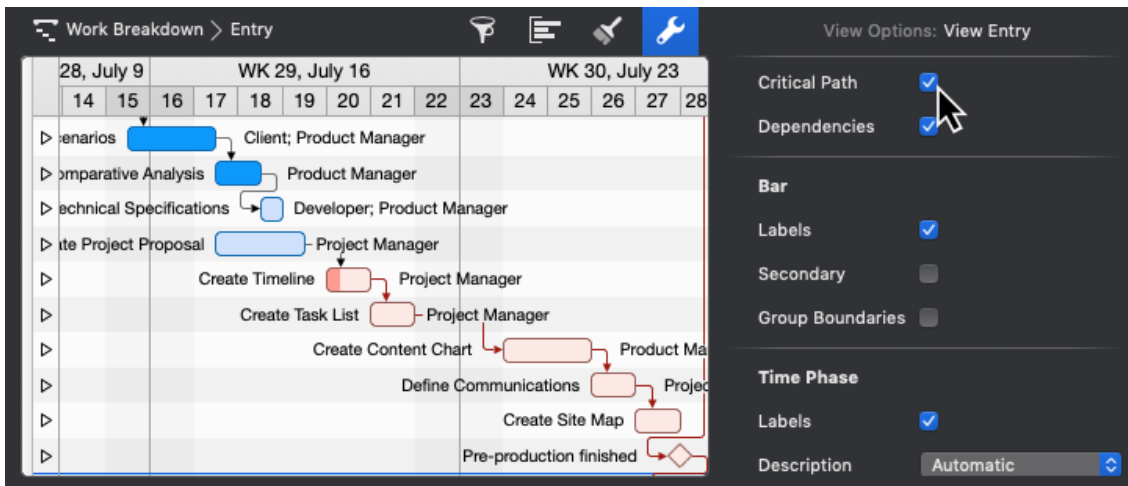
## Critical Path

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.

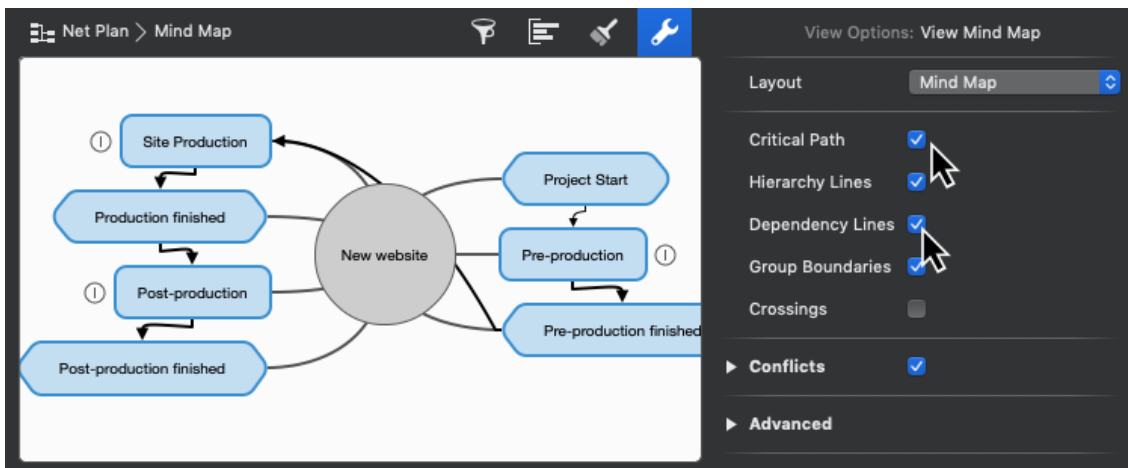
The display of the *Critical Path* can also be activated by clicking the corresponding icon on the toolbar.



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](https://en.wikipedia.org/wiki/Critical_path_method)..

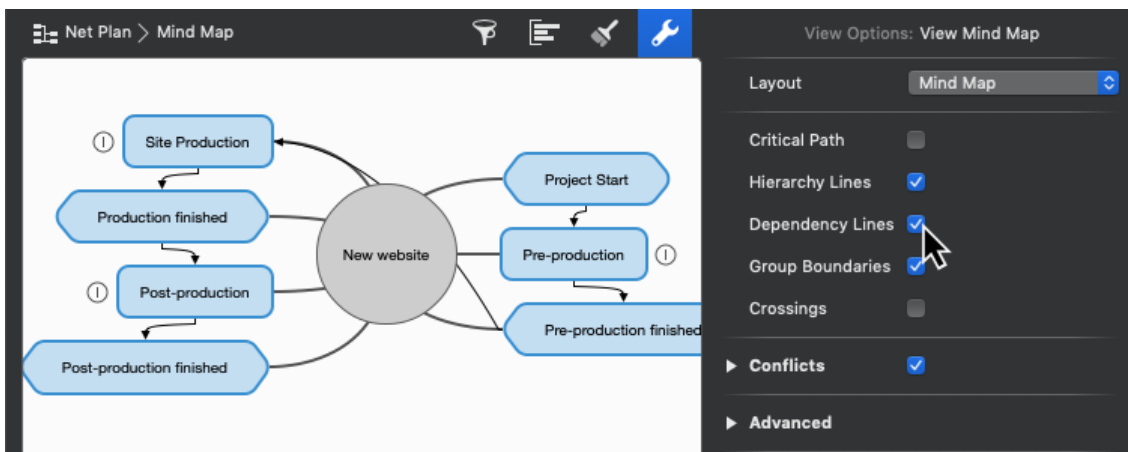


In the **Net Plan > Mind Map** view, where the dependency lines are not displayed by default, please activate the display of the link lines of the [Dependency Lines](#) in addition if you want to highlight the Critical Path.

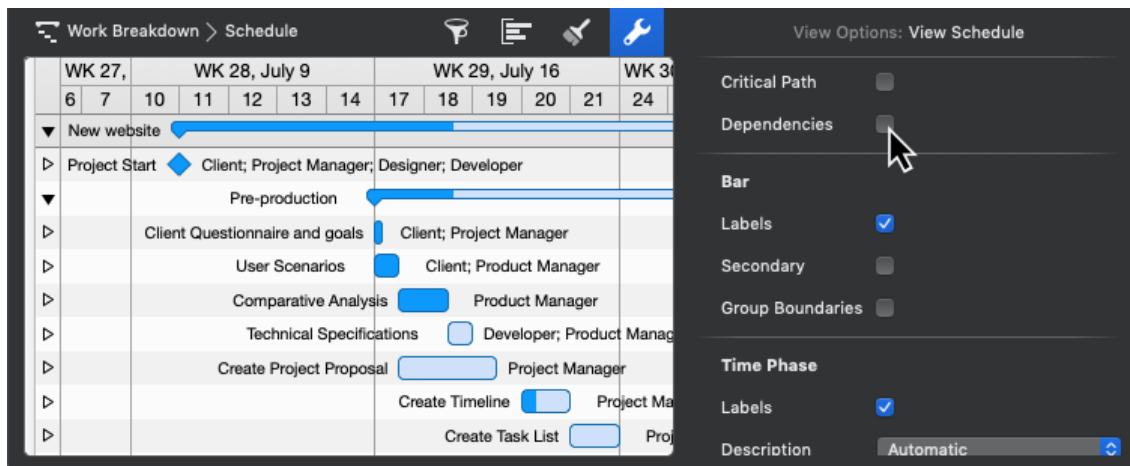


## Dependency Lines

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



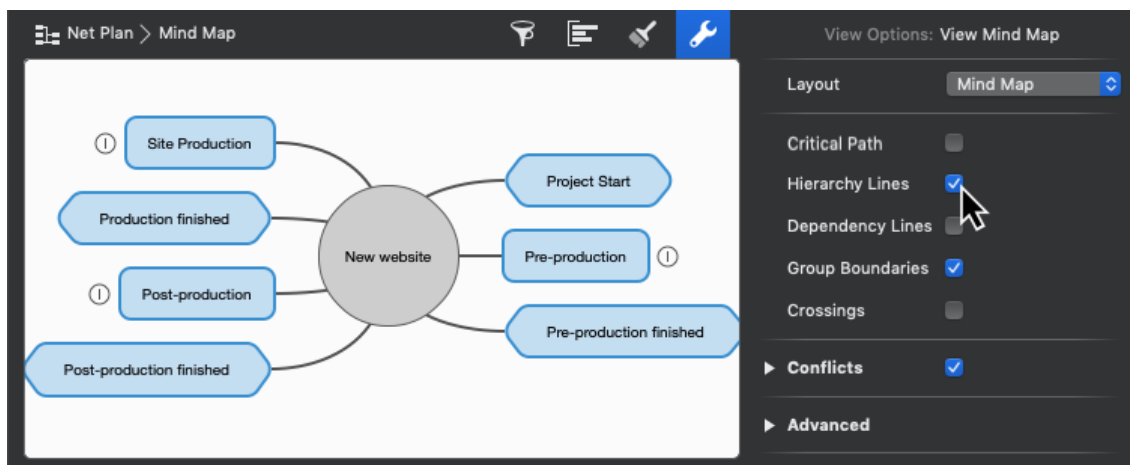
With it you can activate or deactivate the display of the dependency lines between the Gantt bars or cards in the Net plan views.



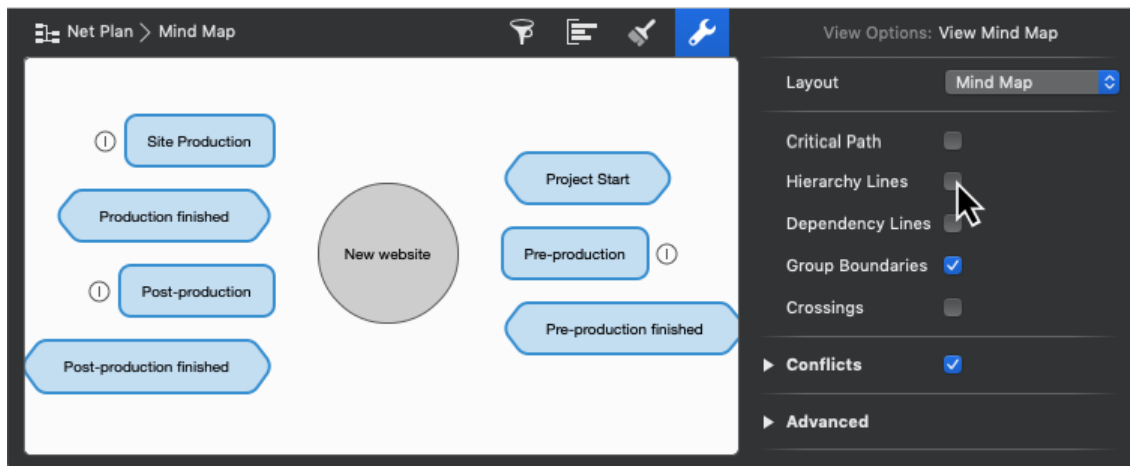
This option has no effect in a Work Breakdown view, if your Gantt chart is not a **bar chart** but a **time phase** representation.

## Hierarchy Lines

The **Hierarchy Lines** option is available in [Net Plan](#) views.

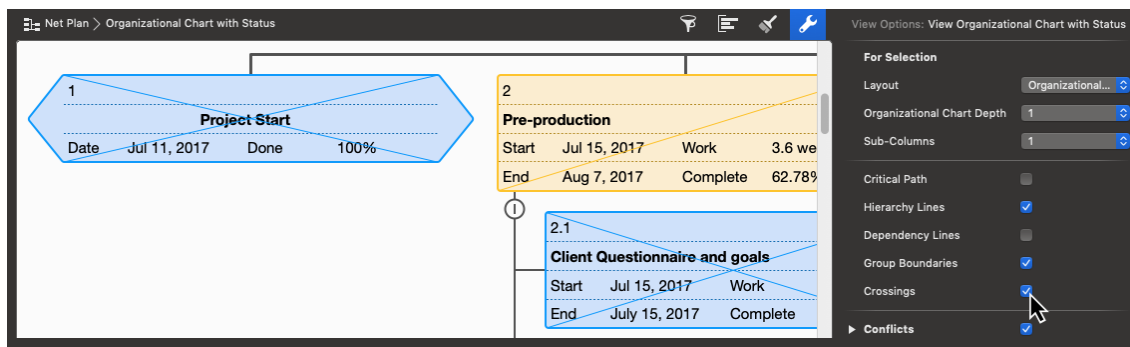


The option *Hierarchy Lines* activates/deactivates the display of lines that lead from higher structures to lower structures. These lines help understanding the hierarchy of the respective cards in the Net plan, but can be switched off if required.

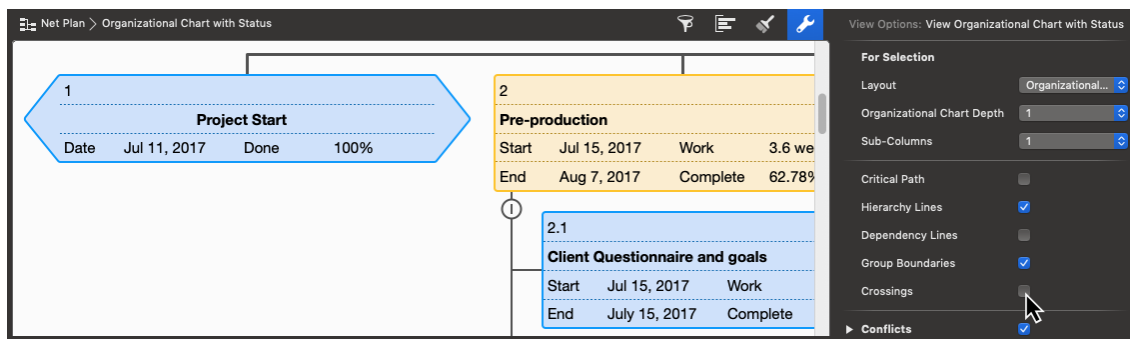


## Crossings

The *Crossings* option is available in [Net Plan](#) views.

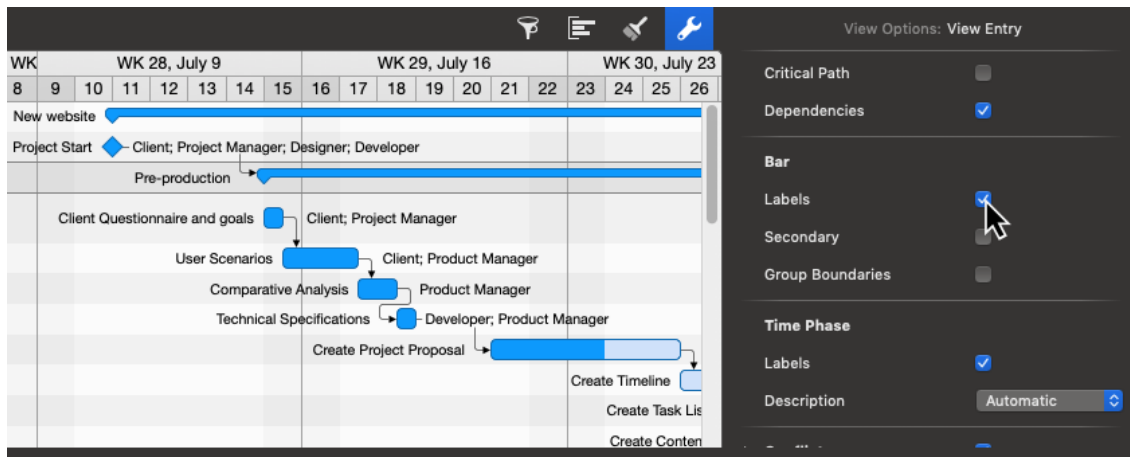


The option *Crossings* activates/deactivates the display of crossings at started and completed cards of Net plan views, which are coded according to the status. These are for example *PERT*, *Organizational Chart with Status*, *Phases*, *Kanban*, *Kanban Compact* and *Flow*. One line on the card indicates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

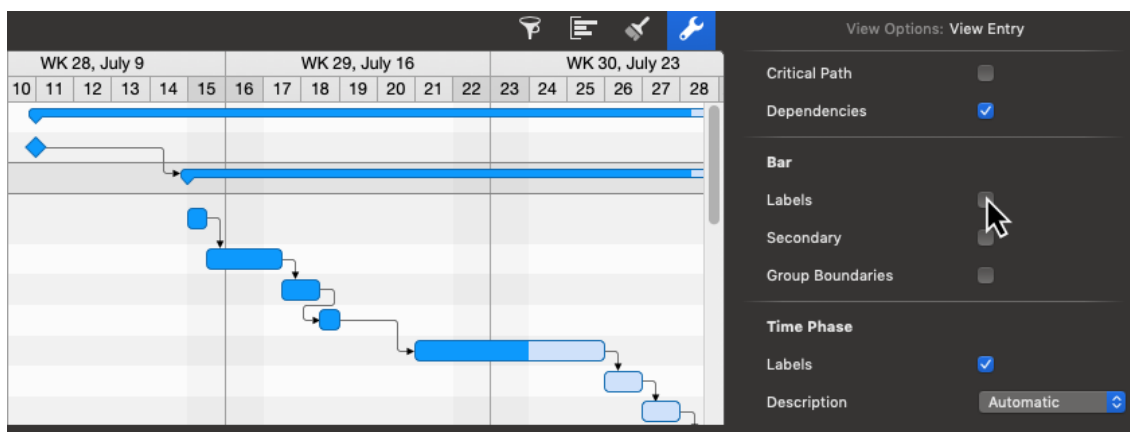


## Bar

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

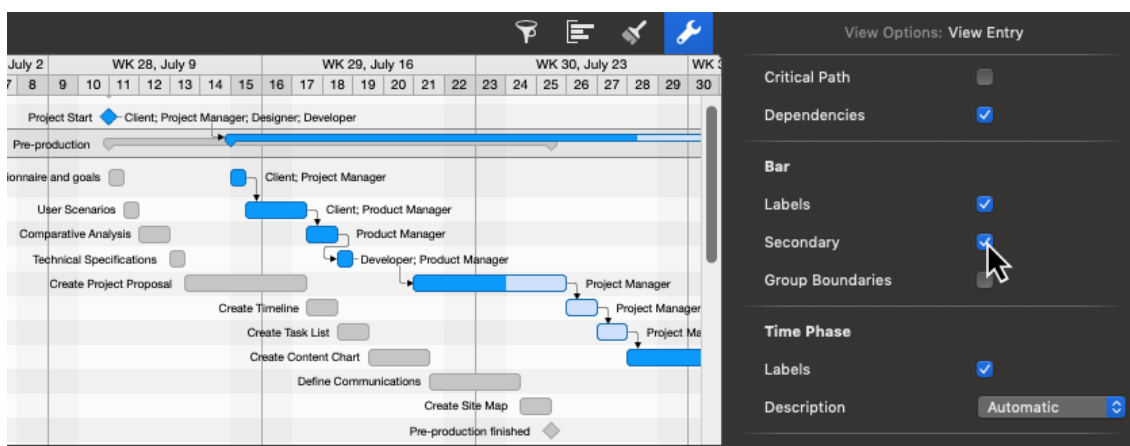


The *Labels* option enables/disables the bar labels display.



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

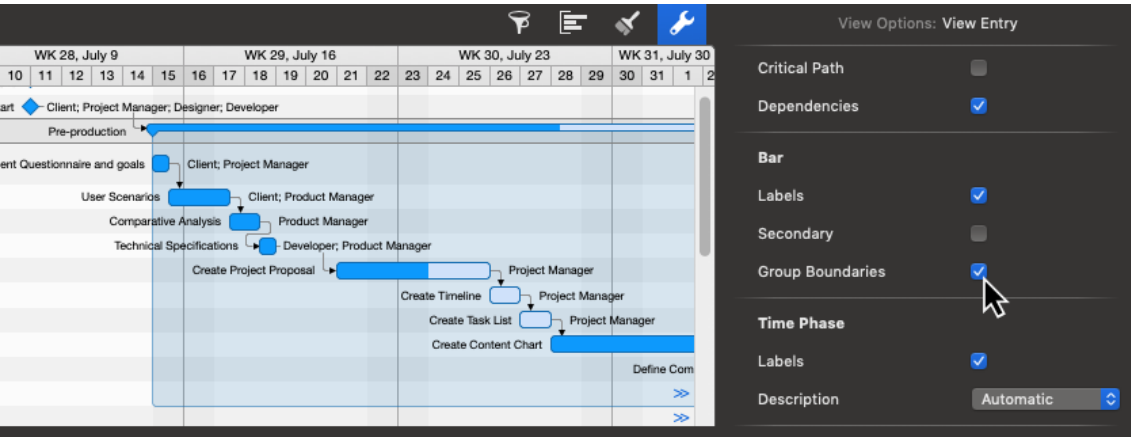
The *Secondary* option enables/disables the display of planned values. These values are displayed as a gray bar and appear automatically if the real values differ from the planned values.



### Group Boundaries

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

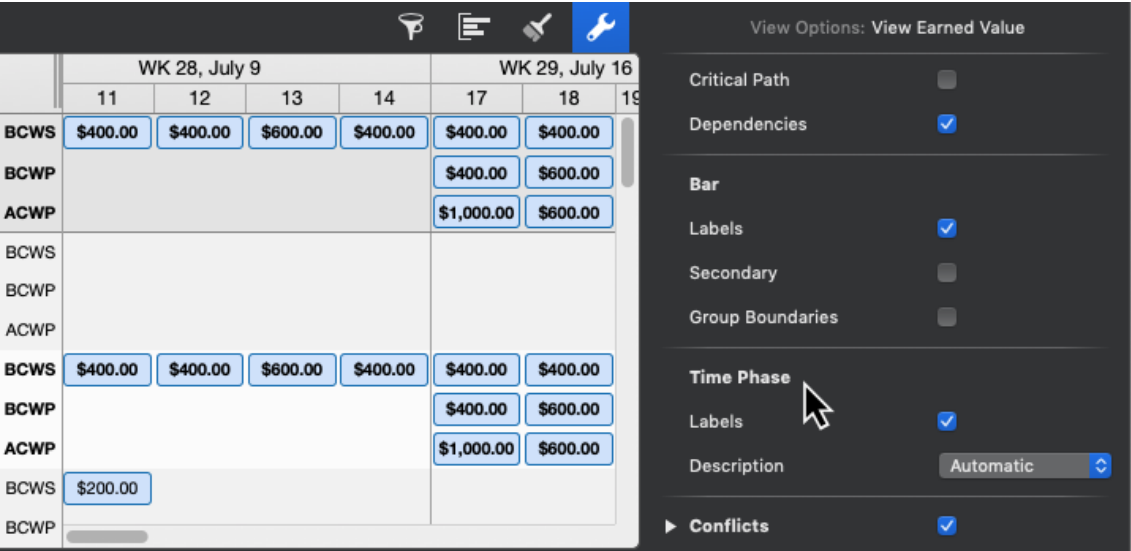
groups in the Gantt chart.



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

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.



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

View Options: View Earned Value

Critical Path ☐

Dependencies ☒

**Bar**

Labels ☒

Secondary ☐

Group Boundaries ☐

**Time Phase**

Labels ☒

Description Automatic

► Conflicts ☒

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

View Options: View Earned Value

Critical Path ☐

Dependencies ☒

**Bar**

Labels ☒

Secondary ☐

Group Boundaries ☐

**Time Phase**

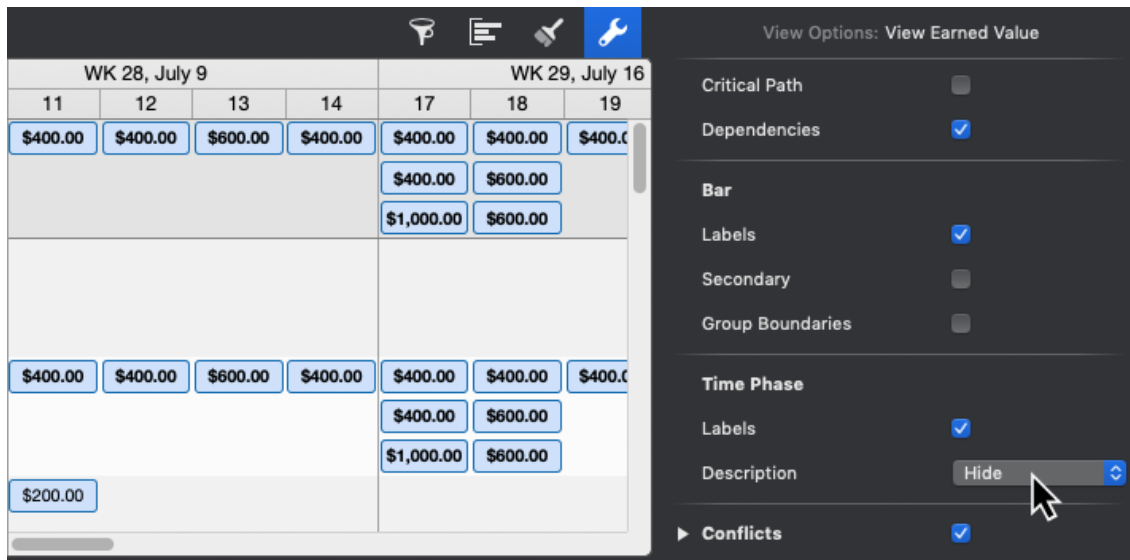
Labels ☒

Description
 

- ✓ Automatic
- Show
- Hide

► Conflicts ☒

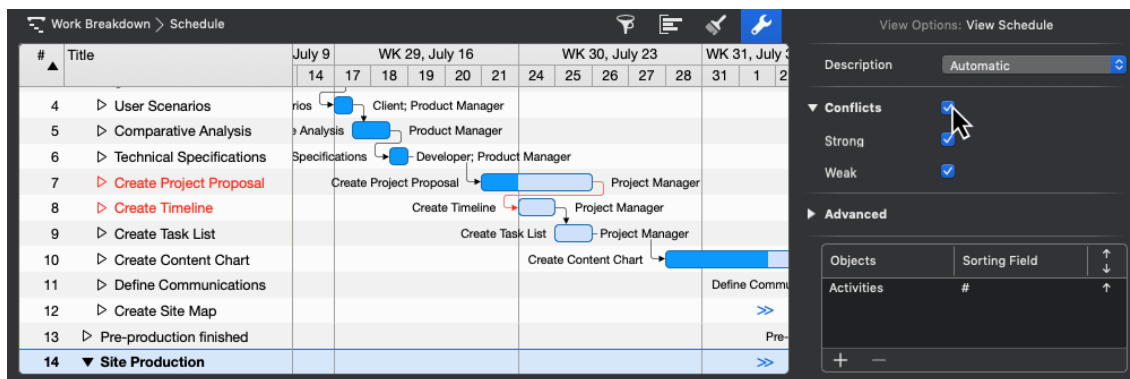
- *Show*: Always show Time Phase Description
- *Hide*: Always hide Time Phase Description



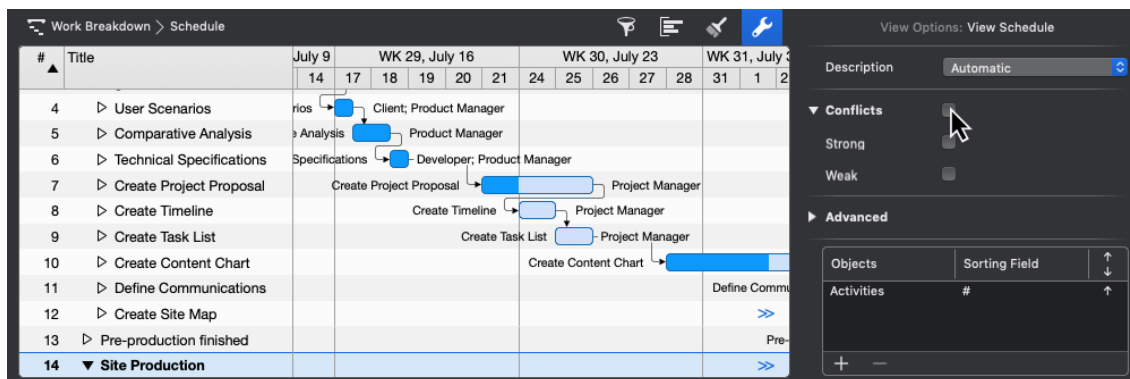
- *Automatic*: Show Time Phase descriptions only if multiple Time Phase lines are enabled in the current view, e.g. in the Gantt of the **Work Breakdown > Earned Value** view. A maximum of 3 Time Phase rows can be activated.

## Conflicts

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



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](#).

## 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

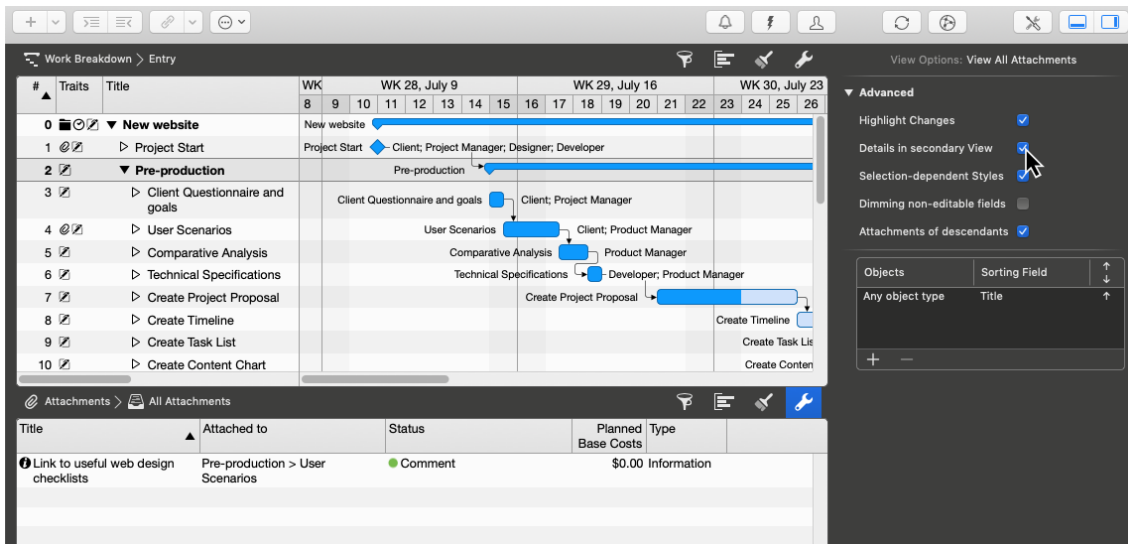
The **Advanced** section contains advanced [View Options](#).

## Highlight Changes

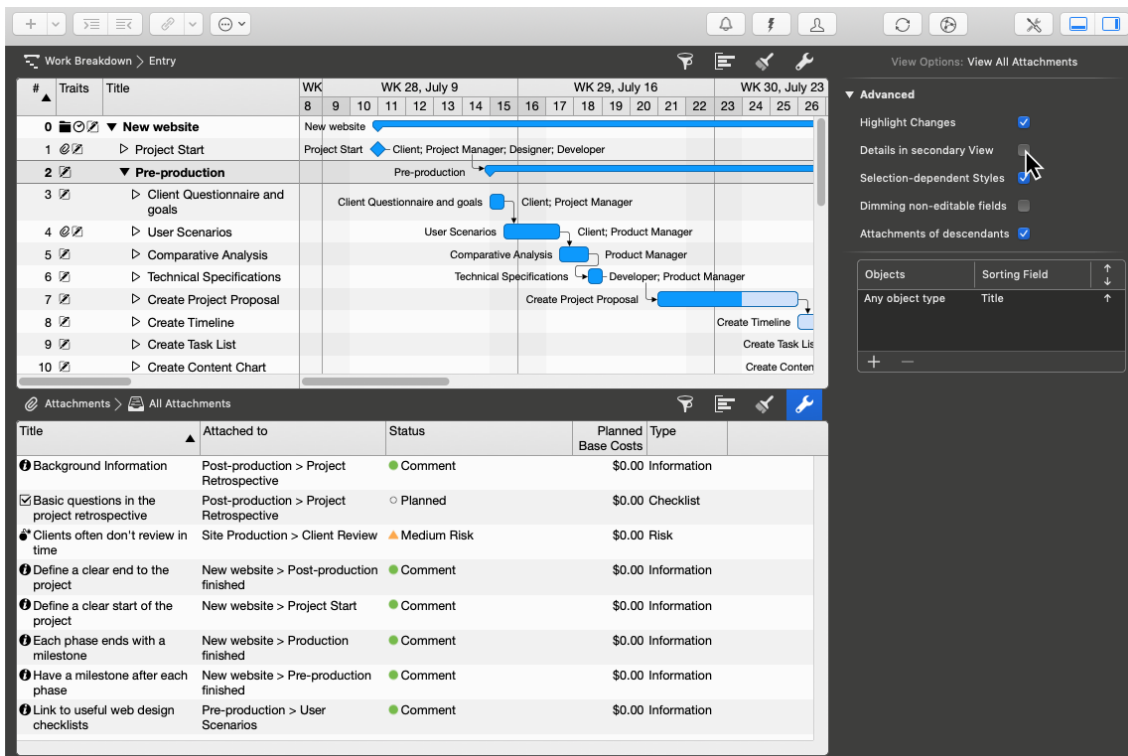
The option **Highlight Changes** activates/deactivates the highlighting of the last changed values. This highlighting is only effective for the display and will not be printed.

## 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.



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.

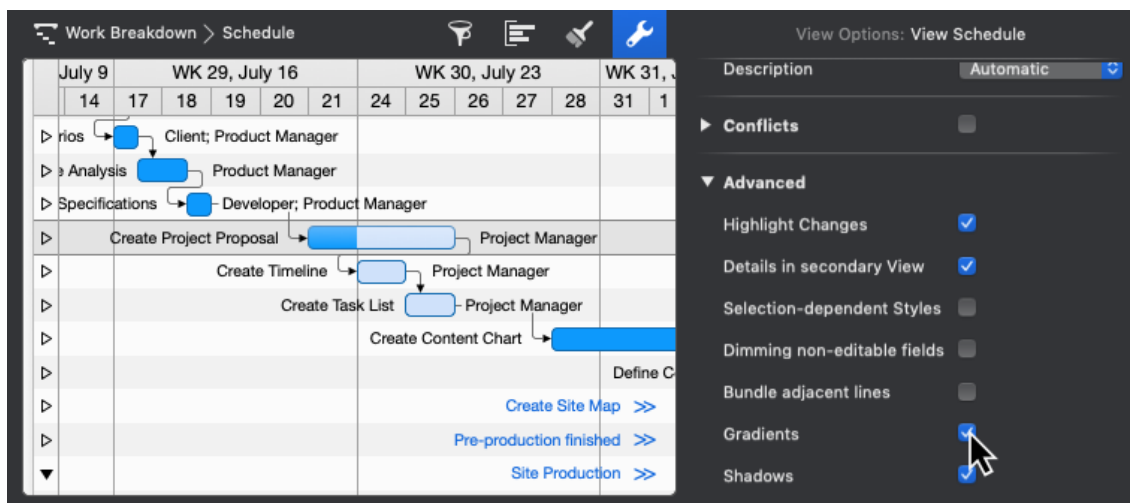
If this option is enabled and you select a row in the main view where attachments are defined in its substructure (in sub-activities or child activities), the Attachments Detail view will show the attachments of the substructure.

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.

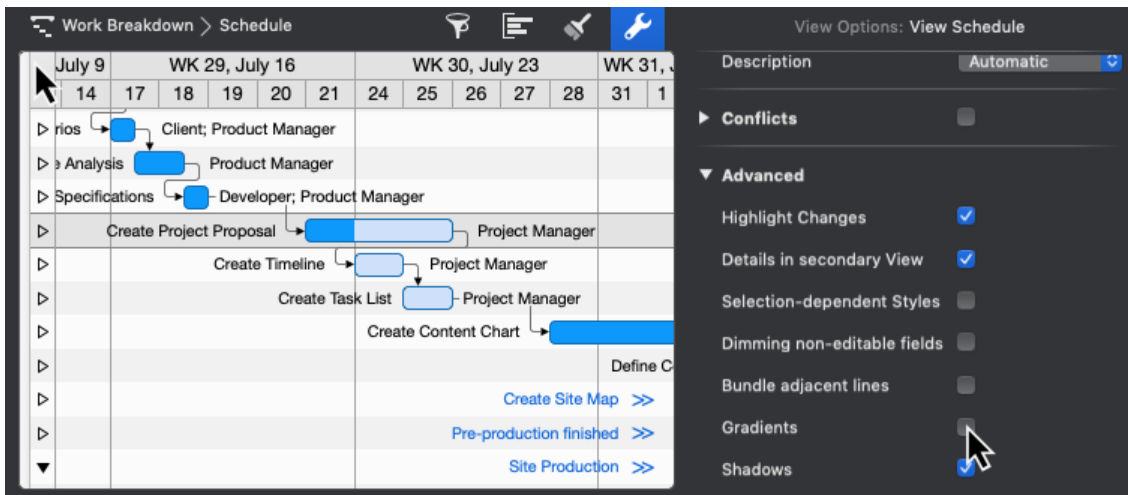
### Bundle adjacent lines

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.

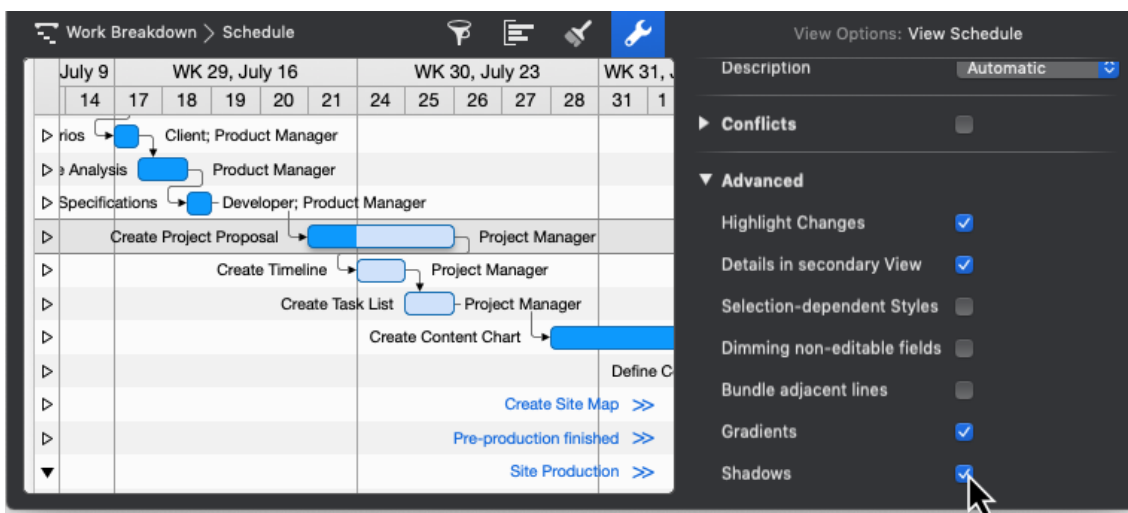
### Gradients



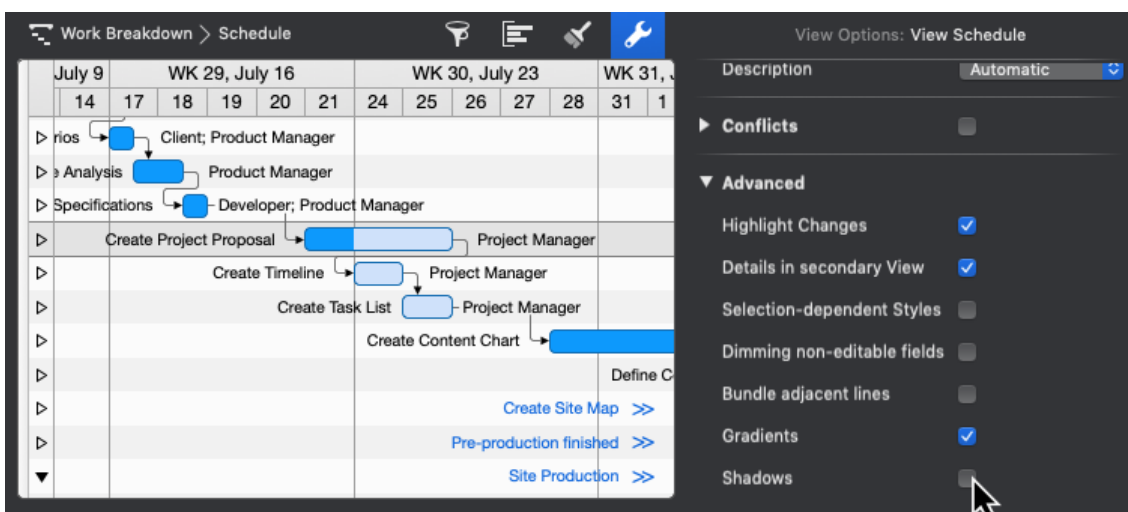
The *Gradients* option enables/disables the display of color gradients if the *Gradients* style is enabled for bar elements of this view.



### 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.

Work Breakdown > Schedule

#▲	Title	Expected Start	Expected End
4	▷ User Scenarios	July 15, 2017	July 17, 2017
5	▷ Comparative Analysis	July 17, 2017	July 18, 2017
6	▷ Technical Specifications	July 18, 2017	July 18, 2017
7	▷ Create Project Proposal	July 21, 2017	July 25, 2017
8	▷ Create Timeline	July 24, 2017	July 24, 2017
9	▷ Create Task List	July 25, 2017	July 25, 2017
10	▷ Create Content Chart	July 28, 2017	Aug 2, 2017
11	▷ Define Communications	Aug 4, 2017	Aug 4, 2017
12	▷ Create Site Map	Aug 7, 2017	Aug 7, 2017
13	▷ Pre-production finished	Aug 7, 2017	Aug 7, 2017
14	▼ Site Production	Aug 8, 2017	Aug 31, 2017
15	▷ Design Comps	Aug 8, 2017	Aug 9, 2017

View Options: View Schedule

Time Phase

Labels☒

DescriptionAutomatic

Conflicts☐

Advanced

Objects	Sorting Field	
Activities	#	✓ ↑ Ascending ↓ Descending

+ -

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