

# MERLIN

**The Quick Start Guide**  
to professional project management



# INTRODUCTION



## **Welcome to the quick start guide to Merlin!**

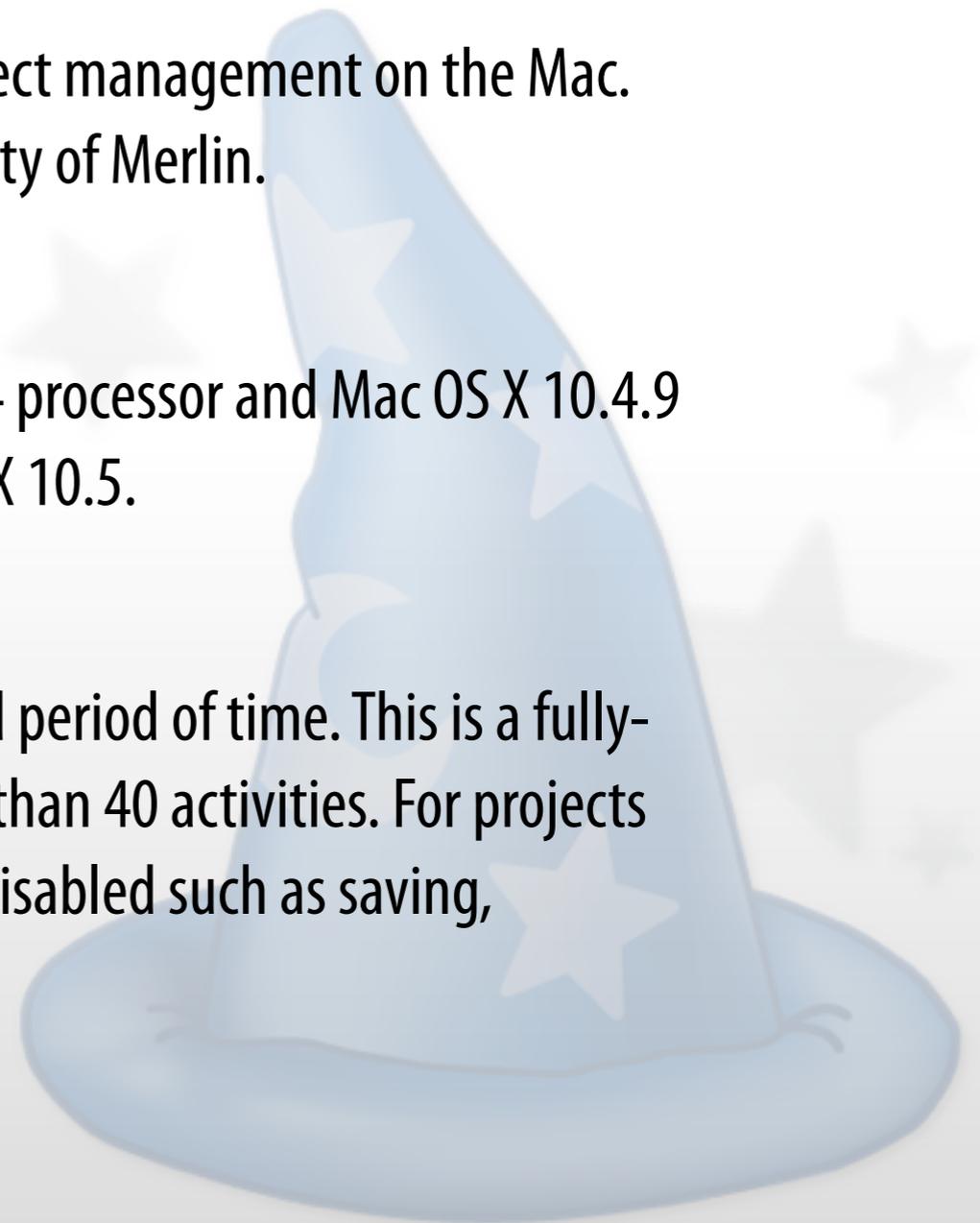
Thank you for choosing the leading software solution for project management on the Mac. This document will help introduce you to the basic functionality of Merlin.

## **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 fully-functional 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](http://www.projectwizards.net)

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

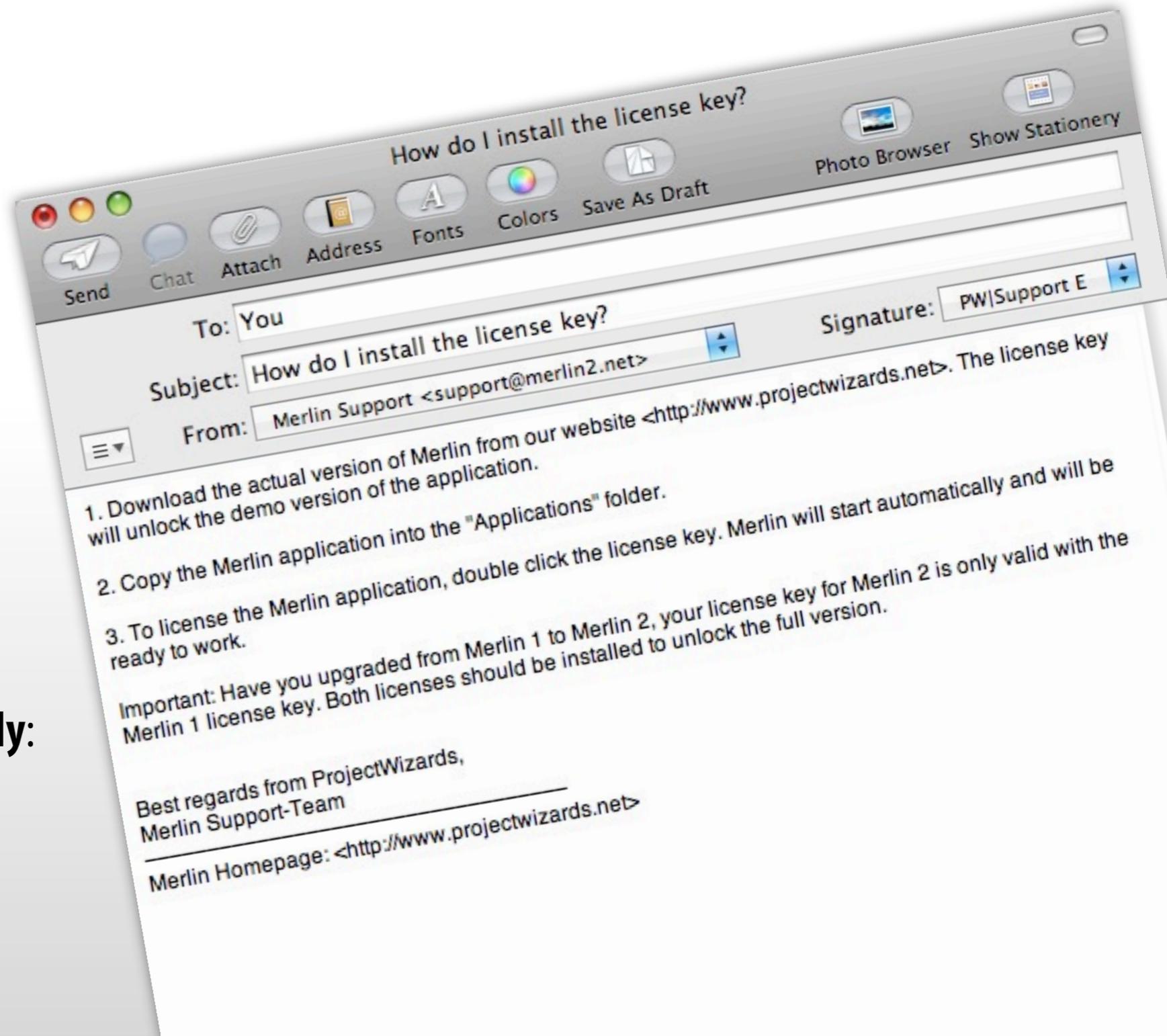
- ▶ Merlin 2 help
- ▶ Google groups (in English and German)

**Or contact our support team directly:**

[support@projectwizards.net](mailto:support@projectwizards.net)



# INSTALLING THE LICENSE



**Contact our support team directly:**  
[support@projectwizards.net](mailto:support@projectwizards.net)

# STARTING MERLIN

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

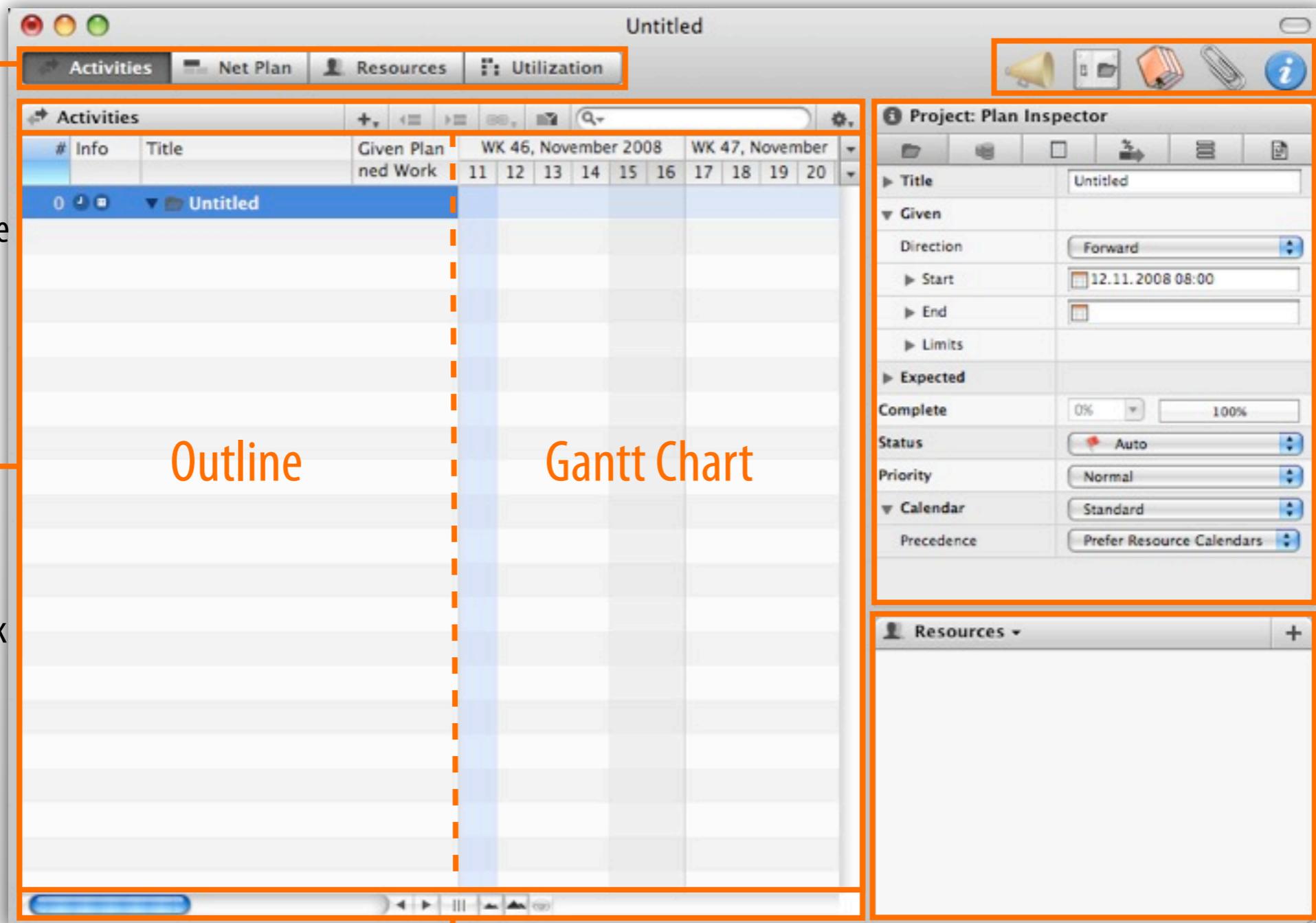
- ▶ view the Merlin tutorial
- ▶ open an existing project
- ▶ create a new project from a template
- ▶ create an empty project

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



**Views**  
select a view from the main content area

**Main content area**  
this is where you work on your projects!

Outline

Gantt Chart

**Configure the main content area**  
organize, enlarge, reduce and overview



**Icons**  
for frequently used functions

**The Inspector**  
context sensitive control of all your project items

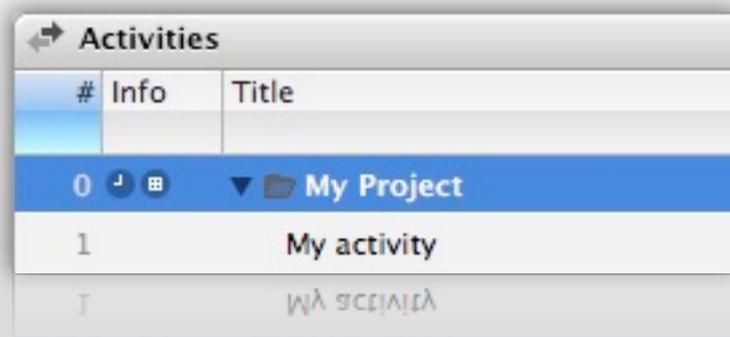
**Supplementary field**  
for resources and planning conflicts

# THE INSPECTOR

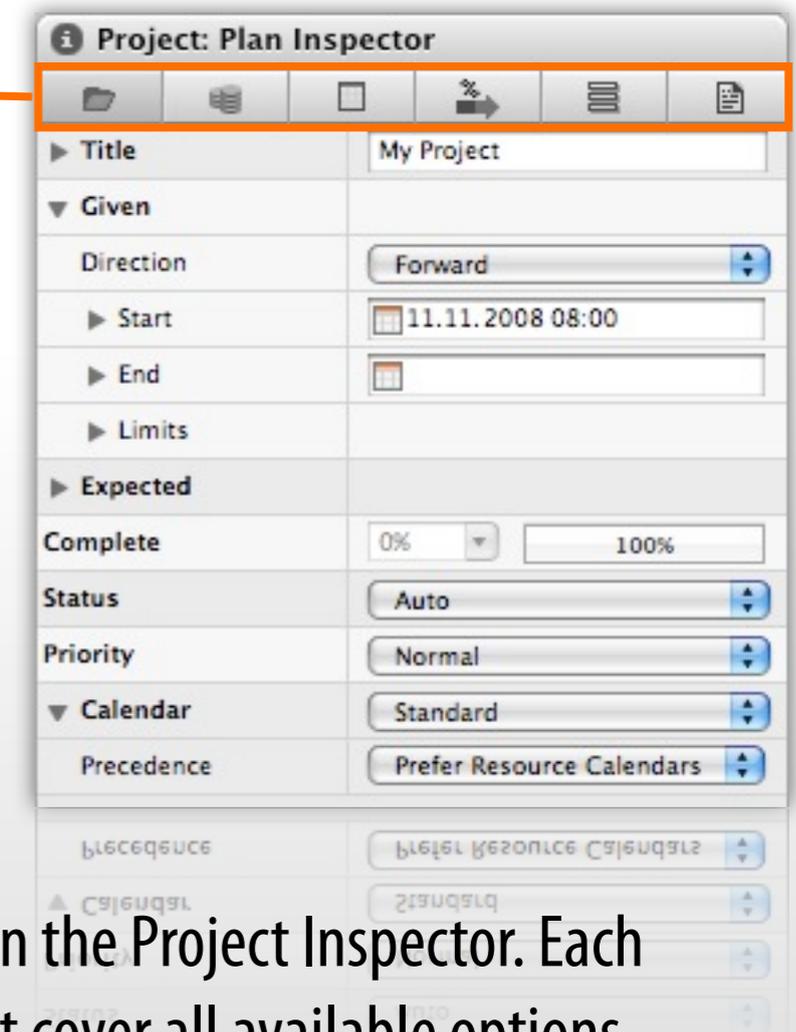
**The Inspector lets you take control of all kinds of objects used in Merlin.**

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

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



#	Info	Title
0	▼	My Project
1		My activity



Simply click on the project\* to open the Project Inspector. Each Inspector includes several tabs that cover all available 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.

The image displays four screenshots of the Merlin project management software interface, each showing a different view. The views are: Activities, Net Plan, Resources, and Utilization. Each screenshot has a corresponding button highlighted in orange in the top navigation bar.

**Activities View:** Shows a table with columns: #, Info, Title, Given Plan, Flag, # Predecessors. A row is visible for 'My activity' with a duration of '1 day?'.

#	Info	Title	Given Plan	Flag	# Predecessors
0		My Project			
1		My activity	1 day ?		

**Net Plan View:** Shows a Gantt chart for 'My Project' and 'My activity' with start and end dates of 11.11.08 and a duration of 1 day?.

**Resources View:** Shows a table with columns: Info, Title, Flag, Status, Type, Mat. Rows include 'My resource' (Person) and 'My material' (Material, kg).

Info	Title	Flag	Status	Type	Mat
	My resource			Person	
	My material			Material	kg

**Utilization View:** Shows a resource utilization chart for 'WK 46, November 2008'. The chart displays utilization percentages for 'My equipment' (25%) and 'My resource' (50%).

Title	10	11	12	13	14	15	16	17
Keine Ressourcen zugewiesen								
My company								
My equipment		25%	25%					
My activity		2 days						
My material								
My resource		50%	100	100				

# ACTIVITIES

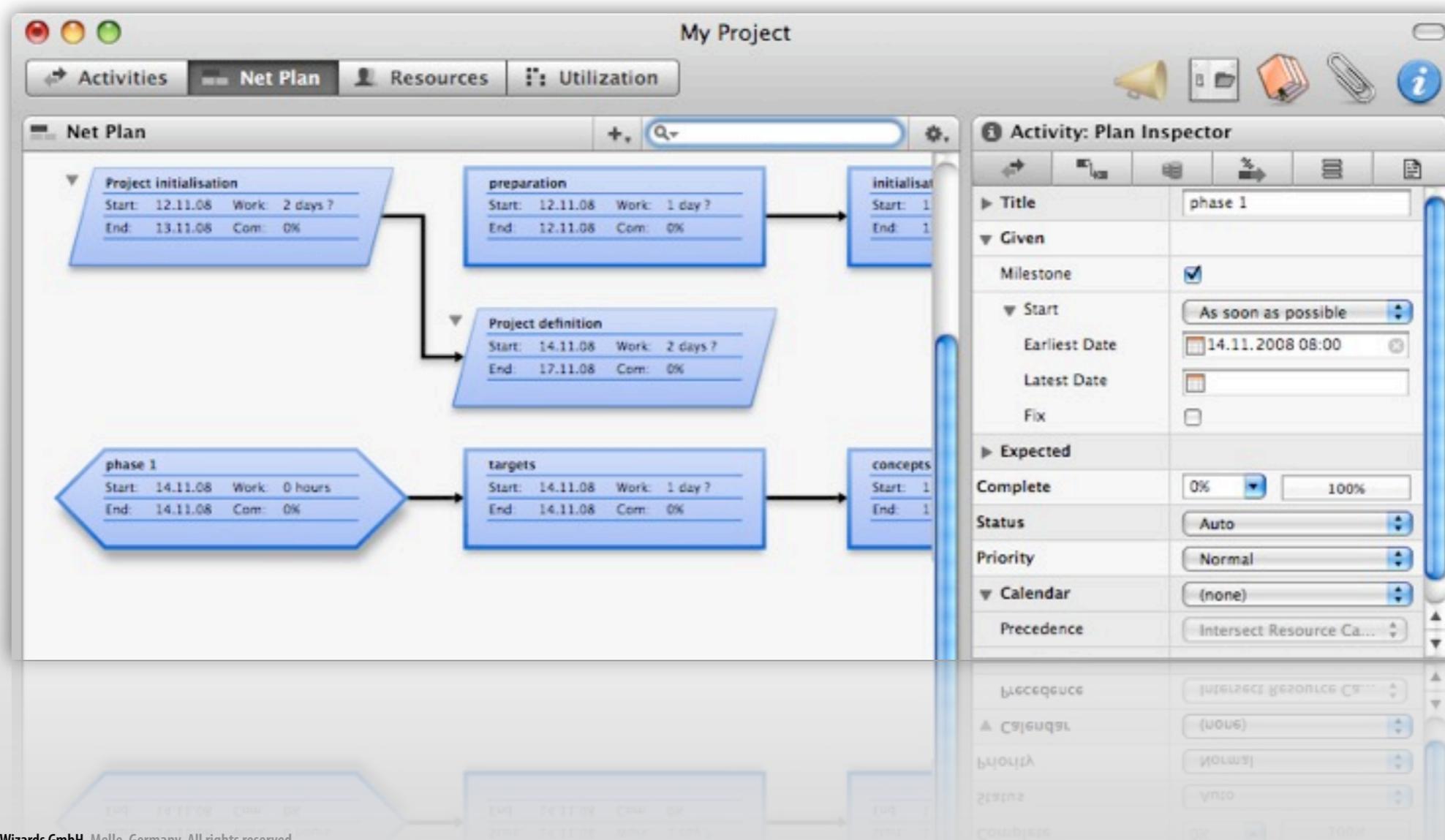
The “**Activities**” view is generally the most often used as you plan the majority of your projects. To accomplish this, activities and related details can be modified in both the outline and in the bar chart. You can fully customize your column settings based on the information you would like to display 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.

Merlin's standard columns

#	Info	Title	Given Planned Work	Flag Status	# Predecessors	Expected Start	Assigned Resources	% Complete
0		My Project						
1		Project initialisation	2 da					
2		preparation	1 da					
3		initialisation done	1 da					
4		Project definition						
5		phase 1	1 da					
6		targets	1 da					
7		concepts	1 da					
8		testing	1 da					
9		definition done	1 da					
10		Next steps	1 da					

# NET PLAN

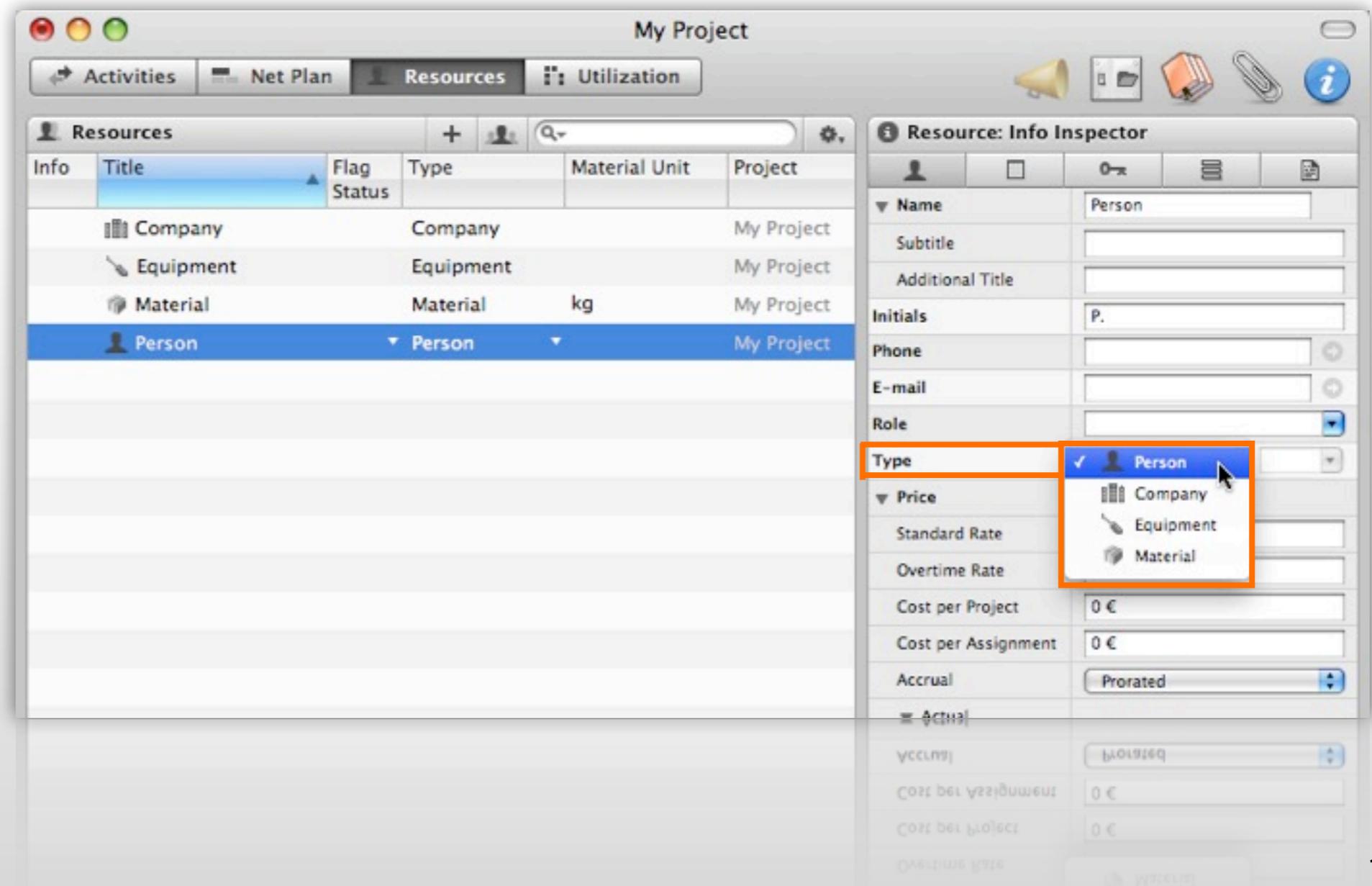
The “**Net Plan**” view provides a clear and fully-editable visualization of the logical links and structure of your project from beginning to end.



# 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:

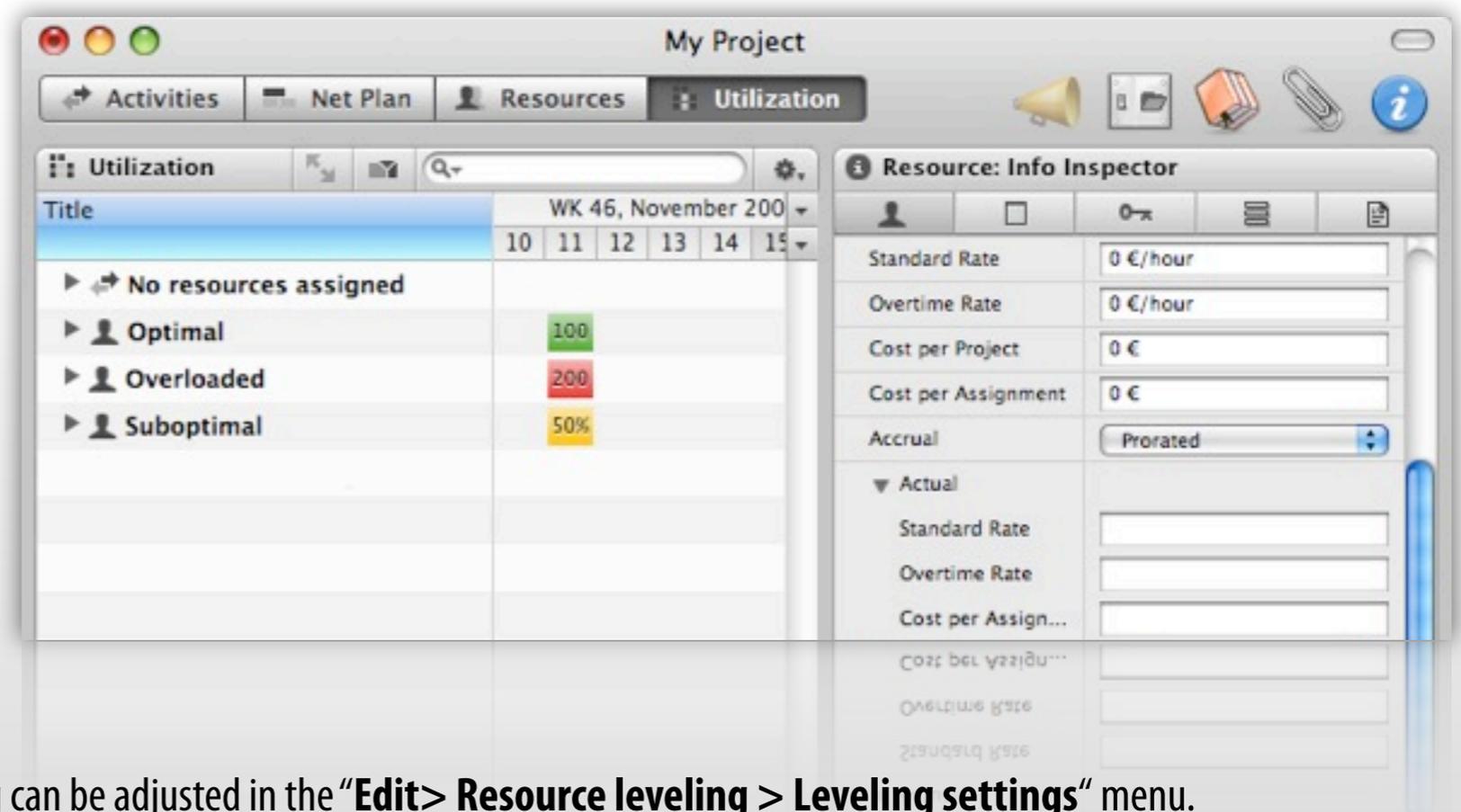
- ▶ **person**
- ▶ **material**
- ▶ **company**
- ▶ **equipment**



# 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:

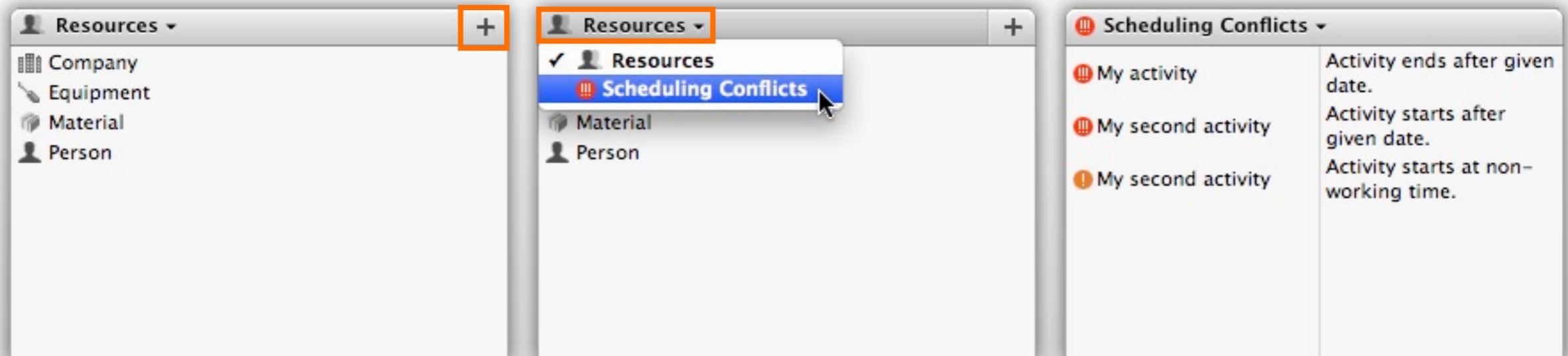
- ▶ **Publishing:** launches the dialog for publications. [Command + Shift +P]
- ▶ **Settings:** launches the dialog for all project settings. [Command + Shift + , ]
- ▶ **Library:** toggles the display of the library window. [F3]
- ▶ **Elements:** toggles the display of the field “elements”. [F2]
-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



# THE SUPPLEMENTARY FIELD

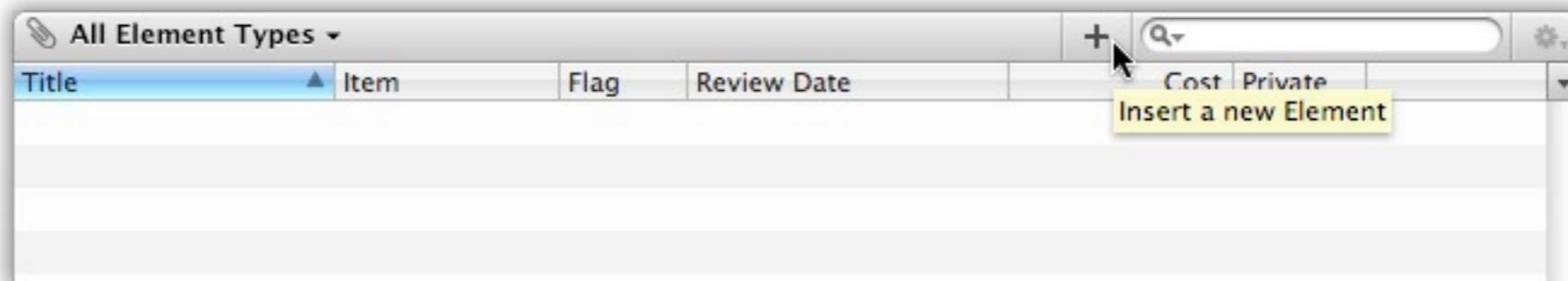
The supplementary field is divided into two areas, which can be modified by clicking on the title bar:

- ▶ **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.

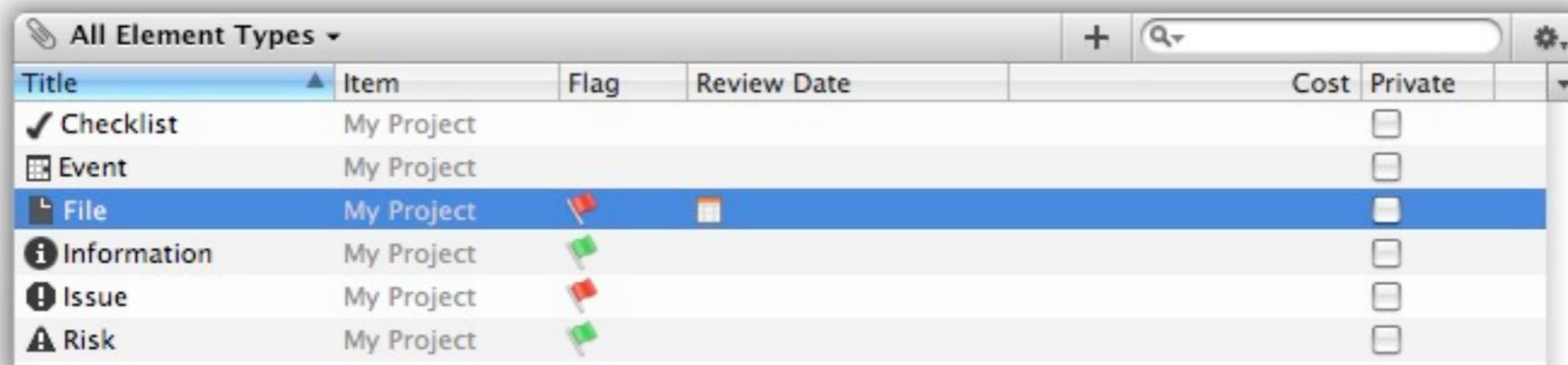


# THE ELEMENTS

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.



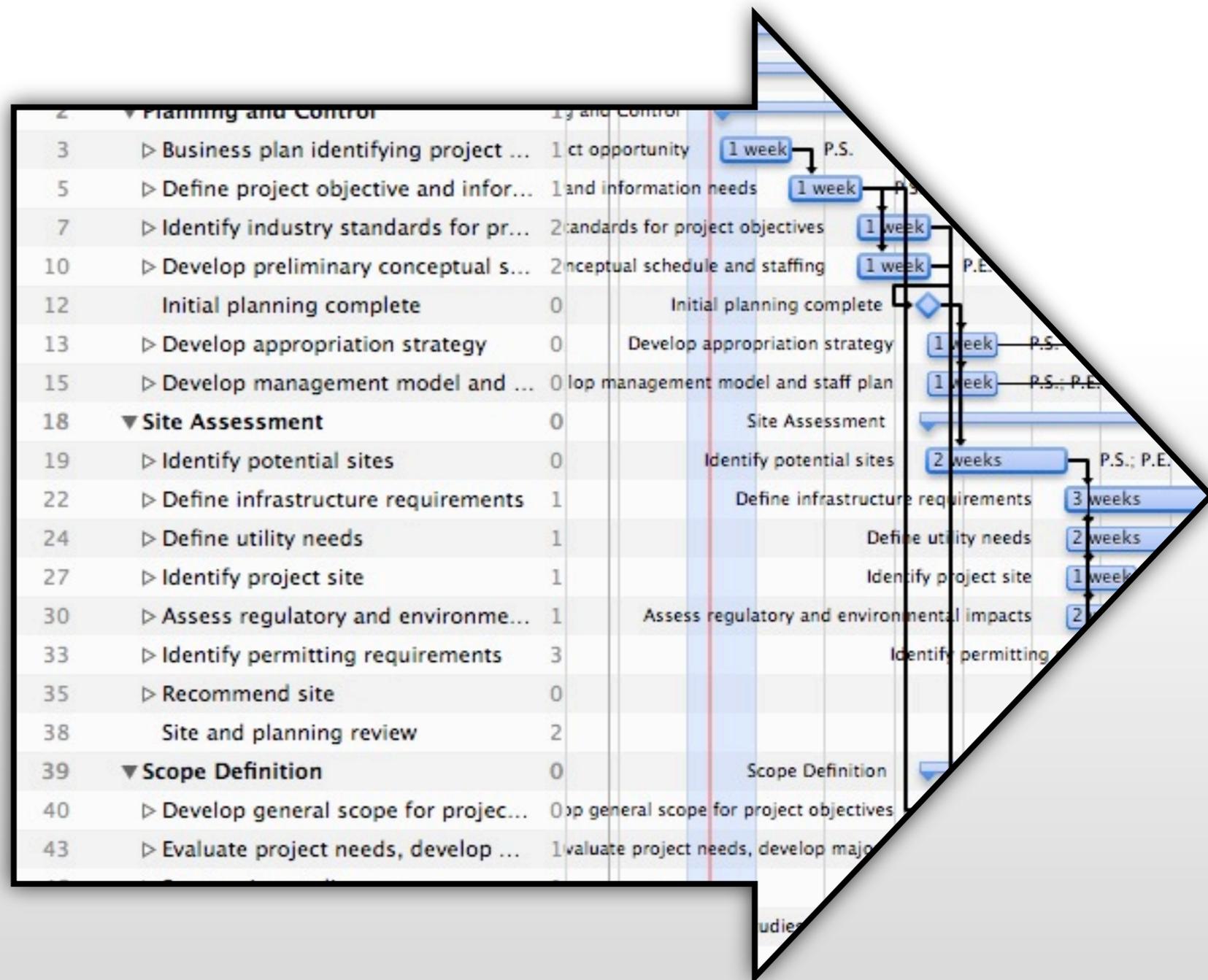
Highlight an activity/resource/project to associate a new element with it. You may choose from the following six element types:



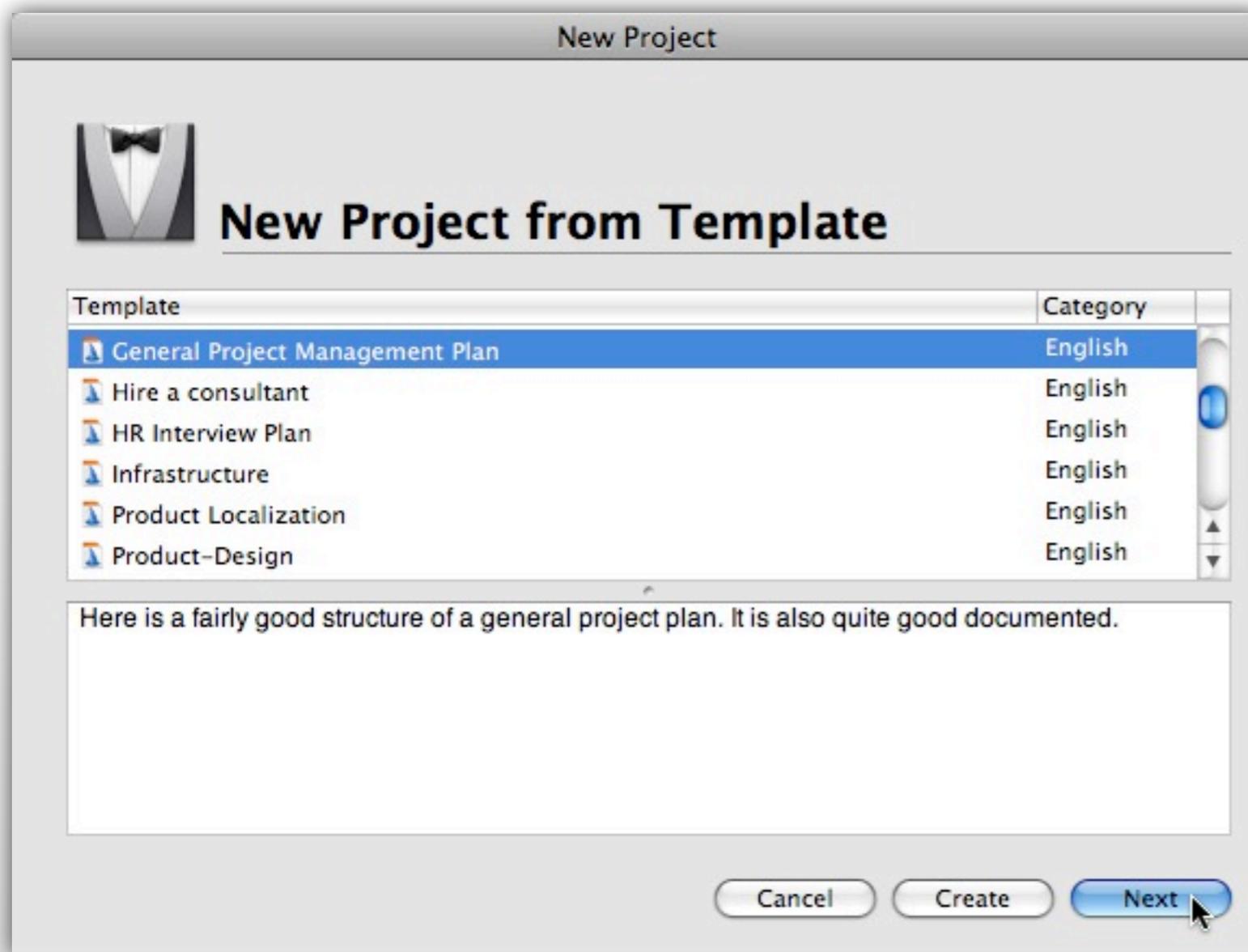
# MERLIN'S WORKFLOW

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

- 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



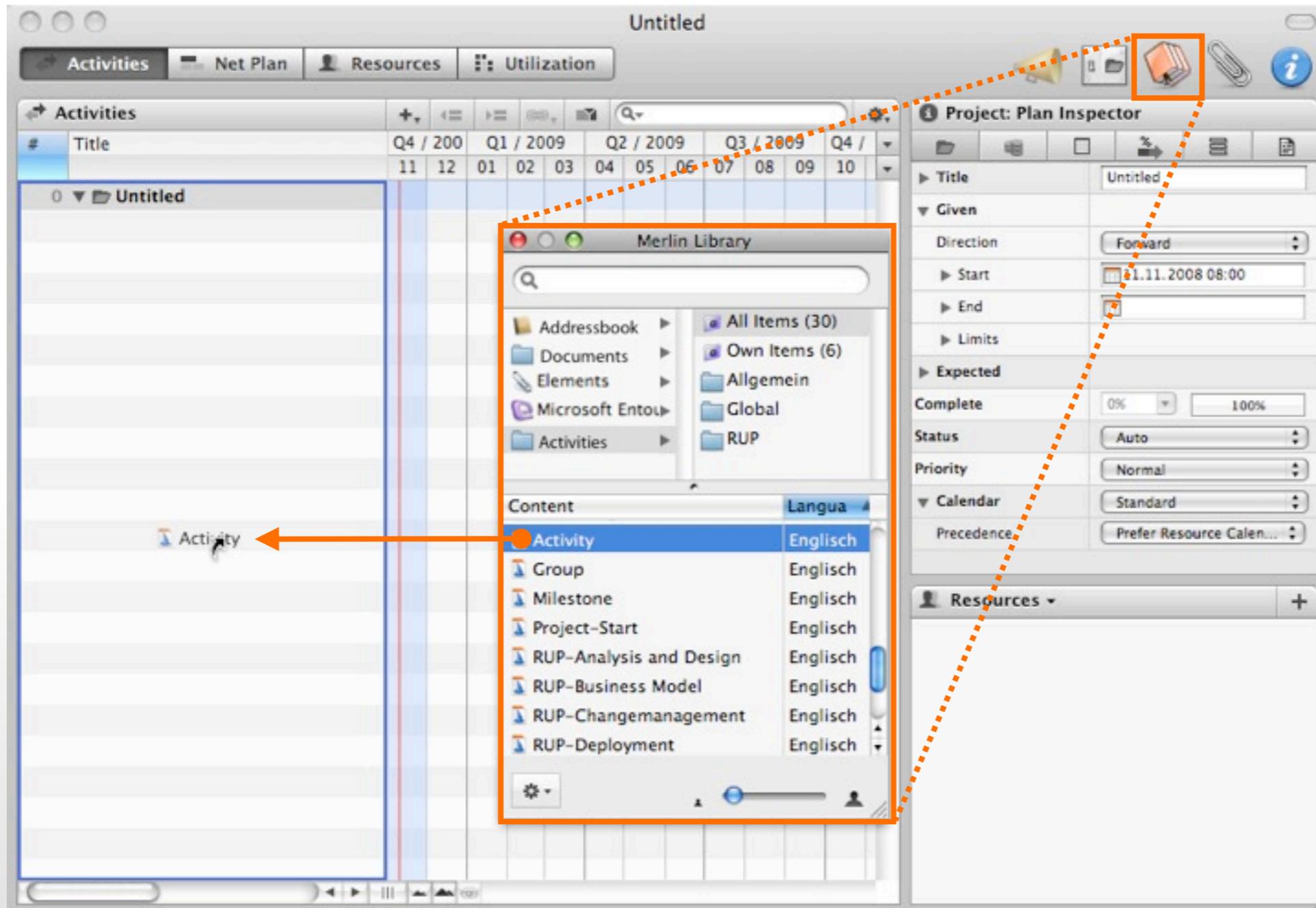
# A NEW PROJECT



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

For additional information for the selected project template, [click here](#).

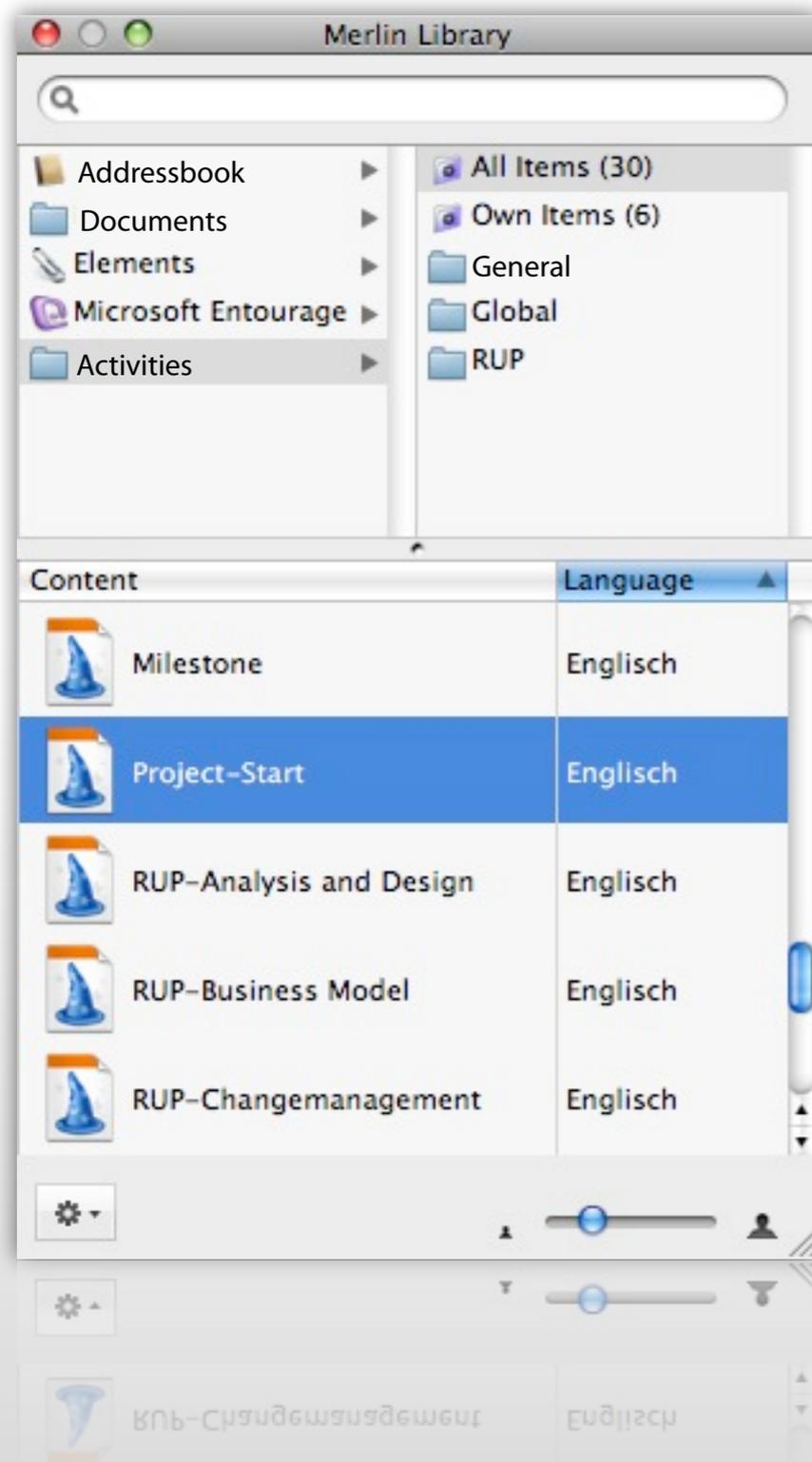
# FROM ZERO TO SIXTY IN ONE STEP...



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

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

# USING THE LIBRARY



If you click on the  icon ... 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, [click here](#).

# PRELIMINARY RESULT

The screenshot displays the Microsoft Project interface for a project named "My Project". The main window is divided into several panes:

- Activities Pane:** A list of project activities with columns for weeks (WK 46, November 2008 and WK 47, November 2008) and days (12-23). Activities include "Initialize the project", "Prepare infrastructure", "Project definition" (with sub-activities like "Initialize phase", "Define objectives", "Develop concept", "Prepare testing", "Close phase"), "Implementation" (with sub-activities like "Initialize phase", "Develop system", "Test system", "Close phase"), "Roll out" (with sub-activities like "Step 1", "Step 2", "Step 3"), "Launch party", and "Project finished".
- Gantt Chart:** A visual representation of the project schedule. A blue bar indicates the project duration from week 46 to week 47. A network diagram shows task dependencies with arrows and "Id?" labels.
- Project: Plan Inspector:** A pane on the right showing project details such as Title ("My Project"), Direction ("Forward"), Start date ("17.11.2008 08:00"), End date, Limits, Expected completion (0% to 100%), Status ("Auto"), Priority ("Normal"), Calendar ("Standard"), and Precedence ("Prefer Resource Calendars").
- Resources Pane:** A pane at the bottom right, currently empty, for managing project resources.

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

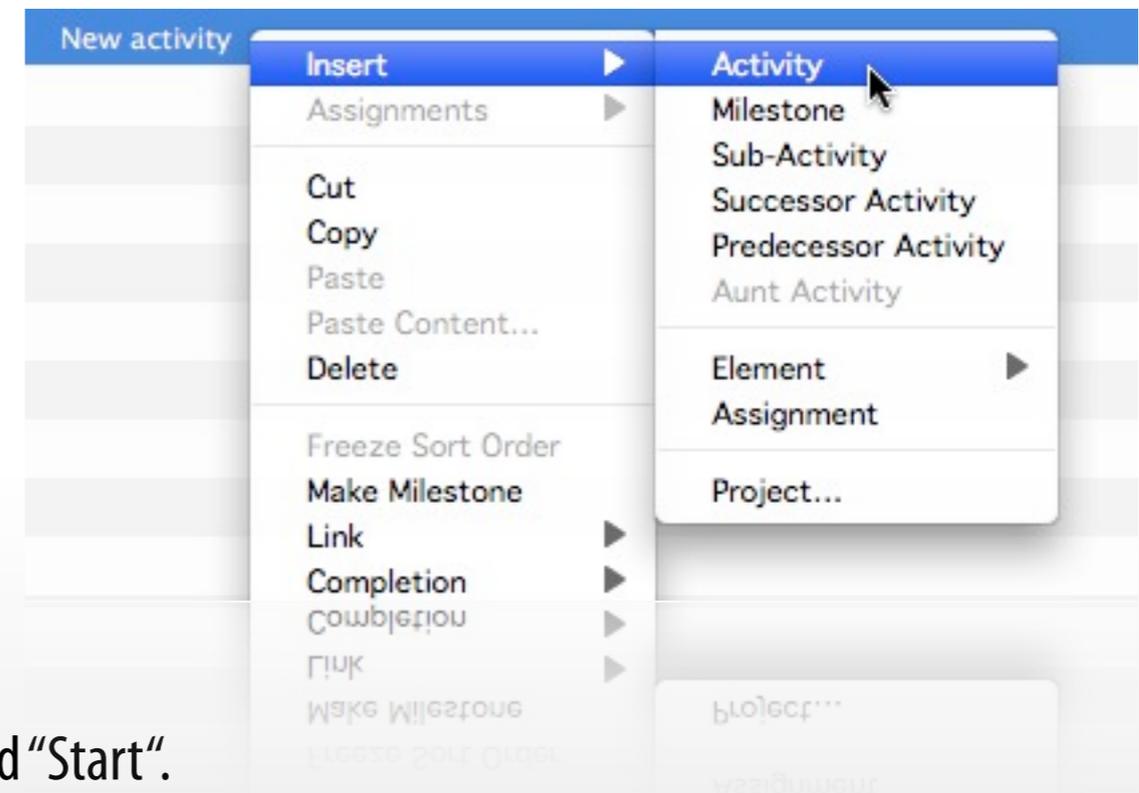
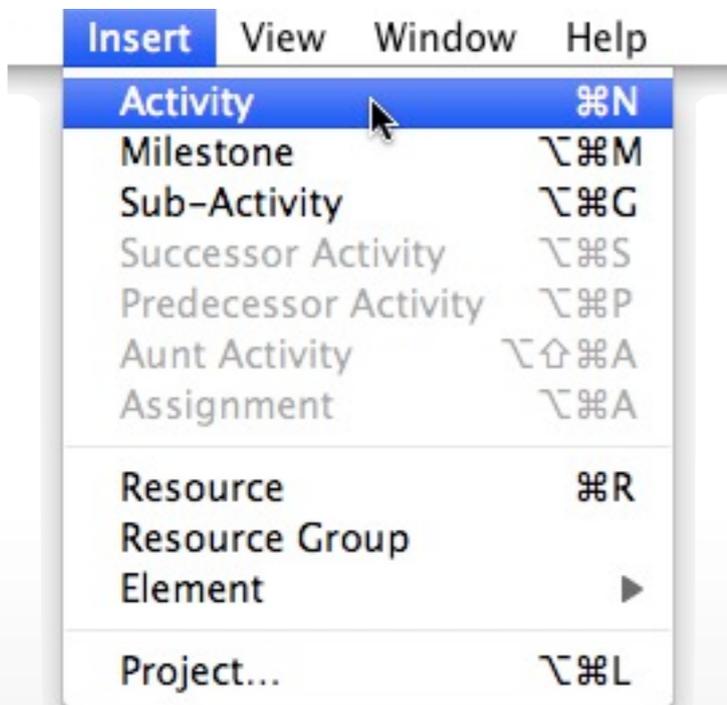
For our next step, the basic structure will be refined with new activities and milestones.

Next we will create new activities...

# CREATING NEW ACTIVITIES

Select an activity type from the “Insert” menu...

...or right click on the activity and select the “Insert” entry from the context menu\*.



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.

Activities		
#	Info	Title
		WK 46, November 2008
		10 11 12 13 14 15 16
0	My Project	My Project
1		Start

\* 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".

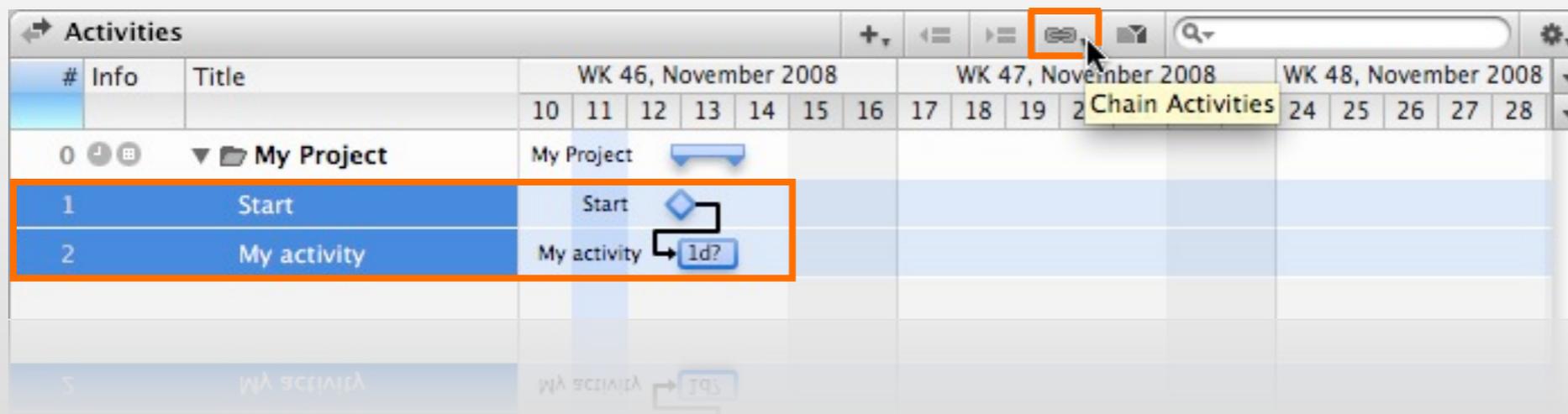
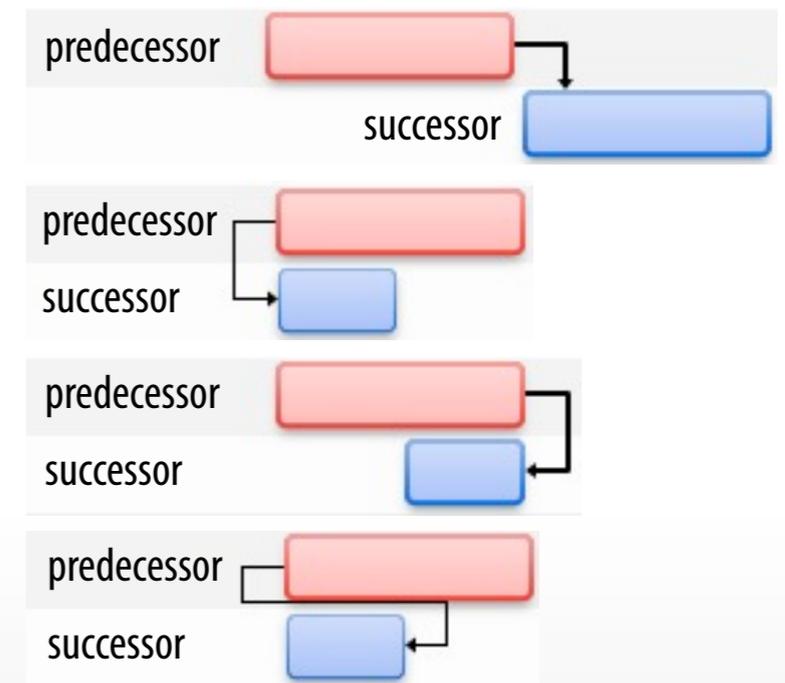
In order to create a new link in Merlin, you need to select two (or more) activities and click on the "Chain Activities" icon. The activities will then be linked using "finish to start". This can also be done by selecting "Edit > connect activities" from the menu or with the [Ctrl + Command + L] keyboard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

**"finish to start"**

**"start to start"**

**"finish to finish"**

**"start to finish"**



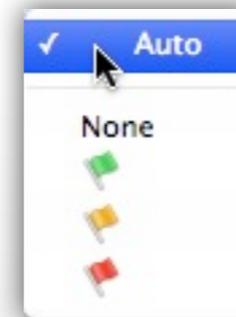
More information on [this topic...](#)

# 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.

Activity done	1,5 days		
Activity in progress	1,5 days		
Activity not yet started	1,5 days		

# 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

Activities	
#	Info
0	   
1	
2	
3	 
4	  
5	
6	
7	
8	
8	
9	
9	

# ASSIGNING RESOURCES

The screenshot displays the Microsoft Project interface. The main window is titled 'General Project Management Plan'. The 'Activities' pane on the left shows a hierarchical list of tasks. The 'Project: Plan Inspector' pane on the right provides details for the selected task, including its title, direction, start and end dates, and completion status. The 'Resources' list at the bottom right shows a list of resources, with 'Project Manager' highlighted. An orange arrow points from the 'Project Manager' resource to the 'New activity' task in the Gantt chart.

#	Title	Start	End	Resources
0	General Project Management	November 2008		
1	Initiating			
2	Project Initiation			
3	Identify goals and objectives			P.D.
5	Document project costs and benefits			A.A.; P.M.; T.A.
9	Develop project charter			P.M.; A.
12	New activity			Project Manager
13	Planning			
14	Define Scope			
15	Develop strategies and plans			P.D.
17	Conduct planning workshop			P.D.
19	Research previous experience			P.M.
21	Define scope			P.M.
23	Develop high-level work breakdown structure			P.M.
25	Build detailed work breakdown structure			P.M.
27	Document project costs and benefits			A.A.; P.M.
31	Specify deliverables and acceptance criteria			P.M.

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

The screenshot shows the 'Project: Working Time Inspector' dialog box in Microsoft Project. The 'Regular' tab is selected, and the 'Week days' section shows a grid for Monday through Sunday with '4h' selected for Monday. The 'Work intervals' section shows a timeline from 0 to 24 hours with a working period from 13:00 to 15:00 (2h) selected. An orange box highlights the 'Regular' tab, and another orange box highlights the work interval selection area with a red arrow pointing to it.

**Hint:** press the Alt key as well in order to create ¼ hours intervals.

# 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:**  
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

The screenshot displays the Microsoft Project interface. The main window is titled "General Project Management Plan" and shows a Gantt chart for "My Project". The Gantt chart is divided into weeks (WK 45, WK 46, November 2008, WK 47, November 2008). The "Project Initiation" task is highlighted in orange. The "Activity: Actuals Inspector" pane is open on the right, showing the "Actuals" tab. The "Actual Start" date is set to 19.11.2008. The "Actual Progress" section shows "Perce" (Percentage) selected, with a progress bar at 100%.

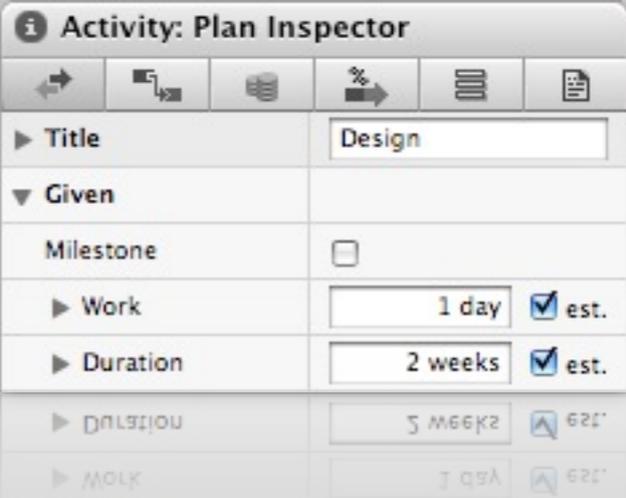
Activity	Actual Start	Actual End	Actual Progress
Identify goals and objectives	19.11.2008		100%

# 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 expected duration.

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



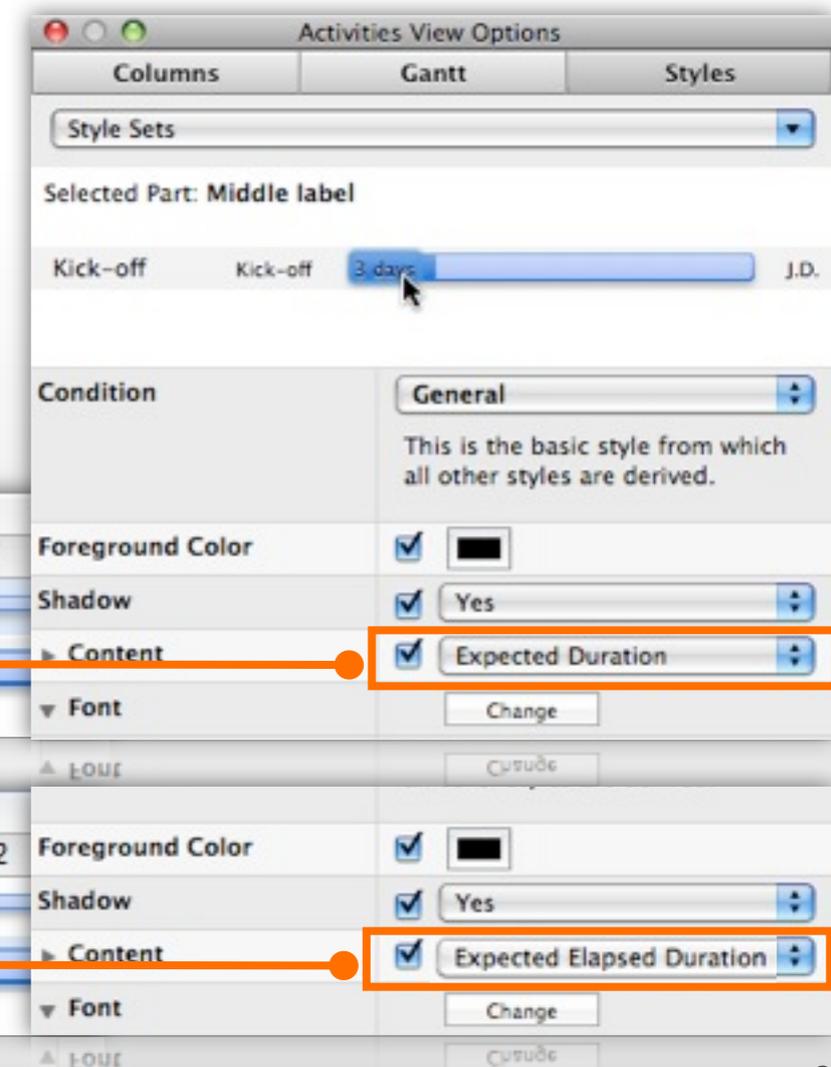
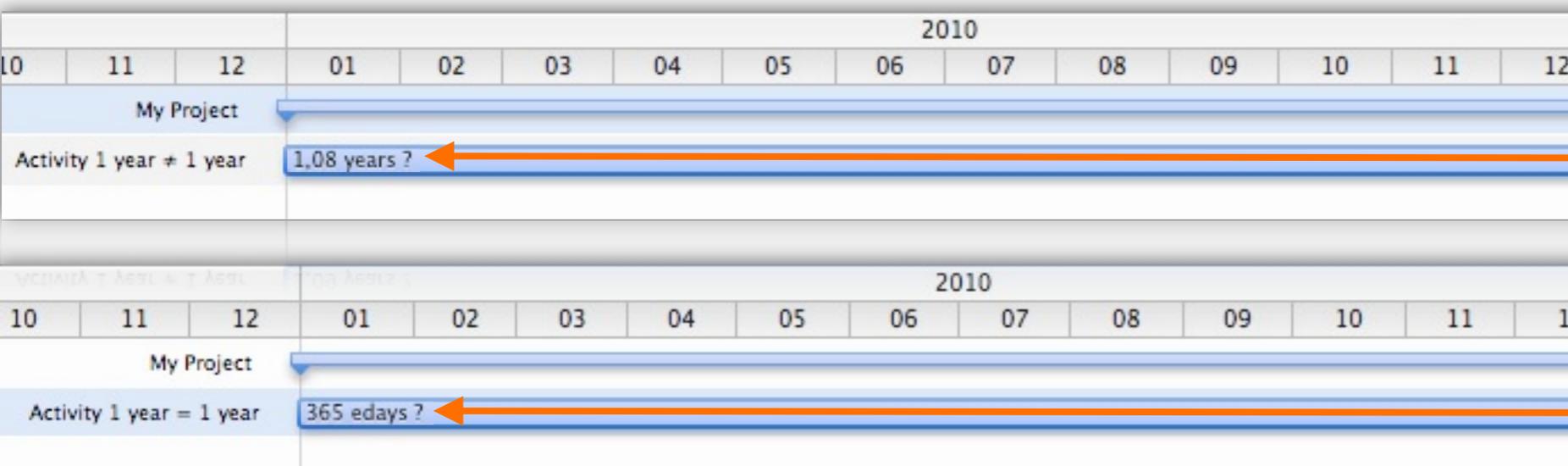
Activity: Plan Inspector	
Title	Design
Given	
Milestone	<input type="checkbox"/>
Work	1 day <input checked="" type="checkbox"/> est.
Duration	2 weeks <input checked="" type="checkbox"/> est.
DURATION	5 WEEKS <input type="checkbox"/> est.
WORK	1 DAY <input type="checkbox"/> est.

# 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 project settings).

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.

**Hint:** Change the content for the middle label in “View Options > Styles”, from “Expected Duration” to “Expected Elapsed Duration”



# 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

General Value Lists Misc

**Financial**

Currency Symbol: €  Before Amount

Default Work Rate: 0 €/hour

Default Overtime Rate: 0 €/hour

**Work Units**

Hours per Man Day: 8

Hours per Man Week: 40

Days per Man Month: 20

Default Work: 1 day ?

Calculated Durations: Dynamic

**Date Presets**

Dynamic Shifting: Off

Status Date:

First day of week: Monday

Settings for My Project

General Value Lists Misc

**Values**

For: Cost

**▼ Kinds**

- Consulting
- Charges
- Material
- Room

**▼ Statuses**

- Requested
- Approved
- Invoice received
- Invoice ordered
- Invoice payed

Make Default for new Projects Add

Settings for My Project

General Value Lists Misc

**Resources**

Resource initials style: F.B.

Resources share their work:

**Security**

Hide from anonymous users:

**Project Image**

Drag & drop an image to this placeholder: It may be used for Reports and Printing.

# 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

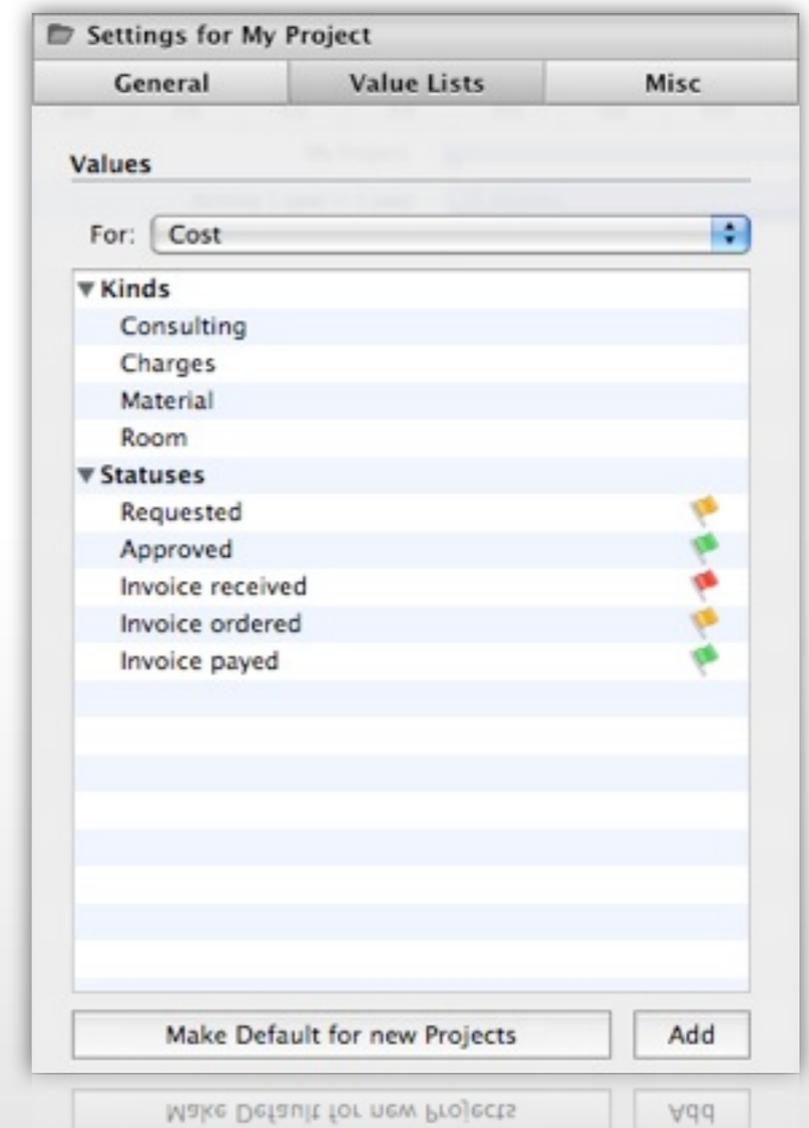
The screenshot shows the 'Settings for My Project' dialog box with the 'General' tab selected. The dialog is divided into three sections: Financial, Work Units, and Date Presets. The 'Financial' section includes fields for 'Currency Symbol' (set to €), 'Default Work Rate' (0 €/hour), and 'Default Overtime Rate' (0 €/hour). The 'Work Units' section includes fields for 'Hours per Man Day' (8), 'Hours per Man Week' (40), 'Days per Man Month' (20), 'Default Work' (1 day ?), and 'Calculated Durations' (Dynamic). The 'Date Presets' section includes fields for 'Dynamic Shifting' (Off), 'Status Date' (empty), and 'First day of week' (Monday). The dialog also has tabs for 'Value Lists' and 'Misc'.

# 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.



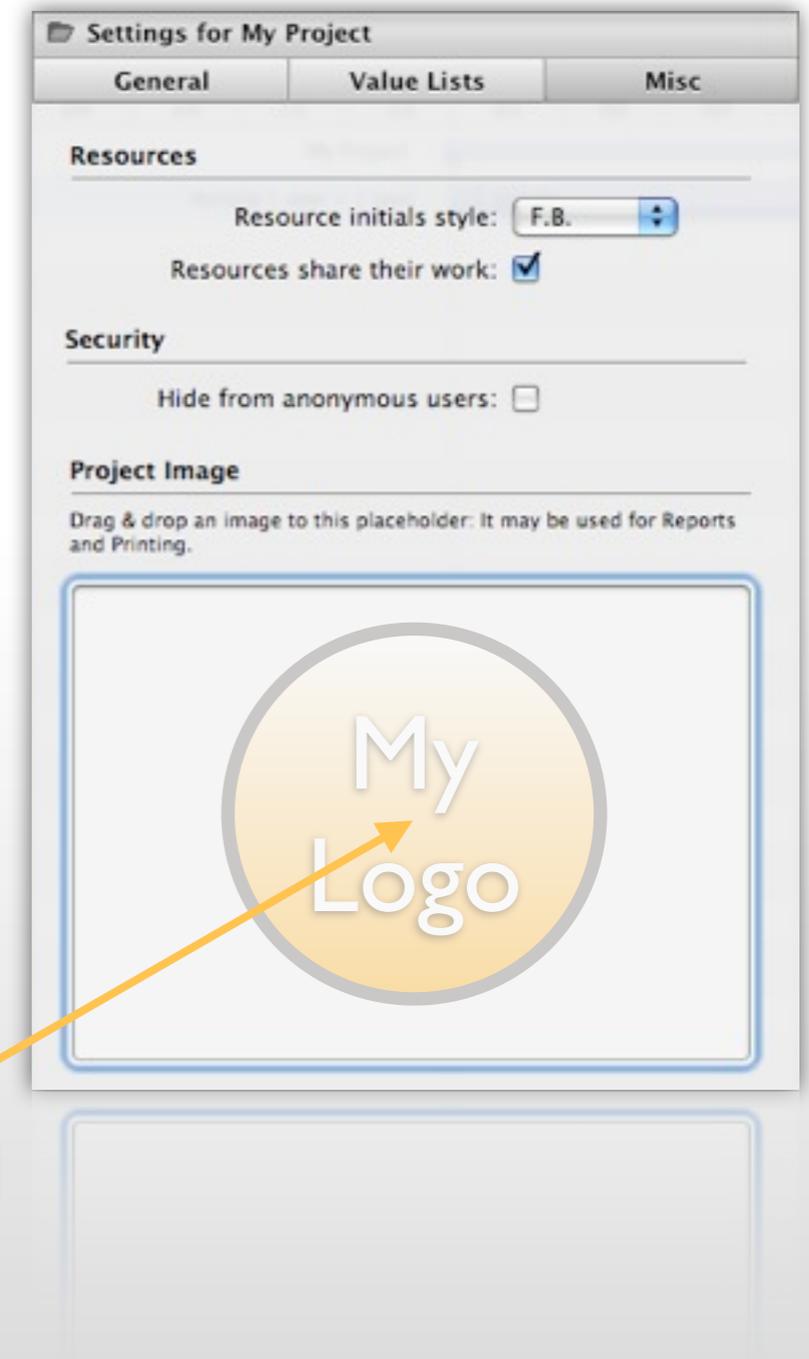
# PROJECT SETTINGS - MISC

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

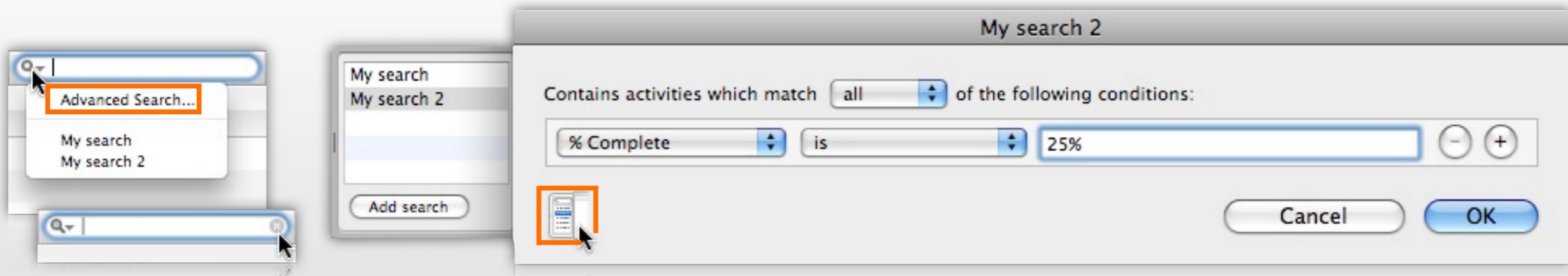
**Project Image:** here, you can place the logo of your company or the client, for instance. It will be included in printouts and reports



# 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

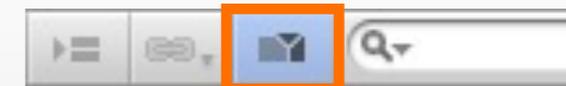
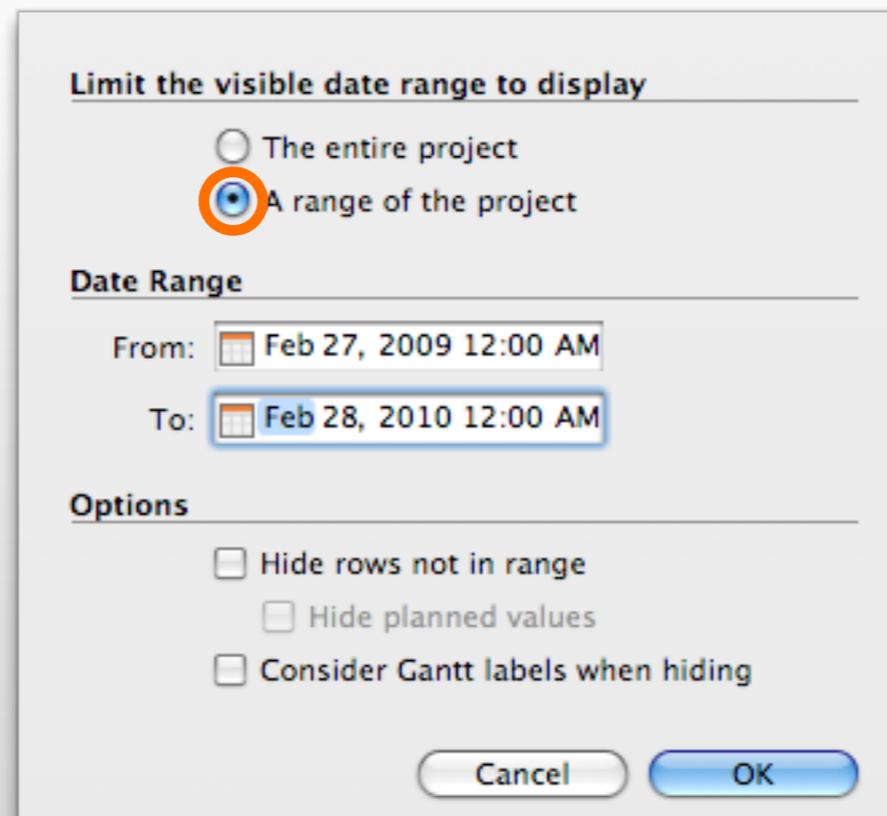
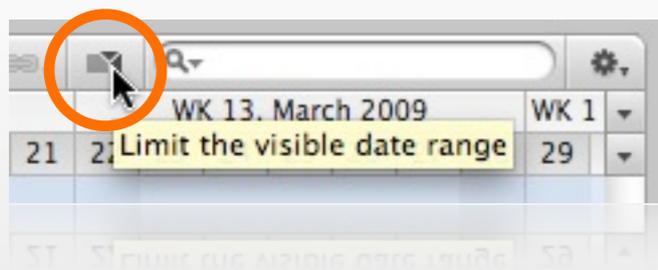


Extended searches can be named and saved for later use. To save your search, click on the drawer symbol and then on "new search".

# 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.



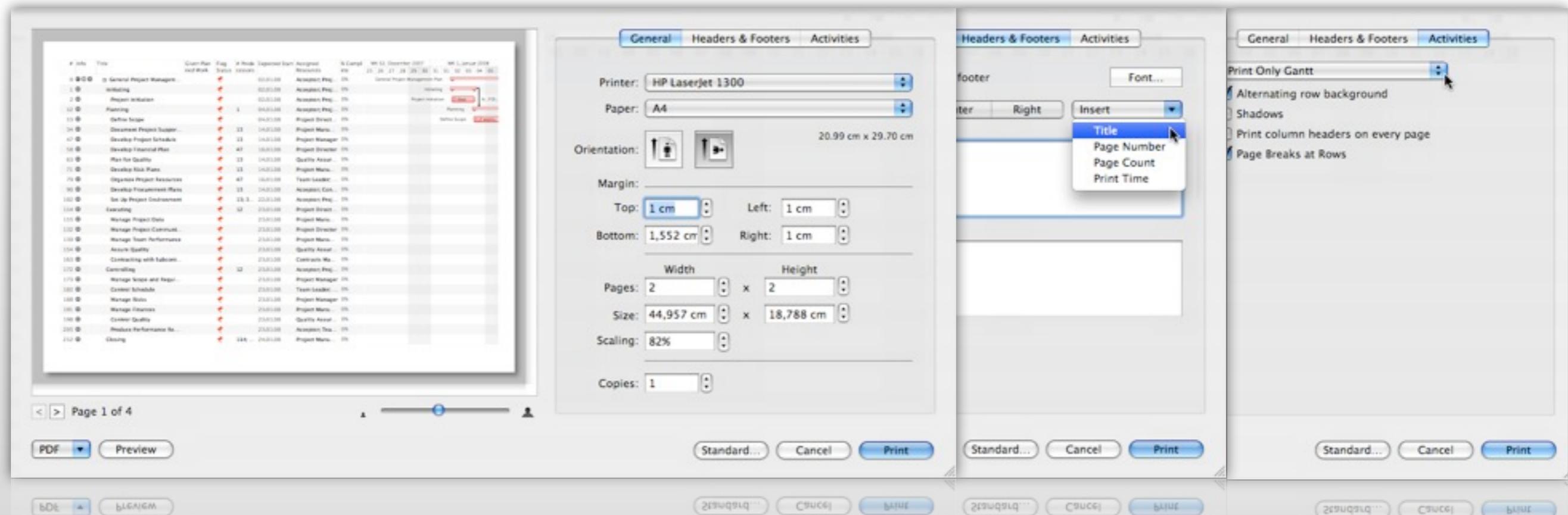
**Hint:** The button for this option has a special feature: It will glow blue if the visible date range has been limited.

# PRINTING

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!

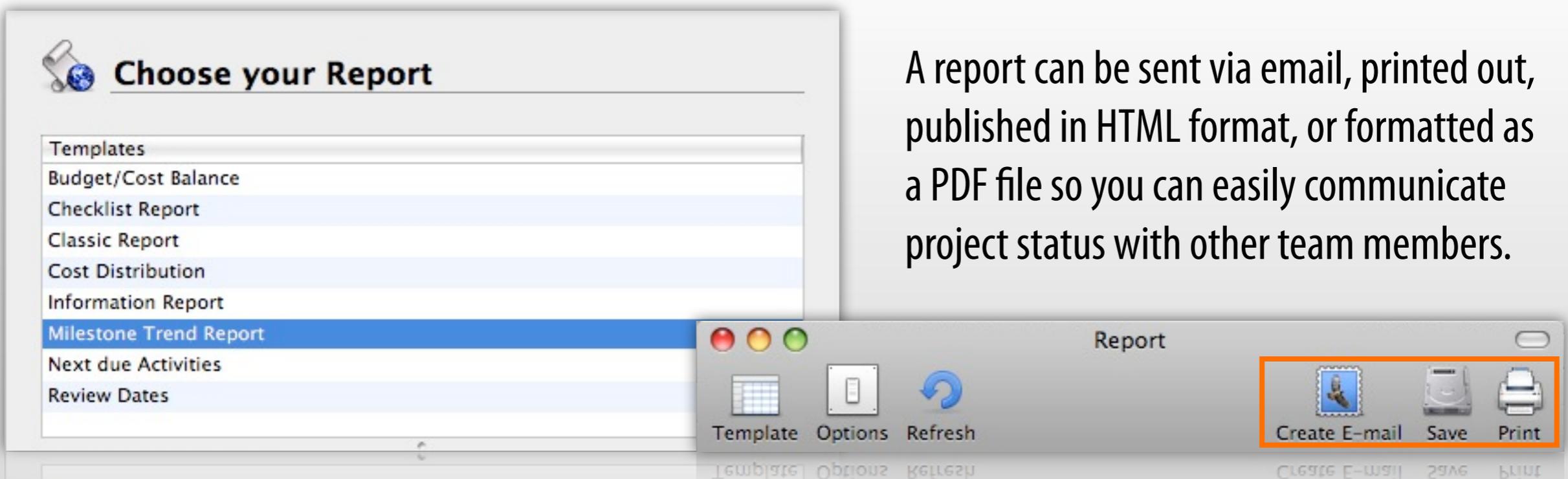
You can customize your print job, modify its size, add headers and footers, and limit output to the gantt or outline display only.



# 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



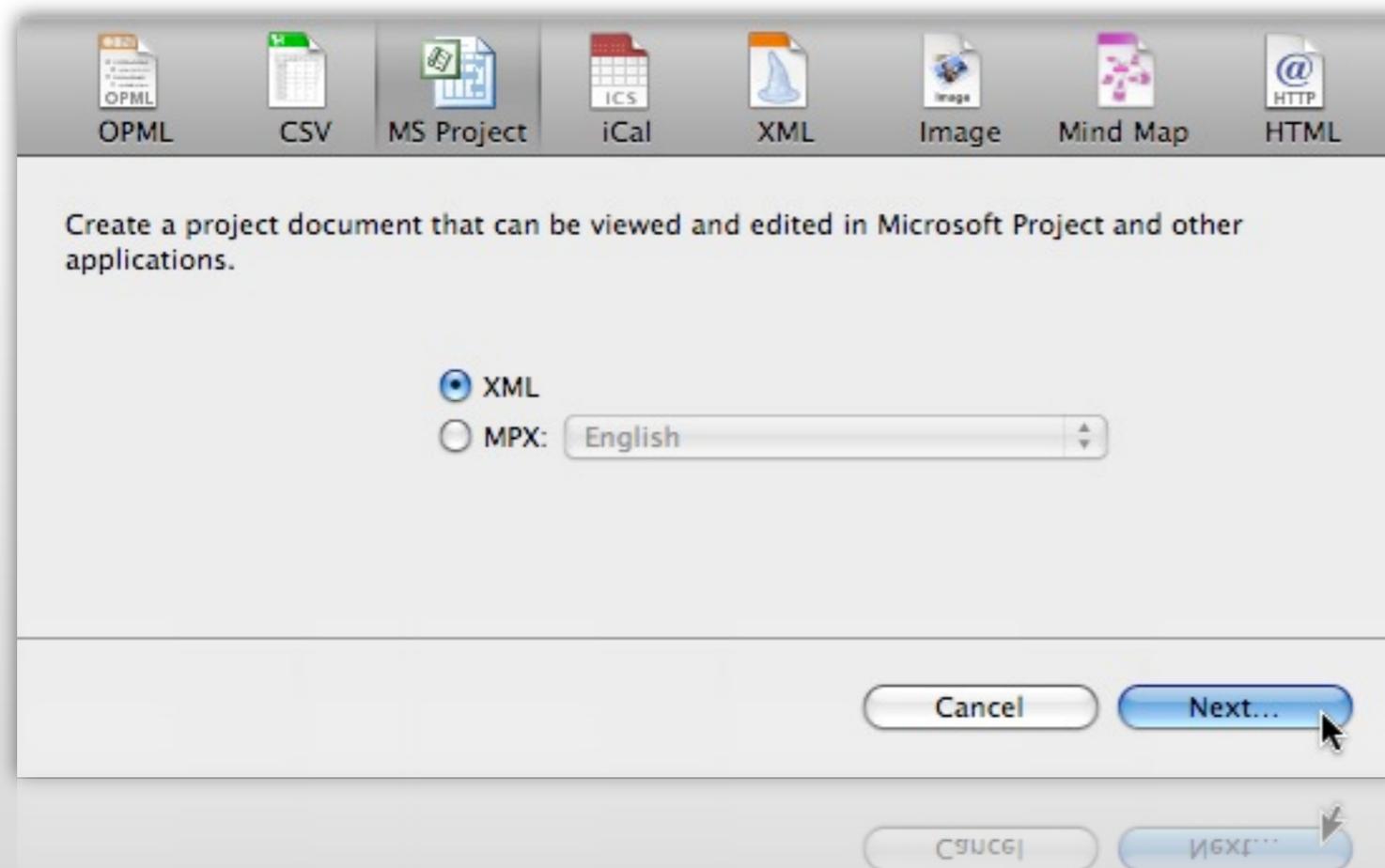
The image shows a screenshot of a software interface. On the left, a dialog box titled "Choose your Report" is open, displaying a list of report templates. The "Milestone Trend Report" is selected. On the right, a window titled "Report" is visible, showing three icons: "Create E-mail", "Save", and "Print". The "Create E-mail" icon is highlighted with an orange box.

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.

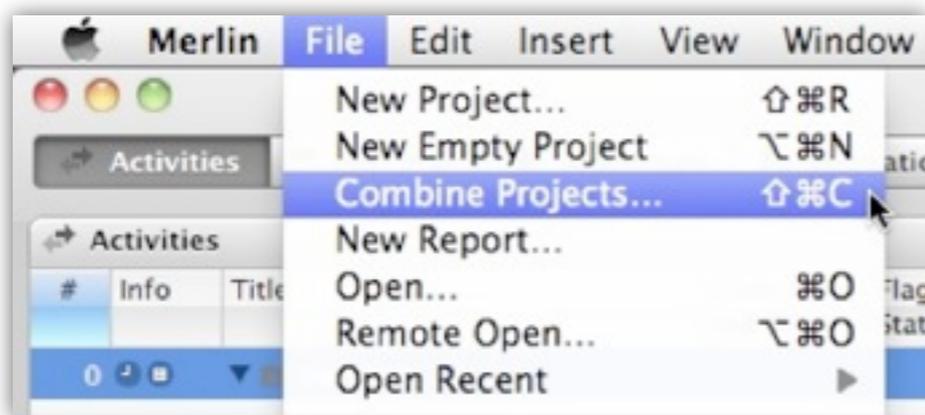
- **to import** different file formats, please select the “File > Open” menu or simply drag and drop the file over the Merlin application icon
- **to export** different file formats, please select the “File > Export” menu option.



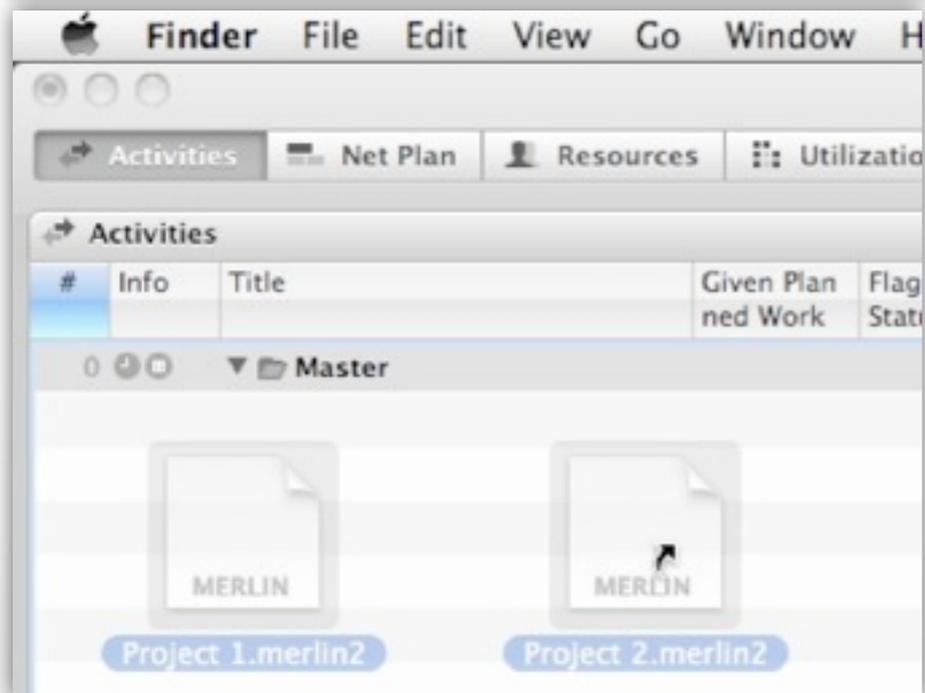
## \*Our recommendation:

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

# COMBINING PROJECTS

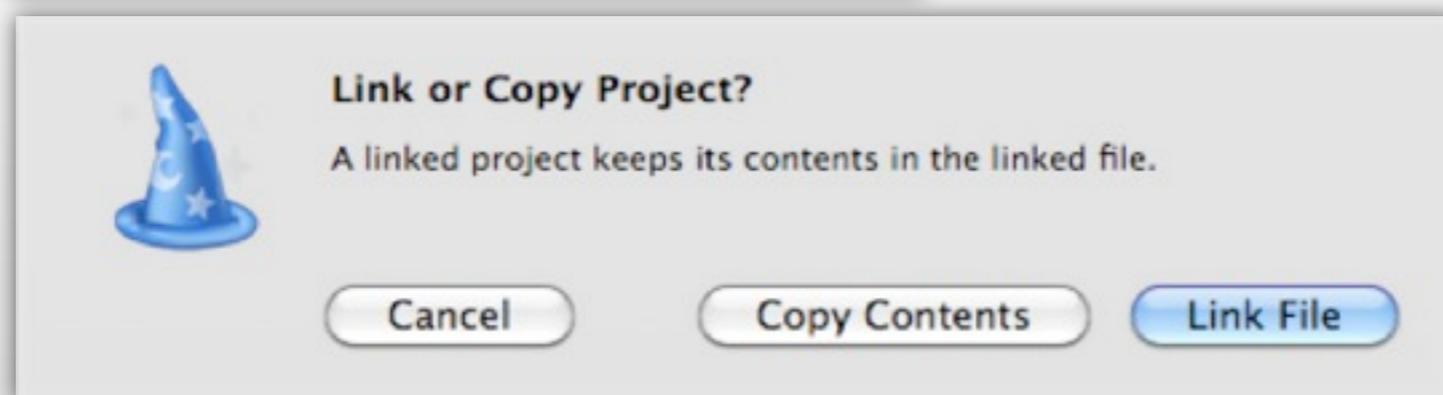


Would you like to observe and manage multiple project files at once in a master project? You may do so by the “Combine Projects...” option.



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.



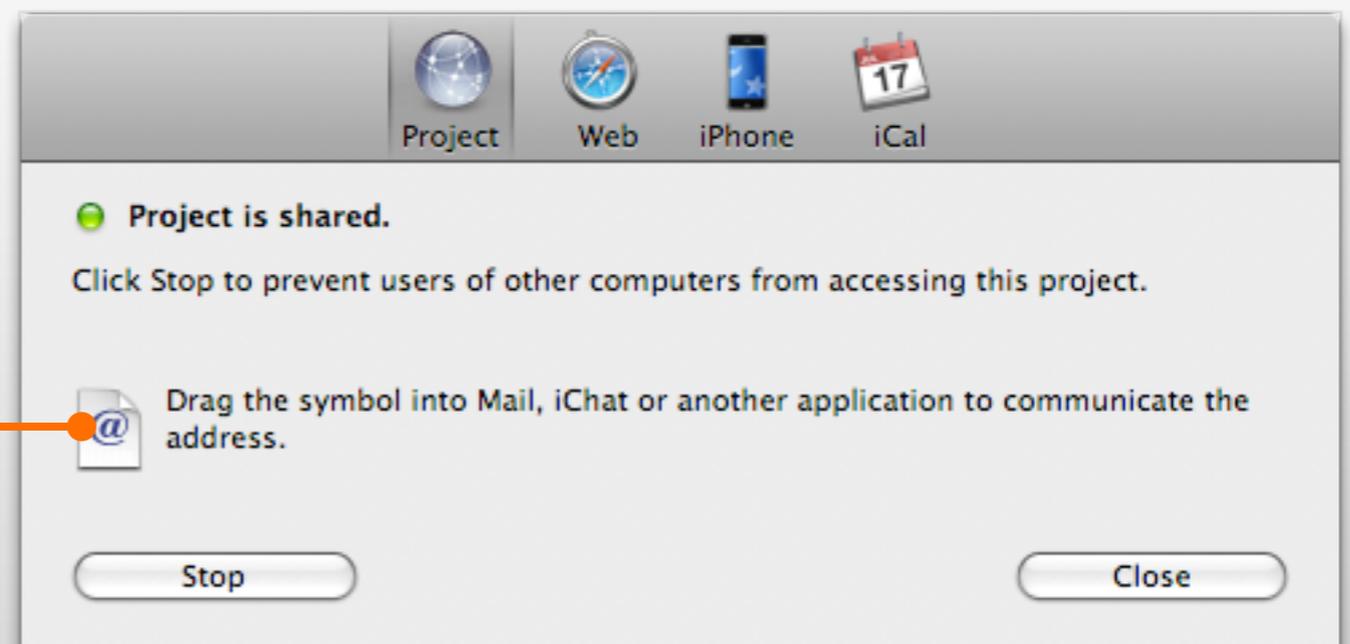
Merlin prompts whether to link or copy the combined projects. Saved changes on linked projects appear in the master and vice-versa.

# 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

\* Drag the proxy symbol to your emailing program, iChat or any other application to share your project

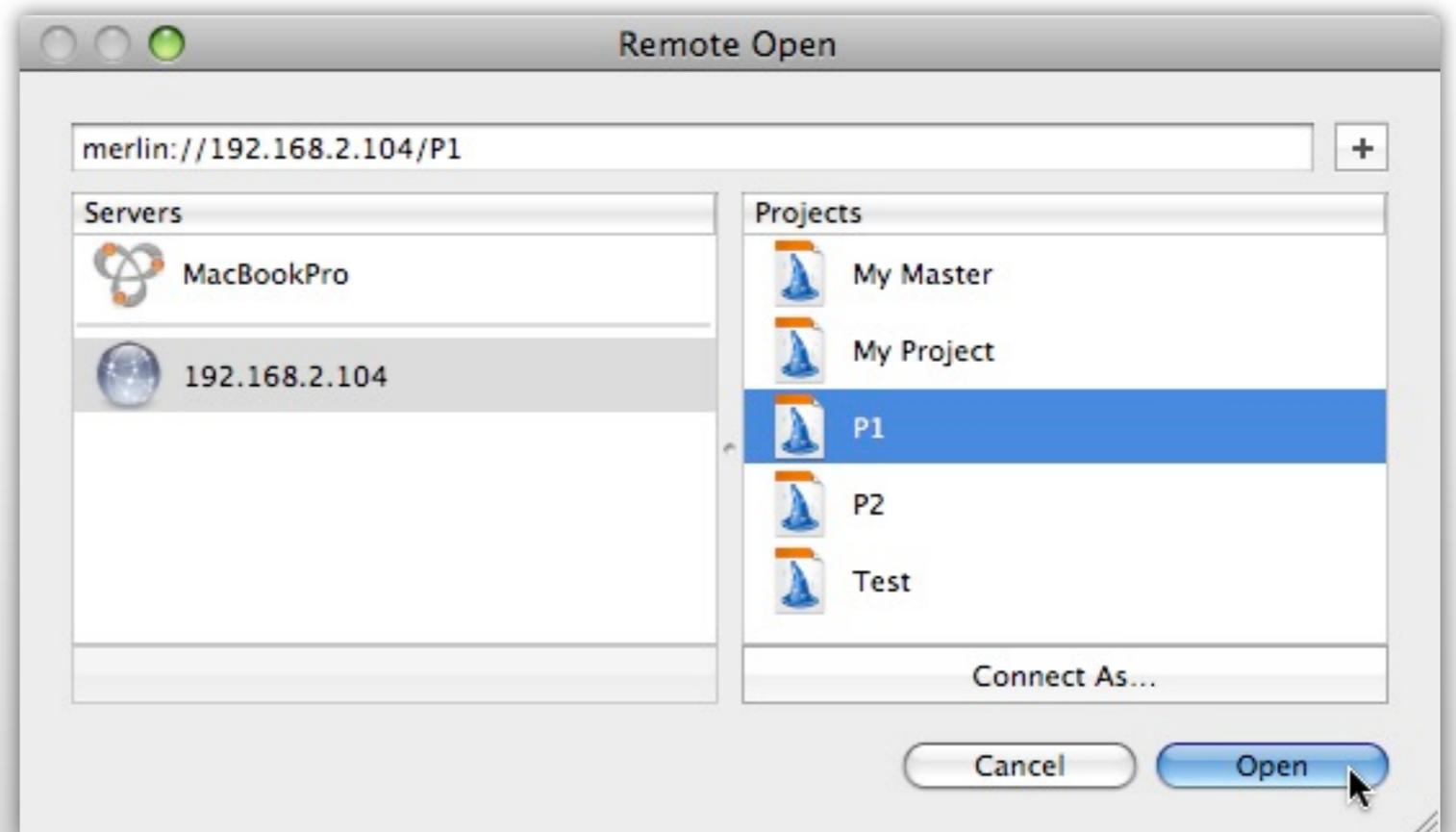


# PUBLISHING YOUR PROJECT

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 publishing on the Internet your router needs to be configured appropriately with UPnP or NAT/SMP

# WEB MODULE

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

The screenshot displays the MerlinWeb web interface. The top window shows the 'Merlin' menu and navigation tabs for 'Activities', 'Resources', and 'Utilization'. Below this is a table of activities for a project named 'Client-Website'.

#	Info	Title	Given	Planned	Fl	St
0		Client-Website				
1		Pre-Production				
2		Begin Client Worksite				
7		Client Questionnaire an	1d			
10		User Scenarios	1d			
13		Comparative Analysis	1d			
15		Technical Specifications	1d			
18		Create Project Proposal	2d			

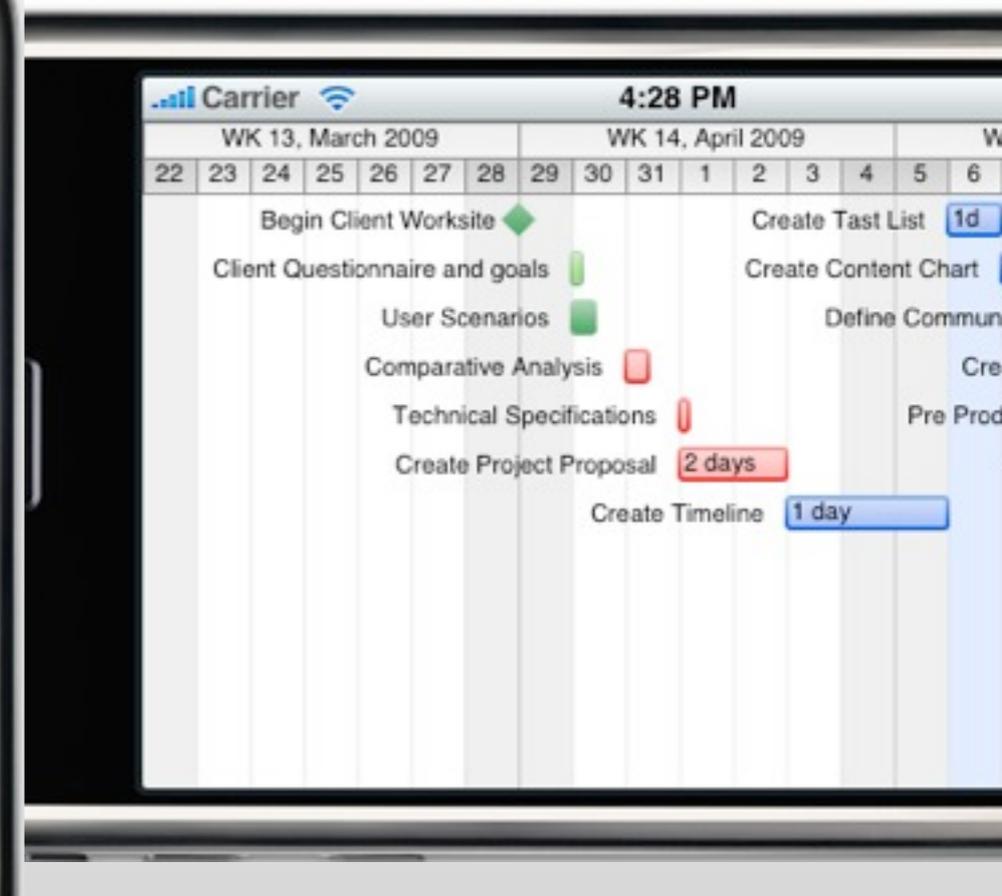
The bottom window shows the 'MerlinWeb' logo and a 'Project List' table.

Title	Expected Start Date	Expected End Date	Info
My Master	18.11.08 08:00	19.12.08 17:00	
My Project	06.03.09 08:00	06.03.09 17:00	
P1	15.12.08 08:00	29.12.08 12:00	
P2	15.12.08 08:00	23.12.08 17:00	
Test			

# IPHONE

Project management has now officially gone mobile!

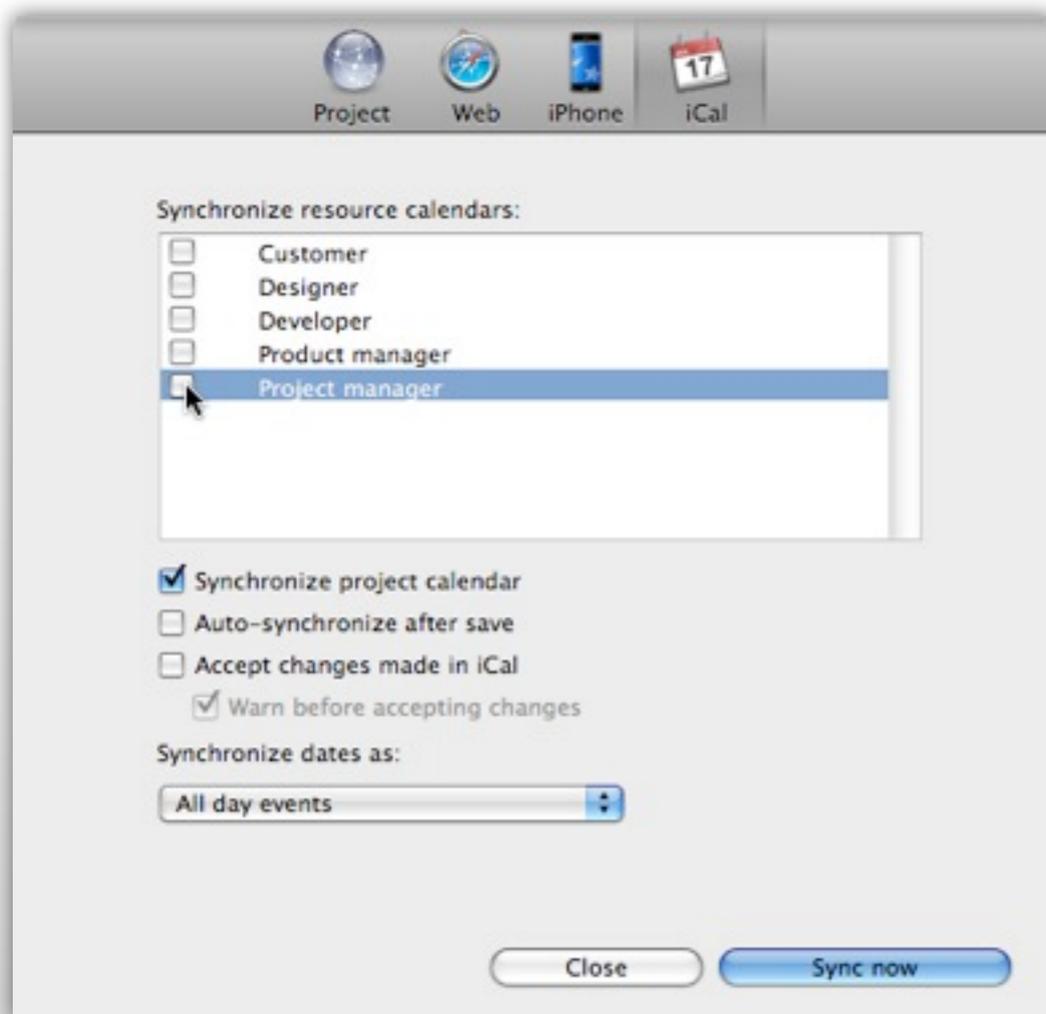
The iPhone module is available as a separate option for publishing your project so it can be opened and worked on using an Apple iPhone or iPod touch. Besides this module, all you will need is the Merlin iPhone app installed on your iPhone, iPad or iPhone touch.



# 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

<input checked="" type="checkbox"/> My Project	6	7
		My activity

## Events with time

<input checked="" type="checkbox"/> My Project	6	7
<input checked="" type="checkbox"/> Ressource - My Project		• 08:00 Define scope • 10:00 Define subcontractor scope

## To dos

To Do Items	
▲ Friday, January 18, 2008	☰
My activity	
▲ Friday, January 4, 2008	☰
My activity	

In Leopard to-do's can also be used in Mail.

# VIEW OPTIONS

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.

The image displays three overlapping screenshots of the 'Activities View Options' dialog box, illustrating different configuration areas:

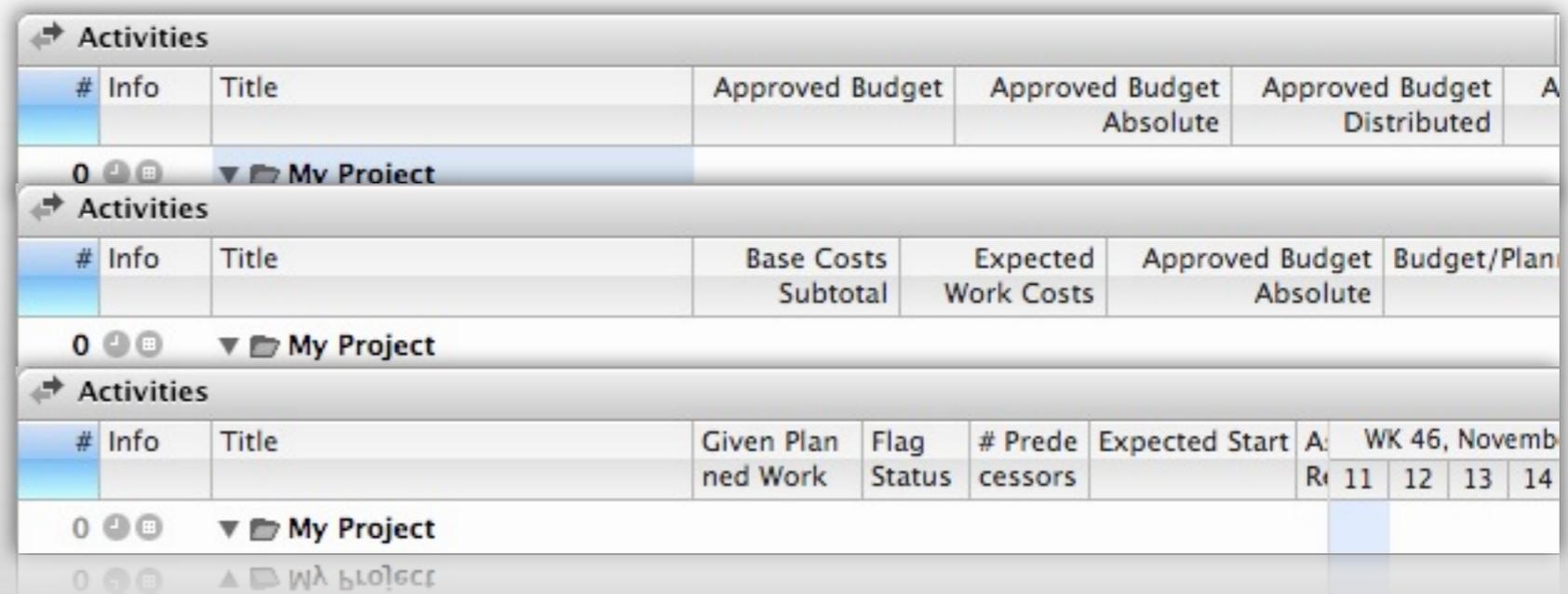
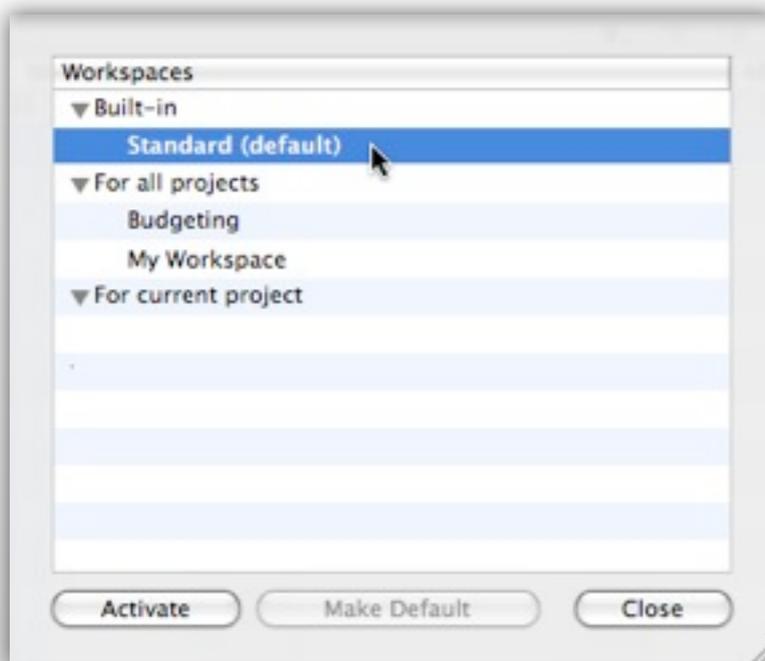
- Left Screenshot (Columns tab):** Shows the 'Column Sets' dropdown menu. The '# Predecessors' option is selected and highlighted. A description box below explains that this option records a list of predecessors for an activity.
- Middle Screenshot (Gantt tab):** Shows various Gantt chart options such as 'Shown Time Range', 'Planned Values', 'Ruler Grid for Level', 'Non working Times', 'Critical Path', 'Dependencies', 'Group Boundaries', 'Current Unit', 'Time Line', 'Animate', 'Labels', 'Dim Non Editable Fields', and 'Highlight Changes'. The 'Ruler Grid for Level' is set to '2'.
- Right Screenshot (Styles tab):** Shows the 'Style Sets' dropdown menu. The 'Selected Part: Left label' is highlighted. Below, there are settings for 'Condition' (General), 'Foreground Color' (black), 'Shadow' (unchecked), 'Content' (Title), and 'Show Times' (unchecked).

# 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.

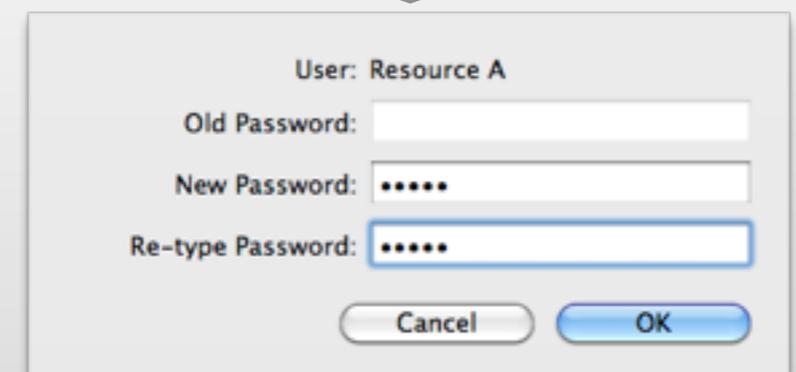
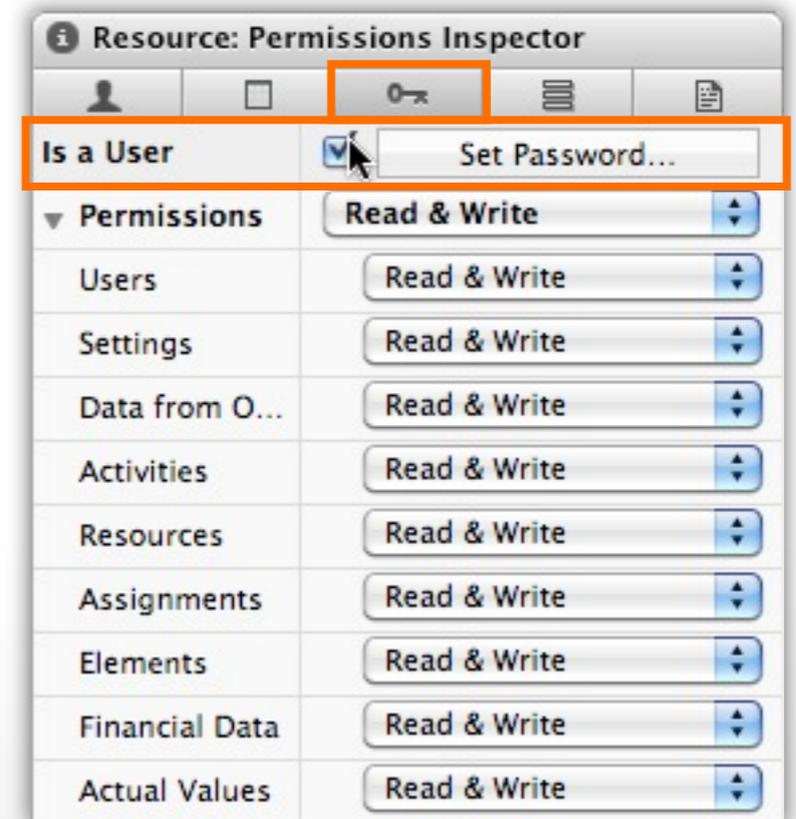


# ACCESS PRIVILEGES

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.



# *ProjectWizards*

ProjectWizards GmbH, Germany  
ProjectWizards Inc., USA

office@projectwizards.net  
www.projectwizards.net

For Merlin version 2.7.7 – as of 06/03/2010

