Project settings

Guides for Merlin Project

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Project settings - as of May 2021

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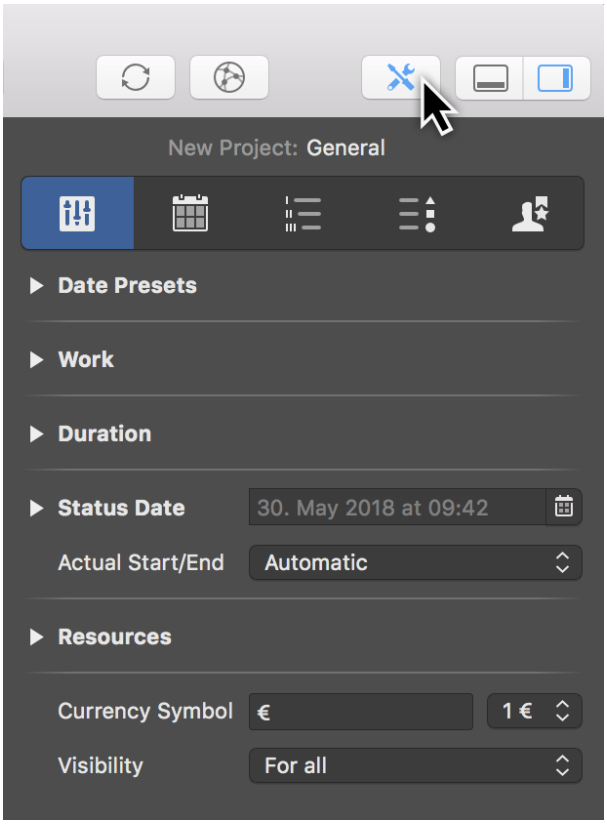
Merlin Project provides a number of settings for the open project. Click the ***Settings*** icon or use the **File → Project Settings** menu to open the Inspector.

General

The ***General*** tab contains the following settings for the project:

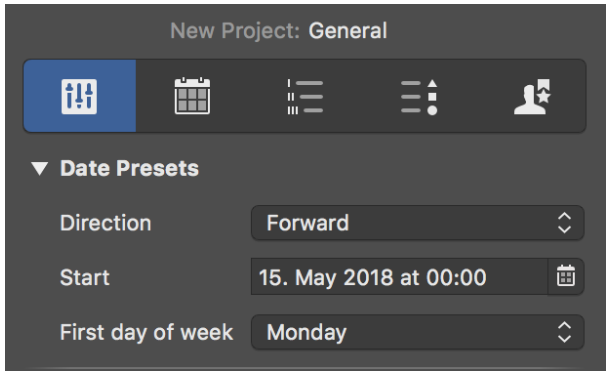
- **Date Presets**
- **Work**
- **Duration**
- **Status Date**
- **Resources**



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



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

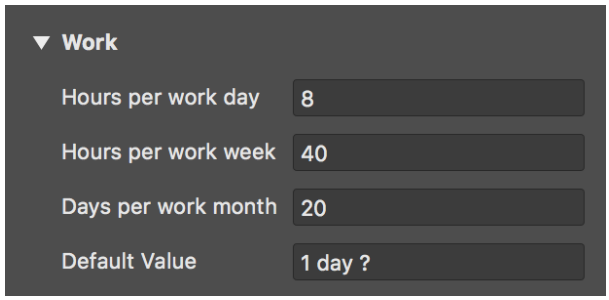
The **Start** is the start date for the project and is required.

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



This is where you will find the project **work** settings.

The following values can be set:

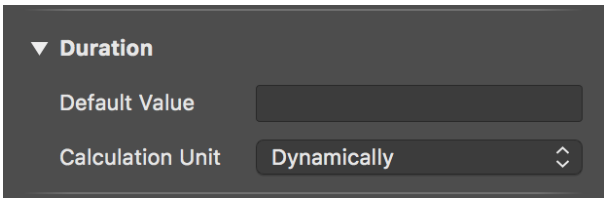
- **Hours per working day**
- **Hours per working week**
- **Days per working month**

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**.

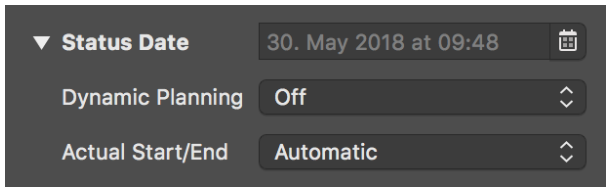
As with **work**, a **Default Value** for **Duration** can optionally be set. This means that new activities are assigned the **Default Value** automatically for the **duration**.

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.

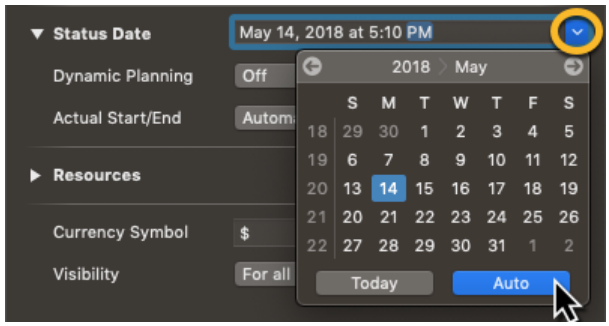
Status Date



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.



Dynamic Planning

Dynamic Planning is disabled by default.

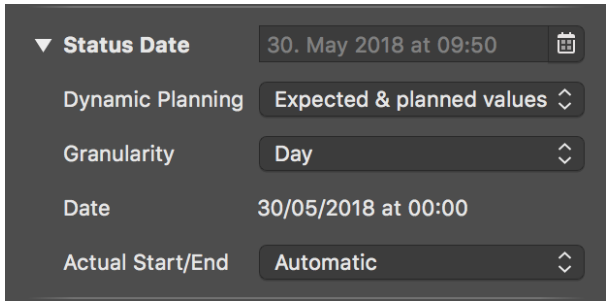
When activated, **Dynamic Planning** shifts the content of the project based on the **Status Date**.

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.



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.

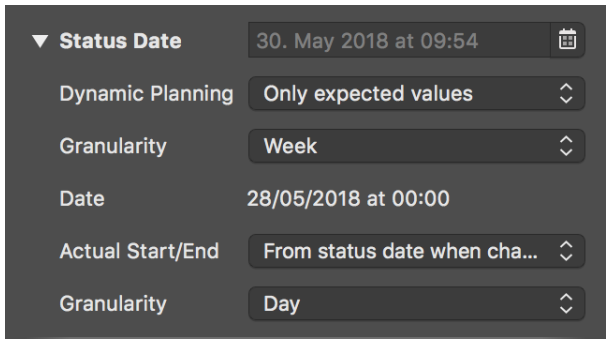
Actual Start/End

The **Actual Start/End** option is calculated automatically by default.

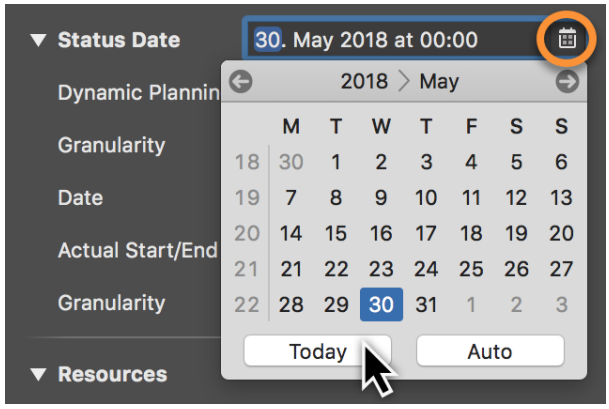
Two further options are available in the drop-down menu:

- **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.

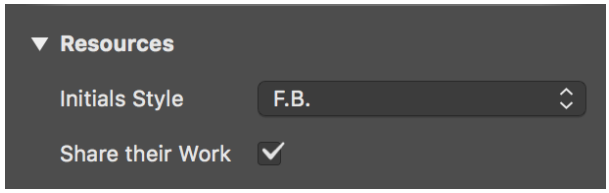


The setting for **granularity** is also displayed with the **From status date when changing completion** option.



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**.

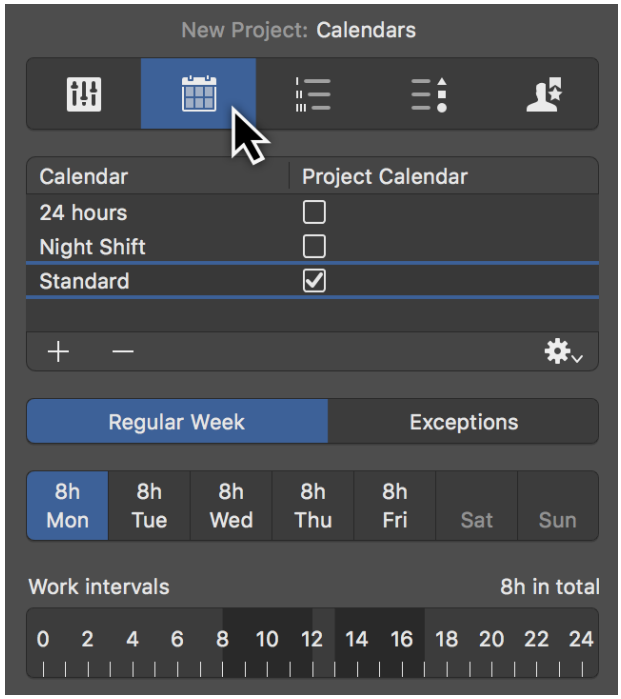
Share their Work

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 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

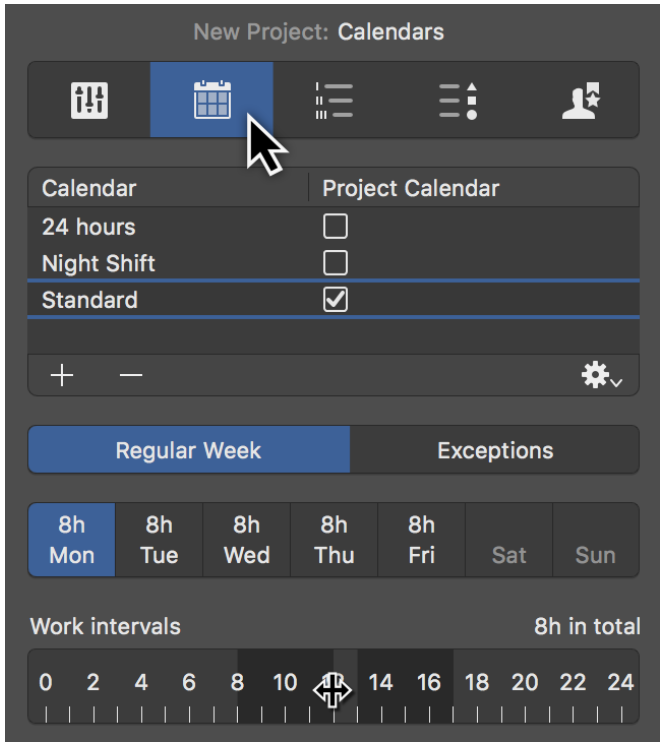
The **Project Calendar** with the enabled tick, is the calendar which Merlin Project will use when scheduling new activities. Resource calendars applying for new resources are automatically based on the **Project Calendar**.

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

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

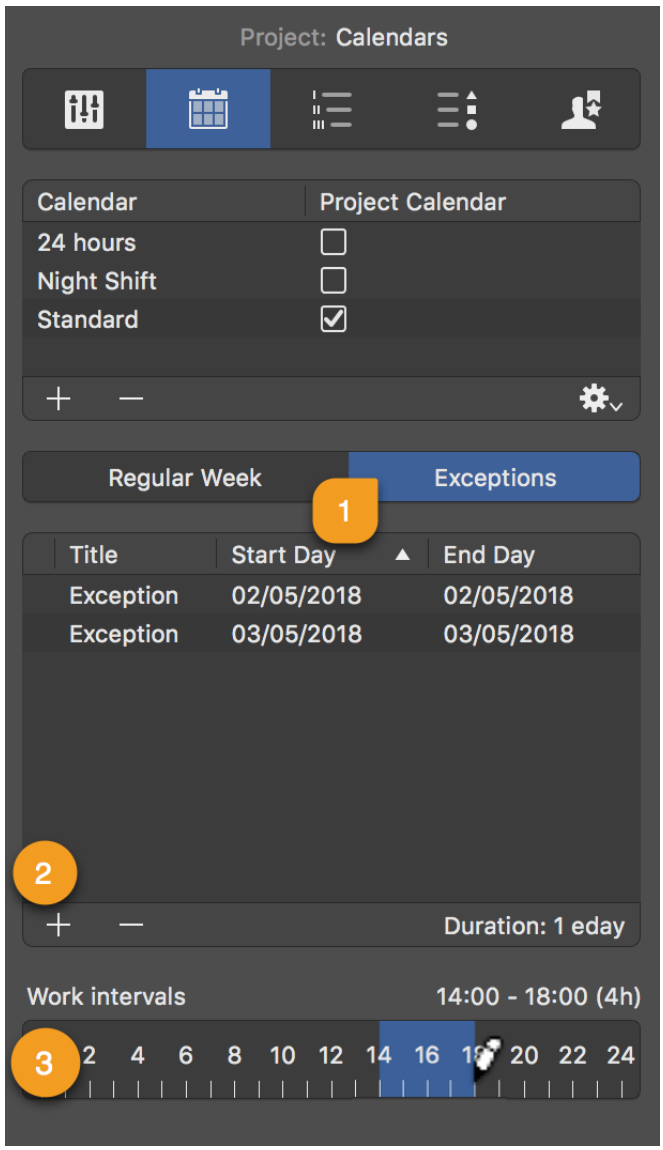
Regular Week

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**.

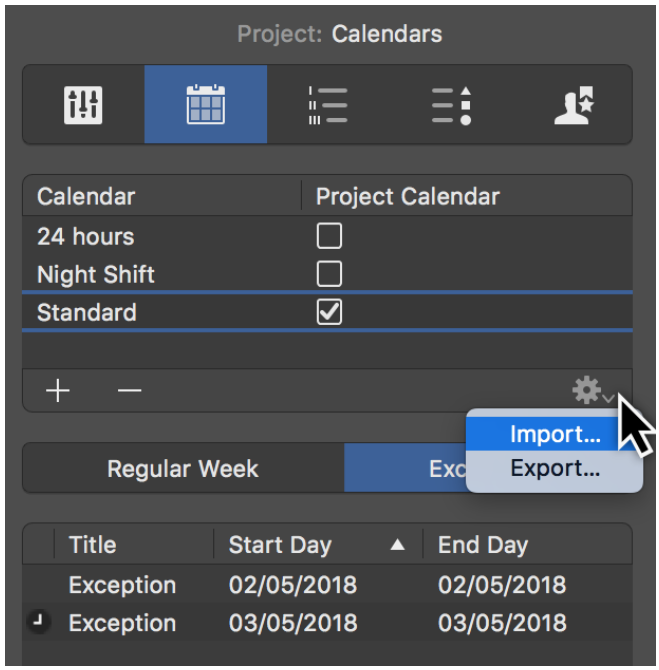
These times are only active as **additional working times** (*outside regular working time*) when times are added in the ***Work intervals*** bar (3).

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 document. The exported file will include the Calendar's **name**, Regular Week and Exceptions.

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

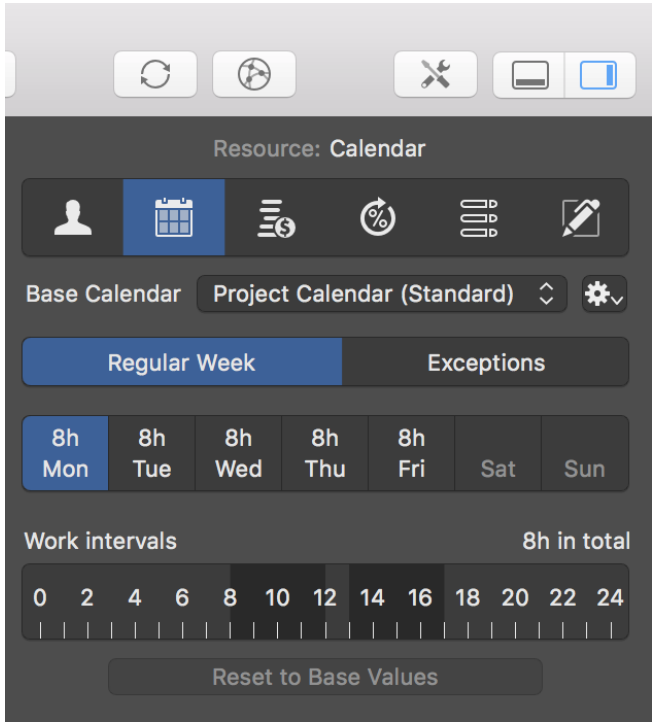


Importing an **ics** calendar file, imports all day events as Exceptions into the project.

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 a Resources or [Assignments] view, and click the **Calendar** tab in the Inspector.



Resource calendars are per default based on the project calendar.

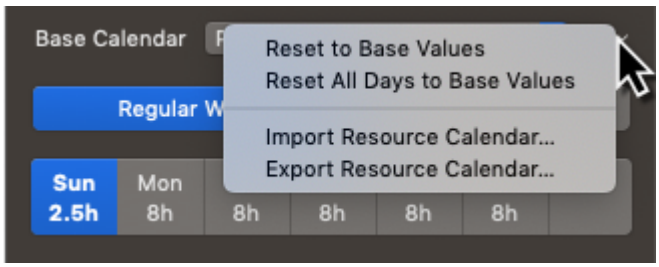
Use the ***Base Calendar*** drop-down menu to select another project calendar for the active resource if needed.

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 calendars or **ics** calendar files as Exceptions.
- **Export Resource Calendar...** - exports Merlin Project calendars

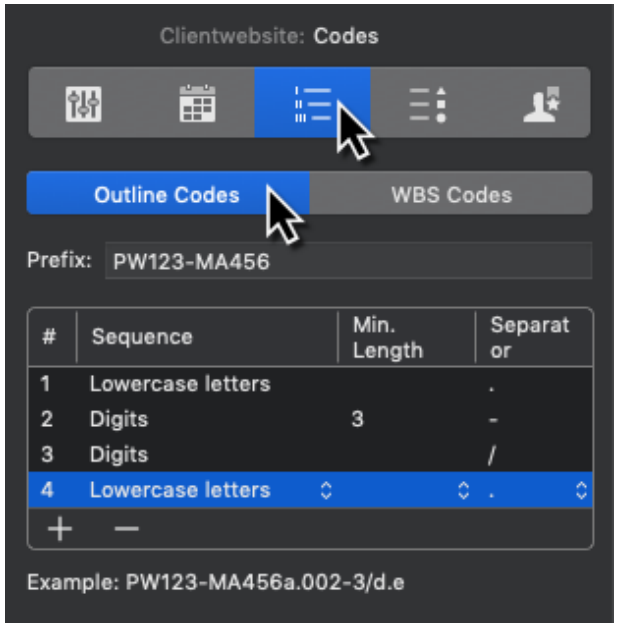
Codes

Work breakdown structure (WBS) elements are typically numbered sequentially in a way revealing their hierarchical structure and providing consistent identification. For example, **1.1.2** identifies an item as a Level 3 WBS element, since there are three numbers separated by two decimal points.

The settings for ***Codes*** allow you to control the format of **WBS Codes** and **Outline Codes**.

Per default **Codes** and **WBS Codes** will use only numbers separated by points.

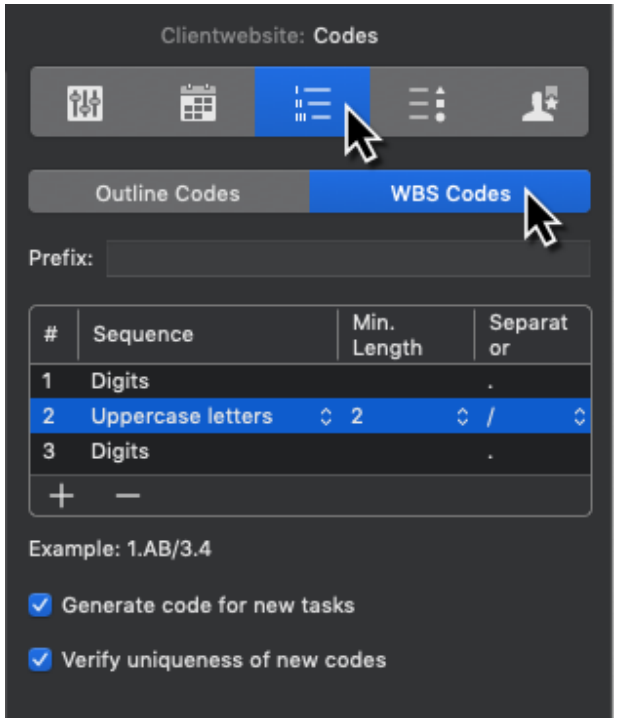
Should you want to define a custom coding scheme, click the **+** icon and configure your scheme accordingly.



- **Prefix** - You can enter a global prefix to be used for all items.
- **#** - Shows the outline level for which a specific **Sequence** is defined.
- **Sequence** - Select how this level should be coded. Available options: *Digits* (Default setting), *Lowercase letters, Uppercase letters, Lowercase roman numerals, Uppercase roman numerals, Numbers - spelled out*
- **Min. Length** - Available options: unlimited (Default setting), min: 1, max: 10
- **Separator** - Available options: ., -, /,
- **Example** - Here you see a Code example for the custom coding scheme.

Activate the **Code** column in the outline, as label on the Gantt or in Net Plan cards. **Code** values are calculated and cannot be edited by the user.

Should you want to define a custom coding scheme for the **WBS Code**, switch to the according tab, click the **+** icon and configure your scheme accordingly.



- **Prefix** - You can enter a global prefix to be used for all items.
- **#** - Shows the outline level for which a specific **Sequence** is defined.

To comply with project management standards, the WBS Code project settings offer you following **Sequence** options:

- **Sequence** - *Digits* (Default setting), *Lowercase letters, Uppercase letters, Characters*
- **Min. Length** - Available options: unlimited (Default setting), min: 1, max: 10
- **Separator** - Available options: ., -, /,
- **Example** - Here you see a WBS Code example for the custom coding scheme.

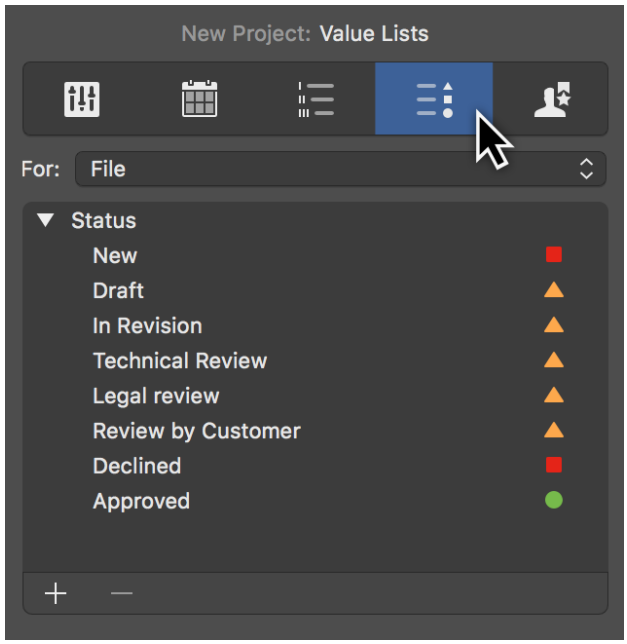
Additional Options:

- **Generate code for new tasks** - Disable this option if you want to leave the **WBS Code** empty when new activities get inserted.
- **Verify uniqueness of new codes** - Disable this option if you want to be able to edit **WBS Codes** and the app should not check for duplicates.

Activate the **WBS Code** in the outline, as label on the Gantt or in Net Plan cards. **WBS Code** values are calculated but can be edited by the user if required.

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)
- **Event** (Status)
- **Information** (Type)
- **Issue** (Category, Type, Status)
- **Resource** (Role)
- **Risk** (Risk Group)

To insert new items in a Value List:

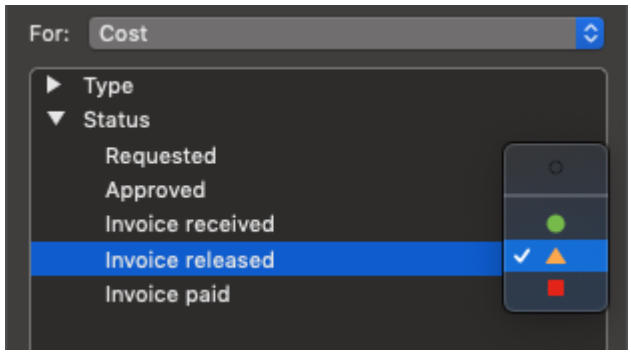
- Select the relevant list from the ***For*** drop-down menu
- Click the section of the list where you would like to insert a new entry
- Click the **+** symbol to create a new entry.
- Edit the entry as desired.

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.

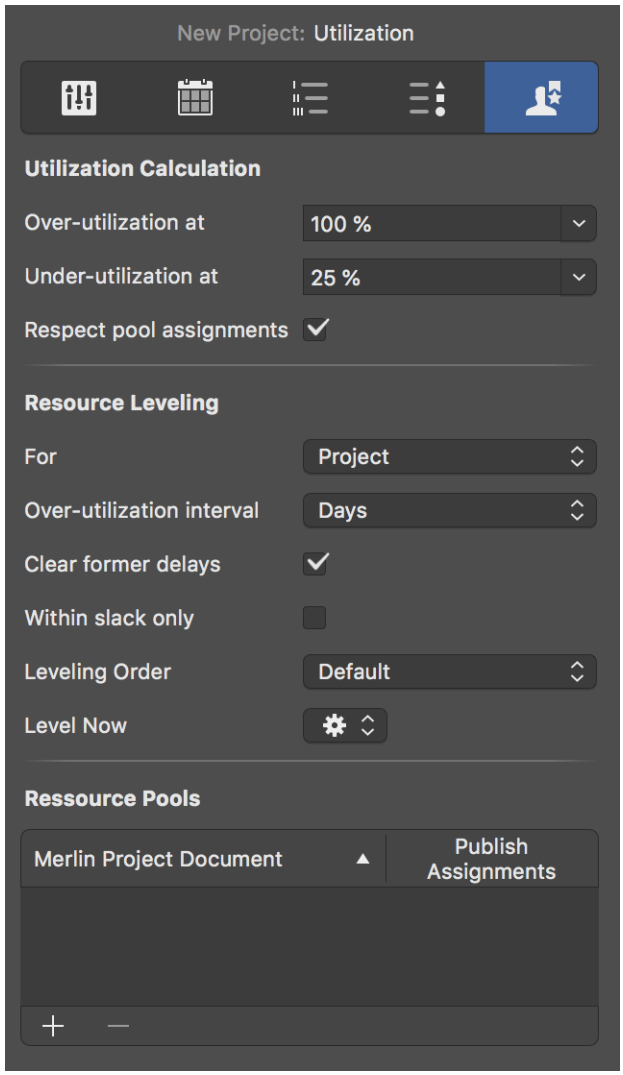
Click the **-** symbol, to delete values from the list.

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



Utilization

The ***Utilization*** tab contains various options for **Utilization Calculation**, **Resource Leveling**, and for **Resource Pools**.



Utilization calculation

Three options are available for **Utilization Calculation**.

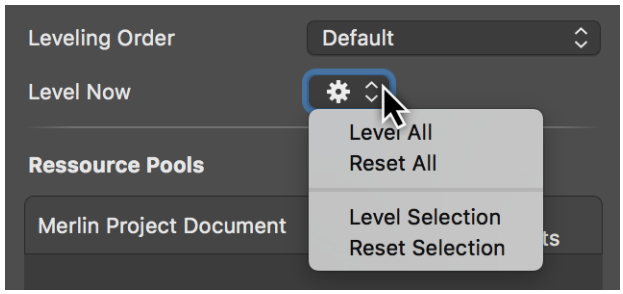
Here you can set the **% values** for the **over-utilization** and **under-utilization thresholds**. These values have a direct influence on the utilization calculation in the project.

The **Respect pool assignments** option also lets you include resources assigned from **resource pools** in the utilization calculation based on the **thresholds**.

Resource Leveling

You have a multitude of options at your disposal to perform **resource leveling** in the project:

- **For** (entire project or an area)
- **Over-utilization interval** (unit)
- **Clear former delays** (on by default)
- **Within slack only** (off by default)
- **Leveling Order** (default, priority, or # manual order)
- **Level Now**



Click the ***Level Now*** **gear icon** and select one of the leveling options:

- **Level All**
- **Reset All** (restores the original state)
- **Level Selection**
- **Reset Selection** (restores the original state)

Resource pools

Project files can be added as pools in the **Resource Pools** list.

The **Publish Assignments** option lets you make the resource pool assignments visible.

Further information about **resource pools** can be found in the guide of the same name.