ProjectWizards

MERLIN

The Quick Start Guide to professional project management





Welcome to the quick start guide to Merlin!

Thank you for choosing the leading software solution for project management on the Mac. This document will help introduce you to the basic functionality of Merlin.

System requirements

To run Merlin you need an Apple Macintosh computer with G4 processor and Mac OS X 10.4.9 or newer. We highly recommend the latest version of Mac OS X 10.5.

Merlin Free Trial

The free trial of Merlin allows you to try it out for an unlimited period of time. This is a fullyfunctional version that supports projects containing no more than 40 activities. For projects consisting of more than 40 activities, certain functionality is disabled such as saving, printing, exporting and publishing a project.

HELP AND SUPPORT



For assistance and support please visit our website:

www.projectwizards.net

We also invite you to take advantage of these additional support resources:

- Merlin 2 help
- Google groups (in <u>English</u> and <u>German</u>)

Or contact our support team directly:

support@projectwizards.net

INSTALLING THE LICENSE

LICENSE

Contact our support team directly:

support@projectwizards.net

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STARTING MERLIN

When launching Merlin, the welcome screen opens with the following options. Please select one of them:

- view the Merlin tutorial
- open an existing project
- create a new project from a template
- create an empty project

You also have the following options:

- check for Merlin updates at startup
- decide what is displayed when launching Merlin, e. g. your most recent projects



MERLIN 2 - THE MAIN WINDOW



THE INSPECTOR

The Inspector lets you take control of all kinds of objects used in Merlin.

All selectable objects in Merlin can be viewed with the Inspector. The Inspector covers:

- projects
- ▶ activities
- resources
- ▶ elements
- dependencies

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	▶ Title	My Project
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Tabs	Direction	Forward
	▶ Start	11.11.2008 08:00
	▶ End	
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	Status	Auto
	Priority	Normal
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Simply click on the project* to ope	en the Project	inspector. Each
Inspector includes several tabs that	t cover all av	ailable options.



* The project is always the topmost item in the outline.

VIEWS

Merlin offers four project views:

- activities
- ▶ net plan
- resources
- utilization

Simply click on the corresponding buttons to navigate between views.

Each view has its own structure which can be configured by the user by altering its display options.

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ACTIVITIES

The "Activities" view is generally the most often used as you plan the majority of your projects. To accomplish this, activities and related details can be modified in both the outline and in the bar chart. You can fully customize your column settings based on the information you would like to display and edit in the outline view. You can also define numerous column sets, which can be individually saved for future reference. Simply right click on the columns to customize them.



NET PLAN

The "**Net Plan**" view provides a clear and fully-editable visualization of the logical links and structure of your project from beginning to end.



RESOURCES

The "Resources" View helps you manage all resources available and assigned to the project. A resource may consist of one of the following types:

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UTILIZATION

The "**Utilization**" view contains a list of all resources assigned to a project. The diagram displays the daily utilization value for the respective resource. This provides you an overview of the utilization of every single resource and helps you detect and resolve potential resource overload.*

• Green:

Optimal utilization

Yellow: Suboptimal utilization

► Red:

overloading, something needs to be done here!



*Utilization requirements for overloading and derating can be adjusted in the "Edit> Resource leveling > Leveling settings" menu.

THE TOOLBAR

The toolbar provides immediate access to those Merlin functions used most often. With the help of the following icons you will access key functionality very quickly:

- **Publishing:** launches the dialog for publications. [Command + Shift +P]
- **Settings:** launches the dialog for all project settings. [Command + Shift + ,]
- **Library:** toggles the display of the library window. [F3]
- Elements: toggles the display of the field "elements". [F2]
- **Inspector:** toggles the display of the inspector. [F1]



THE SUPPLEMENTARY FIELD

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The supplementary field is divided into two areas, which can be modified by clicking on the title bar:

- Resources: all resources involved in the project are listed. Simply click the plus button to add new resources. Activity resource assignments can then be established using a simple drag and drop from this area onto the Gantt display or Activity outline.
- Scheduling Conflicts: alerts of potential conflicts in the timetable are displayed. By clicking on a scheduling conflict entry, you automatically see the activity and the conflict associated with it.

1 Resources -	+	1 Resources -	+	Scheduling Conflict	s *
IIII Company Sequipment IIII Material IIII Person		 Resources Scheduling Conflicts Material Person 		 My activity My second activity My second activity 	Activity ends after given date. Activity starts after given date. Activity starts at non- working time.
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THE ELEMENTS

The "Elements" area is where you store additional information and artifacts during or after a project. Although not displayed by default, the area can be viewed by clicking on the paperclip icon in the right part of the toolbar, by pushing F2, or by selecting the "Window > Show Elements" menu option. Elements can be attached to activities, milestones, entire projects or resources.

📎 All Eleme	ent Types 👻			+ .) #.
Title .	▲ Item	Flag	Review Date	Cost Private Insert a new Element	,
					_

Highlight an activity/resource/project to associate a new element with it. You may choose from the following six element types:

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MERLIN'S WORKFLOW

In the following section, we will briefly demonstrate how simple it is to create a project using Merlin. Specifically, we are going to

- Business plan identifying project ... 1 ct opportunity 1 week P.S. 5 Define project objective and infor... 1 and information needs 1 week 7 Identify industry standards for pr... 2 andards for project objectives 10 Develop preliminary conceptual s... 2 nceptual schedule and staffing 12 Initial planning complete 0 Initial planning complete 13 Develop appropriation strategy 0 Develop appropriation strategy () lop management model and staff plan 15 Develop management model and ... 18 Site Assessment 0 Site Assessment 19 Identify potential sites 0 Identify potential sites P.S.; P. 2 weeks 22 Define infrastructure requirements Define infrastructur requirements 3 weeks 24 Define utility needs Define utility needs weeks 27 Identify project site Identify project site 30 Assess regulatory and environme... Assess regulatory and environmenta impacts 33 Identify permitting requirements 3 permitting entify 35 Recommend site 0 38 Site and planning review 2 39 Scope Definition Scope Definition Develop general scope for projec... Opp general scope for project objectives 40 43 Evaluate project needs, develop 1 valuate project needs, develop majo
- create a project structure
 - design phases
 - create milestones
 - include activities
- create dependencies
- assign resources
- optimize resource utilization
- enter real data
- generate a milestone report
- send e-mails

A NEW PROJECT

	oject	
New Project from	Tomplato	
	Category	
General Project Management Plan	English	
Thire a consultant	English	
THR Interview Plan	English	
Infrastructure	English	
Product Localization	English	
Product-Design	English	
There is a fairly good sirectore of a general project	pian. It is also quite good documented.	
	Cancel Create Next	

A new project can be created on the basis of a template.

For additional information for the selected project template, <u>click here</u>.

FROM ZERO TO SIXTY IN ONE STEP...



Select from the "File > New Empty Project" menu or simply use the shortcut [Command + Alt + N].

The <u>Library</u> can be extremely helpful to drag and drop preset activities to get you on your way...

USING THE LIBRARY



If you click on the library opens.

The library contains preset activities and groups of activities that simplify and speed up the creation of a project.

The contents of the library can simply be dragged and dropped to the project window. It's that simple!

Search " Project-Start" and paste it into the outline of an activity view.

For further information on the library, <u>click here</u>.

PRELIMINARY RESULT

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2	Prepare infrastructure	Prepare infrastructure 1d?		Direction	Forward
3	▼ Project definition	Project definition		▶ Start	17.11.2008 08:00
4	Initialize phase	Initialize phase 1d?		▶ End	
5	Define objectives	Define objectives 1d?		▶ Limits	
6	Develop concept	Develop concept 1d?		▶ Expected	
7	Prepare testing	Prepare testing 1d?		Complete	0% * 100%
8	Close phase	Close phase 1d?		Status	Auto
9	Definition done	Definition done		Priority	Normal
10	▼ Implementation	Implementation	-	= Calendar	(Standard
11	Initialize phase	Initialize phase 10?		V Calendar	Standard
12	Develop system	Develop system 1d?		Precedence	Prefer Resource Calendars
13	Test system	Test system 1d?	٦		
14	Close phase	Close phase	40		1.
15	Implementation done	Implementation d	lone	I Resources -	+
16	▼ Roll out	Roll	out		
17	Step 1	S	tep 1		
18	Step 2				
19	Step 3				
20	Roll out done				
21	Launch party				
22	Project finished				
() () + +		•		
) ()		Þ		
	Project finished				

Once the activities have been transfered from the library, the blue background in the outline indicates the last modification made the project.

For our next step, the basic structure will be refined with new activities and milestones.

Next we will <u>create new</u> <u>activities...</u>

CREATING NEW ACTIVITIES

Select an activity type from the "Insert" menu...

nsert View	Windov	v Help
Activity	N	ЖN
Milestone	A.	N₩7
Sub-Activity		\C₩G
Successor Ac	tivity	\C₩S
Predecessor	Activity	\C ₩P
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This way, you can (for example) create a new milestone named "Start". To do this, you can also use the [Alt + command + M] keyboard shortcut.

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... or right click on the activity and select the "Insert" entry from the context menu*.

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	Make Milestone Link	Project
	Completion	
	Make Milestone	Project
t".		

* The new activity is always placed below the selected activity.

LINKING ACTIVITIES

Four different types of dependences can be established when linking activities. The one most commonly used is "finish to start".

In order to create a new link in Merlin, you need to select two (or more) activities and click on the "Chain Activities" icon. The activities will then be linked using "finish to start". This can also be done by selecting "Edit> connect activities" from the menu or with the [Ctrl + Command + L] keyboard shortcut.



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More information on this topic...

STATUS OF THE FLAGS

The color status of the flags indicates the status of activities. The status generally occurs automatically but can also be manually set by the user.

There are three kinds of status flags to reflect the status of activities. They are:

- **Green** = the activity has been completed
- **Yellow** = the activity is currently in progress
- **Red** = the activity is overdue



The flags may also be used simply as markers to denote various kinds of information based on the context the user wishes to establish.



SYMBOLS IN THE INFO COLUMN

Merlin displays in the column "Info" various symbols for various information:

- The given end date of an activity is set to "as soon as possible"
- The given end date of an activity is set to "as late as possible"
- A calendar is defined for the project
- Time/date constraints are defined
- At least one scheduling conflict existing
- At least one scheduling warning existing
- An element has been attached
- Notes defined



ASSIGNING RESOURCES

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9	Develop project charter		Develop pro	ject chart	er 🛶 P.M.; A.	U	▶ Expected	
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21	Define scope				Define scope			
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So far, we have created activities, groups, milestones, links and elements.

The general design of your project should be well in hand at this point.

The next step logical step involves the assigning of resources.

You can simply drag and drop any resources directly onto one or more activities to establish resource assignments for the activities selected.

WORK TIME PERIOD

Using the Inspector for working time you can schedule how much time you regularly spend on your projects and define periods of exempt, non-working times. Highlight the project and select the "working time" tab. Using the mouse, working time can be delineated in the "Regular" field and under the "Weekdays" and "Work intervals" section:

• click on a day out listed under "Week days" to select it

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• simply drag the mouse to insert as many working periods in 30-minutes intervals as you desire

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▼ Initiating	Initiating	Regular Exceptions
▼ Project Initiation	Project Initiation	Week days
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> New activity	New activity P.M.	Work intervals well in order to create ¹ / ₄
▼ Planning	Planning -	0 2 4 6 3 10 12 14 26 16 20 22 24 hours intervals
▼ Define Scope	Define Scope	
Develop strategies and plans	Develop strategies and plansR.D.	13:00 - 15:00 (2h)

PLANNING DATA

In order to maintain project control, you can document your project's progress. To do so, you may rely on the following data types:

• projected data:

values you expect while planning

• real data:

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the actual values that can be entered as the project progresses. The projected values appear in grey.

• expected data:

values that are derived from modifications made to projected values

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2010 Project Wizards GmbH, Melle, Germany. All rights reserved.	5	Docu	imen	t pro	oject	costs	and	d be	nefit	5		Ľ	4	- 1	.A.; I	>.N	▼ Rea	sults									

GIVEN WORK AND DURATION

The difference between work and duration should be distinguished for activities. These two factors are respectively expressed by measures of time, but have different meanings.

- "work" is the time that is dedicated to your projects during the defined working hours, working days, working months. It is therefore only net working time, so holidays, leave days and sick days are not included. Moreover, no delays and waiting periods caused by certain activities are reflected in the work value.
- "duration" is the total time that reflects both working time and the remaining time to complete the activity; this is the preset and projected duration and should not be confused with <u>expected duration</u>.

Example: it takes a designer one day to complete a task. It may, however, be completed sometime in the next two weeks.



THE PLANNED DURATION

In the following example, the activity runs from January 1, 2011 at 8 am until January 1, 2012 at 8 am. The activity bar in the Gantt-chart says 1.08 years. **Why the strange number?** This is due to the calculation of net time, which is defined for a working month of 20 days in Merlin (which can be modified in the <u>project settings</u>).

Activities View Options

Gantt

Styles

Columns

One working year consists of 240 working days (20 x 12 months). In reality, however, a year consists of 261 possible working days and therefore by definition has a length of 1,08 working years.

		Style Sets	•
		Selected Part: Middle label	
Hint: (Change the content for the middle label in " <u>View Options</u> > Styles",	Kick-off Kick-off	J.D.
from "l	Expected Duration" to "Expected Elapsed Duration"	Condition	General
) 11 12	2010 01 02 03 04 05 06 07 08 09 10 11 12	Foreground Color	
My Project		Shadow	Yes
Activity 1 year ≠ 1 year	1,08 years ?	₹ Font	Change
		▼ Font	Change
Activity 1 year + 1 year	2010		-
10 11 12	01 02 03 04 05 06 07 08 09 10 11 12	Foreground Color	
My Project	ý -	Shadow	Yes 🛟
Activity 1 year = 1 year	365 edays ?	▶ Content	Expected Elapsed Duration
		v Font	Change
		▼ Font	Change

PROJECT SETTINGS

The "File> Project Settings" menu contains all settings that concern your project. These can be modified and saved directly to the project file. The project settings are divided into three areas: General, Value Lists and Misc.

Settings for My Project			Settings for My	Project	E Settings for My Project					
General Va	lue Lists	Misc	General	Value Lists	Misc	General	Value Lists	Misc		
Financial	_		Values	-		Resources	-			
Currency Symbol:	E 🛛 🛛 Be	fore Amount	For: Cost		:	Res	ource initials style: F.B	. 🔹		
Default Work Rate:	0 €/hour		▼ Kinds			Resource	s share their work.			
			Consulting			Security				
Default Overtime Rate:	0 €/hour		Charges							
			Material			Hide from	anonymous users: 📃			
Work Units			Room							
WORK OTHES			▼ Statuses			Project Image				
Hours per Man Day:	8		Requested		1	Drag & drop an image	to this placeholder: It may b	e used for Reports		
			Approved			and Printing.				
Hours per Man Week:	40		Invoice receive	ed						
Days per Man Month:	20		Invoice ordere	d						
buys per main month.			Invoice payed		1					
Default Work:	1 day ?									
Calculated Durations:	Dynamic	:								
Date Presets										
Dynamic Shifting:	Off	•								
Status Date:										
First day of week:	Monday	•	Make Defa	ult for new Projects	Add					
	(unserver)		Make Defa	ult for new Projects	Add					

PROJECT SETTINGS - GENERAL

The "General" project settings is subdivided into three categories:

Financial: enter your country currency symbol, standard costs for your work as well as overtime costs

Work Units: define the time units to be used for standard work. These values are used as the basis for the calculation of the activities' expected duration in the activity display

Date Presets: this is where dynamic postponing, status date, and first day of the week is defined

General	Va	lue Lists	Misc
nancial	-		
Currency S	ymbol:	E Befe	ore Amount
Default Wor	k Rate:	0 €/hour	
Default Overtim	e Rate:	0 €/hour	
ork Units			
Hours per Ma	an Day:	8	
Hours per Mar	Week:	40	
Days per Man	Month:	20	
Defaul	t Work:	1 day ?	
Calculated Dur	ations:	Dynamic	\$
ate Presets			
Dynamic S	hifting:	Off	\$
Statu	s Date:		
First day o	of week:	Monday	\$
First day o	of week:	Monday	¢
Statu	s Date:		

PROJECT SETTINGS - VALUE LISTS

Here you can add and define types for the following aspects associated with the project:

- Cost
- → File
- Information
- Issue
- Resource
- ► Risk

Simply double click an entry to modify it; or click "New" to create a new entry.

General	Value Lists	Misc
alues	and the second second	
For: Cost	and a lower the second	
r Kinds		
Consulting		
Charges		
Material		
Room		
Statuses		
Requested		1
Approved		
Invoice receiv	ved	
Invoice order	ed	
invoice payed		
		bbA
Make Def	ault for new Projects	
Make Def	ault for new Projects	
Make Def	ault for new Projects	Add

PROJECT SETTINGS - MISC

The "Misc" tab is divided into three sections:

Resources: define the initials style for named resources and whether resources can share in their work

Security: to remove access to your project for anonymous users, add a check mark

Project Image: here, you can place the logo of your company or the client, for instance. It will be included in printouts and reports



EXTENDED SEARCH

In addition to Merlin's standard search feature, the "extended search" option can assist you further when working on your projects:

- to open it, simply click on the magnifying glass icon in the search box
- you can select various search criteria from the pop-up menu and add or remove them using the "plus" or "minus" buttons. Being able to include additional search conditions helps you conduct more precise searches when clicking "OK"
- ▶ By clicking on the small "x"-symbol in the search field you cancel the extended search option

		My search 2	
Advanced Search	My search My search 2	Contains activities which match all of the following conditions:	
My search My search 2	-	% Complete 🛟 is 25%	$\bigcirc \bigcirc$
Q	Add search		Cancel OK

Extended searches can be named and saved for later use. To save your search, click on the drawer symbol and then on "new search".

LIMIT THE VISIBLE DATE RANGE

The extended search helps define the vertical constraints of your project. By limiting the date range you can also limit the horizontal view of your project.

Click on the "Limit the visible date range" button and then on the "A range of the project" radio button. Next you can define a date range which limits the entire project and the related view in the Gantt display.

WK 13. March 2009 WK 1 21 21 21	Limit the visible date range to display The entire project The entire project A range of the project Date Range From: Feb 27, 2009 12:00 AM To: Feb 28, 2010 12:00 AM Detions	Hint: The button for this option has a special feature: It will glow blue if the visible date range has been limited.
	Hide planned values Consider Gantt labels when hiding	

Cancel

OK

PRINTING

Der M

Merlin offers robust and flexible printing services. Simply select "File > Print" from the menu or use the "Command + P" keyboard shortcut to start your print job.

The printing capabilities in Merlin precisely reproduce the contents of what is displayed on the Merlin screen. This means you get true **WYSIWYG** – "What You See Is What You Get" in both the preview window and in the final print-out!

You can customize your print job, modify its size, add headers and footers, and limit output to the gantt or outline display only.

 Consult Project 1 Mattering Mattering Annormal Pancing Charte Scape Consult Project Manage Project Consult Project Manage Project 	anagan	0.01.00 0.02.00 0.000 0.000 0.000 0.000 0.000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.00000 0.00000 0.00000 0.000000	Arapari Pari Arapari Pari Arapari Pari Arapari Pari Papat Dana Papat Dana Pap	Company C	Pr Grient M. Bo Sc Co	rinter: (Paper: (ation: [argin: - Top: ttom: [size:] size: [saling:] opies:]	HP Lase A4 1 1 cm 1,552 cr WidtP 2 44,957 c 82%	erjet 1300	Left: 1 cr ight: 1 cr e 2 e 2 e 18,788	20.99 cm x m (*) m (*) ht (*) F cm (*)	19.70 cm	footer	Right	P P P	Font Itle age Number age Count rint Time	Alternating Shadows Print colum Page Breaks	row backgroi n headers on . at Rows	every pag		
Preview	Ð							Standard	i C	ancel	Print	Stand	ard)	Cancel	Print		Standard		ancel	Print

CREATING REPORTS

Merlin offers a separate report system for the creation and sending of reports, based on the report templates provided. These can be modified with the report options available with each pre-defined template.

- select the "File > New Report" menu to access reports
- then simply choose the report template you desire



A report can be sent via email, printed out, published in HTML format, or formatted as a PDF file so you can easily communicate project status with other team members.



IMPORT AND EXPORT

Merlin supports a vast array of import- and export formats, including file formats for Microsoft Project*, Microsoft Excel, mind maps and many other third-party applications.

- to import different file formats, please select the "File > Open" menu or simply drag and drop the file over the Merlin application icon
- **to export** different file formats, please select the "File > Export" menu option.

OPML	CSV	MS Project	iCal	XML	image	Mind Map	HTML
Create a pro applications	oject docur 5.	ment that can b	oe viewed a	and edited in	Microsoft P	roject and oth	er
		• XML • MPX:	English			A Y	
				(Cancel		ext
					Cancel		xt

*Our recommendation:

Use the XML format for best results when importing and exporting MS Project files.

COMBINING PROJECTS

meriin	File Edit Insert View Window
00	New Project 企業R
Activities	New Empty Project て発N ativ
	Combine Projects 企業C
Activities	New Report
# Info Title	Open #O Tag
000 .	Open Recent
Finder	File Edit View Go Window H
00	
Activities	- Net Plan Resources : Utilizatio
	_
Activities	
# Info Title	Given Plan Flag
	Master
	master
MERLIN	4 MERÊIN
Project 1.m	erlin2 Project 2.merlin2

Cancel

Copy Contents

Link File

Would you like to observe and manage multiple j	project files at
once in a master project? You may do so by the	"Combine
Projects" option.	

Select "File > Combine Projects..." to choose the projects you would like to combine with the help of the next dialogue.

Or use drag & drop. Simply locate the project files in the Finder, select and drop them in the activities view of an empty project.

Merlin prompts whether to link or
copy the combined projects. Saved
changes on linked projects appear
in the master and vise-versa.

PUBLISHING YOUR PROJECTS

By "publishing" your projects, you make them accessible to others across the network or on the Internet. The optional web-module allows the projects to be modified by others, independent from the operating system platform, by using a web-browser. Furthermore, projects can be synchronized with iCal and published as calendars.

- to publish your project, it first needs to be saved; otherwise the function is not available
- using the proxy icon the IP address of your computer can be forwarded to other users involved in your project or on the web*
- for publishing on the Internet your router needs to be configured appropriately with UPnP or NAT/SMP

	Project Web iPhone iCal
	Project is shared. Click Stop to prevent users of other computers from accessing this project.
* Drag the proxy symbol to your emailing program, iChat or any other	Drag the symbol into Mail, iChat or another application to communicate the address.
application to share your project	Stop Close

PUBLISHING YOUR PROJECT

If you select "Project" the current project becomes enabled for common use in networks and on the Internet.

If you click on "start" the project becomes accessible. Based on the assigned IP address, it can be accessed by other Merlin users via local networks as well as on the Internet*.

The "File > Remote Open" menu lists all available projects that can be opened over a local network.

*	for	pu	blis	hing	j on	the	lr	nternet	your	router
	nee	ds	to	be	confi	gure	d	approp	riately	y with
	UPr	nP c	or N	AT/S	MP					

000	Remote Open
merlin://192.168.2.104/P1 Servers	+ Projects
MacBookPro 192.168.2.104	My Master My Project P1 P2 Test
	Connect As Cancel Open

Cancer Open

WEB MODULE

Der

The Web module is available as a separate option for publishing your project so it can be opened and worked on using a web browser, which means Merlin can become platform independent. The following web browsers are supported:

- Safari 3 or higher for Mac OS X or Windows
- Firefox 3 or higher for Mac OS X or Windows
- Internet Explorer 7 on Windows
- Internet Explorer 8 (only in the compatibility mode) on Windows

ec	lient-Website	- Windows Internet Explorer							
1	http://76.1				00	http://172.1	6.2.32:7081/		
Me	rlin File	Edit Insert View	Help		• • • •	+ \lambda http://172.16.2.32:7081/		• Q+ Goo	gle
_				1	http://172.16.2.32:708	81/			
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1		Pre-Production			Mermine	0			
2	0	⊳Begin Client Worksite		1	Projects				0-* 🖾 ?
7	0	▷ Client Questionnaire and	1d		Title	Expected Start Date	Expected End Date	Info	
10	0	⊳User Scenarios	1d		My Master	18.11.08 08:00	19.12.08 17:00		
13	0	▷ Comparative Analysis	1d		My Project	06.03.09 08:00	06.03.09 17:00		
15	0	▷ Technical Specifications	1d		P1	15.12.08 08:00	29.12.08 12:00		
18	0	▷ Create Project Proposal	2d		P2	15.12.08 08:00	23.12.08 17:00		
	-				Test				

IPHONE

Project management has now officially gone mobile!

The iPhone module is available as a separate option for publishing your project so it can be opened and worked on using an Apple iPhone or iPod touch. Besides this module, all you will need is the Merlin iPhone app installed on your iPhone, iPad or iPhone touch.



ICAL PUBLISHING

With iCal publishing you can synchronize projects as well as resource calendars in the form of all day events, events with time, and as to-do's.

Attention: We recommend you avoid using the option "Accept changes made in iCal", as this frequently leads to unintended and unwanted modifications to your project.

🕑 🎯 🚺 📆	All day events	
Project Web iPhone iCal Synchronize resource calendars:	My Project	6 My activity
Customer Designer Developer Product manager		
Project manager	Events with time	
	My Project My Project Ressource - My Project	6 7 • 08:00 Define scope • 10:00 Define subcon- tractor scope
Synchronize project calendar		
Accept changes made in iCal		
Warn before accepting changes	Todoo	
Synchronize dates as:	IO OOS	
All day events	To Do Items \$	
	A Friday, January 18, 2008 My activity In Leop	oard to-do's can also be used
Close Sync now	A Friday, January 4, 2008 = My activity in Mai	
	My activity	

VIEW OPTIONS

Der

Use view options to configure columns displayed in the outline, in the Gantt chart, as well as the style of the Gantt chart display. Simply highlight the element you wish to change with the mouse. You can also configure options for foreground color, typeface, and other types of content displayed.

Hint: Column settings as well as custom styles can be saved as personal settings for later use.

$\Theta \cap \Theta$	Activities View Option	s	\varTheta 🔿 🔿 🖌 Activ	ities View Options	\varTheta 🔿 🔿 🖌 Acti	vities View Options		
Columns	Gantt	Styles	Columns	Gantt	S Columns	Gantt	Styles	
Column Sets		•	Shown Time Range	0 2 4 6 8 10	12: Style Sets			
Q			Planned Values		Selected Part: Left label			
Title		Custom	Ruler Grid for Level	🗌 1 🗹 2				
▼ #		0	Non working Times	Based On Project	Kick-off Kick-off	3 days	J.D.	
# Predeces	rs	Ĭ	Critical Path					
S Complete	e Costs				Condition	General	\$	
Actual Base	al Base Costs Subtotal		Group Boundaries			This is the ba	s the basic style from	
Description	If Predesessors' reco	rde a liet with	Current Unit	N N		which all oth derived.	er styles are	
Description	numbers (#) – separated by semicolons		Time Line		Foreground Color			
	chronologically prece	 of the groups and activities that chronologically precede the start of this 			Shadow			
	activity. The type of relationship to each respective predecessor can be given in		Labels		▼ Content	Title	•	
	shorthand form, FS, I	FF, SS, or SF.	Dim Non Editable Fields		Show Times			
Alignment	Left		Highlight Changes		▶ Font	Change		
Alignment	Left		Highlight Changes		▶ Font	Change	;	
erlin Schnelleinstieg. © 2010 Proje	ectWizards GmbH, Melle, Germany. All right	ts reserved.	Dim Non Editable Fields				4	

WORKSPACES

Due to its inherent flexibility, Merlin's program window and interface can be modified in many ways. In order to retain your favorite display settings (such as columns displayed), these can be saved as a separate "workspace".

From the "Window > Workspaces" menu you will find pre-defined workspaces; using the command "Window > Save Workspace" command or using the "Ctrl + Command + S" keyboard shortcut you can save and name your current window settings

The "Window> Manage Workspaces" menu or using the "Ctrl + Command + W" keyboard shortcut will open a separate menu for viewing and managing all saved environments.

Workspaces	
▼ Built-in	
Standard (default)	
Budgeting	
My Workspace	
For current project	
Activate Make Defa	ault Close

#	Info	Title	Approved	Budget	Approv	ed Budget Ap	pro	ved	Bud	get	A
						Absolute		Dis	tribut	ted	
0	00	V Proiect									
⇒ A	ctivitie	25									
#	Info	Title	Base Cos	sts	Expected	Approved B	udg	get	Budg	jet/P	lan
			Subto	tal W	ork Costs	Ab	solu	ute			
0	00	🔻 🗁 My Project									
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	Info	Title	Given Plan	Flag	# Prede	Expected Start	A:	W	K 46,	Nove	mb
#			ned Work	Status	cessors		Re	11	12	13	14
#											
#	90	🔻 🗁 My Project									

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ACCESS PRIVILEGES

In Merlin you can assign access privileges to resources if you want to limit access to the project for security reasons.

To do so, simply select a resource and switch to the " Permissions " pane of the inspector. Enable the check box "is a user ". A new user has per default "read & write " privileges to the whole project. This user could be the main user of this project, so you do not need to do any modifications. Click onto " Set password..." to define a password for this user and to protect thus the whole project.

Now you can define if you wish further resources to users, having limited access privileges. These settings apply for all Merlin applications, restrict the project access for allowed users and, if necessary, to specific functions only.



User:	Resource A
Old Password:	
New Password:	
Re-type Password:	
C	Cancel OK

ProjectWizards

ProjectWizards GmbH, Germany ProjectWizards Inc., USA

office@projectwizards.net www.projectwizards.net

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