



Reports

Guides for Merlin Project

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Reports - as of November 2020

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Note for Merlin Project Express users



The following functions are only available in [Merlin Project](#).

Reports provide you with a better **overview** of project **content** and **information**, and are perfect for **forwarding** to project participants.

The **Report** view in Merlin Project includes several preinstalled reports.

Existing **reports** can be used directly or adapted to your own needs.

Each **report** uses **modules** which compile the **content** from the various project **views** to produce the **report**.

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

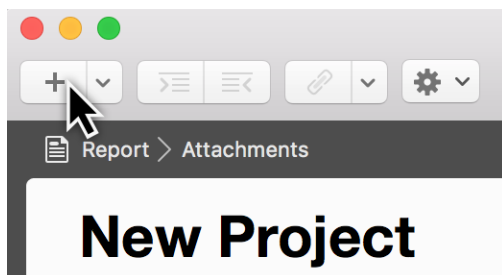
#	Status	Title	Group Path	Resources	Expected Start	Complete	Remaining Work
On time					28.07.17		1,7d
10	●	Create Content Chart	New website > Pre-production	pm	28.07.17	70 %	1,2d
11	●	Define Communications	New website > Pre-production	pm	04.08.17	50 %	4h
Behind schedule					21.07.17		4d
7	■	Create Project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

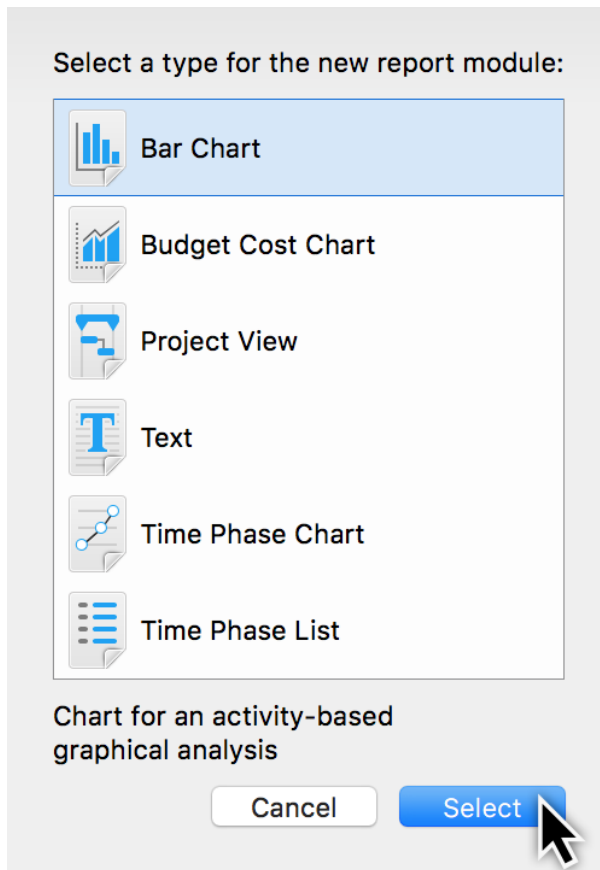
#	Status	Title	Group Path	Resources	Expected Start	Complete	Remaining Work
1	■	Project Start	New website > Pre-production	pm	11.07.17	100 %	

Report modules

The **modules** can be clicked in the report using the mouse and modified in the **Inspector**.



Click the **plus** icon to create new **modules**.



The following **module types** can be used in a report:

- **Bar Chart**
- **Budget Cost Chart**
- **Project View**
- **Text**
- **Time Phase Chart**
- **Time Phase List**

The **Project View module** is used most frequently. Project view columns and Gantt chart options can be modified and managed directly in the **module**.

Use the **Filter** and **Filter Mode** options in the Inspector to filter the display of **information** in the **module**.

Use the **Grouping** and **Grouping Mode** options in the Inspector to group the display of **information** in the **module**.

The **Inspector** offers different options depending on the **type** of report module selected.

The **Budget Cost Chart** provides **budget columns** for the **chart**, making it handy for **creating** reports with **cost information**.

Report Module: Budget Cost Chart

Title: Budget Cost Chart

Chart Type: Layered

Base: Planned Costs

Deduction: Expected Costs

Filters: Activity: Level is equal to 1

Without content: Show message

On New Page: ☐

The **Time Phase List**, however, requires **values** for **sampling duration** and the **fields**.

Report Module: Time Phase List

Title: Time Phase List

Sampling duration: 1 day

On New Page: ☐

Field	Type	Cumulate
Planned Work	Series 1	<input checked="" type="checkbox"/>
Expected Work	Series 2	<input checked="" type="checkbox"/>

+ -

The same applies to the **Time Phase Chart**:

Report Module: Time Phase Chart

Title: Time Phase Chart

Sampling duration: 1 day

On New Page: ☐

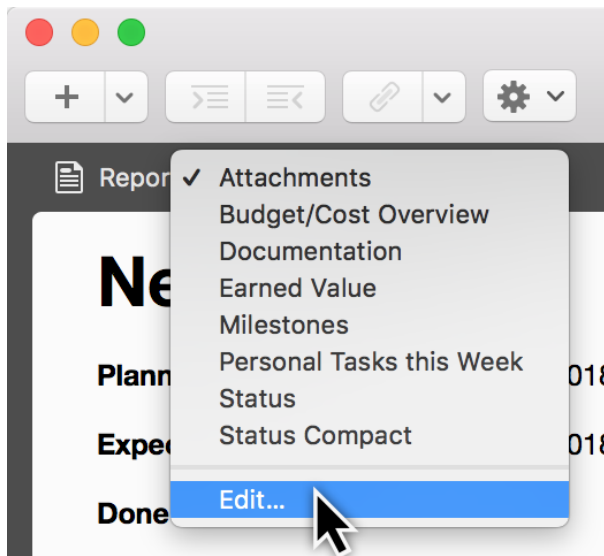
Field	Type	Cumulate
Planned Work	Series 1	<input checked="" type="checkbox"/>
Expected Work	Series 2	<input checked="" type="checkbox"/>

+ -

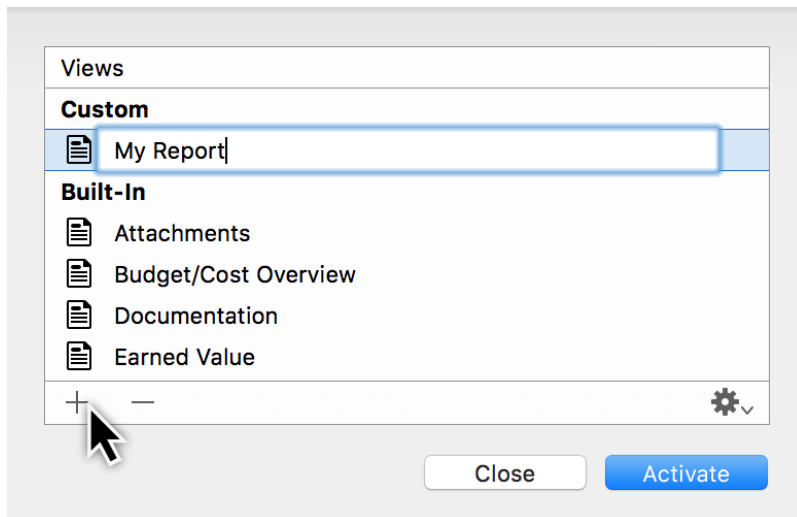
Click the **plus** icon to create a new **field**. In the **Type** column, set the **chart** display type. If you tick the **cumulated** checkbox you can display **cumulated** field **values** in the chart.

Creating custom report views

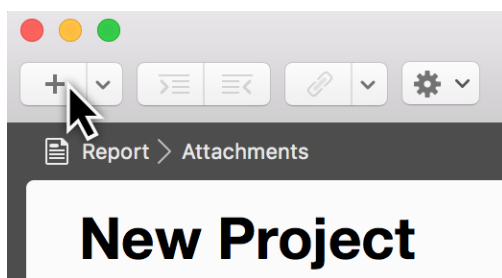
You can create a **custom report view** as follows:



Click a **report view** and select the **Edit** option.



Name the new report view and click **Activate**.



Now continue by building the newly created report view with **modules**. Click the **plus** icon to add new modules.

Examples

Inserting and removing columns in the »Status« report view

To **activate** and **deactivate** columns in the **Project View** report module, you need to configure the actual **project view instance**.

Under **Report** → **Status** several project views are displayed in the modules. In the Inspector, the **views** for the module can be selected using the **Type** and **View** drop-down menus. In the example shown, the **Slightly Behind Schedule** module is selected. It uses the **Work Breakdown** → **Status Compact** view. This view is controlled by **filters**.

In this way, individual **modules** can be integrated with the **filter** option for **activities** that are, for example, **on** or **behind schedule**.

#	Status	Title	Group Path	Resources
11	●	Define Communications	New website > Pre-production	pm

#	Status	Title	Group Path	Resources
8	▲	Create Timeline	New website > Pre-production	pm
10	▲	Create Content Chart	New website > Pre-production	pm

#	Status	Title	Group Path	Resources
9	■	Create Task List	New website > Pre-production	pm

To **insert** another **column** in the module, first switch to the view that the **module** accesses (in this example **Work Breakdown** > **Status Compact**).

Insert the desired **column** by **clicking** the **arrow** in any column and then selecting the option **New Column**.

#	Status	Title	Group Path	Resources	Expected	Complete	Remaining Work
0	●	▼ New website		c; pm; d; d;...			1,9m
1	✓	▷ Project Start	New website	c; pm; d; d			
2	●	▼ Pre-production	New website	c; pm; pm; d			1,3w
3	✓	▷ Client Questionnaire and goals	New website > Pre-production	c; pm			0d
4	✓	▷ User Scenarios	New website > Pre-production	c; pm			0d
5	✓	▷ Comparative Analysis	New website > Pre-production	pm			0d
6	✓	▷ Technical Specifications	New website > Pre-production	d; pm	18.07.17	100 %	0d



You can customize the **format** of the **column** either in the original **project view** or in the **report module**. If you want to apply the change **to all** report modules with this view, **change the format** in the original **project view**.

#	Status	Title	Group Path	Resources	Expected End	Expected	Complete	Remaining Work
0	●	▼ New website		c; pm; d; d;...	04/09/2017			1,9m
1	✓	▷ Project Start	New website	c; pm; d; d	11/07/2017			
2	●	▼ Pre-production	New website	c; pm; pm; d	07/08/2017			1,3w
3	✓	▷ Client Questionnaire and goals	New website > Pre-production	c; pm	15/07/2017			0d
4	✓	▷ User Scenarios	New website > Pre-production	c; pm	17/07/2017			0d
5	✓	▷ Comparative Analysis	New website > Pre-production	pm	18/07/2017			
6	✓	▷ Technical Specifications	New website > Pre-production	d; pm	18/07/2017			
7	■	▷ Create Project Proposal	New website > Pre-production	pm	25/07/2017	21.07.17	33 %	2d

To **remove the column** use the **delete** key or click **Hide** in the **column header**.

#	Status	Title	Group Path	Resources	Expected End	Expected	Complete	Remaining Work
0	●	▼ New website		c; pm; d; d;...				1,9m
1	✓	▷ Project Start	New website	c; pm; d; d				
2	●	▼ Pre-production	New website	c; pm; pm; d				1,3w
3	✓	▷ Client Questionnaire and goals	New website > Pre-production	c; pm				0d
4	✓	▷ User Scenarios	New website > Pre-production	c; pm				0d
5	✓	▷ Comparative Analysis	New website > Pre-production	pm				0d
6	✓	▷ Technical Specifications	New website > Pre-production	d; pm	18/07/2017	18.07.17	100 %	0d

The **steps** listed above produce the following column combination in the **Status Compact** view:

#	Status	Title	Group Path	Expected End	Expected Start	Complete	Remaining Work
0	●	▼ New website		04/09/2017	11.07.17	23 %	1,9m
1	✓	▷ Project Start	New website	11/07/2017	11.07.17	100 %	
2	●	▼ Pre-production	New website	07/08/2017	15.07.17	63 %	1,3w
3	✓	▷ Client Questionnaire and goals	New website > Pre-production	15/07/2017	15.07.17	100 %	0d
4	✓	▷ User Scenarios	New website > Pre-production	17/07/2017	15.07.17	100 %	0d
5	✓	▷ Comparative Analysis	New website > Pre-production	18/07/2017	17.07.17	100 %	0d

When you return to the **Report > Status** view, the changed columns from the **view** appear in the **report modules**.

Report > Status

Im Plan

#	Status	Titel	Gruppenpfad	Erwarteter Start	Erwartetes Ende	Erledigt	Verbleibende Arbeit
11	●	Define Communications	New website > Pre-production	pm	04.08.17	50 %	4h

Leicht hinter Plan

#	Status	Titel	Gruppenpfad	Erwarteter Start	Erwartetes Ende	Erledigt	Verbleibende Arbeit
8	▲	Create Timeline	New website > Pre-production	pm	26.07.17	43 %	3,7d
10	▲	Create Content Chart	New website > Pre-production	pm	28.07.17	22 %	3,1d

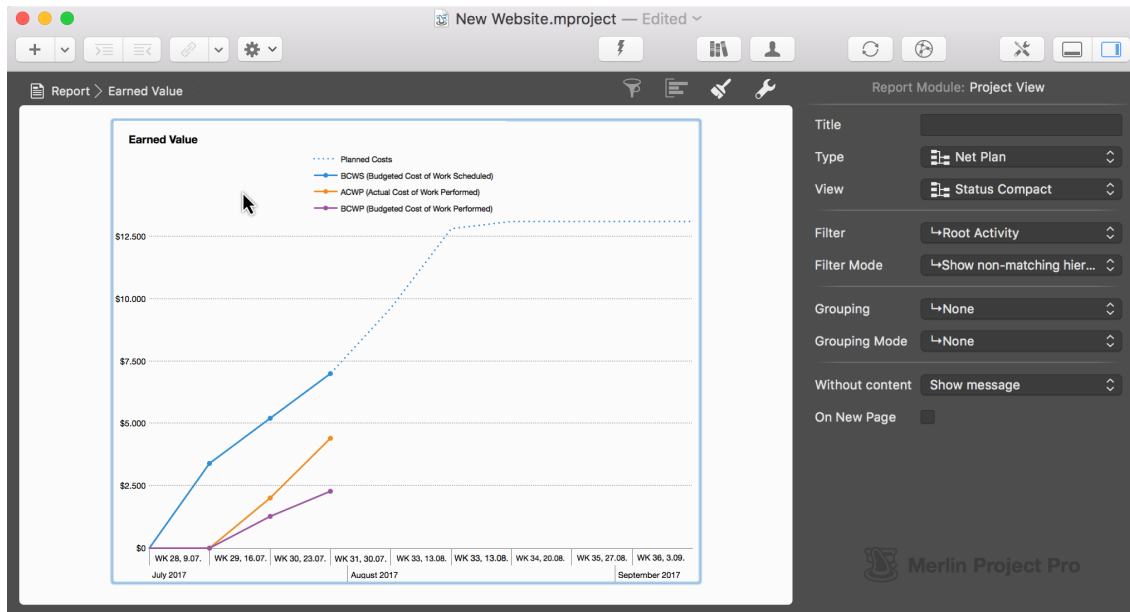
Hinter Zeitplan

#	Status	Titel	Gruppenpfad	Erwarteter Start	Erwartetes Ende	Erledigt	Verbleibende Arbeit
9	■	Create Task List	New website > Pre-production	pm	27.07.17	30 %	5,6h

Changing the sampling duration in the »Earned Value« report view

Switch to the report view **Report > Earned Value**.

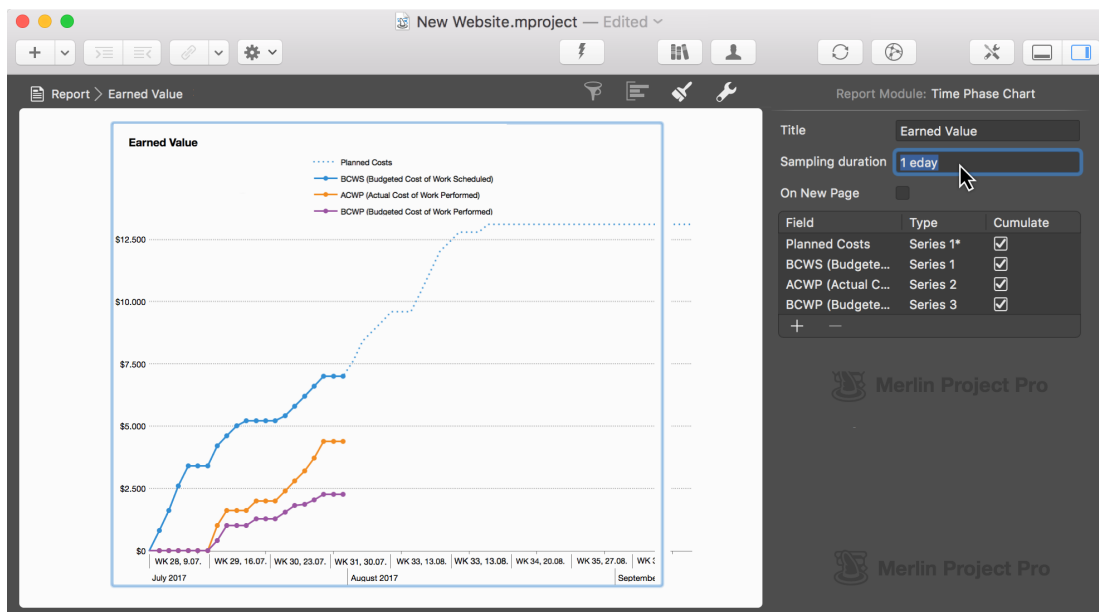
Click the **module** with the **Earned Value** chart.



Enter the desired **Sampling duration** in the **Time Phase Chart** Inspector, for example **1 eday**.



You can use **days**, **weeks**, **quarters**, and **years**. Alternatively, you can use **edays**, **eweeks**, **equarters**, and **eyears**.



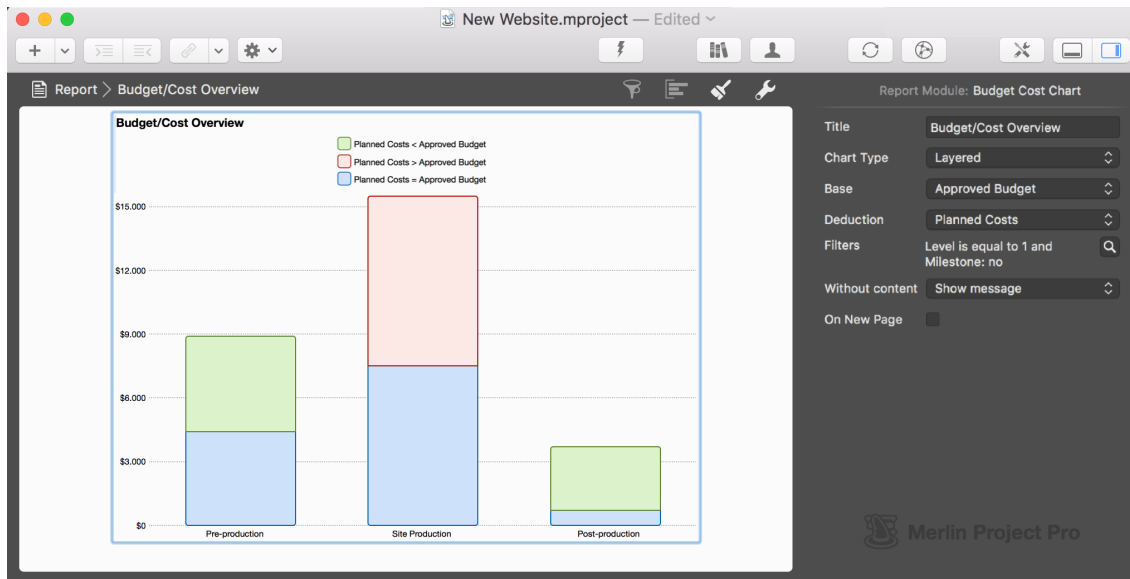
The **accuracy** of the chart increases because the values are calculated per consecutive day.



If you select a long **sampling duration**, the information is displayed **linearly** in the chart.

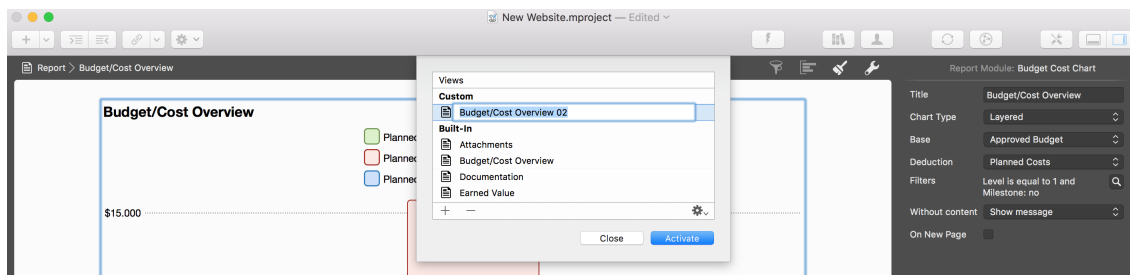
Displaying work costs per resource in a chart and table

In Merlin Project you can customize existing **report views** and save them as new views using custom report modules. In this example, switch to **Report → Budget/Cost Overview**.



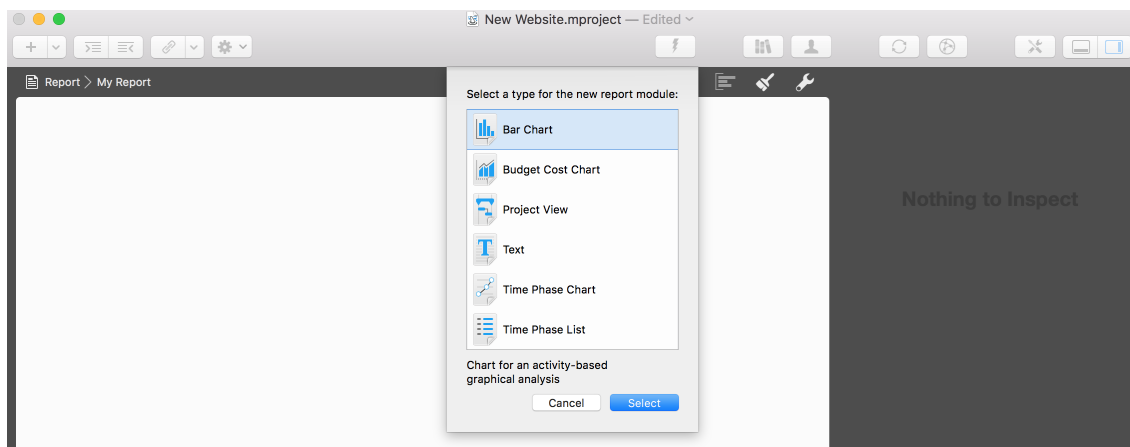
Under the **View** menu item, click **Reports > Edit**.

Select the **Budget/Cost Overview** view, then click the **plus** icon to duplicate the view.

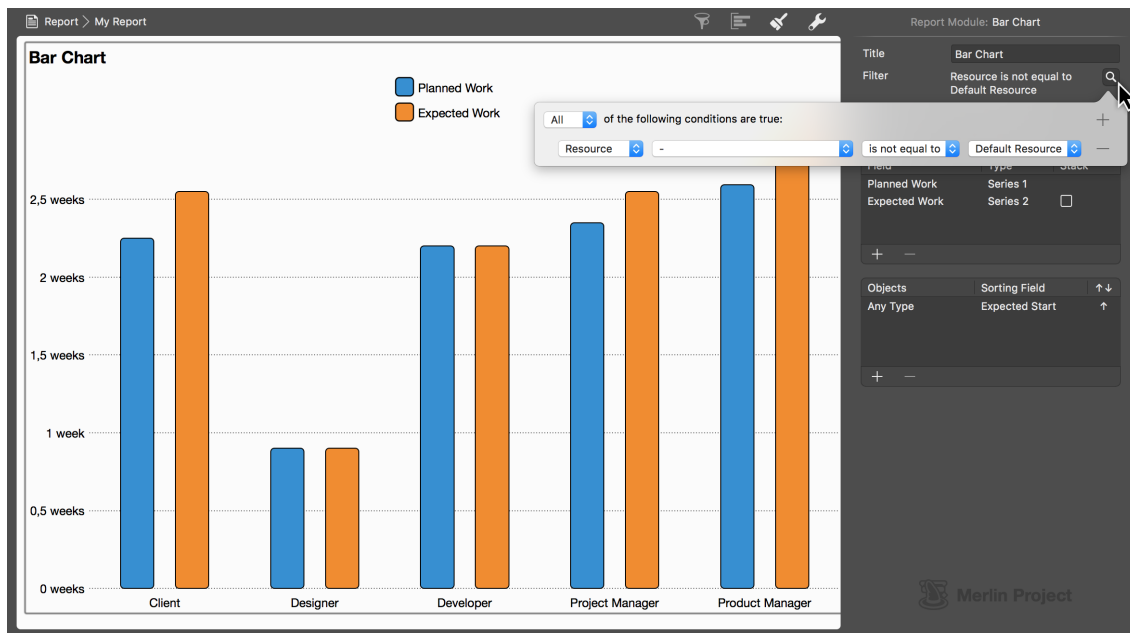


Name your custom report and click **Activate**.

Delete the **Budget Cost Chart** and insert the **Bar Chart** module.



Edit the **title** (e.g. *Work*). Activate the filter by clicking the **magnifying glass**. Configure the **filter setting** for **All Resources** except the **Default Resource**.



Add the **Project View** report module.

Set **Type** to **Resource** and **View** to **Costs**. Activate the **Filter** for **Real Resources**. Set the **Grouping** to **Role**.

Traits	Title	Planned Costs	Actual Costs	Expected Costs
Client	Client			
Designer	Designer	\$1.800,00		\$1.800,00
Developer	Developer	\$4.400,00	\$200,00	\$4.400,00
Engineer	Engineer	\$5.189,50	\$1.749,69	\$5.789,50
Project Manager	Project Manager	\$4.700,00	\$2.038,00	\$5.100,00

The **result** shows you all **resource costs** filtered by **real resources** and grouped by **role**.

Sharing the report view with other local documents

Under the **Display** menu item, select **Reports** → **Edit**.

Select a desired **report view**.

Click the **gear icon** and then click **Share with other local projects**.

