Project Settings - Status June 2018

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Project Settings

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 defaults
- Work
- Duration
- Status date
- Resources

The visibility of the project refers to multi-user use and Merlin Server.

You will also find settings for the currency symbol used in the project and the visibility of the project.

Date defaults
The date defaults concern the project and are therefore important.

**Direction**

The direction determines whether the project *forward* or *backward* is planned.

The **Forward** option is active by default and starts a project from the start date.

The **Backward** option lets the project run from an end date.

**Start**

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

> For a new project, a start with tomorrow's date is automatically set.

**First weekday**

The option **First day of the week** specifies the day on which the week begins. This varies from country to country. By default, one week in Europe starts on **Monday**.
Settings for work in the project are available here.

The following values can be defined:

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

Default value

The default value is used for newly created transactions. Each new activity automatically receives the standard value for work.

The ? is only an indication that the standard value is estimated. Delete the ? if not desired.
Duration

Settings for the duration in the project are available here.

As with work, a default value for duration can optionally be set. This means that new transactions are automatically assigned the standard value for the duration.

Calculation unit

The calculation unit determines the unit for the duration.

It is set to Dynamic by default. This means that the units are calculated dynamically. 7 days becomes 1 week, 4 weeks becomes 1 month etc.

Units are available in the drop-down menu. If one unit is defined, it is used for the entire project.
Status date

The **Status Date** allows you to view the project from a certain date.

If a **Status Date** is set, it is the **current date** for the entire project.

This allows you to simulate the progress of the project on the status date specified.

**Dynamic Planning**

Dynamic planning is issued as standard.

The activated **dynamic planning** shifts the contents of the project to the **status date**.

Two variants for **dynamic planning** are available in the drop-down menu:

- **Expected & planned values**
- **Expected values only**

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**, you can better recognize the consequences of dynamic planning.

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 **Real start/end** option is automatically calculated 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 have influence on the actual start/end of the activities.

For the option From status date when changing the completion, the setting for granularity is also displayed.

To deactivate the status date, click the calendar icon and the Today button again. If you want the status date to shift automatically, click Auto.
Resources

Here you define the **style of the initials** for resources in the project. The **initials** appear in the **style options**. The **format** must then be set to **initials**.

**Share their work**

The **Share their work** option is decisive for **several assignments** at the same time. For example, if **two resources** are moved to one activity, both share the work **half**.

Remove the check mark so that the division of labor for assigned resources no longer takes place automatically.
Calendar

In the area Calendar you will find the list of calendars. Here you can edit and create new calendars. A checkmark sets the default calendar.

New calendars can be created by clicking on Plus. To remove existing calendars, click on the Minus button.

The regular working week for the project can be determined for each calendar. This refers to the fixed working times in the project.

A separate register is available for exceptions. Here you enter the holidays and special working hours for the calendar. With the gear you import or export calendars for use with other users. The format used for the calendars is ics.
Codes

These functions can only be found at Merlin Project.

The settings for Codes control the display and output of Outline codes and WBS code. Here you determine how the codes are formatted and output.

Click on Plus to create a new code. Then click on the respective fields in the line to select the available options. The setting you have made for the code is immediately displayed as an example below the list.

Activate the column Code so that the codes appear in the structure.

To create and edit a WBS code, follow the same procedure as for Outline codes.
Two additional options are available with the WBS code:

- **Create code for new activities**
- **Check uniqueness of new codes**

Activate the column **WBS-Code** so that the WBS codes appear in the structure.
Value lists

The value lists are available for use with the attachments in Merlin Project.

Create new or modify existing value lists for the attachments.

First select an attachment type from the For drop-down menu, and then click the Plus to create a new entry in the value list.

Change the name of existing entries by double-clicking on the title of the entry.

Click on Minus to delete values from the list.
Utilization

These functions can only be found at Merlin Project.

The *Utilization* tab contains various options for **utilization calculation**, **utilization comparison** and for **resource pools**.

### Utilization calculation

Three options are available for *Utilization calculation*.

Set here the **% values** for the **thresholds** of **overload** and **underload**. These values have a direct influence on the capacity utilization calculation in the project.

With the option **Respect pool assignments**, resources assigned from **resource pools** can also be included in the capacity utilization calculation based on the **thresholds**.
Resource Leveling

For the Resource leveling in the project you have a multitude of options at your disposal to carry out the utilization comparison.

- **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 on the gear symbol **Level now** and select one of the matching 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 list for resource pools.

With the option **Publish assignments** you can make the assignments from the resource pools visible.

More about resource pools can be found in the manual of the same name.