



Filters

Guides for Merlin Project

© 2020 - ProjectWizards GmbH

Filters - as of November 2020

What are Filter?	1
Adjusting filters	2
Creating Custom Filters	2
Further filter options	4
Duplicate filter	4
Sharing filters locally	5
Resetting filters	5

Note for Merlin Project Express users



The following functions can only be found in [Merlin Project](#).

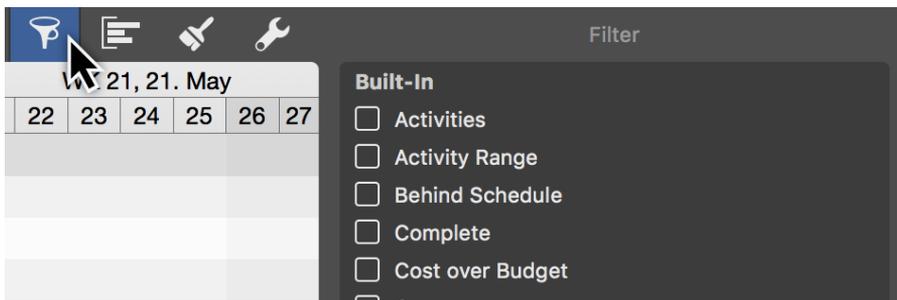
What are Filter?

The **Filter** function allows information in the project to be made **visible** according to different presets. Other information is **hidden**. Several **evaluation options** are created by filtering the project contents.

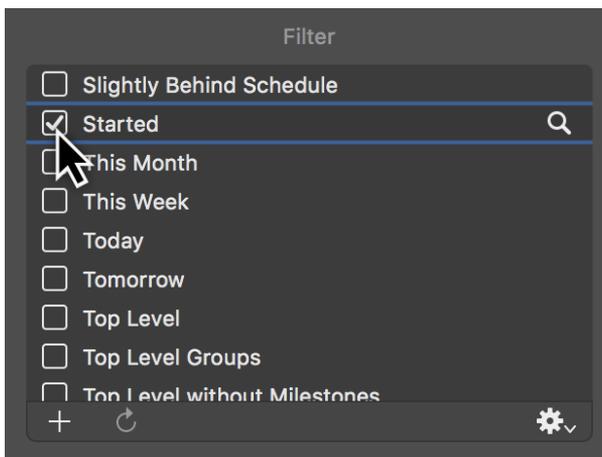


Filters help you select certain **information** for large projects and to display them **graphically** in the different **views**.

Click the **funnel** icon and the **built-in filters** will be displayed in the Inspector.

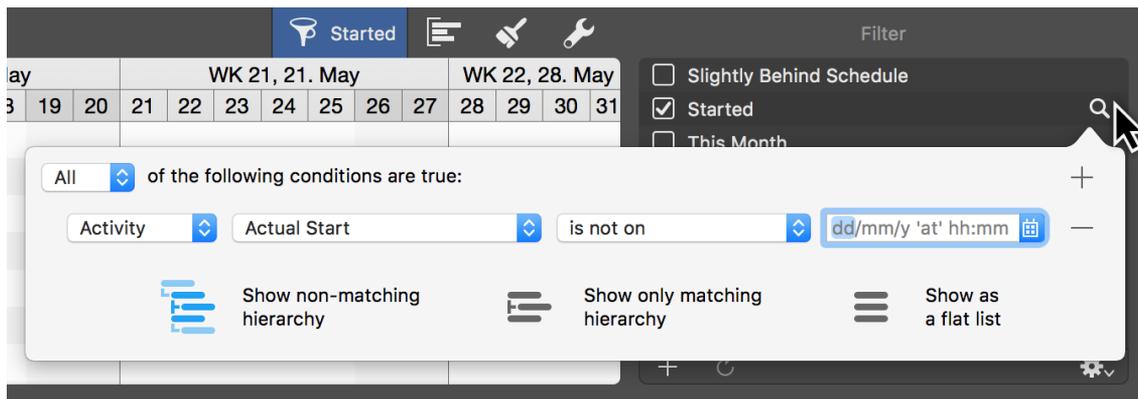


Tick the checkbox to the left of an entry in the **Inspector** to activate the **filter**. The relevant project **content** is then displayed automatically by the activated **filter**.



An active filter will keep on being displayed next to the **funnel** together with its name and remain active until you click the **funnel** again and remove the checkmark the active filter in the Inspector.

Adjusting filters



Click the **magnifying glass** to the right of an entry and a dialog will open in which you can see and modify the **conditions** for the active **filter**.

The **drop-down menus** contain information and values which allow you to configure the conditions for filtering your project.

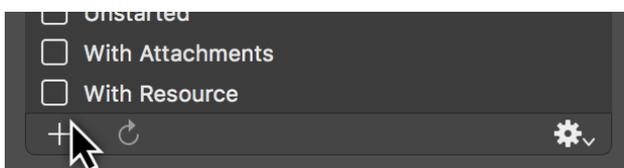
Manage how the **filtered results** are displayed using these **three** options:

- **Show non-matching hierarchy**
- **Show only matching hierarchy**
- **Show as a flat list**

Add **new conditions** for a filter by clicking the **plus** icon. Click the **minus** icon to remove **existing conditions** from the filter.

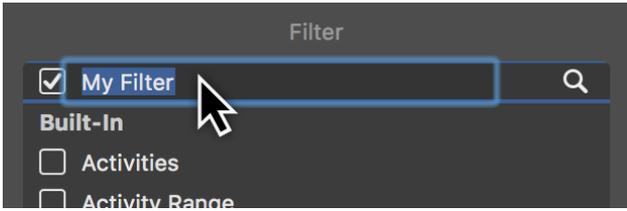
Creating Custom Filters

Create and add **custom filters** to the list of **built-in filters**. To do this, click the **plus** icon in the **filter list**.



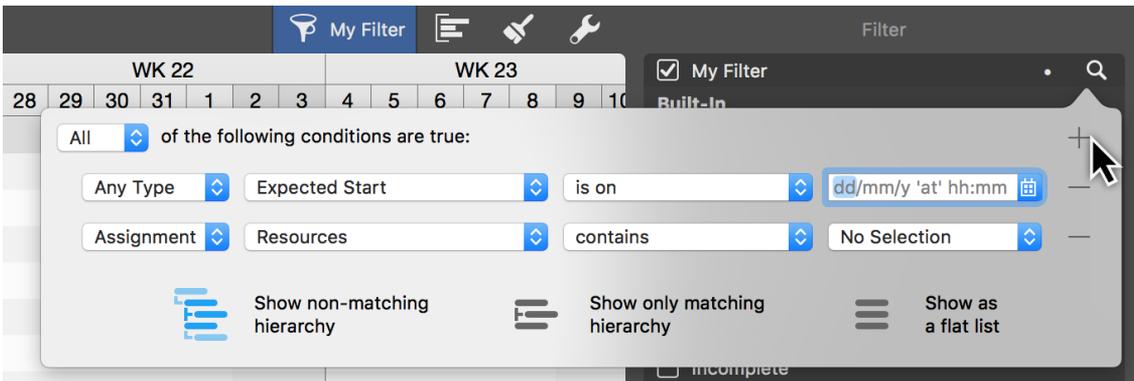
The category **Custom** will be created. This allows you to **differentiate custom (own)** and **supplied (built-in)** filters from each other.

Give custom filters a unique **name** for easier identification **later on**.



Click the **magnifying glass** and create the **conditions** for the filter.

Use the **options** to **adjust** the filter in the **drop-down menus**. You can add further **conditions** by clicking the **plus** icon, or remove the existing conditions by clicking the **minus** icon.



With the **All** drop-down menu you can filter the conditions to **All** or also to **Any** or **None** of the **set values**.

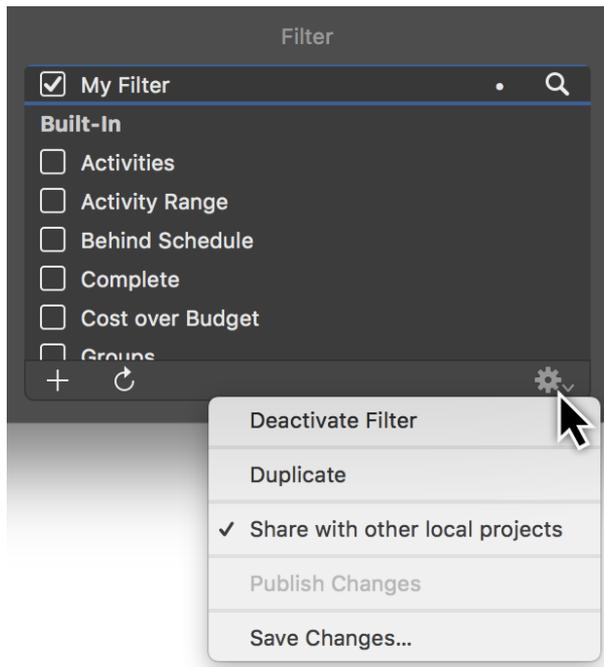
The **graphical display** of the filter is controlled with the three **View Options** for **hierarchy** and **flat list**.



You can delete custom filters from the list by clicking the filter and then pressing the delete key.

Further filter options

The gear menu contains useful options for using the filters:



- **Deactivate Filter** (*disables the active filter*)
- **Duplicate** (*makes a copy of an existing filter*)
- **Duplicate** (*creates a copy of a filter*)
- **Share with other local projects** (*the filter is available in all projects on the local Mac*)
- **Publish Changes** (*for shared filters, the changes are published for all local projects*)
- **Save Changes** (*for shared filters, the changes are only saved in the current project and not published*)

Duplicate filter

Use this option to modify an **existing filter**. A **copy** will then be made.

Duplication saves you from having to go through the **conditions** from the original filter and set them manually.

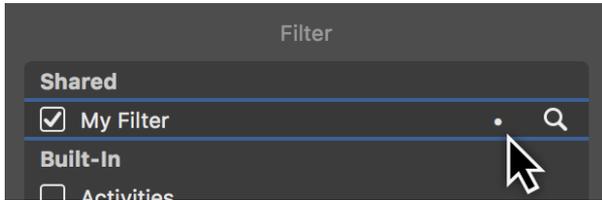
All **conditions** are transferred during duplication and can be modified or added to.

The original filter remains unchanged.

Sharing filters locally

Use this option so you always have a filter available on your Mac for all **local projects**.

If **changes** are made in a locally shared filter, a white **dot** appears next to the filter.

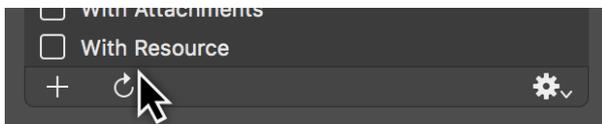


Use the options under the **gear** menu to apply the changes:

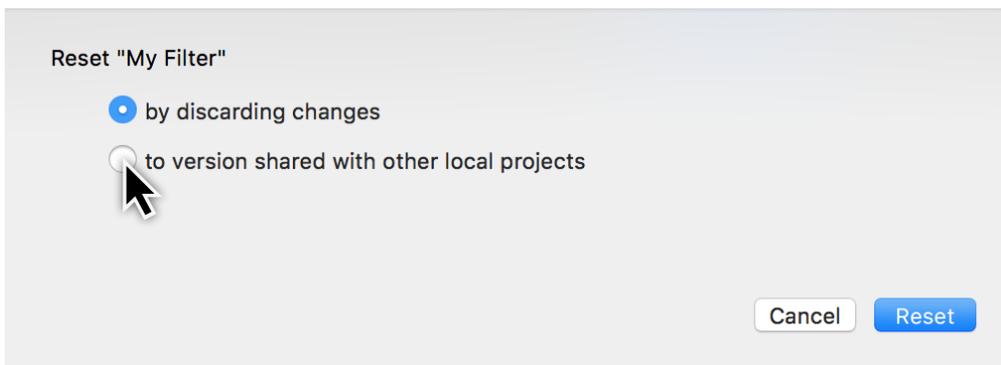
- **Publish Changes**
- **Save Changes**

Resetting filters

You can reset **changes** in a shared filter.



To do so, click the **rotated undo arrow**. A dialog will then appear in which you can undo the changes.



Reset the filter:

- **by discarding changes**
- **to version shared with other local projects**